Choosing Platforms for Your Genealogy Practice

Choose the social media platforms that help you connect with the people you serve, communicate your expertise, and support your professional goals.

You don't need to be everywhere. Start with one or two platforms you can use consistently and comfortably.

1. What do you want social media to support?

Check any that fit:

- Help potential clients understand my services
- Share my genealogy expertise
- Build relationships with colleagues
- Promote talks, webinars, or publications
- Stay visible to past clients and referral partners
- Join conversations in the genealogy community
- Grow an audience for my newsletter, blog, or podcast
- Other: _____

What is the most important goal for the next few months?

2. Who do you want to reach?

- People looking for genealogy help
- Clients with a particular research need
- Fellow professional genealogists
- Genealogy societies and organizations
- Libraries, archives, or other partners
- Event organizers, editors, or publishers
- Students or people learning genealogy
- Other: _____

What do you want someone to understand about your work after seeing your profile?

What action would you like them to take?

- Learn about my services
- Contact me about working together
- Invite me to speak or teach
- Read or watch my educational content
- Subscribe to my newsletter
- Connect with me professionally
- Other: _____

3. What content can you share comfortably?

Check the types of content that suit your practice:

- Practical genealogy tips
- Explanations of research methods or records
- Answers to common questions
- Event, webinar, or publication announcements
- Professional updates and accomplishments
- Commentary on genealogy topics
- Behind-the-scenes views of my work
- Client stories or examples, with permission and identifying details removed
- Other: _____

Which two types could you share regularly?

1.
2.

4. What boundaries and professional standards matter?

Before choosing a platform, consider:

What client information must remain private?

How will I get permission before sharing client stories, images, or outcomes?

What topics or conversations do I want to keep off social media?

How will I distinguish general educational content from advice about an individual's case?

What kinds of direct messages can I reasonably respond to?

How will I handle requests that need a consultation or formal service?

My professional boundaries for social media are:

5. What feels manageable?

How often could you realistically post?

Once a week

A few times a month

Around an event or announcement

When I have something useful to share

How much time can you set aside each week?

15 minutes or less

About 30 minutes

About an hour

It will vary by season or project

What formats feel practical for you?

Short text posts

Photos or simple graphics

Longer written posts or articles

Short videos

Live presentations or webinars

Sharing links to my existing content

Other: _____

6. Compare a few platform options

Consider where your potential clients and professional peers already spend time. Check each platform's current features, audience controls, and norms before committing.

Platform or community	Who i could reach	What it could help me do	Time and skills required	Does it fit?
				Yes / Maybe / No
				Yes / Maybe / No
				Yes / Maybe / No

7. Choose a place to begin

The platform I'll focus on first is:

I'm choosing it because:

My profile should make these things clear:

- Who I help
- My genealogy specialties
- The services or expertise I offer
- Where I work or the areas I cover, if relevant
- How to contact me or learn more
- A current photo, logo, or other professional image

My first post could be:

- A brief introduction to my practice
- A useful answer to a common genealogy question
- A tip related to my specialty
- An invitation to an upcoming talk or event
- A link to something I've published
- Other: _____

8. Review your choice

After trying the platform for a month or two, ask:

Am I reaching the people I intended to reach?

Does the platform support my professional goals?

Can I maintain my presence without taking too much time from client work?

Are people taking useful next steps, such as visiting my site or asking about services?

What should I continue, change, or stop?

My next step: _____

Choose platforms based on the people you want to reach and the work you can sustain. A clear, helpful presence on one well-chosen platform can serve your practice better than trying to keep up everywhere.