

Transform Your SMEs into Facilitators of Learning!

Session W302
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presented by

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Session Learning Objectives

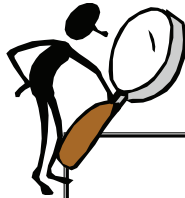
At the end of this session, participants should be able to:

- Design and conduct a program to teach subject-matter experts adult learning principles and techniques
- Coach subject-matter experts to ensure they can deliver value-added learning experiences

Key ideas for my Organization

What are your biggest challenges in working with subject-matter experts?

- ❖ ...in developing learning?
- ❖ ...in content effectiveness?
- ❖ ...in learner success?



Our agenda today!

- I. **Before you ever sign an SME...**
What you need to know before getting started!
- II. **What makes an effective learning leader?**
Factors for success
- III. **Your role in aiding SMEs**
It's a lot more than signin' 'em up!
- IV. **Elements of effective SME development**
Preparing them is crucial to success!
- V. **SMEs make the difference...**
Coaching SMEs to success—for your learners, your SMEs, and your organization

A little context...

❖ **Adult learning—it's not just theory!**

Adults are active & self-directed...

...have a "readiness to learn" based on their own circumstances

...need to know the relevancy of learning to their specific challenges

...bring their life experiences to learning opportunities

❖ **Today's learners are influenced by...**

Instant gratification

The Internet—find anything 24/7/365

Info in 20-second sound bites

"Just-in-time" learning

The rise of social media: blogs, podcasts, wikis

What might "getting this" mean to your programs?

Using these "Key Ideas" spaces

Jot down any relevant "ah-has" or ideas you particularly want to recall later. This makes them easy to find when reviewing your notes.

Before you ever sign an SME...

Key ideas for my organization

❖ **Know what you want**

What should the audience know or be able to do when the program is over?

❖ **Know your audience**

What do they **already** know?
What do they **need** to know?
What about the topic is **most** important?

❖ **Know the topic's flexibility**

Will it allow for different learning styles?
What possibilities does it offer for creative presentation?

❖ **Know learner needs**

Use many information sources
Make it part of your organizational "DNA"



How well, really, do you know your learners?

*And if you don't know your learners, how can you
expect to help your subject-matter experts?*

The first rule of learning is...

learners learn best what learners want to learn.

—Peter Senge, *The Dance of Change*

When was the last time you had a real conversation
with your learners to find out what they need?

**Key ideas
for my
organization**

What makes an effective learning leader?

❖ **Key characteristics**

And some not always considered...

- | | | |
|-----------------|-------------|---------------|
| Effective style | Credibility | Flexibility |
| Confidence | Commitment | Passion |
| Integrity | Focus | Receptiveness |
| Depth | Flexibility | Empathy |

What does it mean to “facilitate” learning?

❖ **It's the SMEs' job to...**

- Create a _____
- Stimulate _____
- Involve _____
- Manage _____

...and your job to make sure they do!

Two approaches SMEs can take

Approach	Key Characteristics
Information-centered The Presenter	<ul style="list-style-type: none"> • Content is given to participants • Speaker as expert/impartor of knowledge • Learners are passive, taking it in
Learner-centered The Facilitator	<ul style="list-style-type: none"> • Improving performance • Meeting learners' need to know & to do • Speaker as facilitator/coach • Learners actively participate & learn by doing

Think about it:

How do these approaches affect your SME's preparation?

The learning process is something you can incite, literally incite, like a riot.

— Andre Lordé

Do your SMEs view their role as a “job,” or as an exciting opportunity to help others grow?

Your role in aiding SMEs

❖ The paradigm

If we always do what we've always done...

❖ Be the learner's advocate

Represent learner interests at all times

...and consider Beginner's Mind!

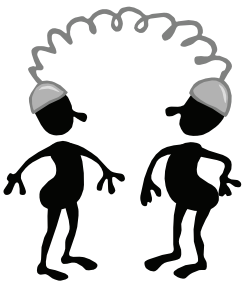
❖ Assess SME's needed level of coaching and support concerning their...

