

Working with Subject Matter Experts: Strategies to Gain Cooperation and Win Respect

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Working well with SMEs is essential to our success as technical communicators. This article recommends strategies to employ to improve your relationships with SMEs – seeking buy-in, increasing transparency and cross-functional teams, expressing expectations clearly, setting common goals and objectives, and making success a shared accountability.

THE TECHNICAL COMMUNICATOR & THE SME

Forging productive, cooperative relationships with Subject Matter Experts (SMEs) is absolutely vital to our success as technical communicators. Without timely, accurate information from our SMEs, our jobs are ten times harder to accomplish. For a technical communicator, the SME is a critical resource. A large part of our jobs consists of getting information from SMEs. The reverse, however, is not generally true. Most SMEs do not list “communicate with the documentation group” as part of their job description. They are often not formally tasked to communicate with us. In many companies, the SMEs and technical experts are the same people responsible for developing the product that we are documenting – and developing that product is their first priority. In sum, SMEs are busy people who generally have little interest in spending time with us. How do you get around this problem? How do you get buy-in from SMEs? How do you get SMEs to recognize the critical nature of your work? And further, how do you get SMEs to willingly share accountability for the success of that work? This article will recommend some strategies to use when forging or improving your relationships with SMEs.

STRATEGIES FOR SUCCESS

The strategies that follow are suggested tactics; they won't apply to every working situation. Pick and choose among them. The tactics that you employ may change over time depending upon your company/environment, the make-up of the project teams involved, how well you know the SMEs and how long you've worked with them, your current doc load and deadlines, and so forth. Some of these strategies are high-level and focus on concepts (such as strategic relationship building, diplomacy, and collaboration), while others are more tactical and procedural in nature (such as keeping a project log and scheduling regular meetings). As is true in any case, use what works best for you.

Build Strategic Relationships

The SME usually does not just have one piece of information that you want; the SME has a head full of knowledge and expertise that will be critical to you over time. Therefore, you want to keep interacting with the SME in order to benefit from her or his knowledge. This sort of situation requires that you build a relationship with the SME. Building alliances is a crucial lynchpin for the documentation effort.

A critical part of this relationship-building stage is that you respond to SMEs on both a personal and professional level. If the SME has a particular hobby that you know of, ask her about it. If the SME has pets or children, initiate conversations about them. Let them get to know you, and tell them about the job you do. Often SMEs do not have a clear idea of what our jobs entail. Let them know how important they are in the documentation process. Emphasize that you are not looking for a one-time or two-time infusion of information but rather a longer-term information partnership.

Get Buy-In & Encourage Collaboration

Get the SME to understand the crucial nature of the documentation (after all, the product cannot roll out without it). Ensure that your SMEs understand *what* you need, *when* you need it, and *why* you need it. You are all a team working for the user. Encourage as much collaboration as possible in this effort.

Persuade the SME to think beyond development, to think of the user's needs and of you as a representative of those needs. Remember to approach SMEs with diplomacy, consistency, and respect. Build credibility over time.

Find a Point Person to Act as Your Information Partner

Oftentimes, the relationship between product development teams and the documentation team is not spelled out. We are dependent upon SMEs for information but they are not necessarily *required* to talk to us. One solution to this sort of situation is to find one person on the team, or one person in each development group, to act as your point person. This person should either be explicitly tasked to communicate with you or should, more informally, accept the responsibility to do so.

Have regular meetings with your point person, or at least engage in some form of regular communication. This process will allow you to learn of product changes and potential slips, and will also allow you to keep your point person apprised of your schedule, the status of your projects, any deadlines that are in jeopardy, and so forth. Engage in under-the-wire communication if need be. Chances are that a potential project slip won't be communicated to you in a formal memo. Sometimes a whisper in the hallway ("This isn't official yet but it looks like project x is going to slip by two months") is all you've got.

Do Your Homework

Nothing annoys busy people as much as having someone waste their time. When you ask for a SME's time, be prepared to use it well. Know what you want to ask. Approach the SME with a list of questions about a product or an area. Take responsibility for your own learning (which will, on its own, earn you a lot of respect). Reflect back and verify the information you receive; draw connections and ask questions.

