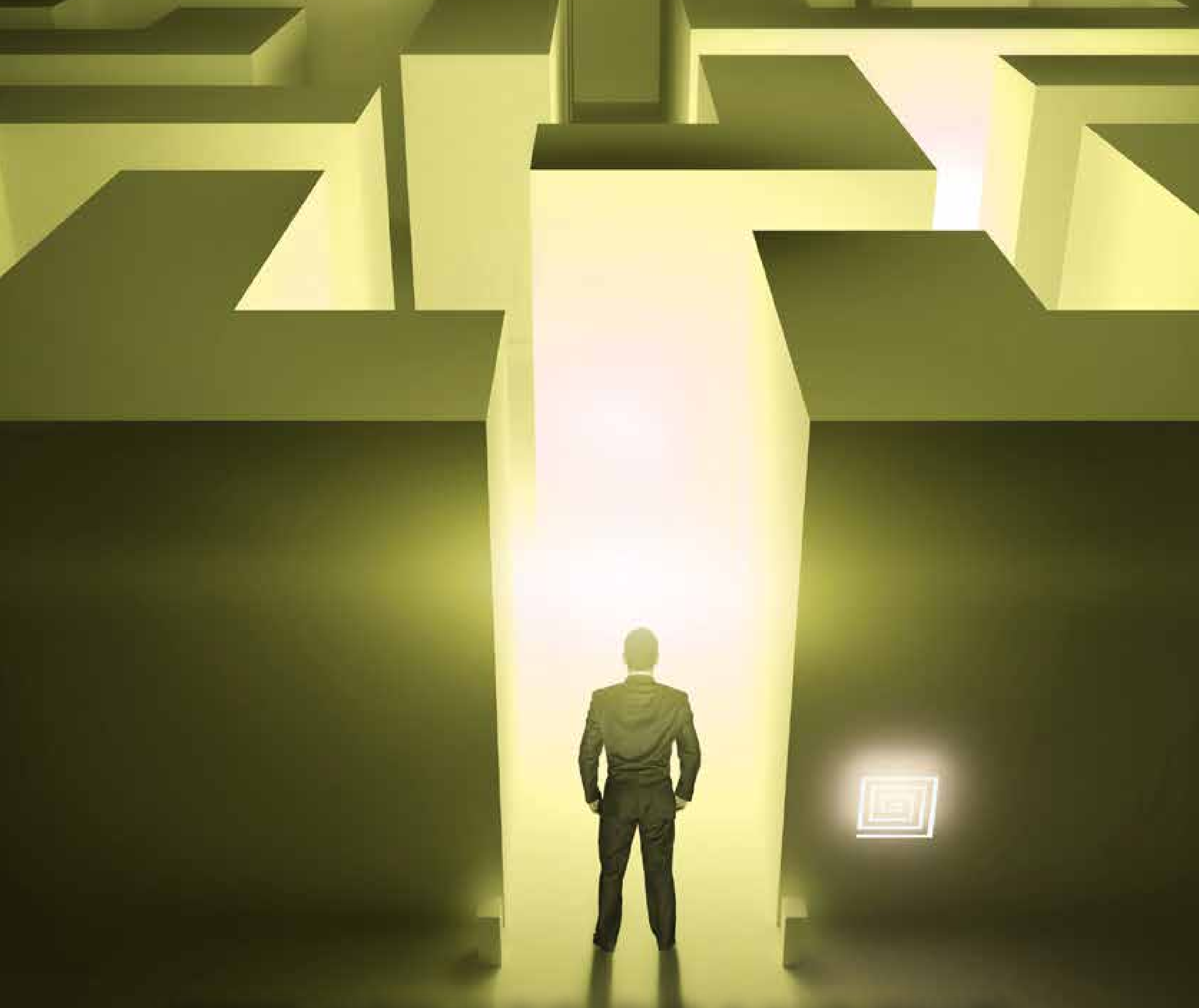
STC
VOLUME 71 ISSUE 4 | JULY/AUGUST 2024

intercom

THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION



STRATEGIC BRANDING

FINDING YOUR AUTHENTIC BRAND | SUPPORTING A SOFTWARE SALES AND RETENTION PIPELINE
STRATEGIES FOR INTERVIEWING SUBJECT MATTER EXPERTS | SUCCINCTNESS AND RELATABILITY

Strategies for Interviewing Subject Matter Experts (SMEs)

By Nicky Bleiel | Fellow

Interviewing Subject Matter Experts (SMEs) is an important part of the knowledge gathering process when writing software documentation.

Through research and testing, we can learn a great deal on our own about new features. But sometimes that isn't enough to get the answers we need. Enter the SME. A SME interview is a three-step process – preparing, conducting, and following up. These steps are the same for both synchronous one-on-one interviews and asynchronous question and answer volleys in issue tracking tickets or messaging apps.

