

The Subject Matter Expert Kickoff Checklist

Get Off to a Strong Start

by Bianca Woods

Subject matter experts (SMEs) are one of your best resources for digging deep on project content and understanding how it applies to people's real work. But from review delays, scope creep, content dumps, and more, sometimes that SME working relationship can have uncomfortable bumps. What's the secret to smooth SME collaboration on a project? A good kickoff that clearly defines the scope of the project and the work you'll each contribute.

DO THIS FIRST

- Confirm that the SME actually has time for the project. Give them an estimate of the project time commitment and time frame, and confirm they can do it. If not, find a different SME.
- Are you also in charge of the project management? If so, prepare a project timeline document that summarizes the main tasks and due dates you, your SME, and other partners need to meet. During the kickoff meeting confirm their due dates work around their other work/vacation commitments and make adjustments as needed.

PREPARING FOR THE KICKOFF MEETING

- Do initial research on the project topic. Understanding the basics will allow you to ask your SME more targeted and complex questions.
- If available, review the organization's previous resources/training on the project topic.
- If they don't already have it, send your SME the key project information (e.g. project timeline, needs analysis, project scoping, and/or other details) they'll need to get ready for the kickoff.
- Prepare SME questions for the kickoff. Read through the rest of this checklist and draft ones that can help you check things off. Your exact questions may vary but be sure they cover these five themes:
 - Getting to know your SME
 - Outlining the project goals and challenge to be solved
 - Confirming the work plan and schedule
 - Getting to know the topic
 - Getting to know the audience
- A few days before the meeting, help your SME prepare by sending them a brief agenda of what will be discussed.

STARTING THE KICKOFF MEETING

While it might be tempting to jump right into the content, ensuring you're both on the same page about your roles, timelines, and workflows now is the best way to avoid future miscommunication and frustration.

- Start out by thanking your SME. Make it clear to them you value what they're bringing to the project.
- Ask if they've been a SME before. If not, share what the role entails. If they have, discuss that experience and outline what will be the same or different with this collaboration.
- Ask about their history and experience connected to the project topic.
- Help your SME understand how they fit into the overall project team. Outline the work each team member is contributing to the project, spending extra time defining both of your roles. Agree on what work you're each doing and how it's being split up.
- Share the high-level goals and main time/resource/budget parameters for the project. Discuss how they impact the work you'll be doing together.
- Talk about the SME's tasks in the project timeline:
 - Confirm their due dates work. If not, discuss changes.
 - If a due date cannot be met, discuss when the other person should be told and what impact missed deadlines will have on the project.
 - Talk through each task your SME has. Share what kind of content/feedback you'll be requesting at each point and the rough time commitment for each task.
- Confirm your process for sharing files and providing reviews.
- Ask how they prefer to work and communicate on this project (e.g. frequency of meetings, how they want to review content, mode of contact, etc.)
- Ask if there's anything additional you can do to help them meet their project deadlines.
- Set dates for future meetings/check-ins.

EXPLORING THE CONTENT AND AUDIENCE

Once you've agreed on your work process and timeline, then dig into the project content and audience. This could take place during the kickoff meeting or at a later date. Now is also a good time to build a shared understanding of what's in and out of scope, which can prevent the project from expanding later.

- Discuss how key project framework details (needs analysis, project scoping, learning objectives, signs of success, etc.) will impact your work together.
- Ask for details about the project's main audience(s) that can help you target it to their needs. Consider questions like:
 - What's their day-to-day work like?
 - What do they currently know and not know about the topic?
 - What technical/environmental/time challenges do they have that could impact how well the project works for them?
- Ask about the most common challenges, pain points, and mistakes this audience has around the project topic. How can this project address these?
- Based on the project framework and audience, reach a shared understanding of the content scope of the project.
 - Agree on what subtopics are must haves, nice to haves, and out of scope. You'll reference this list regularly as you make content and scope decisions later on.
 - Identify the most important content takeaways—the bare bones of what someone needs to know to meet the goals for the project.
- Discuss the project change management process. If the scope needs to shift, how should changes be suggested, who needs to be involved in the decision, and what project milestones could impact the ability to shift?
- Dig into the content must haves. What can your SME tell you about the content now, and what information/resources can they send you later?
- Ask for real world stories that can bring the content to life for learners or help you better understand how it relates to people's real work.

- If necessary, agree on how and when the SME will send you any additional content/resources you've discussed.
- Make sure you're not missing anything. Ask: "What haven't I asked that you think I need to know about?"

RIGHT AFTER THE KICKOFF

- Send invitations for any meeting dates discussed in the kickoff.
- Create a written summary of the core content from the kickoff including roles, tasks, content scope, and deliverables. Send to the SME.
- Make any edits needed and send your SME the project timeline. To make their work clear, consider highlighting their due dates/deliverables.
- Get written confirmation from your SME that they agree to:
 - The content scope.
 - Their tasks, deliverables, and due dates.
 - What happens if either of you miss your due dates.
- If your SME is new to the review process or the medium(s) your final project will be in, send them examples.

KEEPING THINGS GOING SMOOTHLY

- Send brief reminders shortly before your SME's due dates. Summarize what needs to be done at that point and when.
- Use what your SME shared about how they like to work to determine when/how you'll touch base and share progress updates.
- If your SME asks for changes outside of the project or content scope, refer back to your agreed-on change management process. If the change is possible, discuss how that impacts the project goals/timeline/budget and loop in anyone else who needs to be part of the decision.
- Look for opportunities to thank your SME—either directly through complementing their work to colleagues, and/or acknowledgements within the project itself.

ADDITIONAL SME RESOURCES FROM THE LEARNING GUILD COMMUNITY

EBOOK

[Practical Tips for Instructional Designers Working with SMEs](#)

This eBook compiles the themes and advice shared by Learning Guild members on building a strong working relationship between SMEs and instructional designers.

HANDOUT

[SME Project Kickoff](#)

This handout from Dawn Mahoney and Andrea May's presentation, "SMEs: From Smackdown to Nirvana," can help you shape what kinds of questions to ask when kicking off work with a SME.

ARTICLES

[Good SME Relationships Start with Clear, Open Communication](#)

The five strategies for working with SMEs in this article from Pamela Hogle apply to not just your kickoff, but the entire time you and your SME collaborate together.

[Seven Subject Matter Experts You Might Not Meet in Heaven, and How to Work with Each](#)

Not all challenging SMEs are challenging in the same way. In this article Fiona Quigley shares seven SME personas, as well as ideas for how to make your work together go more smoothly for both of you.

[Five Tips for Gathering Content-rich Information in SME Interviews](#)

These tips from Michele Medved can help you get more complex and in-depth information from your SME interviews.

[Nuts and Bolts: Working With Subject Matter Experts \(SMEs\)](#)

This article from Jane Bozarth shares tips for working effectively with SMEs, as well as a helpful story about what can happen when you find just the right SME partner.