



## SME Checklist

Your SME should:	Here's how you can help:
<input type="checkbox"/> Be an expert in a content area to be covered in the training.	<input type="checkbox"/> Work with your sponsor to identify your SME. <input type="checkbox"/> Identify multiple SMEs if needed and clearly define which content each SME is responsible for.
<input type="checkbox"/> Allot adequate time to work on the training project.	<input type="checkbox"/> Estimate the amount of time your SME will spend collecting content, meeting with you to share the content and discuss the course design, and providing feedback on your materials. <input type="checkbox"/> Provide a timeline for the SME's role in the project so he or she can plan appropriately. <input type="checkbox"/> Enlist the sponsor to communicate the SME's role and responsibilities to her or him.
<input type="checkbox"/> Understand the project goals, expected outcomes, and timelines.	<input type="checkbox"/> Include the SME in your project kick-off meeting, which should cover at least: <ul style="list-style-type: none"> <li>○ Course target audience, learning objectives, delivery method</li> <li>○ Project plan/timelines</li> <li>○ Team members' roles and responsibilities</li> <li>○ Communications plan, such as updates and how the team members should be communicating with each other</li> <li>○ If there are multiple subject matter experts, how their responsibilities differ</li> </ul>
<input type="checkbox"/> Be willing and able to describe information so the instructional designer can understand it.	<input type="checkbox"/> Do your homework—read up on the content area and current practices so you can have a conversation with your SME. <input type="checkbox"/> Formulate questions to guide the interviews—and send those questions ahead of time. <input type="checkbox"/> Ask follow-up questions to ensure you understand.
<input type="checkbox"/> Be able to prioritize content based on learner needs and learning objectives for your course.	<input type="checkbox"/> Guide your SME by asking appropriate questions throughout the interview. For example, “Is that ‘must know’ information to achieve our objectives?”
<input type="checkbox"/> Remain engaged throughout the project.	<input type="checkbox"/> Show your appreciation for your SME's time; respect that time by preparing for meetings thoroughly and communicating any changes ahead of time. <input type="checkbox"/> Acknowledge your SME's expertise. <input type="checkbox"/> Demonstrate your personal commitment by conducting some preliminary research on your own. <input type="checkbox"/> Invite your SME to the pilot.
<input type="checkbox"/> Communicate openly: <ul style="list-style-type: none"> <li>○ Respond to requests for information as quickly as possible.</li> <li>○ Tell the instructional designer about any delay if it will take a while to respond.</li> <li>○ Raise any concerns early.</li> </ul>	<input type="checkbox"/> Keep an open line of communication throughout the project with your SMEs, including any timeline or content adjustments. <input type="checkbox"/> Determine the best method of communication during the development phase (telephone or e-mail, for example) and who should be copied on what types of communications.