

LEARNING UPGRADED FIELD TOOL

SME Review Comment Categories

A one-page tool for sorting SME feedback into fact issues, workflow issues, preferences, approval calls, risk issues, and unclear comments before the team revises anything.

Try this one thing today

Take one open review thread and tag every comment before you revise anything.

Use this when

- Review comments conflict or point in different directions.
- A SME is rewriting voice instead of checking accuracy.
- The team is not sure which comments require a decision and which are preferences.

Systems thinking move

Treat every review comment as a system signal. A comment might reveal a bad source, a missing owner, an unclear workflow, a hidden risk, or a preference that needs a budget.

Quick use

Before revising the draft, label every comment and assign an owner only after the feedback type is clear.

Working rows

Fact issue

What to do: Correct against the approved source.

What it tells you about the system: The source of truth is wrong, missing, or not being used.

Workflow issue

What to do: Confirm the real process with the workflow owner.

What it tells you about the system: The draft is exposing a process gap, handoff problem, or outdated workflow.

Preference

What to do: Accept only if it improves clarity without changing scope.

What it tells you about the system: Taste is competing with accuracy, timeline, or learner usefulness.

Approval issue

What to do: Route to the person with decision rights.

What it tells you about the system: The reviewer is asking for a decision they may not own.

Risk issue

What to do: Pause publishing until the risk owner reviews it.

What it tells you about the system: The comment affects compliance, privacy, customer impact, contract language, or learner safety.

Unclear

What to do: Ask one clarifying question before revising.

What it tells you about the system: The team cannot act because the comment has not been translated into a decision type.

Three ways to act

Manual way

Use a whiteboard or simple table during review closeout. Put each comment in one category, then decide whether it is accepted, deferred, escalated, or out of scope.

Microsoft 365 or Google Workspace way

Use Word or Google Docs for the draft, then track decisions in Excel, Sheets, Microsoft Lists, Planner, or a shared table with comment type, owner, status, due date, and scope impact.

AI-assisted way

Use AI to cluster raw comments, flag contradictions, draft reviewer questions, and prepare a decision log. A person still verifies facts, risk, scope, and final approval.

AI output validation

These prompt starters were created for the May 2026 model landscape. Verify all AI outputs before using them with learners, reviewers, leaders, customers, partner teams, or compliance-sensitive work. Do not paste sensitive or proprietary material into an AI tool unless your organization has approved that tool for that data.

Unconventional moves

- Add a taste budget. Give reviewers a small number of preference edits so style comments cannot quietly eat the schedule.
- Use a decision-needed column. A comment is not a decision until the owner accepts, rejects, defers, or escalates it.
- Separate truth reviewers from taste reviewers. The person who knows the work may not be the best person to edit voice.
- Tag late workflow corrections as missed discovery signals. They usually mean intake or source gathering was too thin.

Copy-ready structure

Use the HTML page for the copy button. This PDF includes the working fields so you can recreate the structure in Word, Docs, Excel, Sheets, Lists, or a shared planning note.

- Fact issue: Correct against the approved source.
- Workflow issue: Confirm the real process with the workflow owner.
- Preference: Accept only if it improves clarity without changing scope.
- Approval issue: Route to the person with decision rights.
- Risk issue: Pause publishing until the risk owner reviews it.
- Unclear: Ask one clarifying question before revising.