



## Coffee Chat: My SME is Driving Me Crazy

11:03:32 From Michelle's Notetaker (Otter.ai) : Hi, I'm an AI assistant helping Michelle Dixon take notes for this meeting. Follow along the transcript here:

[https://otter.ai/u/vBGDt0E4u4G1dE0cfmB0ehsZv00?utm\\_source=va\\_chat\\_link\\_1](https://otter.ai/u/vBGDt0E4u4G1dE0cfmB0ehsZv00?utm_source=va_chat_link_1)

You can see screenshots and add highlights and comments. After the meeting, you'll get a summary and action items.

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11:04:17 From Shannon Tipton :

<https://www.learningrebels.com/wp-content/uploads/2026/05/SME-Situation-say-this-not-that-1>.

pdf

11:04:28 From Shannon Tipton :

<https://www.learningrebels.com/2022/03/02/6-tactics-to-successfully-work-with-subject-matter-experts/>

11:06:39 From Shannon Tipton :

<https://www.learningrebels.com/2022/03/02/6-tactics-to-successfully-work-with-subject-matter-experts/>

11:06:53 From Shannon Tipton :

<https://www.learningrebels.com/wp-content/uploads/2026/05/SME-Situation-say-this-not-that-1.pdf>

11:07:23 From Jason Dreyer : NOOOOOOO

11:07:46 From Janet Henry : Good morning! It's been a minute since I attended 😊 and it depends on the expert

11:07:47 From Jason Dreyer : Is this one of those that went to a "training course" years ago and think they know all about L&D

11:08:09 From Heather Ross : Yay! A info dump on a shiny new topic! How can I filter that for the people who need to actually use the tool?

11:08:11 From Sarah Walbridge-Jones : We need training.....then nothing/no engagement.....then where is that course?

11:08:15 From Maureen Flanagan : Mixed and depends on whether they were voluntold or see it as an opportunity to set themselves apart from others on their team.

11:08:19 From Michael Dalessandri : Generalization and oversimplification at times. Especially if they view you as a SME too.

11:08:25 From Trisha Wesley : Reacted to "We need training....." with 👍

11:08:51 From Jason Dreyer : They think training is the solution

11:09:17 From Jason Dreyer : "Can't you just take my PowerPoint and make it a course?"

11:09:29 From Sandra Guzman : Reacted to ""Can't you just take..." with 🙌

11:09:49 From Maureen Flanagan : Replying to ""Can't you just take..."

Polished 🤩

11:09:54 From Jason Dreyer : Reacted to "Polished 🤩" with 😊

11:09:59 From Michael Dalessandri : Reacted to "Polished 🤩" with 😊

11:10:03 From Michael Dalessandri : Reacted to "Polished 🤩" with 👍

11:10:14 From Jason Dreyer : They don't know the difference between good to know and need to know

11:10:32 From Casey Holcom : Replying to ""Can't you just take..."

SO TRUE

11:10:42 From Casey Holcom : Reacted to "They don't know the ..." with 🙌

11:10:55 From Heather Ross : I have been getting them excited about some of the new options we have and how we can capture the short windows of attention the end users have.

11:11:05 From Sandra Guzman : This is an area we are trying to work on ... we try to include them early on for our kick off meeting. To set expectations and let them know the time commitment and how we want to respect their time.

11:11:16 From Shannon Tipton : Reacted to "This is an area we are trying to work on ... we try to include them early on for our kick off meeting. To set expectations and let them know the time commitment and how we want to respect their time." with 🙌

11:11:23 From Shannon Tipton : Reacted to "I have been getting them excited about

some of the new options we have and how we can capture the short windows of attention the end users have." with 700

11:12:10 From Michael Dalessandri : "Stroke their Ego" by acknowledging their knowledge and experience. I try not to include the instructional unit design, because I'm not speaking to them about the instructional design; just the content.

11:13:35 From Heather Ross : We have had so many who are relieved that they can stop doing weekly or Ad Hoc calls for training that doesn't seem to be having the effect they want

11:13:54 From Michael Dalessandri : Exactly. And some are "territorial" and skeptical about, "Why are you asking me these questions?"

