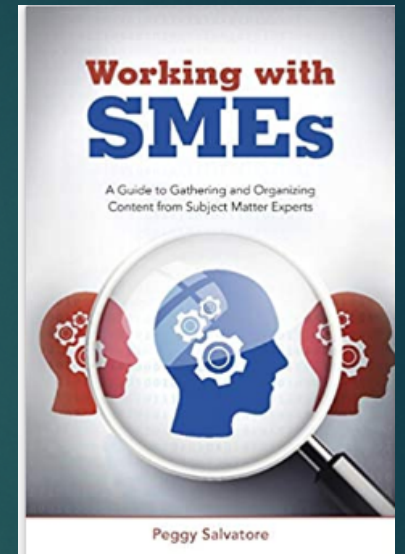


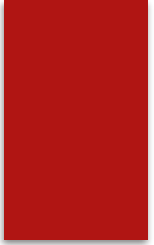
Working with SMEs: Managing Corporate Knowledge Under Crisis Conditions

PEGGY SALVATORE, MBA

AUTHOR, TRAINER, FACILITATOR

- WORKING WITH SMES
- RETAINING EXPERT KNOWLEDGE: WHAT TO KEEP IN AN AGE OF INFORMATION OVERLOAD
- NEW! 30 DAYS TO THE NEW ECONOMY WITH A POST-COVID 19 FORWARD (SECOND EDITION)



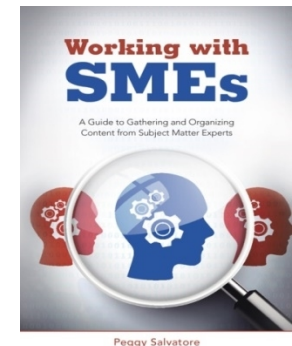


Peggy Salvatore is a published author, trainer and facilitator. She has written 4 books on how to ***Working with SMEs*** in the training and corporate environments. In the fourth book in the series on knowledge management, ***Retaining Expert Knowledge: What to Keep in an Age of Information Overload*** published in 2018 by C&C Press, Peggy explores the value of expertise to your organization, why it is important to capture critical knowledge, how to retain it and how to choose what's important in an age of exploding information. Peggy has presented workshops on how to work with subject matter experts at conferences, inside organizations and on webinars. Her latest book, ***30 Days to the New Economy***, is a 2015 reissue with a new forward for a post-CVID-19 world, that looks at trends in the larger economy undergoing a revolution. She earned an MBA with a concentration in economics and strategy from the New York Institute of Technology. Peggy can be reached at workingwithsmes@gmail.com.

Working with SMEs in a COVID-19 World

TODAY'S TOPIC:

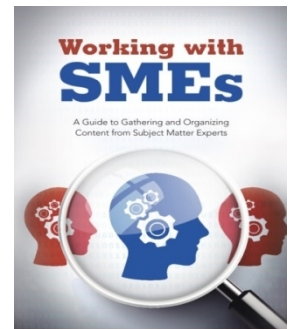
- ▶ Why Working with SMEs is more important than ever
- ▶ About The Perfect SME
- ▶ 10 types of experts and how to work with them
- ▶ Using the Working with SMEs methodology for knowledge management



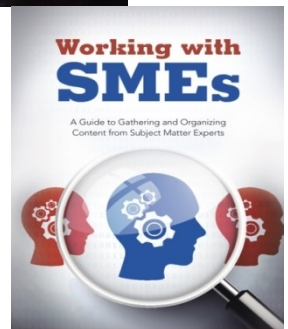
Subject Matter Expert Challenges

Managing Human Resources Post-COVID-19

- ▶ Many experts are still remote from their normal office
 - ▶ How do you manage people when you are physically separate?
 - ▶ How do you manage physical properties when you are off-site?
- ▶ If you're hiring or re-onboarding:
 - ▶ How do you onboard or reboard?
 - ▶ How do you culturally integrate someone?
 - ▶ How do you communicate new rules and ways of working?
- ▶ If you're downsizing:
 - ▶ Who is being "off-boarded"?
 - ▶ What knowledge and skills are they taking with them?
 - ▶ **How do you capture or replace what they know?**



Hiring, Onboarding and Re-onboarding



Where is your greatest need for retaining information?

Your plant

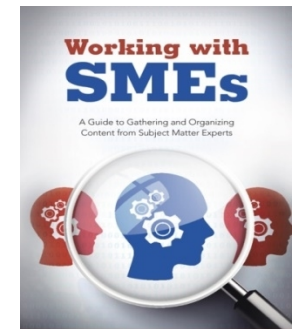
- ▶ Aging?
- ▶ New?

