

Transform Your SMEs into Facilitators of Learning

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(Softcopy available at www.ask-nottell.com)

This session is exactly about how to leverage our friends, the Subject Matter Experts or SMEs. The part-time trainers. The sales guru to teach selling skills. Or the compliance head to teach the latest regulation and policy in your industry.

I know that some of you here have not used SMEs at all but some have. So, more I want to look at the question of how to make them work for you better. What I will do in the remaining 10 minutes or so is to:

1. Outline my learning in the ASTD conference in a structure for this topic
2. Add a few of my thoughts in the structure

I hope that this session would be more than a sharing. It will give you some insight in how to make your job easier in real life.

I went to the ASTD Conference in Atlanta this year. There is a session called 'Transforming Your SMEs into Facilitators of Learning' by Kathleen Edwards. The same topic as today. I have been using SMEs myself for our corporate banking business, but before the conference I have not given a structured thought to this topic

As said, let me first outline my learning in a structure.

We have 3 columns here – Training Strategy, The Implied Challenges and What we need to do in order to tackle them - Solution. Let's look at the first column. I look at using SME as a training strategy. Something which I believe to be especially applicable, or even necessary, in China.

Companies in China are growing very fast in size, and also the training demand. For example, our bank has been almost doubling in size last and this year, and we will continue to grow fast. I am sure your industry or firm will not be much different.

So, fast growing training demand. However, on the supply side, it is difficult to get qualified trainer. Let's be frank, at the current stage of economic development in China, talents are more attracted to frontline functions like sales rather than training. I am sure that most of us here today are having unfilled vacancy because simply you could not find appropriate candidate. So, there is limited supply of talents in China who are capable and really interested in training. Well, I believe most of which have been successfully captured by ASTD in this room today!!

And what's worse in China is that working knowledge changes fast. The regulation, policy, market practice, competition landscape, and so on, are ever-changing. Full time technical trainers cannot easily stay updated with the latest working knowledge.

So, it is tough for us to have supply to meet the demand. We need to think of other options. Outsourcing is one. And I am sure there are a lot of good agencies out there. But they cannot help much when we come to industry-specific technical knowledge e.g. regulations, policies, steps and procedures.

A natural alternative then is SME. They know the subject well. Their knowledge is updated by nature. And of course, a side-benefit to you as the training department is that they are not on your payroll!!!

As such, it particularly make sense to think of leverage SME as a training strategy in China.

Looking back at the structure. The 2nd column contains the challenges which Kathleen pointed out in using SME. I would not take much time to elaborate them because they are

rather self-explanatory. Instead, I want to point out the consequence of ignoring these challenges.

So, what will happen if we do not manage the challenge well? First, we will have bad training sessions. I personally sat in a few un-engaging training sessions by SMEs. The SMEs hide themselves in the dark corner of the room and read directly from slides 1 after another. I strongly felt a waste of resources. It wastes the time spent by the SME, the participants and all the money paid for the venue and so on.

Second, unlike usual bad training, there are not only frustrated participants, but also frustrated SMEs. And SMEs are normally our internal stakeholders. Lastly, given 1 or 2 such bad experiences, you will find it more difficult to invite other SMEs to help in the future.

So, it is important that we do something to handle these challenges, and that's why we need the 3rd column – the Solution.

In the ASTD session, Kathleen has shared with us a few techniques here. Basically what Kathleen said is that we got to know what is needed for the participants well in advance before we sign up the SMEs. And as a training professional, we should leave the SMEs focused only on the delivery. In addition, we should be the learners' advocate. We should represent learner interests at all time. And we should provide facilitation training to the SME, so called TTT – Train the Trainer, teach them things like Adult Learning Principle and help them with visual aid.

I want to elaborate a few points here and add some of my thoughts. Let's look at TTT.

[1 technique at a time] [One-to-one Discussion] In practice, my experience shows that you cannot just solicit SME through email and then do a mass TTT session. SMEs often do not have time to attend such a session. For example, I will have a course to be delivered by SMEs next week with over 10 of them. Only 1 or 2 of them have attended the TTT session I organized before. In addition, because they just train occasionally, they do not have enough practice. You need to teach them less. The principle i.e. 'Less is more' applies very much to them.

So, instead, I subsequently changed to share with them class delivery skills on 1-to-1 basis, and I made it short (just 1 technique at a time), and I did it based on their actual performance in the last session. Well, Adult learning principle again, but this time apply to them.

You need to engage each on a personal basis in order to 1) draw their motivation; 2) polish their skills. In banking terms, my experience is that you need to treat them as private banking client, but not mass market consumer banking client;

[Priority to the Volunteers] Here is another thought. Instead of pushing to have the best in working knowledge, I prefer to pick those who volunteer themselves to be a part-time trainer. It is just a matter of return to your investment. Often, it is hard to sign up the best if they are not willing themselves. You have to spend a lot of effort to persuade them, their boss, and really have them learn how to be a facilitator. Well, simply because they are good at their own work, they often think training is easy and just come unprepared.

['Structure' their delivery] There are cases which the SMEs' delivery is just not up to standard. For example, he / she just read the slides with virtually no interaction. And this is despite your repeated 1-to-1 TTT to him / her. In these cases, I will so called 'structure' or 'programme' them. For example, I will start the session myself by running a small activity. By this, I will gather questions from the floor regarding the topic, and then pass them on to the SMEs to handle the questions. Normally, SMEs are better when they answer questions instead of proactively present the same content.

[Record the Output] It goes back to the issue of non-transferable content. What I mean by 'Record the Output' is, for example, to have an instructional designer to observe the SME delivery and turn it into facilitator guide as much as possible. It will avoid the inconsistency

brought by the fact that different SMEs come to speak for the same topic. I have not done it yet but I will do it in my upcoming SME session in 4Q;

[Show all 10 tactical measures] So, these are the 10 points on the tactical level which will help you.

Other than these, there are areas on the strategic level which I find helpful, and in most cases, necessary

[Support from the Top] Here, what I mean is not the top from the training department, but the top from the SME side. In fact, for me, I would not use the SME unless I can have the line business head initiated it. It is the first thing I do above any tactic I mentioned before. After all, the business head is the best person to mobilize the SME. They can also balance the job vs training requirement and to set the example. Yes, whenever possible, I will ask the business heads to deliver class themselves, even the global business head.

[Training in their Job Objective] Talking about mobilizing the SME, I am proposing in our organization to include training delivery as one of the SMEs' annual job objective e.g. they have to deliver certain amount of training in order to be qualified to become a senior manager. It sounds difficult to propose to the business heads but it actually makes sense to the business. People know the stuff the best if they have taught the stuff. And being a teacher raise their reputation in the organization especially in the Chinese culture. And in reality, this initiative sometimes just means formalizing current practices. After all, the SMEs often have been conducting product briefing to frontline sales anyway.

[Other Personal Reward] Other than putting training in their JO, there could be other personal reward. I know that some organizations will allow extra holiday, sponsored travel for extended stay after an overseas training, or even real extra pay. Other than materialistic reward, recognition works as well. For example, our training department did organize best line trainer award starting from this year. Making the CEO remember your name as the best line trainer motivates a great deal of people.

So, these are the 3 points on the strategic level.

[Overall picture] Let's look back at the overall picture. Treating SME as one of your training strategy. Understand the challenges. And meet them with solution in Strategic and Tactical level. I hope the learning from the ASTD conference and some of my extra ideas will help you with your challenge back to work. Feel free to contact if you want to discuss more.