



# The Video Creator's Guide to Working with Subject Matter Experts



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It's a classic conundrum: You need great video or tutorial content, but you're not an expert in the field. On the other hand, your content experts aren't exactly expert video creators and you need something that looks professional.

So who should make the video?

Great companies play to their employees' strengths and that holds true for content creation, as well. So just like the adage says, teamwork makes the dream work.

Being a content creator means having to know a little about a lot of things. Most of us have to be able to write, do some basic graphic design or image editing, video work, and more. That's on top of often having to know a little something about whatever it is you're creating content for.

But great tutorial and training videos need more than a passing knowledge.

That's where your subject matter expert (SME) comes in.

In a perfect world, all interactions with your SME would be seamless, flawless, and smooth, but that's not always the case.

This guide provides some helpful tips on getting the most out of your interactions and relationships with your various SMEs, as well as some common pitfalls to avoid.



## What is a subject matter expert and why are they important?

Chances are, if you're creating content of any kind, you've had to work with a subject matter expert at one point or another — you just may not have realized it at the time!

Your SME is exactly what it sounds like — the person who is an expert in your content topic. It can be someone on your team, another colleague from somewhere outside your department, or even someone outside your company entirely.

When it comes to creating training or tutorial content, your SME can make all the difference. Imagine creating a video on how to work within a software program when you only know a few of the features. Sure, you could highlight some good information, but your video wouldn't be complete. That's not good content.

Your SME fills in your knowledge gaps and ensures that everything you show and share is accurate and complete. They can provide valuable context and technical knowledge that make your videos more beneficial to your viewers.

Think of them as your own private knowledge bank.

That said, not everyone thinks like a content creator. So, while SMEs might have all the knowledge needed to create great content, they're not necessarily the appropriate choice for actually creating the content.

But how do you create a good working relationship with an SME to ensure that the content you create together will be the best it can be?

Be clear at the outset what you need from your SME, including such things as time commitment, the type of knowledge you need help with, project timeframe, and due dates, etc.

# 10 Tips for working with an SME

As stated above, in a perfect world, every interaction with an SME would go without a hitch. But, for a wide variety of reasons, sometimes that's not the case. But, there are a few sure-fire ways to ensure that the vast majority of your time working with an SME is productive and efficient.

## 1. Choose the right SME

This may seem like a no-brainer, but it can be a little trickier than you might think. For example, when a project is just getting under way, your project manager or other team member may have a suggestion for who you should work with. But that may not always be the best person for the job.

To ensure you enlist the help from the right SME and avoid wasting your and their time, make sure you understand the parameters of the project before you get started.

For example, for a software training video, it may make sense to grab one of the developers to help you get the knowledge you need. But, it may also be beneficial to work with their project manager instead. While a developer might have the technical knowledge of how the product works, a project or product marketing manager might better understand the “why” behind the features.

Other times, you may need to enlist the help of multiple SMEs. Maybe one SME can give you the best technical look, but you also need the full story for other reasons. In that case, having two more may be they key to success.

On occasion, you may not have a choice. You may be assigned to work with someone or a particular person may be the only SME in your organization or available to you at the time. In that case, you may have to make do.

## 2. Define Expectations

Anytime two or more people work together, its best that everyone has a clear and shared understanding of their role and how it relates to yours, as well as the full parameters of the project and what will be expected from each person. Make sure your SME knows the exact process for completing the project.

Be clear at the outset what you need from your SME, including such things as time commitment, the type of knowledge you need help with, project timeframe, and due dates, etc.

Knowing these things up front can go a long way in reducing confusion and/or frustration throughout the process.

Oh, and it's always best to have these things documented, so that whenever there's a question or conflict, you can go back to the document for clarification.

### 3. Set realistic expectations and goals

Want to ensure a project is doomed right from the start? Then by all means, set a whole bunch of unrealistic expectations and goals.

Oh, what's that? You want your project to succeed? Then be realistic.

This will vary project to project, but keep in mind that your SME has a job and likely can't be available to you at a moment's notice. Make sure you build in time for meetings, content reviews, feedback sessions, and more to ensure that you're not scrambling to find time to get it done.

Speaking of which, don't forget to set a realistic timeline for completing the project. Make sure your SME knows how much of their time will be required and when they can expect that time requirement to be over.

### 4. Be prepared

While you may not be the expert, there are a number of ways you can help things along with some basic preparation. If you're working with an SME from inside your company, chances are you have at least some basic familiarity with the topic at hand. But even then, make sure you're not coming into the relationship without the proper context. If you don't know anything about the topic, do some research ahead of any meetings or interviews.

**At the very least, you should:**

- Know key terms around the topic
- Have an understanding of and be able to explain the project topic and goals
- Know why the audience needs to know about the topic
- Have a few questions ready to jumpstart the conversation

When reporters interview people for the articles they write, they do a good amount of research on the person and/or the interview topic long before the interview happens. Do your best to come prepared and your SME will appreciate you even more.