Your workers

- ▶ Aging?
- ▶ New?

Your technology

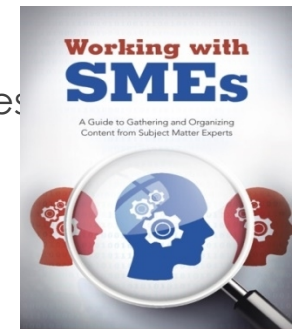
- ▶ Old or new?



Knowledge Management – What is it?

- ▶ What you need to save
- ▶ What you need to jettison
- ▶ How you save it
- ▶ How you transfer it

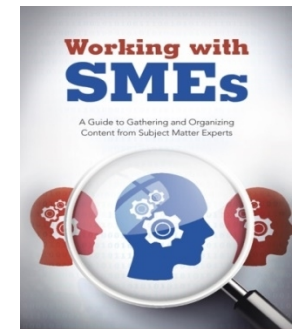
Who is your vendor? Make sure they are forging into new tech, even – or especially – if it makes you uncomfortable.



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Working with
SMEs

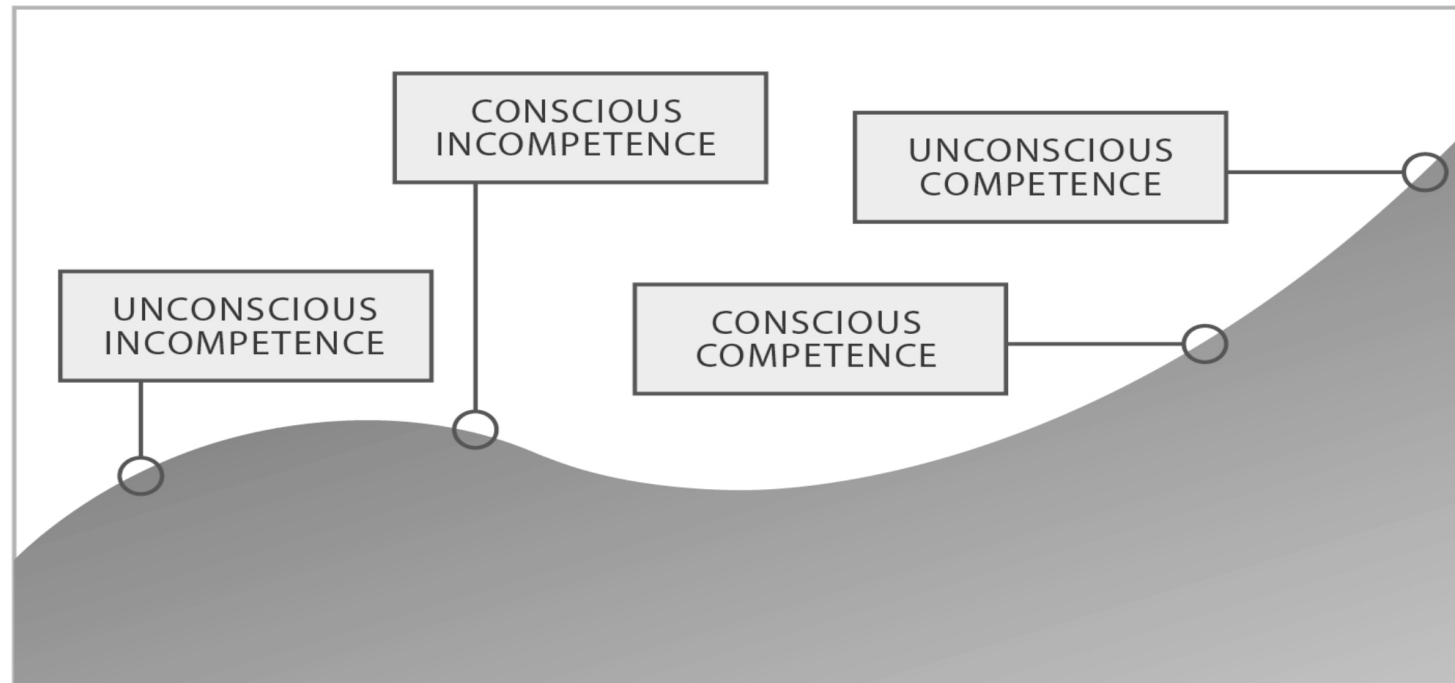
10 TACTICS FOR ENGAGING YOUR SMES



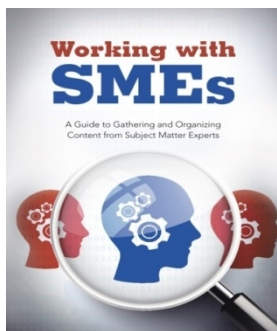
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Experts are Unconscious Competents