11:14:12 From Shannon Tipton :

<https://www.learningrebels.com/wp-content/uploads/2026/05/SME-Situation-say-this-not-that-1.pdf>

11:14:24 From Shannon Tipton :

<https://www.learningrebels.com/2022/03/02/6-tactics-to-successfully-work-with-subject-matter-experts/>


11:16:44 From Michael Dalessandri : If we agree on "What does success look like?" Then they have an impact on being successful; their content is meaningful for success.


11:17:32 From Michael Dalessandri : Sometimes, I need to escalate if the designated SME is not responding.


11:17:47 From Heather Ross : I have a SME who I love who is overwhelmed and keeps cancelling meetings. The last project we started, I made sure to ask who I can check in with for the day-to-day, and make sure that she is included in final approvals.

11:18:42 From Sandra Guzman : Fish or cut only works if there is someone else that can provide input. If they don't respond - we may need to try to schedule time with them to reset

expectations and try to work with them on a way that we can partner and work together going forward.

11:19:03 From Shannon Tipton : Reacted to "I have a SME who I love who is overwhelmed and keeps cancelling meetings. The last project we started, I made sure to ask who I can check in with for the day-to-day, and make sure that she is included in final approvals." with 

11:19:07 From Shannon Tipton : Reacted to "Fish or cut only works if there is someone else that can provide input. If they don't respond - we may need to try to schedule time with them to reset expectations and try to work with them on a way that we can partner and work together going forward." with 

11:19:48 From Donna Smith Fee : Reacted to "Fish or cut only wor..." with 

11:21:25 From Michael Dalessandri : I find many times that when I work with SMEs for content, then develop the program, then request review of the program, which usually includes other SMEs that were not involved in the content collection and always "add" items. Or, they all respond with no feedback or revisions needed, then when the program is launched and live, they provide feedback to change things. It's very frustrating; "Why didn't you provide this feedback previously when I asked for it?" or "It's too late to make changes now."

11:21:33 From Heather Ross : Reacted to "Fish or cut only wor..." with 

11:21:52 From Donna Smith Fee : Reacted to "I find many times th..." with 

11:22:02 From Sandra Guzman : Reacted to "I find many times th..." with 

11:22:17 From Heather Ross : Reacted to "I find many times th..." with 

11:22:19 From Casey Holcom : Reacted to "Fish or cut only wor..." with 

11:22:21 From thomas wivinis : 1. afraid they do not know enough, 2. afraid to make a mistake, We need to make sure they know why they are assigned to the team. (Management

assigned them)

11:22:43 From Casey Holcom : Reacted to "I find many times th..." with 🎯

11:23:38 From Maureen Flanagan : I work for a large global organization and about two years ago, we finally put resources behind creating a SME Resource Portal. This provides information and estimated time commitments for SMEs, Stakeholders and Sponsors. It helps to ensure that we are all communicating the same expectations of working with L&D. These are shared at a kickoff meeting and our PM reiterates where we are in the timeframe / process at regular, ongoing meetings.

11:23:55 From Monique Guggino : Schedule meetings

11:24:31 From Betsy Spetich : Draft or have AI draft something they can review.

11:24:31 From Monique Guggino : We've cancelled projects

11:24:39 From Heather Ross : Reacted to "We've cancelled proj..." with 🙌

11:24:41 From Rhoda Green : Put deadlines in your communications.

11:24:47 From Jason Dreyer : Reacted to "Put deadlines in you..." with 🙌

11:24:50 From Casey Holcom : Reacted to "Put deadlines in you..." with 🙌

11:25:07 From Heather Ross : There's a setting where you can have Teams notify you when someone is active on Teams

11:25:08 From Monique Guggino : if the stakeholder is not ready, then we have to put projects on hold.

11:25:09 From Jonathan Fales : I take it your SMEs have no interest in whether the training gets done?

