



# Building strong SME relationships with insightful questions

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## Crafting Efficient and Impactful SME Working Sessions

As workplace learning professionals, we frequently use questioning skills to elicit the information we need to build high quality learning and change initiatives. The quality of questions we pose to our Subject Matter Experts (SMEs) can make a significant difference in the efficiency with which we can build the intervention. Questioning is a seriously wide and deep skill. In this instance, it's not just about what you ask, but how and why you ask the questions. Here's a proven method I use with my clients to prepare and conduct a SME working session that results in swift decisions, strong alignment to project goals, happy stakeholders and high-quality content for learners.

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### Preparing

Before approaching SMEs, thorough preparation is expected. Review source materials that have been provided to you. If insufficient (or none!) have been provided, do some original research of your own to understand the topic in general and start to identify how that topic applies in your specific situation.

With this background, you will arrive with foundational insight (which saves the SME time in not having to provide you

with basic education on the topic). It also prepares you to ask purposeful questions that get to the heart of what you need.

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### The SME Role

In most cases, your SME has a full-time job – and it is NOT talking to you. Usually, they are not part of the learning team. They are generous with their time (even if they were voluntold to do it) because of their expertise. You want to use their time for ONLY the things you can't discover another way. This is why you do your own background education and prepare thoughtful questions.

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### Structured Questioning Approach

Based on your identified learning and performance outcomes, and what you've discerned by reviewing materials and doing your research – what knowledge gaps do you have? Try to fill those with independent research.

What you ask the SME should directly contribute to the objectives of your program. Focus on questions that fill specific knowledge gaps. This precision in questioning not only saves time but also ensures that you gather information that directly benefits learners.

Then, develop questions that help the SME validate what you've learned or provide you with what is missing.

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### My four-part test

Each of your questions should be able to withstand vetting through my four-part test. It's time to question your questions.

What am I asking?

Why am I asking this?

What do I think I will learn?

How will I use what I learn?

#### 1. What am I asking?

Validate that your question is clear and specific. Stay away from any learning jargon – as many SMEs don't work in our world and you don't want to spend time defining terms.

#### 2. Why am I asking this?

Define which of your knowledge gaps this question will help close. If it doesn't seem to relate to your knowledge gaps – then look at whether the question is useful. If the question is useful, then examine whether there is something missing from the objectives.

#### 3. What do I think I will learn?

Once you ask the question, you should have an expectation that you'll be learning something important to the project. You may identify several things you can learn from the response to a single question.

#### 4. How will I use what I learn?

If you can't tie the anticipated response to your question to a use for it – then you probably have a bad question. There are several uses of responses. It doesn't have to be that you will literally copy what they said into the course content. You could be validating or clarifying information, you could be building foundational knowledge for yourself that will then lead to better content for the learner. If you find that there is no use for the question (or you are asking out of mere curiosity), better to skip it.

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### Bonus strategies

As I was writing this, I kept wanting to include “one more thing” as SMEs often do. So, here's a follow-on set of strategies that will help your SME working sessions go well and result in highly useful outputs.

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## Get a warm introduction

Ask a person who knows the SME to write an email that introduces the two of you and explains why you'll be asking for their time. This prevents the SME being surprised when you reach out – and increases the likelihood of them meeting with you.

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## Don't call it an interview

In the workplace, interview is associated with applying for a job. If you are working on an initiative that will include change (such as departmental restructuring) the term interview can be misunderstood as “come talk to me and justify why you should keep your job”. I had a client not follow my advice on this, and a few of the people I needed insight from came in thinking I was a hatchet woman and they were there to prove themselves. Imagine how much less information you get from a SME who has been unnecessarily scared like this. Call it a working session, or insight gathering – and make it clear that you are not making decisions or recommendations about job roles.

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## Make a recording

If the culture of the organization, and the relationship between you and the SME allows it, ask for permission to record the

meeting. This will free you to listen and engage in the conversation rather than taking notes while trying to listen and trying to formulate the next thing you want to say. Afterward, there are AI-powered tools you can use to synthesize the transcript of the meeting to identify the content you want to use, and even suggest possible follow ups.

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## Follow up questions

When considering what you think you will learn, if you can imagine or predict some potential responses – determine if you will need follow up questions to further explore where the response went. Alternatively, this is something you can do in the moment – if you are focused on listening and staying alert for a topic that pops up and is worthy of exploring. Keep asking yourself how you will use the information before you ask a follow up.

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## Always ask “What else?”

It doesn't matter how good of a conversationalist or interviewer you are, how well you prepared, or even how deep your own subject matter expertise is on the topic – there could always be something really useful right under the surface. You can't imagine all the questions to ask. You won't think of all the ideas to probe. Many times, SMEs will just answer the questions

you ask. This last question opens the door for the SME to share any gem they know that you just didn't ask about. I have lost count of how many times this strategy has led to a significant improvement in the scope and focus of our content and the relevance to the learner's experience.

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### The Gratitude Sandwich

Start and end the meeting by acknowledging that the SME's time is valuable, that you've done research and planned the questions to make the best use of the time together, and how much you appreciate that they are investing their time to help this learning experience be as impactful as it can be.

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### Ask for feedback

So often in our work, we create a learning experience, launch it into the world, and never hear from it again. We don't get visibility into how well it was received, or the rate of adoption, or whether learners are applying the skills. Having a conversation with a SME gives you a chance to ask for feedback on your SME working session approach.

Here's a phrase you can re-write in your own style and use as part of the last slice of your gratitude sandwich.

Thanks again for investing this time with me to make the course impactful. I'd like to ask you what you feel went well about our conversation and what could be done better or differently the next time we speak. As a learning professional, I value this kind of input because it helps me improve.

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### Publicly praise

After the working session, write a note to their leader and put the SME on CC. Thank their leader for providing you with time with the SME and state 2-3 specific things the SME shared that will directly impact the value of the course. This achieves several aims. First, it lets the SME know you were serious about appreciating their time and expertise. Second, it lets the leader know it was a worthwhile idea to let their SME work with you. It also builds up the relationship with both – so when you need time with the SME again – you are likely to get a favorable response.

Effective questioning in SME engagements is a critical skill for workplace learning professionals. By applying this structured approach, avoiding common mistakes, and being appreciative, you can ensure that your interactions with SMEs are both respectful and fruitful. These strategies will not only improve the quality of your programs but also strengthen your professional relationships with SMEs.