Chart 2.1: The Four Stages of Learning Model



Credit: http://seesparkbox.com/uploads/article_uploads/responsive-dip-graph-1b.jpg

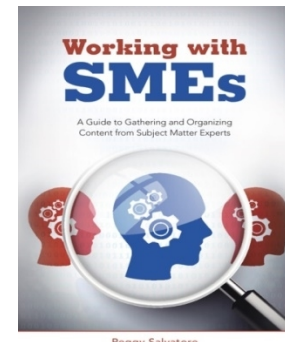


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The Perfect SME

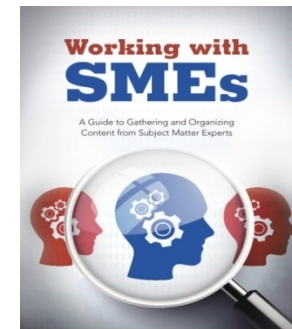
- ▶ Really, really smart
- ▶ Willing, able and looking forward to working with you
- ▶ Has the time

Now for the real humans...



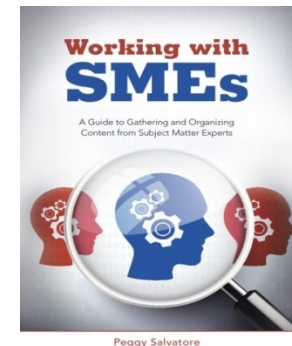
10 Types of Normal Human SMEs

- ▶ Competing obligations
- ▶ Bad days
- ▶ A life outside work
- ▶ Under pressure from others
- ▶ Needs your understanding



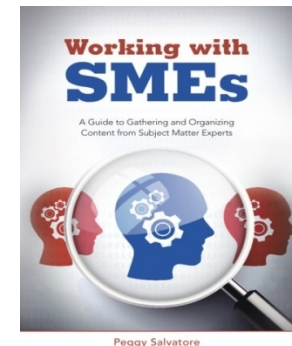
1. The Speedy SME

The SME becomes **impatient** with you controlling the pace of the session.



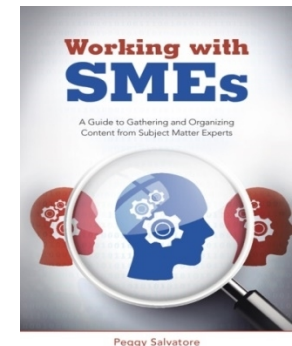
2. The Creative, Scattered SME

The SME **does not think sequentially** and sees the process as so complex and variable that it cannot possibly be captured in the steps.



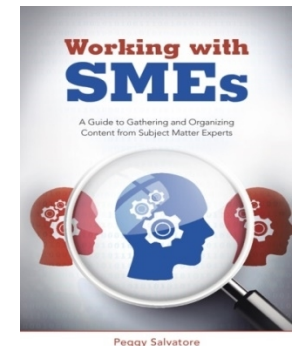
3. The Shortcut SME

The SME has been doing this for so long that she uses shortcuts a novice could never follow and **might not be best practice** for the organization.



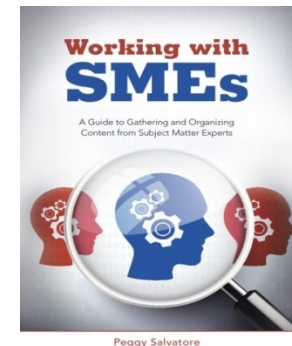
4. The Defensive SME

The SME feels **their job is threatened**. If they tell you anything, they run the risk of losing their job.



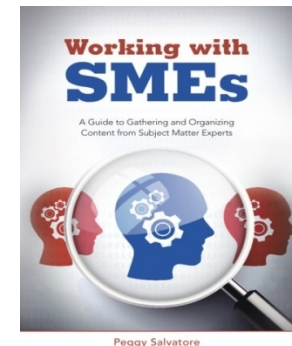
5. The Not-Quite-Expert SME

The SME **does not really know** the best practice or what you are asking them about or at least believes that they do not know.