11:25:20 From Michael Dalessandri : I find that sometimes a "proof of concept" or a "beta program" is easier and more preferred for SMEs to review and provide feedback rather than be involved in content analysis and collection.

11:25:55 From Maureen Flanagan : We set up a new team or channel in Teams, specific to all elements of a project. Since we are disbursed across the globe and different time zones, we have regularly scheduled project meetings and can tag people regarding upcoming deadlines.

11:27:37 From Monique Guggino : We discuss risk early on during the kick-off so everyone is aware of what happens when people don't meet their deadlines.

11:27:47 From Maureen Flanagan : Having the group contribute funding to a project helps get their attention and helps to keep it on track. :-)

11:27:47 From Betsy Spetich : Help them understand the consequences of not answering - incorrect information, delay in development, cancellation of project, change in direction for the project, etc.

11:28:09 From thomas wivinis : I have been lucky to teach the same program year after year and we have SMEs assigned, volunteer, ask to be involved...

11:28:19 From Maureen Flanagan : Reacted to "I have been lucky to..." with 👍

11:28:22 From Casey Holcom : Reacted to "I have been lucky to..." with 👍

11:29:24 From Sandra Guzman : Reacted to "We discuss risk earl..." with 🙌

11:30:22 From Maureen Flanagan : Reacted to "I find that sometime..." with 🙌

11:30:30 From Maureen Flanagan : Reacted to "We discuss risk earl..." with 🙌

11:30:44 From Michael Dalessandri : "Don't ask me if I want to do it, if I don't a choice to do it or not."


11:31:10 From Michael Dalessandri : ...have a choice...


11:31:15 From Maureen Flanagan : Reacted to ""Don't ask me if I w..." with 🙌


11:31:40 From Heather Ross : They get "when you have time" on the first email. They get "what is the best time next week" on the 2nd or 3rd.


They get "I'm putting a meeting next week on your calendar" on the 4th try.


11:31:47 From Maureen Flanagan : Reacted to "Help them understand..." with 

11:32:40 From Shannon Tipton : Reacted to "We discuss risk early on during the kick-off so everyone is aware of what happens when people don't meet their deadlines." with 

11:32:44 From Maureen Flanagan : Reacted to "1. afraid they do no..." with 

11:32:50 From Shannon Tipton : Reacted to "We set up a new team or channel in Teams, specific to all elements of a project. Since we are disbursed across the globe and different time zones, we have regularly scheduled project meetings and can tag people regarding upcoming deadlines." with 

11:33:27 From Maureen Flanagan : Reacted to ""Stroke their Ego" b..." with 


11:33:53 From Maureen Flanagan : Reacted to "This is an area we a..." with 


11:35:15 From Maureen Flanagan : Reacted to "They get "when you h..." with 

11:36:42 From thomas wivinis : That is soooo true

11:37:30 From Michael Dalessandri : Chunk the review and meetings with them into smaller pieces. It's easier and may get better responses for shorter pieces to review rather than the complete long version.

11:38:16 From Sarah Walbridge-Jones : Our ID group creates the Teams Channel and invites the SMEs, rather than the other way around.

11:38:26 From Shannon Tipton : Reacted to "Our ID group creates the Teams Channel and invites the SMEs, rather than the other way around." with 

11:38:33 From Shannon Tipton : Reacted to "Chunk the review and meetings with them into smaller pieces. It's easier and may get better responses for shorter pieces to review rather than the complete long version." with 

11:38:46 From Shannon Tipton : Reacted to "They get "when you have time" on the first

email. They get "what is the best time next week" on the 2nd or 3rd.

They get "I'm putting a meeting next week on your calendar" on the 4th try." with 👍

11:39:51 From Michael Dalessandri : Working with SMEs has taught me to be very specific in my questions and meeting agenda creations.

11:40:02 From Casey Holcom : Reacted to "Working with SMEs ha..." with 100

11:40:17 From Sandra Guzman : Reacted to "Working with SMEs ha..." with 🎯

11:40:59 From Betsy Spetich : Limit the content you ask the SME to review and comment on to technical content you really need their feedback on. Allow them to review more if they are interested in seeing how this fits into the project.

