



Genealogy Goals Planning Companion

In my blog post, [Plan Your Genealogy Goals](#), I dig into the steps needed to build an annual genealogy plan. This companion guides you through the process with additional hints and prompts as you construct your plan in the worksheets that follow.

For a quick reference and example, download the FREE editable [Goals At-A-Glance Template](#).

Grab your pencil and let's get started!

Step 1: Set Your Long-Term Vision

Vision-based planning links the future to the present. Defining your vision – or your “why” – will guide your genealogy journey for the next few years. Think of vision as a description of the future that you'd like to achieve with your family history work.

An effective vision should be bold, concise, inspiring, and oriented to the future. Remember, you're setting the course for your goals year after year.

Reflect on the following questions and jot notes in the space provided.

- Why am I interested in genealogy?
- What purpose does my research serve?
- What do I want my genealogy to be about?
- What do you want descendants and extended family members to say about your genealogy efforts?

Draft your vision statement:

Read it out loud. Make modifications:

Are you happy with it? Write your final (for now) version. You'll probably come up with new thoughts as you go along. Leave room for changes.

Step 2: Assess Your Current Situation

Before you can possibly arrive at your destination, you must establish your starting position. What are you currently doing and how does it relate to your vision? In order to make your vision a reality, determine what is preventing you from being at your destination today.

Review your final vision statement from the previous step. For each of the areas in the table below, use the questions to consider how well-positioned you are to move towards your vision. Bullet list your shortcomings or gaps in the Needs column.

Areas	Assess	Needs
Research	<p><i>What is the status of my existing research?</i></p> <p><i>Are my findings accurate?</i></p> <p><i>Do I have the right methodology in place?</i></p> <p><i>Does my family tree have breadth and depth?</i></p> <p><i>What challenges prevent me from advancing?</i></p>	
Organization	<p><i>Do I know where everything is?</i></p> <p><i>Are my files orderly and consistently labeled?</i></p> <p><i>Will my approach work as my tree expands?</i></p> <p><i>How can I improve my system?</i></p>	
Writing	<p><i>Where can I best share my research?</i></p> <p><i>How do I turn research into stories?</i></p> <p><i>What will I need to learn?</i></p> <p><i>Where can I find tools, templates or guidance?</i></p> <p><i>How do I get started?</i></p>	
Knowledge and Skills	<p><i>Do I know how to effectively conduct research?</i></p> <p><i>What new knowledge and skills would help?</i></p> <p><i>Am I connected to people who can help me?</i></p> <p><i>What communities should I join?</i></p>	
Tools and Resources	<p><i>Are my tools, supplies, equipment, or software in need of an upgrade?</i></p> <p><i>Do I need better resources, subscriptions, access, or materials?</i></p> <p><i>What manual work could I automate?</i></p>	

Step 3: Prioritize Your Opportunities

As the saying goes, what's the best way to eat an elephant? One bite at a time. The same is true for family history research. Prioritizing helps to pinpoint the focus of your plan so you don't spread yourself too thin.

Return to your table in Step 2. Circle your 3-4 most critical needs. These become your prioritized opportunities. Write them in the Opportunities column in the table in Step 4.





Step 4: Write SMART Goals

People who write down their goals are more successful in achieving them than people who don't. The mere process of writing encodes that information into your memory making your goal much easier to recall.

Now let's write SMART goals based on the criteria outlined below.

S pecific	Define your goal in clear, well-defined, and unambiguous language.
M easurable	Add precision that indicates how much or to what degree you're targeting for your goal.
A ttainable	Be realistic with what you can accomplish.
R elevant	Ensure your goal is meaningful to you and aligned with your vision and opportunity.
T ime-bound	Assign a deadline or target date.

Transform each opportunity into a SMART goal. Keep them simple and powerful. One-line statements are sufficient.

Opportunities	SMART Goals
1. 	
2. 	
3. 	
4. 	

Review the SMART criteria. Are each of your goals SMART? Can you make them SMARTer? Modify them if necessary.

Step 5: Create Your Roadmap

A goal without action is just a dream. If SMART goals indicate what you want to achieve, then the roadmap represents how you intend to get there. The roadmap is your action plan, the framework of tasks you want to accomplish to complete the overall goal.

For each SMART goal, brainstorm the tasks you need to accomplish to satisfy that goal. Write them in the first column. Then number each task in chronological order in the second column. Finally, plan your months. Take a look at your task lists and figure out how to best spread the work across all goals.

Once your roadmap worksheets are ready, place them side-by-side to tweak. You might remember that great summer vacation you're planning and decide to move work into a different month.

Review one final time for a personal reality check. Consider the following questions:

- Will this plan move me closer to my vision?
- Does this plan address my current needs and take advantage of my opportunities?
- Are my goals SMART?
- Will the roadmap lead me to accomplishing each goal?
- Is this plan realistic for me?

If your answer to any of these questions is "no," then make the necessary adjustment.

Note: This companion includes worksheets for three goals plus a blank. If you need more pages, then simply print more from the blank.

Next Steps

Now that you have completed your planning, this companion serves as your plan. Of course, you may have new thoughts, inputs, and unexpected situations that cause you to change your plan. You can do that here, using the same process you practiced in steps 1-5.

I keep an abbreviated view of my plan which I hang at my desk and reference almost daily. You can too by downloading the FREE editable **Goals At-A-Glance Template**. Here, you can see my entire plan as an example.

If you want to work directly with someone to create or review your plan together, we're here. Schedule us for a **free 30-minute consultation** so you can get rolling!

Join me for my second post in the series, **Implement Your Genealogy Plan**, for tips on successfully putting your plan into action.

Happy Planning!