Preparing for a SME Interview

Before the interview process begins, prepare your SME by sharing the information they need, such as your project plan and deadlines, final deliverable(s), and other useful details. And remember that some SMEs may need to be told what their responsibilities are – some honestly don't know and may be nervous about being first time SMEs. While being an SME is not their primary job responsibility, most SMEs know how important their contribution is to the success of the product. (If they don't, remind them.) Always share the review process, because SME responsibilities don't end with the interview, they include review and approval.

> **While being a SME is not their primary job responsibility, most SMEs know how important their contribution is to the success of the product is. (If they don't, remind them.)**

Identifying SMEs

First of all, it's important to learn who the SMEs are and cultivate relationships with them. Often a SME will be assigned to you — and you should work with that person — but expanding your cohort of SMEs will often improve the final product, and make it easier to get quick answers to your questions in the future. SMEs are everywhere, and like a good journalist, you need to cultivate them as sources. Potential SMEs include (but are not limited to): software developers, business analysts, quality assurance testers, technical support, product managers, sales professionals, and even customers (though this can be a little challenging to arrange).

Expanding Your Cohort of SMEs

These suggestions are a mix of short-term and long-term efforts.

- During a SME interview, always ask "Who might have more information?" (And if there is additional information published internally – the author could be another resource).
- Volunteer to explain Information Development responsibilities (which include interviewing SMEs) at new hire orientation (it may be a while before those new hires are SMEs, but existing SMEs usually attend orientation).
- Schedule meetings with other teams (such as QA and Customer Support) to explain what the information development team is working on and let them know you are available to answer questions.
- Post to the company messaging channels with Information Development team updates.

Preparing Interview Questions

The next thing you need to do is prepare your questions. Start by reading project documents (such as issue tracking tickets, user stories, design artifacts, and testing the software). Take notes while you are researching. Your notes will come in handy when writing questions, and if your SME asks why you are asking the question – as well as for your reference later when writing.

When writing questions, keep in mind one of the tenets of journalism: the 5 Ws and one H questions (Who, What, Why, Where, When, How). For example:

- **Who would use this feature?** You know your audience but you will gain insight into who the SME thinks the audience is for this content.
- **What are the prerequisites?** What are the *feature* prerequisites – is there anything users need to configure before using the feature? (Not the software version, operating system, etc. Those should be in the project documents.)

- **When would users use this feature?** When **shouldn't** they use it?
- **Why should they use this feature?** This is often conceptual information – the use case.
- **How** and the **Where** combine to explain the task. You may already know this because you have tested the software, but work through the steps together.

> **Write open-ended questions to avoid yes/no answers. And, since we are their representative, always consider the user perspective.**

Write open-ended questions to avoid yes/no answers. And, since we are their representative, always consider the user perspective — what would they ask about the feature? What task would they be trying to accomplish? How will it make their job easier? If the interface has major changes, would it help the user if there was a chart explaining how to accomplish tasks in the old interface versus the new?

After you have all your questions written, your SME prepped, and the interview scheduled, you need to take the time to get your questions in order before the interview. The flow of questions is very important – the interview will go more smoothly if you aren't jumping around from topic to topic. This step is especially useful if you promised to send the questions in advance.

Conducting One-on-One Interviews

As soon as you sit down (whether live or virtually), acknowledge their expertise. Share yours. People have different styles – brusque versus talkative; formal versus informal. Adjust to their style. Don't be intimidated – the interview should be a dialog; not a monologue. If their body language is closed off (a little harder to determine virtually, but at the start, ask them to please turn on their cameras), take a minute to make them more comfortable.

In order to keep the interview on track, ask the SME to take you down the "happy path" (the best-case scenario) for the feature first, followed by the exceptions. Many SMEs want to share the potential issues first, which is understandable, but this method will help you get answers faster (then you can dig into the issues if there is time).

There is one question you should always ask SMEs – what I call *the magic question* – "How do **you think** this feature will help the user?" It helps everyone to level-set on the goals, objectives, and thought process behind the feature. It's very clarifying for everyone.

During the interview, really listen to their answers – does the SME reveal paths you hadn't considered? Or a use case you didn't know about? Follow up on all your questions during the interview – don't assume another chance. One trick to confirm an answer is summarize their statements back to them – "What I hear you saying is..."

Encourage whiteboarding and take pictures for your records. Stick to the planned meeting time as it shows respect for their time.

If the SME can't confirm a fact, ask them if they know who or what can (you might find a new SME to add to the cohort).