Choose Your Mode of Contact

There are many ways to communicate with SMEs in order to get the information you want. The information that you need and how critical it is – along with the personality of the SME and her or his track record in responding to you – will influence what mode of communication you choose. E-mail is often good for disseminating information to groups or asking particular questions, whereas face-to-face meetings are better for longer discussions and project planning activities. Group meetings are best for sizing projects and establishing scope, setting schedules, and conducting reviews and project walkthroughs. A telephone call or popping into someone's office works well for a quick question or fact-check. Also, don't underestimate the importance of "water cooler conversations." Some people may give you ideas or opinions in a more relaxed, private atmosphere than they will during a group meeting.

Engage in Critical Thinking

Logical, critical thinking skills are the foundation of effective communication. Use your training to think clearly and express yourself effectively. Sometimes you receive information in a piecemeal manner. Perhaps an engineer tells you about one specification that's changed but not about how this change affects other elements of the system. It's your job, then, to draw connections and question what other changes might flow from this one change that you do know about.

Don't expect too much from the SME. Learn as much as you can on your own, recycle your knowledge, draw connections and conclusions and, whenever possible,

just double-check your assumptions with your SMEs. This approach saves time and demonstrates that you are taking responsibility for your own learning.

Engage in Strategic Planning

Create and disseminate a publication plan if at all possible. A publication plan (consisting of deliverables, key players, roles and expectations, schedules, usability goals, and so forth) gives everyone involved an opportunity to provide feedback and lets every team member know what is expected of him or her. A publication plan not only increases transparency, it also helps to demystify the documentation process. A well-constructed publication plan has the added value of allowing you to be proactive rather than merely reactive. The more proactive you are, the more likely you are to be viewed as a stakeholder in the development process.

Part of strategic planning is creating clear and reasonable schedules, leaving adequate time for technical review, and reflecting the time required for your own research. You often need time to investigate a new product or a new market before you can even make *decisions* about what documentation to produce. Be clear about the time you need for research, writing, revising, editing, publication, and so forth. Depending upon your environment and your timeline, distributing outlines and storyboards can be extremely useful as it can help secure feedback and ensure that your project is headed in the right direction.

Emphasize Your Strategic Position

Ensure that the SME understands that you occupy a critical position. On the one hand, you are a bridge to the development or expert team; on the other, you are a bridge to the user, customer, or target audience. Your position is that of a user advocate. It's your job to understand the user and how she or he will utilize your product or service. Getting good feedback from users can help secure the participation of SMEs (and the support of management) in our work. Positive user feedback concretely demonstrates both our value to the organization and our contribution to the product.

Encourage Transparency & Cross-Functional Teams

Make the information that you produce available to everyone in your company, and provide a usable index so that individuals can find the bits of information they want. The flipside of increasing the transparency and availability of your work is ensuring that all possible sources of information are open to you (including design documents, specs, marketing requirements documents, and so forth). The more educated and prepared you are, the better (and faster) you can do your work.

Encourage SMEs to think about how the changes they make to a product will affect the product documentation. Getting SMEs to participate in the process reduces the time you spend on revisions (as well as reducing your frustration level when you find that changes have been made but not communicated to you). If possible, get a group other than the documentation group (such as quality control, software testing, or field services) to test the documentation with the product. This approach involves other teams in the documentation process and helps to ensure that everyone understands the hazards involved in distributing untested documentation.

Build Common Cause

Try to build common cause with your SMEs. Perhaps you can appeal to the shared deadline-driven nature of your endeavors, or emphasize that you are all one big team working for user satisfaction. The closer the relationship between development and documentation, the more information you will receive and the more reliable it will be. If there is an “us versus them” culture within your organization that you cannot change, work around it as much as you can. Try to get through the wall between documentation and development by establishing one-on-one relationships. A chink in the wall may be all that you can achieve but it’s better than a solid wall of opposition or apathy. Make anything that you can work in your favor so that you can at least establish an “us” that includes documentation *and* development.

