

LEARNING UPGRADED TEMPLATE

SME Review Checklist

Separate fact issues, workflow issues, approval calls, risk concerns, and preferences before SME review becomes one overloaded step.

Try this one thing today

Label every review comment before responding: fact issue, workflow issue, preference, approval issue, or risk issue.

Use this when

- Review comments mix facts, preferences, legal concerns, workflow changes, and style edits.
- One SME is expected to approve everything.
- Review cycles keep reopening scope after the asset is nearly finished.

What to have ready

- The review comments in one place.
- The source material the asset should match.
- The names of people who can approve facts, workflow, risk, and final decisions.

Start this in 15 minutes

1. Paste the review comments into one shared tracker.
2. Label each comment before responding to it.
3. Assign an owner only after the feedback type is clear.
4. Close review by naming what changed, what did not, and what still needs a decision.

Blank working version

Fill only what you know. Mark missing information as Needs confirmation instead of guessing.

Fact issue

Is the content inaccurate or missing required detail?

Workflow issue

Does the process shown in the asset differ from how the work actually happens?

Preference

Is this a style, wording, or example preference that does not change accuracy?

Approval issue

Who has the authority to make the call?

Risk issue

Could this create compliance, privacy, contractual, or operational risk?

Decision

What changed, who owns it, and does the timeline need to move?

Filled example

Fact issue

The approval threshold is wrong for enterprise accounts.

Workflow issue

The asset skips the handoff from sales ops to customer success.

Preference

Reviewer prefers a different screenshot order.

Approval issue

Legal needs to approve the customer-facing disclaimer.

Risk issue

The scenario includes customer data that should not appear in training.

Decision

Workflow issue accepted. Content owner will revise the handoff section before final SME check.

Conversation script

- I want to keep review from turning into one overloaded approval step.
- Can we separate facts, workflow issues, preferences, risk concerns, and approval calls before we revise?
- That will help us fix what needs fixing without reopening the whole asset every time someone has a preference.

How to decide

Fact issue

Correct the content against an approved source.

Workflow issue

Confirm the real process with the workflow owner before revising.

Preference

Accept only if it improves clarity without changing scope or timeline.

Approval issue

Route to the person with decision rights.

Risk issue

Pause publishing until the risk owner reviews it.

Microsoft 365 or Google Workspace

Use Word comments, Google Docs comments, Excel, Sheets, Planner, or Microsoft Lists to add a feedback type, owner, decision, and status to each review item.

AI-assisted help

Use AI to group review comments by type, draft clarifying questions, and flag comments that change scope or decision rights.

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.

Validation checklist

- Every comment has a feedback type.
- Every accepted change has an owner.
- Preference comments do not quietly change scope.
- Risk and approval issues are not resolved by the designer alone.
- Check every fact against an approved source.
- Mark anything AI guessed, inferred, or could not confirm.
- Remove private, sensitive, or customer-specific details that should not be in the working file.
- Confirm the right human owner approves the final decision.
- Review tone, accessibility, and learner impact before anything goes live.