11:41:17 From Michael Dalessandri : Reacted to "Limit the content ..." with 👍

11:41:57 From Maureen Flanagan : The 100 page document is where ChatGPT or CoPilot or another AI tool can become your best friend!

11:42:29 From Sarah Walbridge-Jones : Thanks for this discussion and resources. I have to jump!

11:42:45 From Michael Dalessandri : Yes. However, sometimes SMEs content they provide comes from AI.




11:42:54 From Heather Ross : Start with the end in mind: what do you want them to do and how do we get them there?

11:43:15 From Betsy Spetich : Or how will the learners use this information.

11:43:36 From Maureen Flanagan : Asking HOW the information helps or WHY it is needed reduces some of the content.

11:44:10 From Jonathan Fales : Conversation moved to Ai suddenly...

11:44:41 From Betsy Spetich : Prompt using the objectives for the training, who the learners are, and other details the AI can use to make the response relevant.

- 11:44:50 From Jason Dreyer : Reacted to "Prompt using the obj..." with 
- 11:44:57 From Maureen Flanagan : IF the project merits it (and not all do), take the time to identify what is needed and why at the different moments of learning need.
- 11:44:58 From Michael Dalessandri : Go back the goal of the program. Content can become a database, then I can link (comb through and specify) the content to the goal achievement and get feedback on the design with the content used.
- 11:45:44 From Casey Holcom : This is the type I've delt with the most recently. When asking the SME questions about what's important or what actions/features use most isn't helpful, if possible I'll reach out to people currently using the system to review the high level overview of content to confirm this aligns to where they spend their time and what's important to their role
- 11:46:04 From Maureen Flanagan : Reacted to "This is the type I'v..." with 
- 11:46:16 From Maureen Flanagan : Reacted to "Go back the goal of ..." with 
- 11:49:30 From Michael Dalessandri : Does someone "need to know" this information to be able to perform the task/skill/action? In my space for example, RNs don't need to know the path of blood flow through the heart to be able to interrpret printed cardiac rhythm strips. However, they need to know the conduction pathway of electricity through the heart.
- 11:49:36 From Heather Ross : Ahhh, the battle between what they're supposed to do and how they are actually doing it...
- 11:50:01 From Jason Dreyer : Replying to "Ahhh, the battle bet..."

#### The eternal battle

- 11:50:22 From Michael Dalessandri : Although, they should now blood flow through the heart, but it's not necessary to perform printed rhythm strip interrpretation.

11:51:15 From Maureen Flanagan : Having success measures also helps in the validation / confirmation of the content. How will [this content] help us to achieve [the measurable goal]?  
What might happen if this is not included?

11:52:04 From Maureen Flanagan : Reacted to "Although, they shoul..." with 👍

11:52:24 From Maureen Flanagan : Reacted to "Does someone "need t..." with 👍

11:52:40 From Michael Dalessandri : Go with consensus! Unless their a HPPO (highly paid person's opinion).

11:53:08 From Betsy Spetich : Reacted to "Go with consensus! ..." with 👍

11:53:18 From Jason Dreyer : Reacted to "Go with consensus! ..." with 🙌

11:53:39 From thomas wivinis : You can take it all in and then level it up to confirm the best...

11:53:45 From Casey Holcom : Reacted to "Go with consensus! ..." with 🙌

11:54:03 From Michelle's Notetaker (Otter.ai) : Add last minute items before the meeting ends: [https://otter.ai/u/vBGDt0E4u4G1dE0cfmB0ehsZv00?utm\\_source=va\\_chat\\_link\\_3](https://otter.ai/u/vBGDt0E4u4G1dE0cfmB0ehsZv00?utm_source=va_chat_link_3)

11:54:42 From Heather Ross : Follow the recipe the first time, then you can make adjustments

11:54:48 From Jason Dreyer : Reacted to "Follow the recipe th..." with ❤️

11:54:51 From Betsy Spetich : Reacted to "Follow the recipe th..." with ❤️

11:54:52 From Casey Holcom : Reacted to "Follow the recipe th..." with ❤️

11:55:07 From Maureen Flanagan : If your organization allows it, send an award / reward to SMEs for helping on a project. It motivates others to help when the situation arises.