Show an Interest

Show an interest in the SME’s work and demonstrate an awareness of and a respect for his or her contribution. If you don’t want to be treated like a necessary evil, don’t treat your SME in that fashion. Make an effort, insofar as is possible, to understand what the SME does and to learn about his or her piece of the larger pie.

Establish Yourself as a SME

Market yourself! Educate SMEs about what you do, what you are capable of, and the value you add to a project. You are a SME in your own area of expertise (documentation, information management, knowledge transfer, and so forth). Make others aware that you are an expert in your field, and aware of the services that you can provide to them. You may be able to contribute to company goals in a multitude of ways – by writing or reviewing marketing literature, bids, requirements, and so forth. Often you know a product or system better than almost anyone else because you are documenting an entire system or product line. Make that expertise known.

Also, if you want to remain an expert in the technical documentation field, defend and protect your own professional development. Encourage your company to

value and support your continued professional growth. It’s easy to let your skills become stale; what’s hard is to keep growing and challenging yourself.

Cultivate & Nourish Alliances

Forge as many relationships as you can with different teams and departments. No matter where the tech pubs group is in your organization (engineering, marketing, customer service, QA), nourish relationships with all other departments. Ask for different points of view. Gain as many allies as possible from as many different departments as you can. And perhaps most importantly, approach all of your co-workers as equals. You’re asking for their feedback, not for their permission to do your job. Own your own projects and be comfortable with that. If you are, you can approach others more productively and in a way that will gain you respect. Don’t wear a chip on your shoulder or act as if you are the only one who has ever had a good idea about documentation, but don’t place yourself in a one-down, subservient position either. Once you say, “I just develop the documentation,” you demean yourself, your job, and your contribution.

Listen to the SME

When you ask for information, be prepared to listen. In addition to the information a SME communicate to you directly, stay attuned to indirect communication as well. If a SME complains about another staff member, for example (such as “he never leaves me enough time to respond”), try to avoid that behavior yourself. File away information about different people and personalities. You’re not only gathering data for your publications, you’re also gathering information about personalities that will enable you to perform your job with less friction.

If you are having difficulty with a SME, try to identify the cause. Listen closely. If you identify the root of a problem, you have a chance of either solving it or finding a way to work around it. Perhaps this is someone who doesn’t trust your team or doesn’t understand your contribution. If the information-gathering or review process is not working with a particular SME, confront the issue. Clarify what you need and why. Ask the SME “what can I do to make this process easier or more productive for you?” Be as flexible as you can without compromising your project or your goals.

Keep a Project Log

You are often managing multiple documents or projects at one time, and organization is key to knowing where you are with each project. Keep a record of when information was disseminated for review, to whom, and what the deadline is for return of the material. Be prepared for slips. Establish traceability by archiving

project notes and review documents. You may also choose to create a reviewer comment database or use bug-tracking software for your own projects. These methods have the added value of increasing transparency and establishing a public forum for comments about and involvement in the documentation effort.

Spell Out Expectations & Give Clear Feedback

Give explicit instructions to technical reviewers. Make clear what you expect. Let them know what is helpful to you and what is not. Get them to focus on technical feedback (rather than grammatical or stylistic matters). In sum, encourage best practices during the review process.

Once reviewers have worked with you for some time and trust your work, they can get sloppy. This turn of events may require a wake-up call. Point out sloppy reviews and emphasize what is at stake (customer satisfaction and performance), but do so diplomatically. Don't approach someone to talk about a shoddy or careless review if you are actively angry about it; wait until you can approach the situation more objectively, emphasizing that the only one who loses is the ill-informed or uninformed user of your product or service. Try to nip problems in the bud rather than waiting until there is a crisis to take action. For example, if you see a bad pattern developing, act on it – call a meeting, talk to the person who is consistently late on reviews or is acting as a roadblock, talk to managers to keep them informed of trouble areas, and so forth.

Schedule Periodic Meetings

Scheduling regular meetings during a documentation project can help clear up small problems before they become big ones. Involve relevant writers and SMEs in the meetings, and conduct walkthroughs on the current state of the product and the documentation. In addition to making sure that everyone is on the same track and working in tandem, these meetings and reviews can help you prepare for the next phase of the project. Setting up a schedule of regular meetings also helps establish your leadership role. The more proactive you are, the more people will look to you to lead.

