



Working with Subject Matter Experts Transcript Summary

Summary

- **Introduction and Welcome [0:00](#)**
 - Shannon Tipton welcomes everyone to the coffee chat, encouraging new participants to introduce themselves and share their locations.
 - Shannon introduces herself as the owner of Learning Rebels and moderator of the conversation.
 - The topic of the meeting is working with subject matter experts (SMEs), and Shannon mentions a checklist she prepared to help with empathy.
 - Shannon congratulates Andrew on his 80-hour learning needs assessment and welcomes new participants Chris, Jennifer, and others.
- **Challenges and Experiences with SMEs [5:36](#)**
 - Shannon shares her experience with working with SMEs, noting the difficulty in aligning their knowledge with the needs of others.
 - Shannon emphasizes the importance of understanding that people only need to know what is necessary to do their jobs effectively.
 - Shannon invites participants to share their favorite SME stories, whether positive or negative, and to open up the floor for discussion.

- Speaker 2 shares a positive experience with an SME who trusted her work and provided valuable feedback, contrasting it with a negative experience of being bullied by another SME.
- **Building Relationships with SMEs [6:43](#)**
 - Shannon and Speaker 2 discuss the importance of personality and rapport in building successful relationships with SMEs.
 - Andrew shares a story about working with a university professor who had recorded all his lectures, highlighting the need for clear communication.
 - Shannon emphasizes the importance of incorporating fun and empathy into interactions with SMEs, especially when dealing with serious topics.
 - Shannon introduces a checklist for working with SMEs and asks participants what their first steps are when starting a new project with an SME.
- **Initial Steps and Building Trust [8:54](#)**
 - Speaker 2 suggests starting with casual conversations to build rapport and get to know the SME.
 - Leslie advises asking SMEs about their experiences and what they would like to achieve to build a better understanding.
 - Shannon and others discuss the importance of understanding the SME's workflow and the challenges they face.
 - Erica shares her experience of advocating for a needs analysis when the initial one was insufficient, emphasizing the importance of trust and open communication.
- **Understanding SME Needs and Pain Points [54:21](#)**
 - Elizabeth discusses her approach of asking SMEs about their audience's needs and pain points to tailor training programs.
 - Shannon and others highlight the importance of understanding the SME's perspective and the challenges they face in their roles.
 - Shannon shares her strategy of using questions to help SMEs understand the learning process and the importance of focusing on essential knowledge.
 - Participants discuss the challenges of dealing with SMEs who are not familiar with the training process and the need to educate them on the time and effort required.
- **Techniques for Effective Communication [54:33](#)**

- Shannon and others discuss the importance of using language that SMEs understand and avoiding jargon.
- Jessica shares her experience of creating a course to help instructors understand asynchronous learning, which has received positive feedback.
- Shannon emphasizes the importance of using tools like AI to distill and summarize information from SMEs.
- Participants discuss the challenges of dealing with SMEs who are resistant to change and the importance of building trust over time.
- **Building Long-Term Relationships with SMEs [54:47](#)**
 - Jason shares his experience of working with SMEs over a long period, emphasizing the importance of proving the value of his work and building trust.
 - Shannon and others discuss the importance of understanding the SME's perspective and the challenges they face in their roles.
 - Participants share tips for dealing with SMEs who are resistant to change and the importance of being patient and persistent.
 - Shannon emphasizes the importance of remembering that SMEs are people first and treating them with respect and empathy.
- **Using Technology to Facilitate Communication [55:06](#)**
 - Shannon discusses the use of technology to help with communication and information management with SMEs.
 - Participants share their experiences of using tools like Slack and AI to streamline communication and distill information.
 - Shannon emphasizes the importance of using technology to make the process easier for SMEs and to facilitate better collaboration.
 - Participants discuss the challenges of dealing with SMEs who are not familiar with technology and the need to educate them on its benefits.
- **Final Thoughts and Next Steps [58:38](#)**
 - Shannon summarizes the key points discussed during the meeting, emphasizing the importance of empathy, trust, and effective communication with SMEs.
 - Participants share their final thoughts and experiences, highlighting the importance of continuous learning and adaptation.
 - Shannon announces the next coffee chat topic, which will focus on building relationships with stakeholders.

- Participants express their appreciation for the conversation and look forward to the next meeting.