Understanding of learning styles & adult learning

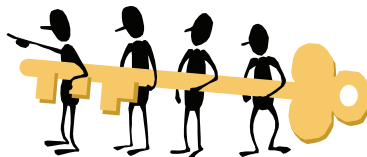
Content knowledge

Facilitation skills...and

ATTITUDE—yours and theirs



The single biggest differentiator:



*Experience is the worst teacher;
it gives the test before presenting the lesson.* —Vernon Law

What if you worked closely with your speakers,
giving them what they need to know and do to
score a '5' on your 1-5 evaluation scale?

**Key ideas
for my
organization**

**Key ideas
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Elements of Effective SME Development

❖ **Putting it all in context**

The value & importance of learning
How adults learn—and who's in today's audiences

❖ **The SME's role in learner success**

It's all about the learners

❖ **Creating an effective session plan**

Integrating learner need with desired outcomes
Developing an instructional plan
Identifying appropriate learning approaches

❖ **Engaging audiences**

Understanding & using collaborative learning
Creating a positive learning environment
Selecting effective exercises/activities

❖ **The value of visuals**

Choosing & using appropriate visual
tools and techniques

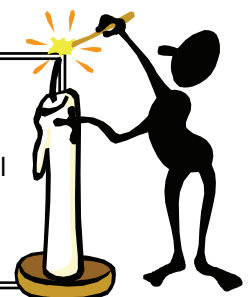
❖ **Speaker = Facilitator of Learning**

Encouraging audience participation
Building on participant experiences
The art of questions

*If you have knowledge,
let others light their candles with it.*

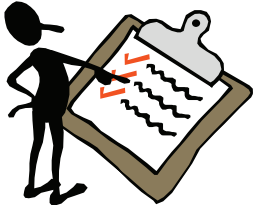
— Winston Churchill

Consider yourself the match that
lights the fire of effective learning!



SMEs make the difference...

...so preparing them becomes crucial to success!



❖ Pay attention to:

- Providing speaker development opportunities
- Talking about adult learning principles
- Requiring engaging learning activities
- Ensuring effective handouts & appropriate visuals

❖ Consider basic learning styles...

- Visual
- Auditory
- Kinesthetic

...and what they mean to your SMEs!

Does content source matter?

❖ When the content is theirs...

- Reach consensus on objectives
- Communicate regularly
- Consider requiring a content outline
- Review all slides and handouts

❖ When the content is yours...

- Reach consensus on objectives
- Communicate regularly
- Provide a content outline, slides, notes
- Provide guidelines concerning modification
- Help the SME make the content his/her own

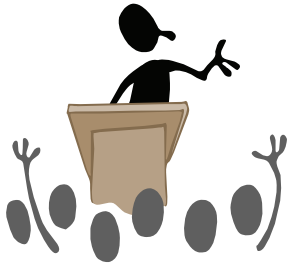
The goal:

An investment in knowledge pays the best interest.

— Benjamin Franklin

Yes, it's more work.
The ROI, however, can be priceless.

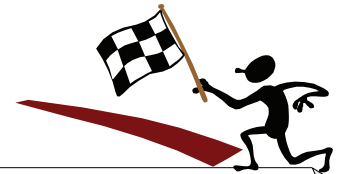
**Key ideas
for my
organization**



Taking it into the world...

What have you learned today, and what implications does that have for the way you work with your subject-matter experts?

How could you embrace the concept of “Beginner’s Mind” in your learning opportunities?



Making it happen...

What three steps will you take in your first week back in the office to leverage your learning from this seminar?

- ✓
- ✓
- ✓

Over a 25-year career as an executive working in five different associations, **Kathi Edwards** led staff departments in professional development, convention and meeting planning, marketing, membership, and communications. Today, as President & Chief Navigator of CompassPoints, she works with clients seeking to enhance their professional development offerings through greater speaker effectiveness, improved curricula, and creative learning opportunities. At a more strategic level, Kathi also helps leaders more effectively achieve organizational goals by incorporating learning principles and practices.

