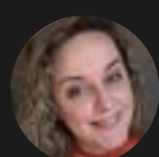


Subject Matter Expert Co-Creation Playbook

A strategic and tactical guide for L&D teams who want to scale without sacrificing quality



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Defining
the approach

What is SME co-creation?

Subject matter expert (SME) co-creation means treating SMEs as collaborators, not just content sources. It's not about dumping work on them... it's about creating shared ownership of knowledge, while L&D leads the experience design. Done right, it frees up your time to focus on some of the things you never have time for: researching your learners, needs assessment, refining learning strategy, finding new sources of data for evaluation, improving accessibility, creating complex learning programs, and building better systems.

This isn't about letting go. It's about thinking differently about your role.

You still define the learning goals and objectives, set quality standards, and shape the experience. But instead of bottlenecking every piece of content, you guide SMEs to co-create the right things at the right level, with you in control of the process.

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Platforms like Parta.io are designed to support this by allowing you to set flexible roles, manage workflows, and maintain some level of oversight while inviting others in your organization to meaningfully contribute to learning and development (L&D).



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Common concerns + what to consider

This section is for anyone who feels unsure about involving SMEs in content creation, especially if you're used to owning every part of the process yourself. You're not alone. These are all normal concerns, and they're worth exploring.





If we let SMEs create content, what does that mean for our roles?

It means your role becomes more strategic, not less essential. You're not handing off your expertise. You're choosing where and when to use it. When you guide SME contributions instead of doing all the building yourself, you get to focus on higher-impact work:

- Improving systems and infrastructure
- Collecting and using learner data
- Driving culture change
- Creating complex or signature learning experiences

You're moving from order taker to innovator.



How do we keep quality high if we're not doing it all ourselves?

First, let's reframe what "quality" means. For internal job aids or quick updates, speed and clarity matter more than polish. There's room for multiple tiers of quality based on the content's purpose.

Second, you're not opening the floodgates. You choose which projects are a fit. You define the format, flow, and review structure. You stay involved and provide feedback that will help your SMEs create better content over time.



Letting others in feels like I'm giving up control.

We get it. You've probably worked hard to be seen as an expert. But here's the truth: the more you bring others into the process, the more visible and respected your role becomes.

You'll be the one enabling learning at scale. You'll be the reason knowledge is flowing like it never has before. That's how you go from reactive request-taker to trusted partner. Those SMEs you worked with before will want to work with you again. Oh, and you know that learner engagement problem you have? By letting people create something – you're giving them a chance to show their expertise to the entire organization, and trust us, they're going to want to. They could become your new biggest champion.



Will this process get out of hand?

It won't if you lead it well. You're not removing structure, you're creating it: intake forms, scoping calls, project oversight. When done intentionally, co-creation is actually more predictable and repeatable than one-off SME handoffs, emailing a SME two days before a holiday, or sending a SME the "final copy" (because we all know that's not the last one).

You decide what to co-create and when. You set the rules and the boundaries.



Parta.io allows you to create branding at the workspace level, so all courses created by SMEs will have the same look and feel. User management also allows you to assign creator roles to SMEs, ensuring you can oversee their work. You can create multiple reusable templates to give to your SMEs to use. These features give you the structure to scale without sacrificing consistency and the confidence to stay in control while others contribute.



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The repeatable process

We’ve got some simple steps here to get you started, but like any good process, this one works best when you take into consideration your culture and current processes and revise it for what works for you!

1 Intake Form

Use a lightweight form to gather:

- Context: what prompted this request?
- Audience: who needs it, and why?
- Current state: what’s going on right now?
- Desired state: what do we want to happen instead?
- SME availability: who’s willing to help?

This also sets expectations that you won’t necessarily be the one creating the content and gives you enough information to determine if the content is right for co-creation.

2 Determine if Co-Creation is a Fit

Ask yourself:

- Is the content simple, procedural, or time-sensitive?
- Is the SME close to the work and invested in getting it right?
- Will co-creating this free you up to work on something more complex or strategic?
- Are clarity and speed more important than refinement and aesthetic for this project?

If the answer to most of these is yes, move forward with SME co-creation. If not, it may be better to keep the project on your plate, or redesign the request.

3 Scoping Call (when a co-creation project moves forward)

Once you’ve determined co-creation is the way to go, you’ll hold a scoping call (much like you would hold a kickoff call on a project where you’re taking the lead). This isn’t just a Q&A, you need an agenda and should cover things like:

- What the SME will create vs. what you and your team will do
- How you’ll provide feedback from the learning perspective
- Timeline and what delivery method you should use (you may need to figure this out together, depending on their skills/abilities)
- Tools they’ll use or have access to (if applicable)
- How you’ll support them throughout the project
- How you will be evaluating the effectiveness of the project

This is where you lead. Be the project manager. Clarify their role. Set expectations. Reinforce that you own the quality and strategy.



