

How to Create a Winning SME Team

Your Subject Matter Experts (SME's) are essential members of your implementation team who will be involved in key elements of the project such as system selection, communicating to their departments, in-depth training, testing, and documentation. SMEs become the bridge between the legacy system and the new system. Because this is such an important role, there are some things to consider when creating your SME team and setting expectations for involvement in the project. Here's 4 tips to help you create a winning SME team.



1. SME Team Selection

Your SME team should be diverse and representative of your organization. It should include a good balance between knowledge of business rules and processes, members from the senior management team, super users and people who handle the daily tasks. All the departments in your organization should be represented on the SME team. The more diverse the SME team members are, the better outcome you will have.



Pro Tip: A SME team that is mostly comprised of manager-level employees or above runs the risk of making decisions that do not reflect the experiences of the hands-on staff or the super users - the people that use and rely on the system the most.

2. When to Start Your SME Team

Forming your SME team early on, prior to sending off your Request for Proposals (RFP), allows you to solicit input from your core project team across departments. The responses to your RFP will be your first formal interaction with potential vendors, so you want it to accurately represent the needs and expectations of your organization. An RFP that has been developed with SME team contribution is vital to selecting a solution and a vendor that will best meet your goals.

3. Defining the Role of SME Team Members

When you invite a staff member to be on the SME team, formalize the invite with an email. Include a description of what the SME team members will be expected to do, why they were chosen and the anticipated time commitment. Also, provide information regarding any incentives that may be provided to SME members.



Pro Tip: Consider providing benefits to your SME team since most team members will be adding tasks to their workload during the implementation process. Benefits might include recognition at staff meetings, free lunches, and small gifts. Some associations even work with their HR Department to provide additional vacation or comp time at the end of the implementation project to reward their efforts.

4. Meeting with your SME Team

Once your SME team is assembled, set recurring days and times for regular team meetings. The frequency of the meetings will change throughout the selection and implementation processes but a good guideline to follow is once a month around project kick off and more often as completing the RFP process or the implementation deadlines near.



Pro Tip: These projects can be long and tough. Don't be afraid to have a little fun with these meetings – cupcakes, a candy basket, themed snacks for holidays and recognizing contributions will help keep your team humming!

501Works is a consulting, design and development firm specializing in software solutions and integrations that help drive our customers productivity and profitability. We also provide advanced web design and content solutions. We have created two flagship products, Mojo Middleware – an integration middleware and Software Mage – a software selection and RFP management system, to improve critical workflows for our customers. We also host a free monthly Webinar – The CIO Hour – where we strive to make complex technology understandable for associations managers and executives. Please join us and help us keep the conversation going!