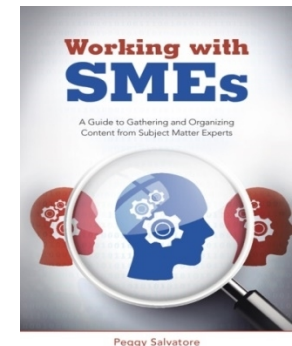
6. The Overcommitted SME

The SME consistently misses or is late for appointments or is **overloaded** with regular work responsibilities, and is grouchy about making time for the documentation session.



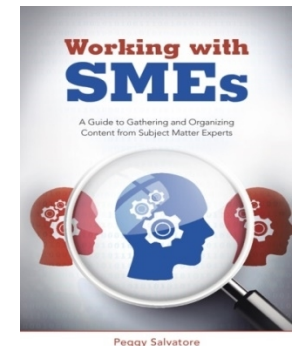
7. The Confounding SME

- ▶ You may not be getting all the correct information that you need.
- ▶ The confounding SME is **difficult to understand**.



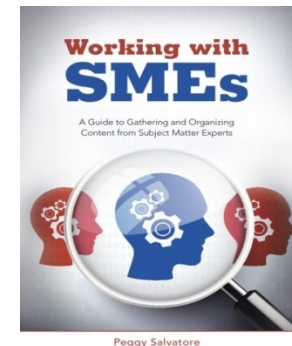
8. SME Interrupted

The SME is **constantly being interrupted** during the info-gathering session.



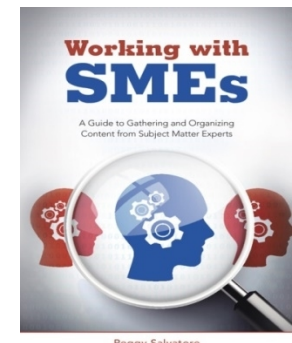
9. The Reckless Reviewer

You are **not able to verify** your content.



10. The Reluctant SME

You may spend **a lot of time breaking down walls** to get them to work with you, and the source of their reluctance may not be obvious.



Guidelines for Working with SMEs

Define the human resources.

Have a toolkit of templates.

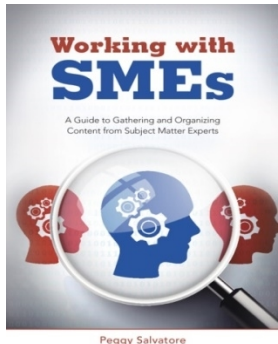
Schedule milestones.

Check in with the writer or instructional designer.

If there appears to be content or deadline problems, check in with the expert.

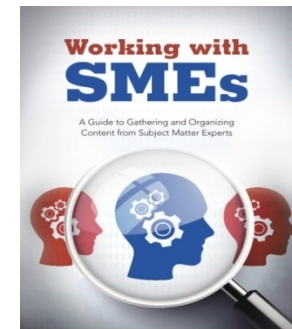
Schedule regular updates.

Make sure everyone is clear.



Moving Knowledge Management Forward

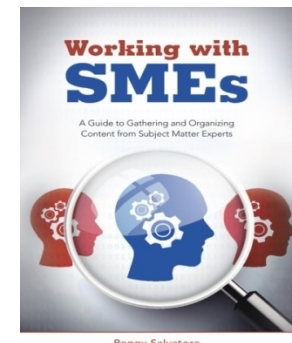
- ▶ Leadership at the front of the effort
- ▶ Creating a “Learning Organization” culture
 - ▶ Learn and lead in a lean world
 - ▶ Share or die
- ▶ Having the right tools in place for capture, preservation and transfer





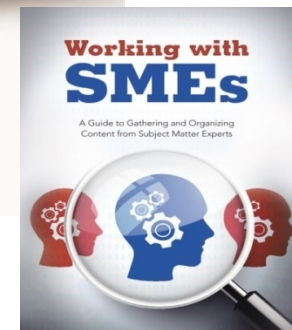
#workingwithsmes
@peggylou74

Information is table stakes for survival.



Peggy Salvatore

**Questions or
comments?**



Contact Peggy!

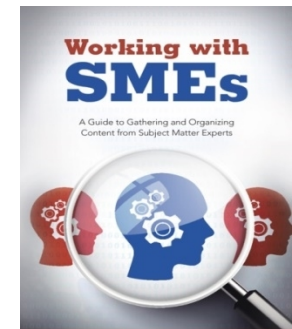
Want to chat?

Confer?

I'd love to hear from you!

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