Get Them to Yes: Working with SMEs Resource Kit

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4 Smart Tips for Getting to Yes

1. Identify what it is you need or challenge you want to address.
    a. -Lack of clarity?
    b. Poor decision making
    c. Unrealistic expectations?

2. Outline the outcome you want.
    a. Needs assessment?
    b. Documented decisions?
    c. Sponsors or SMEs for projects?

3. Determine the most effective way to get what you need.
    a. Gather information from the appropriate people?
    b. Compile existing information (evaluations, assessments, market research)
    c. Create compelling messaging or presentations via visuals, data, or questions?

4. Create effective documents and proposals.

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Creating a Decision Document

1. Use a table for your decisions.
2. Create columns: decision need, final decision, and other requirements.
3. Capture decisions in real time during meeting.

4. Email decision document within 3 days with deadline to respond with updates.

Decision Needed	Final Decision	Notes
Topic selection Criteria	*New research about or novel ideas for treating or managing epilepsy*	
Final course	*Introduction to Diabetes Technology*	
SME for XY Compliance Course	*SME You*	

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Recommendations or Alternatives Proposal-The Rule of Three

Sometimes the project goal isn't feasible for a variety of reasons. Here's a template based on a personal example of how I recommend you create a proposal of alternatives. Note: maybe there aren't three ideas you can come up with, but always try to offer some alternative solution that is a) good for the organization, b) good for the learner, and c) good for YOU!

1. Project Goal: What is the goal of the project? What is the vision? What are you being asked to deliver?

Design 40 visually appealing, interactive and clinically relevant asynchronous eLearning modules for a series of 5 learning programs targeted toward physicians.

2. Create a "dashboard" demonstrating what it would require to meet the original request or idea. Remember to use tables or other easy to read visuals to get to the point quickly. Use your data skills to synthesize the key points for consideration.

To design, develop, and launch the courses for all the programs according to the desired criteria would change the launch date to 2026. The original deadline–September 2024 See table below for details.

5 certificate programs X 8 courses	*40 courses*
eLearning development time	*60–80 hours per courses*
Total course development time (excluding reviews)	*2400–3200 hours*
Target start date (eLearning design & dev)	*February 5th*
Estimated weeks to complete	*106*

3. Risks and constraints: Tell the truth here! What are the risks & constraints of the original plan?
   1. *Only one ID–not enough IDs or eLearning developers to meet original launch date according to the specifications.*
   2. *SMEs/faculty may have limited expertise collaborating to develop eLearning courses which will require additional time and updates.*
   3. *SMEs/faculty delays or missed deadlines.*
   4. *Several layers of approval for branding, etc. that add additional project hours.*

4. Alternative Recommendations: now here's where you can provide additional options including the original request. Consider listing them in order of YOUR preference and what you think will create the best learning experience, and that you can reasonably deliver on time, deadline, and budget.

Alternative 1

Launch the programs in five phases, one for each certificate. See the release schedule.

Certificate 1	*Launch date*
Certificate 2	*Launch date*

Key Opportunities

- *Launch first certificate in September during member week.*
- *Demo select courses at the member event.*

- *Promote upcoming programs at member week.*

Note: To develop and release each of the certificates within five months will require a budget for at least 2–3 contract IDs.

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5. Continue this process with the additional alternatives.

Final Tips

- Try to keep this to a 1–2 page document.
- Allow time for review and consideration by the key influencers.
- Indicate when you will follow up to discuss and answer questions.