## 5. Ask good questions

As mentioned above, it's important to have questions ready to ask to keep the conversation moving. But, make sure those questions really get at the heart of what you need to know.

But did you know there are different kinds of questions you can ask? Here are a few examples.

### **Closed questions**

Closed-ended questions typically require just a single word or short phrase to answer (often just yes or no) and are valuable for confirming facts, opening a conversation, and helping you maintain control of the conversation.

#### **Some examples:**

- Do we want to highlight this feature?
- Are we meeting today or tomorrow?
- Did you have a chance to look at the draft?

### **Open questions**

Open-ended questions typically garner much longer responses and are perfect for getting more details and inviting a dialogue.

#### **Some examples:**

- What can you tell me about this feature?
- What would happen if ...?
- Why should our customers know about this?
- What would be the best use case for this?
- How is this different from previous versions?
- Can you explain in detail how someone would use this?



## 6. Active listening

Asking good questions will get you part of the way, but to really finish the job, you must listen and understand the answers being given.

This means giving your SME your undivided attention. Don't scan the room or check your phone for messages. Don't check and answer emails. Let your SME know that you value their time and their knowledge.

### **Here are a few tips to practice active listening:**

- Face the speaker and maintain eye contact
- Be present and pay attention
- Keep an open mind
- Listen to the words and try to picture what the SME is telling you
- Don't interrupt. Wait for natural pauses to ask clarifying questions
- Ask questions only to ensure understanding

Finally, once your SME is done explaining, it's a good practice to offer a summarizing statement to help them and you ensure you truly understand what they just explained. That way, any misconceptions or misunderstandings can be dealt with right away.

You can also ask if your SME would allow you to record the meeting. That allows you to go back and re-hear anything you need to for clarification purposes.





## 7. Respect your SME's time

This is another one that may seem like a no-brainer, but keep in mind that your SME has another job besides helping you with your video project. Make sure that you maximize your time and theirs by being prepared and by ensuring that each meeting is absolutely necessary. Be on time to your meetings and end them at the appointed time.

## 8. Build content from content they already have

Does your SME regularly speak or write about the topic you're creating content about? Don't reinvent the wheel! If your SME has content that's already been created around your topic, that may be the perfect way to get started on your video. Even if it doesn't work out perfectly, you'll have a great place to start and can gain some valuable information before heading into the question and answer sessions.

A word of caution though: Don't get trapped into a certain way of thinking about your subject just because content has been created from one perspective. A good content creator understands that new perspectives can help people understand new concepts or reinforce understanding. Don't be afraid to take what's been done and turn it on its ear if necessary!

## 9. Welcome your SME's feedback

One of the most common mistakes content creators make when enlisting the help of an SME is not enlisting their feedback as the project moves on. Your SME is more than just an encyclopedia of knowledge about the subject. Your SME can and should have valuable feedback on how you present your examples, the real ways users might use a feature, common workflows, and more. As you create your scripts, storyboards, and video content, make sure your SME has a chance to review and offer help that might end up saving you tons of time down the road.

## 10. Acknowledge their effort

It feels great to create a good piece of content and be recognized for your achievement. Getting kudos from your boss or hearing a customer or coworker tell you the video really helped them can make your day.

The same goes for your SME!

Make sure they understand how much you appreciate their help and, when the kudos come to you for the video you created, make sure you tell your boss, colleagues, and coworkers how invaluable your SME's help was. At the very least, make sure their boss knows that they did a great job.



# Common pitfalls and how to avoid them

Sometimes, all the planning, preparing, goal-setting, and listening in the world isn't enough to get things going in the right direction. But, that doesn't mean your video project is doomed! Here are a few common issues that can arise when working with SMEs and how you might avoid them.

## **Your SME is a “talker”**

The best SMEs are great communicators. They understand what you need and have relevant answers to your questions. They can elaborate and give pertinent details, and make good, succinct points that are easy to follow.

On the other hand, there are the “talkers.” We all know someone like this. They have a LOT to say, and not all of it (or even much of it) is relevant to the topic or task at hand. They go off on tangents and forget what they were originally trying to say, or seemingly have no regard for their time or yours. It's not ill-intended! They're probably even a great person. But they're definitely not helping you finish your video

Your best defense against a talker is to come prepared with a list of very specific questions. Remember the closed-ended questions we highlighted earlier? They can be a great way to keep someone focused and you in control of the conversation.

Another way to keep someone on topic is to submit questions to them before a meeting and have them respond via email or on a collaborative document. That way you ensure you get your most relevant questions answered up front. Then, any face-to-face meetings can be more follow-up and clarification oriented.

