

# Social Media Audit for Professional Genealogists

*Review how your social media presence represents your genealogy practice and supports your professional goals.*

You don't need to change everything at once. Use this audit to identify a few practical updates that can make your presence clearer, more useful, or easier to maintain.

## 1. Revisit your goals

What do you want social media to support?

- Help potential clients understand my services
- Share genealogy knowledge and expertise
- Connect with professional colleagues
- Promote talks, webinars, publications, or events
- Stay in touch with past clients or referral partners
- Build an audience for my newsletter, blog, or other content
- Other: _____

Which goal matters most right now?

Who are you hoping to reach?

- Potential clients
- Fellow genealogists
- Societies and organizations
- Libraries, archives, or other partners
- Students or people learning genealogy
- Event organizers, editors, or publishers
- Other: _____

## 2. Review your professional profiles

Look at each account you use for your practice.

| Platform or account | Profile is current? | Expertise and services are clear? | Contact or next step is easy to find? |
|---|---|---|---|
| _____ | Yes / Update | Yes / Update | Yes / Update |
| _____ | Yes / Update | Yes / Update | Yes / Update |
| _____ | Yes / Update | Yes / Update | Yes / Update |

Check each item that applies:

- My name, photo, and professional description are current.
- My specialties or areas of expertise are easy to understand.
- The people I help can tell whether my services may fit their needs.
- My profile links and contact information work.
- My profiles have a clear next step, such as visiting my website or contacting me.
- I understand what information is public on each account.

One profile update I may make:

**3. Review your content**

Think about your recent posts. Do they reflect the expertise and practice you want people to see?

- I share useful genealogy information or answer common questions.
- My posts reflect my specialties and professional interests.
- I balance educational content with professional updates and invitations.
- My captions are clear and understandable to people outside the profession.
- My calls to action are appropriate and easy to follow.
- I credit sources and creators when sharing their work.
- I distinguish general information from advice about an individual research case.
- My content is consistent with the professional reputation I want to build.

Which recent post best represents your work?

What kind of useful content would you like to share more often?

**4. Check client privacy and professional boundaries**

Before sharing client-related content or responding to requests, consider:

- I have permission before sharing a client story, image, or result.
- I remove identifying details when appropriate.
- I protect client information in comments, messages, and examples.
- I'm clear about what I can answer publicly and what requires a consultation.
- I have a plan for inquiries that need a formal response or service.
- I know how I want to handle disagreement, corrections, or public feedback.

Are any boundaries or response practices worth clarifying?

**5. Review your engagement**

- I interact in spaces where my potential clients or colleagues participate.
- I respond to comments and messages within a timeframe that works for me.
- I know which requests I can answer briefly and which need more time.
- I participate in professional conversations in a way that reflects my values.
- I can mute, leave, or step back from spaces that aren't a good fit.

What would make online engagement more valuable or manageable?

**6. Check your routine and results**

- How often have I been posting?
- Does that pace fit my workload and business goals?
- What content has led to useful conversations, inquiries, invitations, or connections?
- Am I spending time on the platforms that best reach my intended audience?
- Are there activities I could simplify, schedule, or stop?

A sign that social media is supporting my practice:

One activity I could simplify or change:

**7. Choose your next steps**

Select one or two actions from your audit:

- Update a profile, bio, or link.
- Clarify my specialties or services.
- Create a post that answers a common question.
- Review client privacy and permission practices.
- Make a clearer path from a post to my website or services.
- Set a manageable posting or response schedule.
- Focus on the platform that best supports my current goal.
- Other: _____

My first next step: _____

When I'll do it: _____

*Your social media presence should support your professional work in a way that feels clear, ethical, and sustainable. Revisit this audit as your goals or services change.*