Getting Things Done and Family History
Productivity Tips and Tools

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To stay productive when you have numerous projects, you need a trusted system to capture to-do items, prioritize, and erase overwhelm.

Getting Things Done: The Art of Stress-free Productivity by David Allen describes an approach that can be tailored to fit the overwhelm every genealogist feels with so much to do and so little time. Allen gives three key objectives as an overview of the GTD system.

1. *Capturing all the things that might need to get done or have usefulness for you – now, later, someday, big, little, or in between – in a logical and trusted system outside your and head and off your mind.*

2. *Directing yourself to make front-end decisions about all of the "inputs" you let into your life so that you will always have a workable inventory of "next actions."*

3. *Curating and coordinating all of that content, utilizing the recognition of the multiple levels of commitments with yourself and others you will have at play, at any point in time.*

CAPTURE

The first step towards increased productivity is capturing all of the projects taking up space in your head—anything you need to do now or want to do in the future. Examples of family history-related projects could be research projects, papers to organize, people to interview, education opportunities, books to write, etc. These can be short-term or long-term. Big or small. If it comes to mind, write it down. Capture every item on paper or digitally.

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CLARIFY

Clarifying what to do with all those things and making decisions about what needs to happen next in any given project at any given time is the next step. We can't do all of our projects simultaneously, so we need to clarify the order of importance. We need to decide when and how we'll get to our projects.

Thinking Broadly

Consider each project on your list and ask yourself these questions:

- *How committed am I to this project? Should I be doing this, or would it be better delegated?*
- *What is my purpose in doing this project? What outcome do I envision?*
- *Does this project need to be done now, or would it be better for the future?*

Determining the true purpose for each project and the hoped-for outcome will help you clarify and prioritize what you truly want to accomplish with your family history. After thinking broadly about each listed project, review and rate the projects on a scale from 1 to 10, with 1 being "do immediately" and 10 "do someday." Reorder the list to see what project you could start now.

Thinking Deeply

Once you have a prioritized list of projects, it is time to go deep on a specific project. Following the following steps will break a big project into manageable segments.

- Identify the purpose and vision of the project.
- Brainstorm and organize the ideas into a project plan.
- Decide on the next action.
- Set a deadline and record it in a trusted place such as a calendar or list.

ORGANIZE

Set up an organizational system that you trust to hold your projects and give you reminders about what needs to be done on any particular day. Revisit how you organize your genealogy and make some decisions to help you feel more productive.

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- **Physical Filing System**
    - Decide on whether to use binders or file folders.
    - Organize by family group, locality, or record type
- **Digital Filing System**
    - Decide on a backup plan – cloud, external hard drive, flash drive, etc.
    - Organize by family group, surname, locality, or record type.
- **Genealogy Software**
    - Choose a software program that will hold your family tree.
    - Consider its ability to sync with online trees, ease of use, unique features.
- **Research Project Workflow**
    - Experiment with organizational tools for research such as timelines, locality guides, research logs, research reports, etc.
    - Consider working through a complete project for a focused objective rather than a sporadic approach.
- **Reference Material**
    - Organize syllabi, handouts, blog posts, etc., in an organized system.
    - Evernote, OneNote, Google Drive all work well for tracking valuable information for research.
- **Family History Email**
    - Create a system for dealing with email using labeled folders.
    - Consider folders for each surname you're researching.
    - Create folders for ACTION and WAITING
        - Try the 2-minute rule of dealing with any email that you can deal with in 2 minutes. Otherwise, move it to the ACTION folder for later handling.
        - Use the WAITING folder to track requests of others.

Organizing Projects

Once you have sound organizational systems in place, you can organize the projects you captured and clarified in steps 1 and 2. Some simple tools can help.

- **Calendar**
    - Decide on the best calendar for you: planner, wall calendar, an app such as Google Calendar, etc.
    - Use it for items you need to schedule on a specific day, such as appointments with a repository, webinars, or conferences.

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- **Project Lists**
    - Keep lists of projects in one central place: a notebook, word processor, apps such as Google Keep.
    - Organize project lists by categories such as DNA, surname research, interviews, articles to write, research at specific repositories, etc.
- **Next Action Lists**
    - Keep a list of the various next actions that need to be done on each project you've identified as a priority.

CLARIFY

Doing a weekly review can help you Get Clear, Get Current, and Get Creative. Capture any new projects that have come up and reevaluate your task list. Taking some time to review your project list and what you want to be working on can help keep your mind clear so you can let it do what it does best and think of solutions and ideas. Also, build in time periodically to do a big picture review of how your systems are working for you.

ENGAGE

Each moment of the day, we choose what specific task we should be doing. Choose a task that best fits the context and time from your Next Action list. Plan to perform challenging tasks when you have the most energy. Prioritize tasks so that you're consistently moving forward in your family history endeavors.

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