You can use Parta.io’s user management to add SMEs as creators, so they can contribute without disrupting the structure. That way, you stay in control of what gets changed and how.



4 Co-Create

The process you come up with for co-creating learning at your organization will be unique to your culture, existing processes, projects, and more. However, we’ll give you a few high-level processes to get you inspired.

One possible flow:

- SME drafts what needs to be covered
- You shape it into structured learning
- SME reviews once for clarity and accuracy
- You finalize and do quality assurance (QA)

Another possible Process:

- SME drafts input using a template
- You review and request minor edits for good learning practice
- You and SME co-create the assessment together live and do a final review
- You finalize and do QA

Tips:

- Use templates or past examples
- Limit review cycles (make sure this is part of the scoping call)
- Define what will be reviewed specifically each cycle
- Give SMEs some tips on best practices
- Encourage clarity over polish



Save time with branding and pre-built templates for onboarding, job aids, or SOPs. SMEs can jump straight into contributing without starting from scratch, and you ensure consistency across all assets.



5 QA and Launch

QA isn’t optional when you’re allowing someone to create content that is still representative of your team. You need to check for things like:

- Clarity
- Accessibility
- Relevance to the audience
- Broken links or visuals
- Spelling/grammar
- Functionality
- Correctness of any data, dates, or links

Then publish, track, and gather feedback from real users.



Keep SME reviews focused and contained using block-level commenting and task assignments directly in the tool. No scattered feedback or back-and-forth emails, just clear action steps in one place.



Decision-making guidance

We wanted to provide some examples of situations where SMEs can be a great help in co-creating content and others where you should keep the development with an experienced ID. Of course, there are always exceptions, but hopefully, this will give you a good idea of when to involve your SMEs more heavily.

Scenario	ID Involvement Level	Why
New software quick-start guide	Medium	Learners need to follow steps quickly and clarity matters more than polish, but clear instructions are important too
Internal team process update	Low	Internal and frequently changing, don't overinvest
Customer-facing training	High	An external audience means it will have higher expectations for tone, design, and accuracy
Compliance or legal content	High	Legal risks require clarity, accessibility, and precise review, and although your SMEs are invaluable here, you need to keep oversight
Just-in-time microlearning	Low	Projects like this are usually utility focused, meaning relevance and speed matter more than visuals
Onboarding week 1 welcome module	High	First impressions are everything, and this needs thoughtful structure and inclusive design
SME-led product walkthrough video	Medium	Authenticity is great, but the ID will need to step in to make sure accessibility is part of the process
Performance coaching guide	High	Projects on sensitive topics like this are best done by someone who knows how to approach them with care
Refresher on internal product, process, or tool	Low	For something that is internally used for reference and may become outdated, you can hand it off
Leadership development training program	High	This type of large project requires a lot of strategy and deserves an ID's full attention

- High

Requires full instructional design, strategic alignment, and QA
- Medium

Can be co-created with light support and structured guidance
- Low

Can be handed off to SMEs for co-creation with a review from IDs at the end



Strategic payoff: what to measure and show

This isn't just about making content faster, it's about demonstrating instructional strategy, cross-functional efficiency, and learner impact

Things to measure to show how co-creation improves efficiency:

- % of learning requests handled via SME co-creation
- Time to readiness (how quickly learners can apply the content after launch)
- SME re-engagement (how often SMEs participate more than once)
- Feedback from learners on relevance, usefulness, or confidence
- Time or effort saved on L&D team (can be estimated by reduction in direct build time)

Note: Be cautious about measuring time from intake to launch, it can backfire by highlighting delays without context. The goal should never be to create as much content as you can as fast as possible. Instead, focus on how quickly learners are equipped to act.

How to show impact:

- Connect SME co-creation to common learning metrics (confidence, behavior change, task completion)
- Share learner feedback that emphasizes usefulness, clarity, or timeliness
- Show where co-created content allowed L&D to redirect effort to deeper or higher-value work (reprioritization)
- Illustrate increased SME visibility and engagement across the org

Co-creation isn't about speed alone. It's about amplifying L&D's role, improving access to knowledge, and increasing impact across the business. It's also not about losing control. It's about gaining influence.

It's how you scale without burning out and how learning becomes part of the business, not a bottleneck.



Wrapping it up



Amanda

Co-creation isn't a shortcut, it's a strategy.
When done with structure and care, it creates
better learning, stronger cross-functional
relationships, and a more efficient use of
everyone's time.

Henry

James

You don't have to give up quality to gain speed. You don't have to compromise your role to invite others in. What you do need is a system and a mindset that put collaboration at the center of how learning happens.

Let this playbook evolve with you. Use it to try something new, build trust with your SMEs, and shift your role from overwhelmed content creator to intentional learning leader.

The future of learning is collaborative.
You're already in it.

Parta.io has been built to empower you
on this collaborative journey.

Book a demo

If you are interested
to learn more