## **Your SME is not a talker**

On the other hand, some SMEs have all kinds of knowledge, but seem loathe to actually share it with anyone.

There may be a variety of reasons for this. Some people are just more introverted than others and may not feel comfortable speaking with someone they're not super-familiar with. Other people are — let's face it — just plain old anti-social.

Whatever the reason, getting information from someone like this doesn't have to be like pulling teeth.

Thinking about journalists again, most good reporters know that getting more information from someone who seems unwilling to cooperate can be as simple as staying silent. Even non-talkers get more uncomfortable the longer an awkward silence goes on. At some point, they may get so uncomfortable that they just start talking to fill the silence. Then you can use your questions to get at the real knowledge.



Also, like with the talkers, you might have more luck by sending a list of questions and asking for answers before any face-to-face meetings. Even bullet points would help. Make sure your questions are pointed and get to the heart of what you need to know to make sure they can answer them without too much effort.

As a last resort, if your SME just isn't giving you the information you need, work with your boss or another colleague to identify someone else in your organization who might be a better fit. Keep this in mind the next time you have need of an SME so that you don't have the same problem again.

#### **Too much knowledge is too much**

Sometimes a SME has so much expertise it can be hard to find the most relevant information for the task at hand. They have so much to share that it can strain the scope of your current video and threatens to balloon the viewing time beyond what's reasonable.

In cases like this, setting goals and expectations and having a shared understanding of the project scope at the outset helps keep things focused and on target.

Make sure your SME understands the purpose of this particular piece of video content and why it's important. Be upfront with what you need and why you need it. An outline of your video can be helpful in maintaining focus, as well.

On the other hand, don't be afraid to listen to your SME when they have a valid reason for providing more information than was requested. Maybe your original video scope won't accurately or completely answer the problem at hand. Perhaps there is different or additional content that will make more sense to present.

**Working with a Subject Matter Expert (SME) successfully can make a difference in the the outcome of your projects.**

Listen to their perspective and be prepared to change if there's good reason to. Keep in mind that changing project scope may need permission from a supervisor or the person who requested the project.

### **Your SME wants to take a stab at the content**

While this is more common with written content, for video creators, there will be times when your SME just wants to take the reins and create some of the content themselves. While they likely won't want to actually make your video, they may want to write the script, work on the storyboard, or take over on another aspect of the pre-video planning.

Handle this on a case-by-case basis. If you have a good working relationship with your SME and you're confident in their content abilities, this can actually work out well. As the SMEs, they can go a long way in creating — at the very least — a good place to start.

On the other hand, if you're new to working with this SME, or you're not confident that this kind of "help" will actually be helpful, it's better to push back. There are a number of ways to do that without hurting feelings.

For example, thank them for the suggestion, but let them know that you're relishing the opportunity to really learn from them, so it will be more helpful for you to get the information and boil it down to the most salient points.

Or, remind them of the expectations and roles you set at the beginning of the project.

Finally, you can compromise and ask them to put together an outline to help shape the content.

No matter what, make sure they understand you appreciate all their effort and you're happy to be working with them.

## **Put it all together**

**Working with SMEs can mean the difference between a good video and a great one. Pulling together the most relevant and accurate information ensures that your viewers get exactly what they need. Whether you work with one SME or several, follow the tips in this guide to ensure your working relationships and projects are the absolute best they can be.**

# 10 quick tips for great SME content

- 01. Simply the language:** Your SME probably knows all kinds of technical terms, acronyms, and jargon that — unless they're experts themselves — may be unfamiliar to your users or customers. Be sure to create your content to a level makes it easier to understand.
- 02. Start from the beginning:** Remember, before someone starts using that nifty new software feature, they have to log in. Did you include all of the steps, even if they seem obvious to you or your SME?
- 03. Don't be afraid to ask for help:** Clarify what you don't understand!
- 04. Take it slow:** While you don't want to waste your SME's time, be sure to take the time you need to truly understand what you have to explain in your video to avoid unnecessary follow-ups.
- 05. Explore the "what-ifs":** What happens if the customer clicks this button? What would happen if this system failed? What would a customer do if this happened?
- 06. Explore the "whys":** Why does this happen? Why would a customer need to do this? Why is this a best practice?
- 07. Ask follow-up questions:** Why is that? Can you tell me more about how this happens?
- 08. Ask the SME if they have anything to add:** You never know what insights they may provide!
- 09. Let them give you their background story:** While it may not be pertinent to the discussion at hand, it helps build rapport by showing you care about more than just what they can give you. And, you never know, you may end up learning something more useful than you thought!
- 10. Come prepared, but don't be afraid to deviate from your plan:** Create a list of questions you need answered, but follow relevant answers down paths you may not have foreseen. You can gain valuable insights both for you and — ultimately — your video viewers.

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