A frequent content leader for a variety of organizations, she shares her passion for learning by creating engaging workshops and conversations for clients and volunteer organizations. Kathi has been a Certified Association Executive (CAE) since 1989, and is a past chair of the ASAE Professional Development Section Council (2003-2004). Currently, she is a member of the facilitator team for ASTD’s *Training Certificate Program*.



Contact Kathi at 410-939-1125 or via e-mail at kedwards@learningevangelist.com.

Job Aid: SME Training Inventory Checklist

Use this checklist to help identify the strengths and weaknesses of each of your subject-matter experts, and determine in which areas further development is needed.

SME Name: _____ Date: _____

Skills	Yes / No/ Somewhat	Notes & Areas for Improvement
Possesses & demonstrates a thorough & comprehensive knowledge of the subject.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Confident in knowledge & can explain principles & skills easily.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Knowledgeable about adult learning principles.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Aware of adult learning characteristics.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Has a confident & inviting presence.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Comfortable in front of groups & can facilitate a group.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Comfortable working one-on-one.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Establishes good rapport with others.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Interacts well with others.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Speaks & enunciates clearly. Uses effective voice projection. Maintains a comfortable speaking pace.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Maintains eye contact with others. Uses hand & arm gestures to reinforce points.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Familiar with using audiovisual equipment (flip charts, overheads, PC projector, etc.)	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	
Enthusiastic about helping others acquire knowledge.	Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat (explain) <input type="checkbox"/>	

Adapted from *Teaching SMEs to Train*, ASTD InfoLine, November 1999 – non-copyrighted material

Job Aid: Speaker & Program Preparation Checklist

<i>Things to consider when planning your learning opportunities...</i>	Yes	No	Need to acquire
1. We have identified session objectives – what the audience will know or be able to do at the end of the program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. We know the approximate size the audience will be, and of whom it will be comprised.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. We know the existing knowledge level of the intended audience for this topic.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The topic will allow for flexible presentation and different learning styles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The speaker being considered has at least some speaking experience and is easily “coachable.”	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. The speaker being considered has at least a basic understanding of adult learning principles, i.e. knows that s/he will need to include real-life examples, effective visual illustrations, audience engagement opportunities, ideas for content application, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

As speaker(s) is selected and planning gets underway...

- The speaker is flexible and can adapt to learning new ways of doing things, is comfortable with presenting content, and has an engaging personality.
- The speaker is designing the program with the format in mind. Time is allowed for audience activities and/or exercises as well as for Q&A and a few minutes of personal reflection.
- A plan is in place for review of speaker-developed content – an outline, slides, handout – early enough to make any changes that may be needed.
- Visuals – slides, diagrams, charts, etc. – support the content. The speaker doesn’t plan to merely read them. There will be verbal “value-add” to what participants will see during the program.
- If use of supplemental visual or audio tools is planned, they will support the content. They’re not being used just because they can be.
- A handout is being prepared to supplement the session; ideally it should be interactive and perhaps include other job aids or reference materials that support the topic – not just a print-out of slides.

Preparing the speaker...

- At least one orientation conversation is scheduled with the speaker (or speaker panel) to ensure he/ she/they are on track to deliver the session as conceived and marketed. Regular communication throughout the preparation is planned.
- Appropriate opportunities are scheduled to coach the speaker as needed on presentation and facilitation skills (formal or informal one-on-one, speaker development workshop, etc.).
- The speaker has been encouraged to practice conducting the session – in front of a mirror, for friends and/or family, etc., to become comfortable with the content and refine personal style.
- The speaker has developed one or two “reflection” questions for participants to think about at the end of the program and with colleagues back at the office. Effective reflection drives application of learning.
- The speaker can be available for additional questions after the program in whatever way is appropriate for your organization.
- The speaker has been encouraged to have fun! It will come across in voice, technique, and audience activities, and result in a more satisfying learning experience for all concerned.

