Task Analysis

Working Effectively with Subject Matter Experts
Agenda

- Objectives
- Establish your own credibility
- Develop effective working relationships
- Establish clear roles and responsibilities
- Manage the workflow
- Q/A
Objectives

This webinar is designed to cover some fundamental strategies and best practices to help you succeed in the Task Analysis phase of a project. We’ll cover the basics today and follow up with a more advanced webinar at a later date.

▪ Describe the ways in which you, as an ID, can establish your own credibility with clients, and why that is so important

▪ Identity the most effective ways to build strong working relationships, and the pitfalls to avoid when working with others on a project

▪ Describe best practices for establishing roles and responsibilities

▪ Discuss ways to manage workflow and some tools to help

▪ Answer your questions
Personal Credibility

Establishing yourself as an expert partner…
Are you really expected to know it all?
Sometimes, yes.

Clients—internal or external—expect us to know their business. The more you know the more quickly you’ll gain the respect of the SMEs and the business—and position yourself as a “go to” person.

▪ Do your homework:
  ▪ With Google, there’s no excuse not to know the industry and the company
  ▪ Read project documents, including technical specifications
  ▪ Ask for job descriptions, org charts, etc.
  ▪ Ask for time with the key project team members (IT, SI, etc.)
  ▪ Listen carefully to conversations to learn the culture and buzz words
Don’t be shy about your experience—it’s why you’re on the team.

- Draw on your past experiences and bring them into the conversation
- Offer up examples of work products or successes you’ve engineered
- Come in with a draft, a template or at least a POV

- The consummate professional readily acknowledges the expertise of OTHERS
Develop Effective Working Relationships

Internal, External and Matrixed — Partnerships are key to your success
Working with Primary Clients

May be internal, external or both

Establish working “rules” up front:

▪ Communication
▪ Meeting times and styles
▪ Work product reviews
▪ Working with the Client’s team / direct reports

“What’s keeping you up at night?”
▪ And how can I help?
Working within a matrixed organization

Your success will depend to a large degree on how well you work with others. This is especially true on large-scale projects with multiple teams and outside consultants.

- Educate others about your role and your work; clarify roles and responsibilities, especially when working with other consulting groups
  - Ask your client to spearhead these meetings to ensure alignment across all teams
- Seek to understand the same about others on the team
- Be proactive in asking how others like to work
- Offer to do more than your assigned work—put the success of the project first
Roles and Responsibilities
Who does what…and when
Roles and Responsibilities

- Critical to have this conversation early
- Involve the right people
- Can be a politically sensitive topic
## Sample Roles and Responsibilities Chart

<table>
<thead>
<tr>
<th>Training Strategy</th>
<th>Project Sponsor (Executive)</th>
<th>Business Sponsor</th>
<th>Project Manager</th>
<th>IT Lead/Technical Team</th>
<th>Super Users, Front-Line Managers</th>
<th>Client L/D Resources</th>
<th>Consulting Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Review/Approve</td>
<td>Review</td>
<td>Review</td>
<td>Review</td>
<td>Review and Approve</td>
<td>Review and Approve</td>
<td>Primary</td>
</tr>
</tbody>
</table>

| Training Design   | Approve                     | Review and approve | Review    | Review                 | Review and Approve               | Review and Approve | Primary             |

| Training Development | Inform     | Review and approve | Inform | Review for technical accuracy | Review                  | Review and Approve | Primary             |

| Training Delivery | Inform | Support | Inform | Support | Support | Primary | Support |

| Training Assessments | Review results and action plans | Review and approve | ---- | ---- | Support | Support | Primary |

| Post-training support | Approve plan and tactics | Review and approve | Review | Primary | Primary | Support |

| Training Materials Edits/Updates | ---- | ----- | Coordinate | Review for technical accuracy | Review | Primary | Review if/as needed |
Managing Workflow

Keeping it all running smoothly...
Workflow Tools

Build simple Gantt chart views in Excel
• Quick to build, easy to edit

Share with client and project team
• More detailed work-plan lives behind this

Other tips:
Add training review meetings to SME calendars well in advance
Establish clear expectations for how meetings will run: Pre-reads, etc.

Plan on last minute fire drills
Know when and how to escalate—and to whom