Course Syllabus

Project Management Tools for Genealogy

INSTRUCTOR

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COURSE DESCRIPTION

Learn how to organize and manage complex family genealogy projects using 5 basic project management tools, including a bonus tip sheet for video recording & video meetings.

COURSE OVERVIEW

Working with others is one of the greatest benefits of research. However, team genealogical research presents a unique set of challenges (e.g., communication, budgeting, managing scope, documenting progress, and sharing and storing [everything!]).

The answer: Project management tools that don't require project management experience!

The speaker will demonstrate Trello and Asana project management tools. Five project management templates will be introduced and discussed. Bonus: a tip sheet for video recordings and meetings.

COURSE OBJECTIVES

At the end of this short course, attendees should be able to

1. Document a project and explain the importance of scope
2. Outline roles & responsibilities of project team members
3. Set up a budget and a plan for communication
4. Explore simple cloud-based tools for managing genealogical projects
5. Begin using video and video conferencing for documenting progress and sharing results

COURSE OUTLINE

Video Introduction
- Managing family research can be exciting & messy; excitement can lead to enlisting others' participation, which is great!
- But what to do about the dilemmas of a team project such as communication, budgeting, managing scope, documenting progress, sharing and storing [everything!]
- The answer: project management tools!

Is it a project?
- Use interactive roulette wheel graphic to demonstrate characteristics of a project
- Template #1: Documenting project (Charter) for clarity and to avoid misunderstandings
- Template #2: Budget (it's very easy to ignore the need for a budget!)

Who ya gonna call? Scope Busters!
- Good, better, best scope statements
- Tips to guard against scope creep

Roles & Responsibilities
- Template #3: Who's on the team and what are their roles/responsibilities?

Meetings are dead. Long live meetings!
- Template #4: Communication Plan
- Template #5: Script/Storyboard outline for use with video/video chat for communications and documenting project progress (e.g., Skype, ooVoo, Google chat)
  - Example YouTube video on chosen ancestor (under 5 minutes)
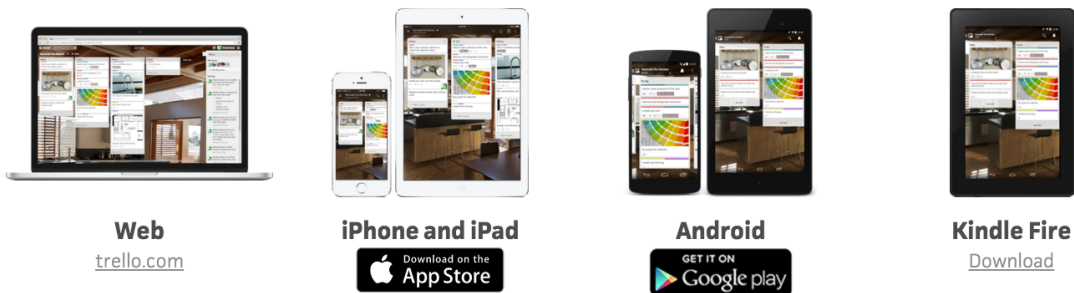 - Bonus: Tip sheet for video meetings

Sample Project Plan & Tools
- Use sample project plan to demonstrate Trello and Asana
- Integration and devices: options, options, options!
- URL for templates and video tip sheet

Closing, Q&A
- Reiterate problems/solutions and templates (with URL for later retrieval)
- Reminder to always celebrate project successes!

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