Asynchronous Interviews

It's a reality that there are some SMEs you will never get one-on-one time with, or there are so many SMEs on a project that you can't set up an interview with all of them. In that case, you need to get your questions answered in other ways. You can use a combination of issue tracking tickets, messaging apps, wikis, and other remote collaboration tools. Questions answered outside of the issue tracking ticket should be retained in some way. Save emails as PDFs and attach them to the ticket. Link to messaging app conversations (or screen capture them) and attach those as well.

The questions you need to ask won't vary too much between one-on-one and asynchronous interviews, but there are some things to keep in mind:

- Write succinct, clear questions.
- Avoid asking questions that have already been answered elsewhere (such as a comment in the ticket or other document).
- Include links to related issues/information so the SME knows you've seen that information and it doesn't answer your question (if you don't, you might get those very same links back as answers).
- Be specific! Add screen caps if they will make your question clearer.
- Long lists of questions can be overwhelming – try to avoid that if you can.
- As always, ask who might have more information, or where you could find it.

What If?

Sometimes you can't get the answers you need. One suggestion to work around that issue — write what you can with the information you have, then post it to your internal wiki or in the issue tracking ticket. Point stakeholders to this content and diplomatically share your process. Include the SME (or SMEs) in all messages. This can help identify other possible SMEs or kick-start the process.

Following Up and Post Release

The interview is over. Now we need to handle the follow-up, which is a quick but important task. First, thank the SME via email or messaging app, and copy their manager (this verifies to the manager that the SME participated in the interview). In the message, make sure to mention that you look forward to working with the SME on the next phases of the project. This reminds everyone that we aren't quite done yet (since there are additional steps in the process that they are responsible for). The next phase will, of course, be writing. Followed by review and approval by SMEs.

Celebrate the release with your entire team. And if you uncover any previously unknown information during your SME interviews, add that content to your company knowledgebase/wiki and publicize it. ■

FURTHER READING AND RESOURCES

Akinci, Ugur. 2009. "Interviewing a Subject Matter Expert (SME)." Technical Communication Center. Last modified March, 13, 2009. http://www.technicalcommunicationcenter.com/2009/03/13/technical-writing-cardinal-rule-of-interviewing-a-subject-matter-expert-sme-for-a-document/.

Bozarth, Jane. 2011. "Nuts and Bolts: Working with Subject Matter Experts." Learning Solutions Magazine. Last modified March 1, 2011. http://www.learningsolutionsmag.com/articles/635/nuts-and-bolts-working-with-subject-matter-experts-smes.

Hill, Carmel. 2015. "How to be an Awesome Subject Matter Expert." Filmed January 26, 2015. Video, 3:53. https://www.youtube.com/watch?v=cteidKaD5NA.

Kuhlmann, Tom. 2007. "How to Get The Most Out Of Your Subject Matter Experts." Rapid E-Learning. Last modified July 5, 2007. http://www.articulate.com/rapid-elearning/how-to-get-the-most-out-of-your-subject-matter-experts/.

Medved, Michelle. 2011. "12 Tips for Working with Subject Matter Experts." Learning in the News. Last modified October 10, 2011. https://mbmtraining.wordpress.com/2011/10/10/12-tips-for-working-with-subject-matter-experts/.

Quigley, Fiona. 2013. "Working as a Subject Matter Expert." Filmed January 31, 2013. Video, 1:58. https://www.youtube.com/watch?v=9uacHadHKuc.

Sabramowicz, Anna. 2011. "Subject Matter Expert: 5 Tips for Working with a SME." Filmed August 19. 2011. Video, 3:24. https://www.youtube.com/watch?v=_qtXDBmfffs.

Uahtechcomm. 2012. "Interviewing Subject Matter Experts." Technical Communication at UAHuntsville. Last modified January 30, 2012. https://uahtechcomm.com/2012/01/30/interviewing-subject-matter-experts/.

Vaughan, Shauna LeBlanc. 2015. "Words Matter: 3 Words to Avoid When Consulting with Subject Matter Experts." eLearning Industry. Last modified August 18, 2015. https://elearningindustry.com/3-words-avoid-consulting-with-subject-matter-experts.

Weber, Kai. 2010. "Top 4 Steps to Solicit Perfect Documentation Reviews." Kai's Tech Writing Blog. Last modified November 8, 2010. https://kaiweber.wordpress.com/2010/11/08/top-4-steps-to-perfect-documentation-reviews/.

NICKY BLEIEL is the Senior Information Developer & Content Strategist at Innovative Systems in Pittsburgh, PA. She is a Fellow and Past President of the STC with more than 20 years of experience writing and designing content for software products in a variety of industries. She is a popular speaker at many conferences, including the STC Summit, tcworld, WritersUA, CIDM, CPTSC, IEEE ProComm, and LavaCon; and has been published in STC's *Intercom*, *tcworld magazine*, *ISTC Communicator*, and more. See nickybleiel.com for a list of her talks and articles.

Email: nbleiel@innovativesystems.com