11:55:16 From Jason Dreyer : Are you cooking or baking?

11:55:59 From Michael Dalessandri : Electronic programs are a great example of having multiple ways to do the same thing. So, what way do we want to include in the program we can

all agree on. If learners figure out how to do the thing in a different way but get the same result... that's OK.

11:56:12 From Casey Holcom : Reacted to "If your organization..." with ❤️

11:56:22 From Casey Holcom : Reacted to "Electronic programs ..." with 🎉

11:57:31 From thomas wivinis : History of the training program helps

11:58:08 From Michael Dalessandri : I try to be timely and responsive to their questions and feedback acknowledgement (when they do respond); sort of role modeling or leading by example. If I respond timely, they usually respond timely to my requests.

11:58:29 From Rhoda Green : We are planning to give certificates of appreciation to our voice actors for our ethics class. Plus, put their names in the credits.

11:58:33 From Michael Dalessandri : Also, acknowledging them individually and publicly.

11:58:58 From Sandra Guzman : Find small moments to build that trust through intentional moments of communication. We don't have alot of extra time but always check in to see how they are doing, as I learn about them - ask how their child, cat, dog, squirrel is doing, and highlight positive contributions early and often (how what they have done has helped to move this to the next stage/phase).

11:59:17 From Heather Ross : Ope, gotta jump...Thanks for the great ideas

11:59:37 From thomas wivinis : Does anyone reward the SMEs at the end of the program

12:00:07 From Maureen Flanagan : Provide written appreciation in a way that it can be used in the performance management cycle.

12:00:18 From Donna Smith Fee : Reacted to "Provide written appr..." with ❤️

12:00:34 From Betsy Spetich : Reacted to "Provide written appr..." with 🎉

12:00:37 From Sandra Guzman : We have company awards and will try to give shout outs to folks that have contributed. There are different levels that allow you to get some gift cards.

12:00:49 From Michael Dalessandri : Sometimes the reward/acknowledgment doesn't have to be something large. Small items can be just as meaningful.

12:01:17 From Jason Dreyer : I make sure their manager as well as their Business Unit Director are aware

12:01:24 From Betsy Spetich : Yep, anything we do must be "free"

12:01:48 From Michael Dalessandri : I also include their name within the program as references and acknowledgments.

12:02:07 From Jason Dreyer : Reacted to "Yep, anything we do ..." with 👍

12:02:11 From Sandra Guzman : Food = LOVE

12:02:13 From Casey Holcom : Food is always the trick for me 😄

12:02:19 From Betsy Spetich : Mentions in employee newsletters. Mentions during training events.

12:02:26 From Casey Holcom : Reacted to "Food = LOVE" with 🎉

12:02:34 From Donna Smith Fee : As usual, you all have made me smarter and I appreciate that! Have a sweet weekend!

12:02:45 From Sandra Guzman : Another great discussion! Thanks Shannon and all. Happy Mom's day to all you moms out there.

12:03:24 From Maureen Flanagan : Microsoft Teams has a "Praise" option which allows me to post appreciation and messages in chat to individuals. I'm not sure if it can be used in a group chat or meeting chat.

12:03:48 From Jonathan Fales : Thanks!

12:04:44 From Casey Holcom : Just returned from a fun work trip so I'm going to the farmer's market and getting plenty of R&R 😊

12:04:51 From Janet Henry : I'm planting all my tomato babies\  
12:05:06 From Janet Henry : Oregon :)  
12:05:39 From Monique Guggino : Thank you so much!  
12:06:39 From thomas wivinis : Be well and Happy Mother's Day  
12:07:03 From Michael Dalessandri : Thank you Shannon and everyone. I'll see you next  
time.