

DUAL ROLE

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Bringing subject matter experts into the training process can be one of the best things learning leaders can do. SMEs bring depth of experience, enterprise-wide perspective, and credibility to the learning process. Their stories bring content to life.

Reliance on SMEs also brings risk. Although they want to do well in the classroom, it is an environment outside their expertise. SMEs often do not understand that the delivery of information does not equal learning transfer. They also struggle to assume the learner's perspective when speaking from their own. As talent development professionals, we need to do all we can to help them use their expertise to serve the learning process. When we don't, learners become frustrated, the business suffers because learning didn't take place, and the reputation of talent development within the organization erodes.

Support your SMEs

To succeed, SMEs need gentle, yet firm, support from talent development professionals. For example, materials should be designed

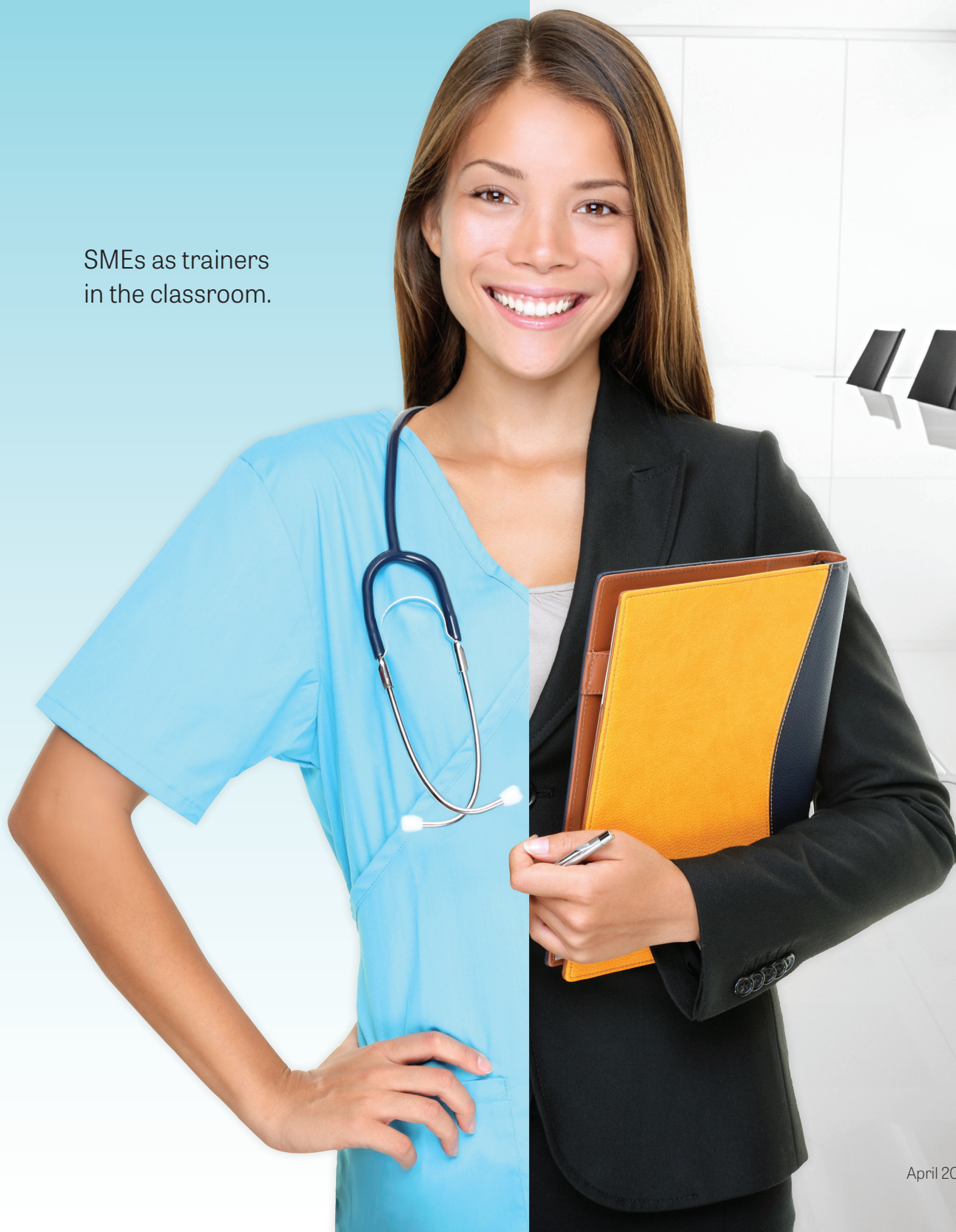
with SMEs in mind. Their style or experience level should be taken into account.