Be Clear About Constraints

Various events will place your deliverables in jeopardy. For example, slips in the development schedule will affect the documentation schedule. Be clear about these risks and dependencies up-front. Documents need lead-time for development just as other products do. Be honest about your resources and abilities. Be clear about what you can deliver and when. Do the best you can given the constraints that you are operating under. Then

don't be afraid to say no and stand by it. Learn how to say no without being overly confrontational and without apology. It's a lot easier to say no than it is to say yes and then fail to deliver what you have promised.

Be Open to Failure

All learning occurs by trial and error. Mistakes will be made; projects will encounter setbacks. The documentation effort, like the product development effort, is not perfect. Like software and hardware, product documents will have bugs (in spite of your best efforts). You need to accept failure when it occurs and learn from it to continually improve the process.

Show a Sense of Humor

Showing a sense of humor about the work, the workload, the deadlines, and so forth can win tremendous goodwill from your co-workers. Using humor can defuse stressful situations and make people feel more at ease. Be aware that many SMEs may have had bad experiences with other technical communicators in the past. Demonstrating that you are a reasonable person capable of maintaining perspective and bringing a sense of humor to a crazy situation can go a long way towards winning cooperation from others.

Conduct Post-Mortems

End-of-project reviews are as important as planning meetings. These post-mortem meetings – involving writers, SMEs, and any other participants in the process – allow everyone to assess what worked and what didn't and to provide feedback about the process. The importance of getting mutual agreement about project successes and failures should not be underestimated – when everyone agrees, everyone can change. This sort of process makes change the responsibility of the group rather than of any individual. As with reviews, walkthroughs, and planning meetings, calling post-mortem project meetings enhances your credibility and demonstrates both dedication and leadership.

Lead by Example

When dealing with SMEs, remember the golden rule. If you expect cooperation and respect from them, give them cooperation and respect as well. Be aware of your behavior, body language, and presentation. If a SME comes to talk to you and you cannot give that person your attention, clarify when you can address the issue at hand and make sure that you follow up on it. Your SME is a precious resource that you will need later. Don't poison the well.

Thank the SME

When a SME contributes to your project, thank him or her both privately and publicly. Gratitude and recognition help to secure future cooperation. Let your SMEs know that you appreciate their efforts, and let others know as well. When you announce that a project is complete or a document has been published, acknowledge and thank those who helped you or your team reach that goal. Aside from being good form, it's good business too.

SMEs Gone Bad: Responses to Stonewalling

In spite of your best efforts, you may come across an occasional SME with whom it is simply impossible to work productively. This person may stonewall you and derail your projects. She or he might even bear a grudge against you and/or attempt to attack your credibility. There are some measures you can take when you are confronted with an uncooperative SME.

Utilize good record-keeping so that you can show how a lack of cooperation has affected your schedule of deliverables or the completeness of the documentation you produce. Look for parallel routes to the information you need. (With luck, you may not need to interact with the difficult SME at all, or very little.) Make your needs and expectations – and the reasons behind them – very clear.

In some circumstances you may choose to confront the problematic SME directly. Do so diplomatically and armed with the necessary information. Understand that you are taking a risk in doing so, but if the relationship isn't working anyway you may not be risking much of value. Make the SME aware of your problem and offer to help find a solution. Finally, if all other measures have failed, you may choose to go over the head of the SME and report the lack of cooperation to the SME's manager and to your own. If you can reach general agreement that the SME's actions are posing a problem and negatively affecting your work, you may get the SME to comply with your needs (whether willingly or not).

When You Are a SME

If someone approaches you as an expert in the documentation arena or in another area of expertise that you may have, think about what behavior you like to see from your SMEs and replicate it. Make sure that the person who has sought you out understands the information you've conveyed. Explain your reasoning when necessary. And finally, be gracious. Understand that knowledge is a powerful tool, and that being asked to share your knowledge is a tribute.

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