

Interviewing Subject Matter Experts

An important skill for instructional designers is knowing how to interview Subject Matter Experts (SMEs). We interview SMEs to figure out how to perform tasks, what skills and knowledge are needed when performing a task, as well as other information that will help us create more meaningful instructional materials.

When interviewing a SME it is important to bring a 'beginners' mindset to the table. The SME will likely know the process so well that they forget steps and knowledge needed. You can remind the SME that you are approaching it from a beginners perspective and will be asking clarifying questions.

Here are some tips to help an instructional designer conduct an effective interview with a subject matter expert (SME):

1. **Prepare ahead of time:** Before the interview, research the topic and prepare a list of questions that will help you gain a deep understanding of the subject matter. Make sure to review any existing training materials or documentation related to the topic.
2. **Establish rapport:** Begin the interview by introducing yourself and establishing a rapport with the SME. Show interest in their experience and expertise, and let them know that you value their input.
3. **Use open-ended questions:** Ask open-ended questions that encourage the SME to share their knowledge and insights. Avoid questions that can be answered with a simple "yes" or "no." Use follow-up questions to dig deeper into their responses.
4. **Listen actively:** Listen carefully to the SME's responses and take notes. Clarify any points that are unclear or that you need more information about.
5. **Don't make assumptions:** Avoid making assumptions about the SME's knowledge or expertise. Instead, ask them to explain concepts in their own words and provide examples.
6. **Record the interview:** If possible, record the interview so that you can review it later and ensure that you have captured all of the important information.
7. **Follow up:** After the interview, follow up with the SME to clarify any points that were not clear or to request additional information.
8. **Respect their time:** Respect the SME's time by keeping the interview focused and on topic. Be mindful of any time constraints they may have and adjust your questions accordingly.

Overall, an instructional designer should approach the SME interview as a collaborative process that is focused on gaining a deep understanding of the subject matter. By preparing ahead of time, asking open-ended questions, and actively listening, an instructional designer can gather the information they need to create effective training materials.

Questions

When interviewing a subject matter expert about a specific topic, it's important to ask open-ended questions that encourage the SME to share their knowledge and insights. Here are some examples of open-ended questions that you

could ask:

1. What are some of the key concepts that someone needs to understand in order to be proficient in this topic?
2. Can you walk me through the step-by-step process for [a specific task related to the topic]?
3. What are some of the common misconceptions people have about this topic?
4. How do you stay up-to-date with the latest developments and trends in this field?
5. What are some of the most important skills that someone needs to have in order to be successful in this area?
6. Can you give me an example of a real-world scenario where this knowledge or skill would be applicable?
7. What are some of the most common challenges people face when trying to learn or apply this knowledge?
8. How do you think this topic will evolve over the next few years?
9. What are some of the most effective teaching strategies or techniques that you've used to help people learn this material?
10. What do you think are the most important things that people should keep in mind when applying this knowledge or skill in a practical setting?

These open-ended questions can help to elicit detailed and informative responses from subject matter experts, which in turn can help an instructional designer to create more effective training materials.

Process

I typically follow this process:

1. I ask the SME to explain the process step-by-step. I like to draw this out on a whiteboard as they are explaining it (if feasible) – or I use a Google doc if I'm doing it online.
2. For each of the steps, I ask if there are substeps. I repeat this until we have all the steps down.
3. I then ask for each of the steps: what does the learner need to know, that is knowledge, and what does the learner need to know how to do?

As I go through the process I ask a lot of clarifying questions, such as:

1. What does this mean?
2. Why do we do it that way?
3. Will learners already know this?
4. Do you have any tips or tricks for remembering this?

Further, the most important questions I ask is "what mistakes do people new to the activity make? and What are the consequences of making that mistake?" This question serves two purposes. It helps identify gaps in the task analysis and it helps to provide context for creating assessments and case study scenarios.

Observation and think aloud protocol

Since the first part of a task analysis involves what the expert does, rather than asking the expert you can observe them doing the task. This way, you can write down what you are seeing them do.

Another technique for interviewing SMEs is called 'think aloud protocol'. With this, you ask the expert to perform the task but also ask them to verbalize everything they are thinking as they perform the task. This provides you with a lot of valuable information for your task analysis.



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