Getting the Most out of your Subject Matter Experts (SMEs)

by Lynne Laracy

Lynne Laracy is the director of Laracy Communications, an Auckland-based business-writing and plain-language consultancy. She now spends her days training SMEs to write better.

Meet Max. He's the finance guy in charge of pulling the annual plans and reports together. Meet Jane. She's the technical communicator in charge of making sure the documents read well, look great, and do good things for the organisation's brand.

Matt and Jane are very nice people, and excellent at their jobs. However, they are about to make each other's life a nightmare. Their shared projects – of producing high-quality organisational documents – are about to become a battle ground.

Why is this? Surely their aims are the same. Well, yes… and no. Like everything, it's a matter of how we see the world, and what we care about.

So how can we avoid 'blood on the floor', as we work with our subject matter experts to create great documents? Here are a few things I've learnt along the way.

Understand that SMEs are from Uranus and communicators are from Pluto

Apologies to John Gray for messing with his book title, but in my experience, we and our SMEs often seem to come from different planets.

When Max and Jane did the Herrmann Brain Dominance (personality and thinking styles) tests in their organisation, they were in opposite corners.

Max is in the blue corner (analytic, logical, mathematical), while Jane is in the red corner (interpersonal, emotional, verbal). When the going gets tough, he gets detailed and nit-picky; she gets emotional and verbal. He's a bullet-point kinda guy; she's a narrative gal.

As good communicators, we know we need to adjust our communication styles to suit our audience. We excel at this when we write, but can forget about it when dealing with our document project teams.

We need to remember that we are the right people for our respective jobs. Picture an annual report produced solely by the finance team. Equally, a report that looks fabulous and is a joy to read, but that doesn't have the sums right, is no good either.

Appreciating and harnessing what everyone brings to the project, not only in terms of knowledge, but in terms of world view and personality, is a crucial first step.

Put your heads together at the start

Initial planning is often done separately, in the different camps. If the planning is done together, it is more effective, has a broader perspective, and hopefully, more buy-in. We can ask the usual document questions, wearing different hats.

- *Who is it for?* This is not only the end-reader, who often occupies communicators' thoughts, but may also be auditors or other arbiters; industry observers; industry award judges; political or organisational masters. Our SMEs can bring us valuable insights into some of the hidden audiences, and those that share their expertise or world view.

- *Why are we producing it?* Consider what the SMEs think the purpose, or best outcome, for this document is. It may be different to our view.

- *How will we present it?* Getting agreement on design, layout and language is not always straightforward. SMEs often don't care about many of the things that exercise us. They can see design as irrelevant 'prettying-up'. The push for plain language can be seen as 'dumbing down' their message. This is our chance to educate them, with some good facts to back up our assertions, about how clear structure, layout and language are crucial to get their message across.

- *When is it due by?* A robust, agreed timeline, working back from the publication date is critical to the success of any document. It must have clearly allocated responsibilities and take into account time for peer review, editorial revision, and each sign-off stage with its associated rework. That being said, there is never enough time, and there are always competing priorities. Therefore, the more managers are involved in setting timelines, the better. They need to agree to prioritise the work at crucial times and to ensure that there are consequences for those who consistently do not deliver to deadline.

- *What is the content?* Brainstorm to bring a fresh approach to content, and then decide who will produce it. Consider using templates with strong guidelines on word count and level of detail. Get to know your content experts, and guide them in the early stages of writing to produce information that requires as little rework as possible.

After the initial planning phase, have regular update meetings, and communicate regularly with the SMEs and their managers.

Share desks and the muffins

If possible, work in the same space as your SMEs. You can't beat 'over the divider' conversations for efficiency and for creating a sense of one team. If that's not feasible, try to find ways to work together on some parts of the project to prevent a 'them and us' atmosphere.

Make it really clear who is responsible for what. There is nothing more frustrating than having your beautifully plain, clear text put back into bureaucratic- or corporate-speak. Work at establishing your credentials as the word expert. Be pragmatic, not dogmatic. Learn to let go of some things, even if they are your pet writing hates; it shows you are listening and that you are flexible.

Use good project management tools and principles. Often SMEs can relate well to this – but would not think of applying it to a writing task.

Help your SMEs become better writers

Most SMEs hate writing. Many went into technical disciplines to escape the long shadow of their English teacher. A lot of them simply don't care about the finer points of grammar. What they do care about is accuracy and detail, and producing a quality product. And they usually care about being professional and advancing their careers. Those are great touch points as you work with them to provide you with better content. Keep the messages simple.

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- Readers don't want to work hard; they want short sentences, easy-to-understand words and a clear logical structure. Short sentences mean the grammar and punctuation are less likely to go wrong.
- Readers skim and scan, so creating an inviting, open layout with lots of signposts will help ensure the important content is not missed.
- It's essential to tell readers the facts accurately and succinctly but most of all, it's crucial to tell them what the facts mean. It's the SME's job to give context to the information and to help the reader make sense of it.
- It's a sign of professionalism and excellent control of your topic when you can explain complex ideas in clear language. Flashy language is often seen by readers as grandstanding and covering up lack of knowledge.

Don't make editing a battleground

The SMEs also need to understand that editing is a process. They will sometimes not see what we do as an improvement, or understand why we are even 'fiddling' with it. It's helpful to explain at the beginning that you may not get it all right the first time, so a conversation to clarify some points is often needed.

If you don't understand something, ask before rewriting (and maybe offer up your 'best guess' version). This helps them feel involved, and reduces their fear about

you introducing error into the text. Have robust version control systems, to ensure everyone is working on the latest version.

It helps to 'work into' the field. Put in some time to learn what content-specific terms and concepts mean. This puts you in a better position to translate their text into a readable form and reduces the scope for introduced error (which undermines their confidence in you). If you ask your SMEs directly, they often feel that you are taking their content seriously. This will ease the process further down the line and build good relationships. Trust comes over time.

Prepare a brief style sheet

To save endless debates about the small stuff, give your SMEs a really brief style guide – one page or so. Stick to the points that cause the most rework such as capitalisation, how the organisation is referred to, the active voice, and list and heading styles. If they are true 'blues', they will stick to the rules. Make your plug for plain language. Consider doing a road-show to your content contributing groups. But keep it short and light-hearted, with some quizzes or something interactive. Remember, many don't care about this stuff.

Involve them in the fun stuff

For many SMEs, working with the creative team is new and exciting. If they can see some of the process, they are less inclined to think that printed documents happen in the blink of an eye. This may help with getting compliance with deadlines. A trip to the design studio or the printers can engender new respect for the expertise involved and create a sense of being part of something quite special.

Drink lots of wine

In the end, this is a relationship. Shared time, some of it social, can help bridge that planetary divide between you and your SMEs. Respect comes from understanding the value that someone brings to a task. When blues and reds (and all the other shades) learn to talk and harness each other's strengths, we produce great documents – without the battle scars.

Max and Jane now know that they have more commonalities than differences – including their shared aims for their document. They look forward to sharing a table at the next plain language awards dinner.

In her former role as publications manager at Auckland City Council, Lynne was responsible for ensuring the council's publications were up to scratch. She confesses to being in the red corner, and is now very good friends with many of her former 'blue' colleagues. Collective amnesia about deadline dramas, facilitated by wine, has been useful.