



# SME Collaboration Checklist for Instructional Designers

*Practical steps to foster empathy, build trust, and streamline your SME partnerships.*

## Before the First Meeting

- Understand SME workloads — this is likely an ‘extra’ for them.
- Research the topic beforehand to avoid wasting SME time.
- Draft open-ended questions to gather stories and insights.
- Recognize and respect their expertise and experiences.
- Avoid assumptions and stay curious about their perspective.

## Initial Kickoff Meeting

- Listen actively — reflect and paraphrase key points to confirm understanding.
- Align on project goals, timelines, and expectations.
- Discuss communication preferences and check-in frequency.
- Identify any past pain points or hesitations — and co-create solutions.
- Clarify roles, responsibilities, and decision-making authority.

## Content Gathering

- Ask for real-world examples, tools, and documents.
- Validate their knowledge by showing how it connects to learning outcomes.
- Be patient when they go deep — filter later, not during.
- Frame requests in a way that highlights learner benefits.
- Respect their time: batch questions and requests when possible.

## Content Structuring & Drafting

- Share outlines/storyboards early and ask for input.

- Translate jargon, then confirm understanding with the SME.
- Seek feedback with targeted prompts (e.g., “Is this how you’d explain it?”).
- Adapt drafts based on their voice or preferred analogies.
- Flag disagreements with empathy and a learner-focused mindset.

### **Review & Feedback Loops**

- Be transparent about timelines and expectations for reviews.
- Send focused review requests — not everything needs SME input.
- Summarize their feedback and confirm what was applied.
- Keep the tone appreciative, especially when asking for changes.
- Celebrate when something comes together — even small wins.

### **Final Review & Wrap-Up**

- Confirm accuracy and flow of final materials with SME.
- Publicly or privately thank them for their partnership.
- Share final products so they can see their input in action.
- Ask for feedback about your process and what could improve.
- Leave the door open for future collaborations.