

5 Powerful Steps To Plan Family History Projects That You Actually Complete

PRUDENCE:

Are you a starter of family history projects that you never actually complete? Maybe it's because they go off track, and you have no idea how to wrangle them back on. Or is it that you never really get started because something else always seems to get in the way? Perhaps you didn't abandon it, but it took longer – a lot longer – than expected and certainly didn't work out the way you hoped it would.

Good news, you're not alone. Better news, there is a process you can use to set yourself up for success. It's easy to implement and sets you up to successfully complete every project you start. Nope, it's not a magic wand but a five-step planning process that will be worth every second you invest in it. In this episode of Art of Family History, number 33, I'll walk you through the five steps I use when planning out family history projects.

You'll learn about two common reasons people avoid planning, the five steps to use when planning out your projects and how to use the system to keep going when motivation wears off. I'll also share a downloadable roadmap that you can use to plan your future family history projects.

INTRODUCTION:

Is this your first time watching one of my videos? If so, let me quickly introduce myself. Hello, I'm Prudence, The Creative Family Historian. I'm a graphic designer who helps genealogists – like you – bring their family history to life by converting research into stories and beautiful heritage keepsakes. On this channel, I provide tips on family history productivity, organisation, writing and design, as well as sharing my current journey as I undertake a genealogy reset.

And if you're a regular visitor to this channel, welcome back. Are you enjoying my family history content and want to hear more from me? Then hit subscribe and the notification bell, so you get updated every time I upload a video. And please consider giving this video a thumbs up to let me know you enjoy the topic and would like to see more content like this.

PRUDENCE:

So I've noticed family historians love to research and compile ancestral stories. What they don't necessarily love is planning. So when it comes to taking on a significant family history project, like creating a book or writing one, it's common to want to jump straight into the doing and then get stuck. I get it. Planning isn't glamorous or especially fun.

However, it is valuable, and if you do it right, it will save you time and reduce overwhelm throughout the project. In my experience, there are two key reasons why people don't like to plan. The first one is that it requires a time investment. And one that you usually think is better spent working on the project. And the second is that you don't know where to start or exactly what to include in your plan.

I have a solid history of taking the “shortcut” and diving straight in because I always thought the planning part would take care of itself once I got started. And that taking action would make it obvious what the next step should be. You can guess how that went. I call these moments “taking a long cut” because that’s what it is.

Sure, I might achieve the expected result in the end, but it takes me a lot longer and creates more stress and frustration than if I’d taken the time to develop a plan in the first place. Lesson learned. So let me share the five steps I use when planning my family history projects. Number one, determine the outcome. Number two, get clear on your starting point.

Number three, develop a work flow. Number four, create checklists. Number five, schedule time to complete the tasks. Seems straightforward, right? So keep watching and I’ll break down each steps purpose so you can try it for yourself.

NUMBER ONE, DETERMINE THE OUTCOME.

So always start with the end result in mind. So that means getting clear on what you want to have at the end of the project.

Is it a physical book in your hands? An ebook that you can send to all your relatives? A completed family history website with photos, stories and room for community contributions? Clarifying the outcome will make it easier to determine the steps you’ll need to take to get the desired result. Now, all projects may share similar tasks, such as write copy, but the specifics can be worlds apart. For example, a book may mean writing thousands of words while a trading card requires only a couple of hundred. Your plan will include all the steps to develop your item. So be specific about what you want. Changing the outcome once the project is underway can cause delays and impact the quality of the final product.

Get clear by crafting a single sentence stating what you intend to have at the end. For example, your specific statement for a book project might be a physical 8.5 by 11 hardcover book. Approximately 150 to 200 pages printed, two sided with lay flat binding. If you plan to create something and repurpose it, that’s smart. It will save you time in the long run.

But each project plan is still separate. One may require the other to be completed first, but it’s still a different project. Therefore, the first step of planning your family history projects is to craft a specific statement that answers the question – what is the end result?

STEP NUMBER TWO IS GET CLEAR ON YOUR STARTING POINT.

So once you know what you want to achieve, it’s time to review your starting point.

Take time to assess what you have ready to use and still need to do, source, create or learn. Then, use the results to develop four task lists that you’ll continue to add to during the planning process. Also include your budget for the project, the time you have available to work on it, and when it needs to be done.

If you have other family members contributing items, create a list with what you’ll get, who it’s from, plus when and how your save it. Be completely honest with yourself and the status of the task. You’re only going to create more stress for yourself if you aren’t. For example, when creating the book I made for Mum, I developed a plan based on work I hadn’t done yet.

I considered the photo component complete as I had all my sister’s albums and scans of Mom’s negatives. However, the scanned negatives all had names like D1000001 or D1001037 and everything in the albums had to be sorted and scanned. All the work that I should have included in my plan. Therefore, the second step of planning a project is to audit where you’re at, what needs to be done, and the resources available.

AND STEP NUMBER THREE, DEVELOP A WORKFLOW.

So now that you've got a clear picture of where you're at and what you want the finished result to be, it's time to develop a workflow of the steps to get there. So to create that workflow, you're going to brainstorm everything you need to do to complete the project. So those tasks will then be grouped together with similar ones to become the categories or stages of your workflow.

