

Interviewing a Subject Matter Expert

Gathering information for a writing assignment can be a very straightforward process. You are given (or pointed to) resources and collateral which provide you with product or project background and you begin your investigation there. However, sometimes there is just not enough collateral to work from. In those cases, you likely need to interview a subject-matter expert (SME) to get the information you need.

Getting helpful and pertinent information out of a SME is tantamount to producing useful, targeted documentation. A SME likely knows a tremendous amount about the subject area you're interested in. SMEs also tend to be busy, overburdened people, so it is vital that when you interview them, you capture as much of the needed information as you can in that sitting. Gathering unfocused, cumbersome information only leads to churn in the overall review cycle and possible client dissatisfaction with the work you're producing.

Following are a few steps you can take to ensure your SME interview is productive.

Familiarize yourself with available collateral and resources before doing your interview

Reviewing and familiarizing yourself with whatever collateral is available will better ground your understanding of what you will be writing about. Even if the resources and collateral provided are scarce or seemingly incomplete, it will help you gain knowledge about the subject matter before talking to the SME. If no collateral is provided, go online and look up any public-facing material available on the topic. Older material can also serve as a touchstone, as it may be what you'll be asked to replace.

Create a list of questions to ask the SME

You want to be as engaged, curious, and knowledgeable as you can be coming into an interview. Questions give you a starting point from which to work from. Even if the questions turn out not to be pertinent to the content you are asked to create, they still help frame a cursory understanding from which to work from, or provide a point of departure should those points no longer be salient.

Meet face-to-face whenever possible

Meeting face-to-face helps the overall communication and allows for a richer interview experience. It also allows for a shared white board experience (see below).

Be sure to ask these three questions:

"What do you want the document to say?"

The SME is in a unique position, as they not only have the knowledge you're looking for, they also likely know what the focus of your work should be. Be sure to get the SME to boil down the topic matter to two or three salient, overarching points that they feel must be made. These will serve as your pillars as you develop the content.

"Who is the audience?"

Determining the audience pronouncedly helps frame the scope and technical depth of the paper and cut down on review churn. It may be only one very specific group of people, or it may be quite a few (business decision makers (BDMs), technical decision makers (TDMs), end users, IT Pros, etc.). Once you know the audience, the development path your content will take becomes much clearer.

"What will this document be used for?"

This question helps determine tone as well as scope and technical depth. For example, if the document will be used as presentation material, it will often take a marketing tone and focus. If it is used to supplement a reader's understanding of the product or project, it may take the shape of a user assistance/help-based resource.

Go to the white board

After answering those three questions, document brainstorming begins. You should now ask the SME to frame what specific content they want conveyed in a diagramed form. This should be a loose, free-flowing exercise that captures the many different avenues the document may wind up covering. You will gather more information here than you will likely use, but this exercise helps clarify what the SME wants in the document, as well as what they *don't* want.

For example, they may want to use the documentation to be used by a marketer to sell a BDM on the product. However, during the white boarding exercise the SME realizes they want a level of technical knowledge included that is beyond the scope of a marketing presentation. This can mean one of many things: the scope and audience of the document needs to change and/or expand, the technical information needs to be summarized in an appendix at the end of the document, the document should not go into as much technical depth to keep aligned with the original scope and audience and should not be included, or this particular information merits its own separate document with a different scope and audience entirely.

IT IS VITAL that you take notes and capture what *you* think the SME is saying at the same time the white boarding exercise occurs. Be sure to also practice your active listening skills, a communication technique where the listener attempts to actively understand, interpret, and evaluate what they hear. For more about active listening, go here: http://en.wikipedia.org/wiki/Active_listening.

Verbally summarize what you think you heard the SME say and diagram on the white board

Summarizing what you heard the SME say and diagram serves two purposes: First, it ensures that you followed the presentation of content correctly and, if not, allows you to course correct with the SME there to help you in real time. Second, it gives you a rough outline to begin your work from once you and the SME have consensus on your summary.

Take pictures of the white board diagrams and material

Taking pictures of what the SME diagramed on the white board helps clarify and crystalize the notes you took and likewise serves as a record of what occurred and was discussed.

After the interview is done, be sure to:

- Set up a first draft outline handoff date with the SME. This sets expectations of delivery and helps reinforce a joint effort in developing the documentation.
- Ask the SME for any other reviewers/partners they believe should be on the review loop and include them in the handoff. This will help reduce churn down the road, as it may lead to content decision points better made early on than later.
- Head back to the office and get crackin'! ☺