They also need the skills and feedback required to deliver information clearly and facilitate efficient and relevant discussions. Too often these things don't happen because designers (and the SMEs themselves, if they are involved in the learning design) exert too much control over content and delivery during the design phase. This leads to scripting and overly complex slides, which in turn leads to stilted, disengaged, and content-driven delivery. The result is that learners are left to make sense of everything on their own.

Learning events succeed on two levels

First, learning leaders, instructional designers, and SMEs need to take a step back from the details of design and the nitty-gritty of delivery to understand what must happen for training to succeed. These learning events—like all types of business communication—succeed on two levels. Success is achieved by meeting the business goal and the process goal.

SMEs as trainers
in the classroom.



In training situations, the business goal is the learning objective, and the process goal is met when the trainer creates the conditions for fruitful learning. When this happens, learning feels efficient and relevant, the trainer earns the trust and goodwill of learners, and learners sense that the trainer is doing everything possible to help them learn. To meet learning objectives (level 1):

- Create a learner-centric plan.
 - Deliver material so that it is clear.
- And to manage the process (level 2):
- Create the conditions for fruitful learning.
 - Make participating easy.
 - Create thinking opportunities.
 - Manage the give and take.
 - Reinforce what was previously learned.

Looking at the process in this way helps us understand why a seemingly solid learning design can fail to reach its goal and, in particular, why SMEs struggle as trainers. Simply put: When the process goal is not met, efficient learning does not happen.

SMES OFTEN DO NOT UNDERSTAND THAT THE DELIVERY OF INFORMATION DOES NOT EQUAL LEARNING TRANSFER.

SMEs have two roles

SMEs in the training room wear two hats. They wear a SME hat and a trainer hat. Both need to fit comfortably, and SMEs need to know when to switch from one to the other.

Let's consider the expert hat first. SMEs are already comfortable wearing this hat because it involves focusing on the data (if data are involved in the training) and detailed explanations. This hat gives SMEs an opportunity to shine and talk about their experiences and perspectives. They get to explain how to do the work, how processes came to be, or what it was like back in the day.

It's important, of course, for SMEs to be clear and concise when wearing the SME hat. But that's not enough. They also need to make sure that learning and job application takes place. That requires the trainer hat. This hat is

less comfortable for SMEs. It involves putting details and data in context, reinforcing what has been learned, and explaining why certain concepts are important. The trainer hat makes learning easier.

Ensure SME success

Because SMEs aren't as comfortable in their trainer hat, they'll need your assistance and guidance as they prepare and present their session. Here are five ways to help SMEs succeed.

Explain that training is a conversation. SMEs and learning designers must understand that training is a type of conversation, not a speech or a script to be recited. This is not just any type of conversation, of course; it is one that has been prepared and has a specific goal. We call this type of interaction an "orderly conversation" and define it as an outcome-oriented communication event that is prepared, well-organized, and takes place in a responsive, conversational way.

This definition draws attention to the tension between preparation and delivery that must be managed during every training session. What it means in a practical sense is that what has been prepared (the learning design, slides, leader guide, job aids, and so on) must be brought into the conversation taking place between the SME and learner. Sometimes that means that the plan needs to be adapted or massaged on the fly to fit a specific situation or group. At other times it's just a matter of making sure that it is the SME's connection to the learner, and not the plan, that drives the process. As learning professionals, we know this. SMEs do not.

Design learning to allow the conversation.

When the learning design is too prescriptive, scripted, or inflexible, SMEs are left with a difficult choice. They can either follow the plan, thereby sacrificing the conversation, or they can abandon the plan and, quite possibly, lose control. In most situations, it's the former.

To avoid this, the instructional design should be flexible. Also, it's important to:

- Focus on the learning goal, not just the details. Rather than filling the notes section of

each slide with a detailed script, help SMEs get comfortable with the overall message of each slide. What's the takeaway or the most important point? What's the "so what?" This will help SMEs think about the information they're delivering in terms of learner needs and perspective.