So, you've already started this process in Step 2 when you wrote the lists for what you need to source, do, create, learn and what is being contributed. These are all preparation tasks, so let's group these together and categorise them as "Prep" or something similar. To create the rest of the workflow, develop a mind map from the categories that apply to your project.

For example, when creating a book, you'd typically prepare, then format the content, review the document, revise it and finally send the file to print. Therefore your workflow might be Prep, Format, Review, Revise and Print. If you've never created a mind map or are looking for a refresher on exactly what to do, check out the article on my website "How to Quickly and Easily Create Family History Mind Maps".

You'll find the link in the description box below. And once you've made that mind map you want to order these groups to map out the logical path through the workflow. So, in our example, the order would be Prep, Format, Review, Revise and Print, as you need to prep the content before you can format it. And you must format the file before you can review, revise and finally print it.

Therefore, the third step of planning your project is to develop a workflow to get you from your starting point to the desired outcome.

AND STEP NUMBER FOUR IS CREATE CHECKLISTS.

So once you have the shell of that workflow in place, it's time to create checklists for each stage of the project. These checklists will serve as a guide and a safety net for you. As a guide they'll help you maintain consistency, efficiency and productivity throughout the project. Don't look at them as a to do list, but as a system for managing repetitive tasks. They're a safety net to keep you on track and ensure you don't forget anything critical. The good news is that you've already started to develop these. Those lists you've been creating in steps two and three?

They're the foundation for your checklists. So it's just a matter of expanding them and then continuing continuing to review and revise as you use them. Depending on how you set your workflow up, you'll likely have multiple checklists per stage. So for example, the prep stage will have a checklist for each of the different subcategories to source to create, to do, to learn and contributors.

When you reuse this workflow for similar projects in the future, you're going to be so glad you invested the time in developing detailed checklists. After all, you'll never remember all the steps but your checklists will. So you'll want to review them at the end of every project to add in the tasks that weren't previously included and remove steps you didn't need to do.

So the fourth step of planning your project is to create robust checklists of all the tasks you have to do at each stage of the workflow. These checklists will be the living documents that you will need to adapt over time.

AND THE FIFTH AND FINAL STEP IN THE PROCESS IS TO SCHEDULE TIME TO COMPLETE THE PROJECT IN YOUR CALENDAR.

So well done. You've finished the heavy lifting to plan out your family history project. You have a goal, a workflow to follow and checklists to keep you on track. So the last step is to make time to complete the project. This is the step in the planning process that many people don't because it seems silly or a waste of time.

After all, you know you must do it. So why put it on your calendar? Life gets in the way of the best of intentions. Projects fall off the radar and then you feel guilty, stressed and frustrated by the entire process. So that's why we add things to our calendars, to remind us, to show up to get it done. Take the less stressful approach instead, and block out time in your calendar now.

Estimate how long you think each task will take and then multiply it by two or three. We always think we're going to be faster than we actually are. So allow more time and then block out that time in your calendar. Can you manage 30 minutes three times a week? Or 2 hours on a Sunday afternoon every other week? Be realistic and give yourself breathing room.

Don't overcommit yourself because that's the first step in not completing the project. So the fifth step of planning your project is to schedule time into your calendar where you commit to working on it. But life will happen and things will get in the way. So add more sessions than you think you're going to need. Then, if you need to miss a few, you don't have to scramble to reschedule but can just keep going.

SO THE ACTUAL SHORTCUT TO ACHIEVING YOUR FAMILY HISTORY PROJECTS MEANS TAKING TIME OUT TO DETERMINE THE OUTCOME BEFORE YOU BEGIN SO YOU CLEARLY UNDERSTAND WHAT YOU MUST DO TO GET THAT RESULT.

After all, a website requires different things from a book, and books vary in shape, size, quality and binding. Conduct an audit of where you're at so you can realistically plan out the steps and commit to a deadline.

Develop a workflow so you can complete the task in a logical order. Therefore, not wasting time backtracking to get things done so you can keep moving forward and use checklists to keep you on track and maintain consistency, efficiency and productivity. And there the things that are going to keep you motivated and keep you going when that initial motivation wears off. And block out, time in your calendar to complete the project because small, consistent effort adds up faster than you think.

By investing time to plan out your family history project, you are setting yourself up for success. Not only will you know what you want to achieve, but you'll also have a roadmap to keep you on track. To help you out I've created a family history project roadmap for you to use the next time you need to plan out creating keepsakes or putting together a reunion.

It's free, so follow the link in the description box to get it sent out to your email address today. So how are you feeling about creating a family history project plan now? I'd love it if we continue the conversation in the comments. What is the next family history project that you want to work on? Download the Project Roadmap - the link is in the description - to help you get your family history project started. Do you have a question you'd like to ask or genealogy organization, writing or design problem that you'd like me to look into? Look for the link to The Ask The Creative Family Historian Submission Form in the description below. I look forward to seeing if I can help.

And if you'd like to learn more from me, check out the video on the screen now. But that's it for me for this video, though, so I'll see you in the next one. Until then, happy storytelling.