Partnering with subject-matter experts

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Choosing, collaborating, and coaching the right expert for your presentation.

**Imagine** you’re a bedside nurse working on your portfolio so you can apply for your hospital’s clinical ladder. One requirement is to develop a presentation for either bedside nurses or patients related to a healthcare topic. Because the topic is outside your area of expertise, you’ll work with a subject-matter expert (SME) who will deliver the program but isn’t necessarily an experienced presenter.

Whether you’re developing an instructional presentation for nurses or patients, you’ll want to follow some basic principles to ensure a successful partnership with your SME.

**Choosing the right SME**

The SME provides knowledge about the topic, but you, as the designer of the instructional plan, develop the working structure that helps the audience understand the content. Choosing the right SME ensures that the presentation stays focused on your audience. (See Choosing the right SME.)

Start by determining exactly what you need for the presentation. Selecting the right SME is difficult when you don’t have a clear understanding of the information you require. If you need help at this stage, seek out a trusted colleague or supervisor. For added credibility, consider SMEs who have strong professional standing and expertise related to the topic. Ask your potential SME for collaboration, let him or her know when presentation materials need to be completed, and explain the support you’ll provide. Once your SME is on board, clarify roles and responsibilities. Finally, discuss how much time and effort you expect the project to take, including how often you’ll communicate or meet to review content.

**Establishing a partnership**

The relationship you establish with the SME will affect the success of your project. Typically, SMEs want to do a good job, but they may assume they know best how to engage the audience. Collaborate throughout the design and planning process, reiterating the intended audience to ensure the content is realistic, concise, and clear.

Make the SME your partner in decision-making and show a genuine interest in the topic. To engage the SME and create excitement about the project, work with him or

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**Choosing the right SME**

Ask yourself these questions when choosing subject-matter experts (SMEs).

- Are they knowledgeable about the topic?
- Are they credible?
- Can they commit the time?
- Can they agree on the learning objectives?
her to develop specific learning objectives. Be respectful of your SME’s time, but communicate frequently with check-ins and progress reports to help keep momentum and ensure deadlines are met. Let the SME know you appreciate his or her work on the project, and give credit for the expertise provided to make the presentation a success.

**Coaching the SME**

Now that you’ve established a relationship, it’s time to coach the SME on the skills needed to deliver the presentation. Most SMEs don’t receive adequate speaker training, or they may not have experience speaking to nurses. For example, a surgeon who teaches residents may not know how to present similar information to nurses.

For an effective presentation, the SME must take the time to prepare and rehearse. Encourage the SME to rehearse in front of others who can offer specific feedback about nervous habits, voice volume, and talking speed.

The final presentation should flow through a beginning, middle, and end. As the first contact with the audience, the beginning of the presentation should grab their attention; it sets the stage for the rest of the program and provides the audience with key points that will be covered.

The bulk of the presentation should focus on the problem, the solution, the impact on practice, and available resources. Coach the SME to support abstract concepts with concrete examples. Good slide design incorporates appropriate font and color choices, and includes a suitable number of words. The SME should be comfortable enough with the content that he or she doesn’t feel compelled to read the slides. And high energy will keep the audience engaged.

The SME should end the presentation by summarizing key points and taking questions. The summary may seem repetitive, but it reinforces important concepts and is essential to the flow of the presentation.

The question-and-answer session may be stressful for the presenter, so prepare with sample practice questions. Provide tips, such as acknowledging the audience member for asking the question and restating the question so everyone hears it, which also gives the SME time to consider the answer. The SME should plan how to conclude the question session on a positive note.

Audience questions also provide initial feedback to the presenter about the audience’s understanding of the content. After the event, the SME should stay for individual face-to-face questions, continuing the evaluation process. For more formal feedback, send out an audience survey to determine if the presentation objectives were reached. Share the results with the SME.

**Tips for working with SMEs**

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<th>Preparing a presentation with a subject-matter expert (SME) requires collaboration, organization, and careful planning. Use these tips as a guide for your SME partnership.</th>
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<td><strong>•</strong> Engage the SME by explaining the importance of the presentation to both you and the audience.</td>
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<td><strong>•</strong> Establish role expectations at the start, including your role as having final approval for presentation materials.</td>
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<td><strong>•</strong> Agree on a schedule with due dates for materials, reviews, and so on.</td>
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<td><strong>•</strong> Remind the SME that the audience doesn’t have to become experts in the topic (some SMEs can’t resist sharing all that they know).</td>
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<td><strong>•</strong> If possible, show the SME examples of what you want. For example, share PowerPoint presentations that have been effective for your audience in the past.</td>
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<td><strong>•</strong> Keep notes of your meeting discussions and share them with the SME.</td>
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<td><strong>•</strong> Track progress and provide due-date reminders.</td>
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<td><strong>•</strong> Coach SMEs who aren’t experienced presenters and provide ample practice time.</td>
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<td><strong>•</strong> Acknowledge your SME’s contribution.</td>
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<td><strong>•</strong> Share audience feedback.</td>
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**Simple principles**

Developing an instructional presentation delivered by another person can seem daunting at first. But when you follow a few simple principles—choosing the right SME, working together collaboratively, and providing appropriate coaching—you can provide an outstanding presentation that gives the audience valuable information and enhances your portfolio. (See Tips for working with SMEs.)

**Selected references**


