



CREDENTIALING CORNER  
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# The *ABC's* of SME ENGAGEMENT

Developing credentialing tests that assess what they are meant to assess in a fair and reliable ways requires the work of Subject Matter Experts (SMEs). Too often too little time and effort are spent on engaging SMEs to support test development. Maintaining a robust SME lineup requires paying attention to your ABCs.

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*A*wareness

*B*uddies

*C*elebrate



# Awareness

Two types of awareness are needed in SME engagement. Potential SMEs need to be aware of opportunities for contributing to examination development for the credentials that they hold. And the credentialing organization needs to be aware of how to incentivize SMEs and roadblocks to their participation.

Word of mouth can be one of the most effective means of getting the word out about volunteer opportunities. This occurs informally through current SMEs sharing their experiences with friends and colleagues. More formally, testimonials from the SMEs can be recorded and shared via the credentialing organization's website and social media platforms. Sometimes, however, outreach needs to occur with a demographic of credentialed individuals that is not currently well-represented - if at all. In these instances, a more aggressive outreach may be necessary. Direct, personalized contact with credentialed individuals who meet the desired demographic characteristics may be necessary.

In order to be successful with recruiting - and retaining - SMEs, credentialing organizations need to understand the SME experience. SMEs typically are volunteers. Do they have issues with getting time off work to participate? The term *Subject Matter Expert* itself can be intimidating. Is this stopping some professionals from participating?

One way of a gaining greater understanding of the SME experience is through creating a journey map. A journey map is a visual representation that lays out all the steps a user, a customer, or in this case, a SME takes in achieving a goal or performing a function. It highlights not only the steps but also the emotions, opportunities and pain points encountered during their journey. Journey maps can help organizations identify sources of satisfaction as well as frustration, and process improvements that are needed. Having participation from both staff of the organization and current SMEs is essential to creating a realistic portrait of the SME experience.





# Buddies

Just as current SMEs are valuable assets in recruiting SMEs, they are also important to the onboarding process and in retaining SMEs. They support new SMEs in formal and informal ways.

Formally, new item writers can be assigned a *buddy* to review and provide feedback on items before they go through a formal review process. Informally, current SMEs are integral to creating a warm and welcoming environment for their newer counterparts.

One of the things that not being able to meet in person during the pandemic reinforced was how integral the social interaction provided by these meetings was to the SME experience. Conversely, some credentialing organizations also realized that some test development activities were just as effectively and efficiently performed in virtual environments.

So, how to balance the social needs which contribute to SME satisfaction with the credentialing organization's need to operate in the most efficient and budget-conscious way possible? One way is to adopt a hybrid approach that includes both in person and virtual test development activities. Participation in virtual activities can even be required in order to be invited to an in-person event. Time for social interaction can also be incorporated into virtual activities. For example, time for a social hour could be allowed at the end of the virtual meeting's agenda.

Creating and sustaining a collegial spirit amongst SMEs involved in the test development process not only aids in making the SME experience something that professionals want to participate in, it can aid in making the outcome of that process better.





# Celebrate

Regardless of the activity, celebrating success fosters a sense of accomplishment, boosts morale, and motivates individuals to continue striving for success in the activity. Success in test development processes may be meeting item writing goals or completing a standard setting study.

Celebrations and acknowledgements can come in many forms - a digital badge, a plaque or other acknowledgement of participation, a simple thank you letter. Being aware of what incentivizes SMEs should be used to determine how best to celebrate success. Acknowledging achievements, whether big or small, creates a positive atmosphere and reinforces the value of hard work and perseverance. It also helps to build confidence and reinforces the belief that goals are attainable. Celebrating success strengthens relationships, as it allows people to share in collective joy, and creates a culture of appreciation and recognition.

Celebrations during an ongoing activity can offer encouragement to continue with the process. For example, visual displaying item writing goals and progress toward that goal can motivate continued progress. Taking time to celebrate at the end of an activity can provide a much-needed moment of reflection, allowing individuals to recognize their growth and set new goals with renewed energy and enthusiasm.



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