



Working with SMEs

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The Tech Writer and the SME

- Subject Matter Experts (SMEs) are vital to our success as a Technical Writer.
- “Communicate with Documentation team” is not in their job description.
- SMEs are busy people who have little interest in spending time with us.
- How do you get a SME to work with you?

Build Strategic Relationships

- SMEs have all the knowledge.
- Ask the SME about a hobby, children, recent vacation, pets, etc.
- Let them get to know you and tell them about the job you do.
- Tell the SME how important they are in the documentation process.
- Emphasize you are looking for a long-term relationship.

Encourage Collaboration

- Make sure the SME understands *what* you need, *when* you need it, and *why* you need it.
- Persuade the SME to think beyond development, to think of the user's needs.
- Remember to approach the SME with diplomacy, courtesy, and respect.
- Build credibility over time.

Do Your Homework

- Nothing annoys busy people as much as having someone waste their time.
- Use the SMEs time well; do your homework first.
- Know what you want to ask.
- Approach the SME with a list of questions.
- Verify the information you receive.

Choose Your Mode of Contact

- E-mail
- Telephone
- Group meetings
- One-on-one meetings
- Water cooler conversations

Build a Common Cause

- The closer the relationship between Development and Documentation, the more information you will receive and the more reliable it will be.
- If there is an “us vs. them” culture, work around it. Get to the SME on a personal level.

Show an Interest

- Show an interest in the SMEs work and demonstrate an awareness of and a respect for his/her contribution.
- If you don't want to be treated like a necessary evil, don't treat your SME like that.
- Make an effort to learn what the SME does.

Listen to the SME

- Be prepared to listen.
- Never talk bad about any other employees in front of your SME. Change the subject if the SME displays the behavior.
- If you're having difficulty with a SME, try to identify the cause.
- Ask the SME, "What can I do to make this process easier or more productive for you?"

Spell out Expectations

- Give explicit instructions to technical reviewers.
- Let them know what is helpful to you and what is not.
- Get them to focus on technical feedback rather than grammar or style issues.
- Try to nip problems in the bud rather than waiting until a crisis to take action.

Show a Sense of Humor

- Showing a sense of humor about the work, deadlines, and so forth can win tremendous good will.
- Use humor can diffuse stressful situations and make people feel more at ease.
- Be aware that SMEs may have had bad experiences with other technical communicators in the past.

Lead by Example

- Remember the golden rule. If you expect cooperation and respect from someone, give the same to them.
- Be aware of your behavior, body language, and presentation.
- Your SME is a precious resource that you will need later. Don't poison the well.

Thank the SME

- Thank the SME privately and publicly.
- Gratitude and recognition help to secure future cooperation.
- Candy, cookies, cake – food is the way to a SME's heart.

SMEs Gone Bad

- There is always the occasional SME who is impossible to work with.
 - Keep good records to show how a lack of cooperation has affected your schedule.
 - Look for alternatives (other SMEs, developers).
 - Give the SME the benefit of the doubt.
 - Confront the SME diplomatically/politely.
 - Last resort – go to your manager and/or the SMEs manager.