- Help the SME understand how each slide should be set up. Why is the slide laid out the way it is? Why is a particular graphic used? What information on a complex slide is most important for learners to understand now? This will help SMEs communicate the overall meaning of the slide, not merely the information on it.
- Understand that individual SMEs have different strengths and weaknesses. If you're designing for a detail-oriented SME, help her step back from the detail to focus on broader learning goals. If the SME has a tendency to stray from the learning path, give her a framework, but not a script, to keep her on track.

Encourage personal stories. Communicate to SMEs that they should talk about their individual experiences or background. This might mean adding slides to the deck in advance of training, but sometimes stories emerge spontaneously during class. In either case, give SMEs the power to select what will be included and remind them to reinforce the story's relevance to what is supposed to be learned.

Beware of the danger of training activities. From what we've seen, one of the biggest challenges facing SMEs is the successful execution of learning activities and exercises. Sometimes this is because the exercise itself is a bad strategy to begin with.

For example, activities should not be used to engage or warm up learners. Don't assume that including icebreakers, games, or humor as part of the plan will be welcomed by SMEs. Although these tactics are dubious enough when training professionals use them, they are particularly egregious when forced on a SME.

Activities should be used only to reinforce learning and relevance. When you include them, give SMEs guidance on how to set up and debrief them. The set-up should provide

context, clear instruction, and learner benefits. Help SMEs debrief the exercise by encouraging the right balance of relevance, depth, and efficiency.

"I Do My Best Teaching at the Bar"

Not too long ago we were working with a subject matter expert, we'll call her Lynn, who had been given a detailed PowerPoint deck to use when delivering a week-long onboarding program. She came into our workshop carrying an accordion folder stuffed with laminated pages. These pages were PowerPoint slides on which she had typed a script. During her training program, she would recite her script and ask learners to hold their questions until the end.

During our coaching session, she confessed that while she'd been using this approach for years, she felt inadequate. She just couldn't figure out what she was doing wrong. At one point she said, "Now that I think about it, I do my best teaching at the bar after the training session is over."

This insight was critical in helping Lynn succeed. Conversations at the bar are just that: conversations. People ask questions, they probe, they share their experiences, and they connect dots. Learning takes place. The process goal is met.

What Lynn realized was that her in-class training was driven entirely by her plan—the slides, the script, the laminated notes. Her conversations in the bar were driven by her connection to learners. It was a genuine, spontaneous, responsive conversation. The learning message didn't change, but she was able to deliver it in response to the individuals she was talking to.

We're not suggesting that we should wheel a wet bar into the training room, but the essence of the conversations Lynn described needs to take place.

Coach them to facilitate the learning conversation. Facilitating a learning discussion requires striking the right balance between the needs of individuals in the room with the needs of the group as a whole, and the SME's desire to focus on details with the trainer's need to keep the process moving along. As you coach SMEs to facilitate, keep the following in mind:

- Listening is the most important skill when facilitating a learning discussion. SMEs need to be fearless listeners, able to focus all of their attention on learners without anticipating the response they are going to give.
- SMEs should assume that every question

is an opportunity to reinforce learning for the group. While a question may come from a single person in the room, the answer to it should be delivered to everyone in the room.

- Novice facilitators, as many SMEs are, err on the side of controlling the process too much. Encourage them to trust the conversation taking place and trust themselves to think on their feet.

The organizations that we support through our training efforts deserve efficient and effective learning events. SMEs can be key to that, but they need our help. Just as individuals receive management training (or should) when they are first promoted to their managerial position, SMEs need training too. Helping them understand their dual role in the training process will lay the foundation that they need to succeed.

Play to Your SMEs' Strengths

It's often assumed that subject matter experts should be left alone to deliver training. That shouldn't be the case. Here are a few options to consider to play to your SMEs' strengths and support them without making them go it alone.

- Plan for two people to lead the training event. One can wear the trainer hat and function as the master of ceremonies. This person's primary function is to provide context and foundation for SMEs to express their expertise and share their real-world examples.
- Invite SMEs to sit on a panel and answer questions. The questions should be prepared in advance and, of course, learners should be able to ask their own questions too.
- Have SMEs introduce a case study of their own. They can provide excellent context and real-life examples of what they did, what was learned, and so on.
- Encourage SMEs to step in occasionally to share a personal story. You can prompt them and step in to connect dots when necessary.

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