



Coffee Chat: My SME is Driving Me Bananas!

Transcript

<https://otter.ai/u/kczcH4y-F03MO4OxRW1DeBkNWOW?view=summary>

Overview

Shannon Tipton and Heather Ross led a discussion on managing subject matter experts (SMEs) who can be challenging to work with. They emphasized the importance of clear communication, setting deadlines, and understanding SMEs' workloads. Strategies included using AI tools to synthesize information, involving end-users for validation, and ensuring SMEs feel valued. They also discussed the significance of building trust through collaboration and recognizing SMEs' contributions. The conversation highlighted the need for flexibility, empathy, and effective project management to ensure successful outcomes and maintain positive relationships with SMEs.

Action Items

- [] @Shannon Tipton - Send the Coffee Chat recording and all referenced resources (including the 'Say this, not that' resource and the blog post) to all attendees after the meeting.
- [] @Shannon Tipton - Prepare and deliver the planned presentation at the upcoming conference over the weekend.

- [] @Shannon Tipton - Prepare for the next Coffee Chat session focused on recognizing internal learning and how to track and acknowledge self-directed learning.

Outline

Coffee Chat Introduction and Initial Banter

- Shannon Tipton and Heather Ross exchange greetings and discuss their weekend plans, including listening to Abba and baking banana bread and lemon pound cake.
- Shannon Tipton welcomes everyone to the Coffee Chat and introduces the topic of dealing with subject matter experts (SMEs) who drive you bananas.
- Shannon Tipton mentions an email sent out the previous day with a resource titled "Say this, not that" to prepare for the conversation.
- Shannon Tipton asks participants to share their main struggles with SMEs and emphasizes the importance of building relationships with them.

Setting the Stage for Discussion on SMEs

- Shannon Tipton introduces herself as the moderator of the Coffee Chat and outlines the topic of the meeting: how to work with SMEs effectively.
- Shannon Tipton shares a blog post she wrote a few years ago on working with SMEs, which she believes still has relevance today.
- Participants are encouraged to introduce themselves in the chat and share their thoughts on working with SMEs.
- Shannon Tipton discusses the importance of nurturing relationships with SMEs and the challenges of dealing with SMEs who are overwhelmed or resistant to collaboration.

Challenges with SMEs: Ghosting and Overwhelm

- Trisha shares her experience with SMEs who ghost her and suggests finding a replacement if the SME is not fulfilling their role.
- Donna and Trisha discuss the possibility that SMEs might be ghosting due to fear or imposter syndrome.
- Heather Ross talks about dealing with an SME who is overwhelmed and has taken on additional roles, suggesting involving other team members for content updates.
- Shannon Tipton emphasizes the importance of understanding the underlying reasons behind SMEs' behavior and finding ways to support them.

Handling Virtual SMEs and Escalation

- Shannon Tipton and participants discuss the challenges of dealing with virtual SMEs who are difficult to reach.

- Sandra suggests stalking SMEs on Teams and finding ways to compromise on time frames and responsibilities.
- Michael shares his approach of being clear and direct with SMEs and involving them early in the project to avoid last-minute changes.
- Shannon Tipton and participants discuss the importance of setting clear deadlines and expectations in communications with SMEs.

Dealing with Over-Sharing SMEs

- Jason suggests using AI tools to synthesize large amounts of information from SMEs and focus on mission-critical content.
- Trisha emphasizes the importance of asking the right questions to help SMEs understand the critical elements of their content.
- Casey shares his experience of involving end-users in the review process to validate SMEs' content and ensure it is relevant and useful.
- Shannon Tipton highlights the importance of building trust with SMEs and involving them in the design process to create meaningful content.

Building Trust and Relationships with SMEs

- Jason shares his method of incorporating SMEs' stories and ideas into training content to make them feel valued and involved.
- Michael emphasizes the importance of role-modeling and building relationships based on mutual respect and collaboration.
- Shannon Tipton suggests giving certificates of appreciation and writing performance management notes to recognize SMEs' contributions.
- Participants discuss various ways to build trust and maintain positive relationships with SMEs, including providing small rewards and acknowledging their efforts.

Final Thoughts and Closing Remarks

- Shannon Tipton thanks everyone for their participation and contributions to the discussion.
- Participants share their plans for the weekend, including attending a baseball game, preparing for a conference, and helping with a new business venture.
- Shannon Tipton reminds everyone about the next Coffee Chat, which will focus on recognizing internal learning and tracking personal development.
- The meeting concludes with participants expressing their appreciation for the discussion and looking forward to future sessions.