



Strategic Research

Beginner Level

#1 Review What You're Starting With

- Identify Your Target Ancestor** (the next person or family unit you wish to research).
- Back up to the younger generation and **make sure that you're confident in the children** of this Target Ancestor before research begins.
- Review the records you have on hand** for the Target Ancestor.

#2 Start Research Notes with What You Have

- One set of **Research Notes** per ancestor.
- Cite the sources** of each record you find.

#3 Start Building a Tree

- Pick one location (website or software) as your "go to" tree. This is your primary tree. This is the place where all your findings go. It's okay to have trees at other locations, but make sure your primary tree has everything from online sources. My "Go To" tree is on Ancestry. You do you!
- Your research notes will have EVERYTHING, including your personal thoughts, hypotheses, and findings no matter where they came from.

#4 Review Hints (Low Hanging Fruit)

- Ignore Member Trees** to start. We'll get back to them later.
- Carefully **review each document** and import if necessary.
- Select Later or Maybe** (if on Ancestry) **for records you are unsure about**. You may find they are a match later when you have learned more information. You may need to keep notes or hyperlinks to records you suspect are related.

Intermediate Level (Constructive Thinking)

#5 Review What is Missing

- Review all documents and think about **what is missing**.
- Review the timeline of your Target Ancestor. Is there a gap in the lifetime?

#6 Create a Research Plan

- Now that you've done some searching... now is the time to do some "Research."



- Create a list of what is missing**, what you might be able to find and where to look for it. Don't research until your plan is as complete as possible.

#7 Research the Plan

- Follow the **Research Plan**. Don't deviate, but you can add to it if you think of more.

#8 Update Your Research Notes as You Go

- Update Research Notes** throughout your process. Don't wait until you're finished looking for records.

Your Research Notes are the most important document in your ancestors file! – Connie Knox

Advanced Research (Critical Thinking)

#9 Search the “3 Way Method” ([Trifecta Strategy](#))

- Search in three places** (Ancestry, FamilySearch, plus one more that makes sense).
- Search in three ways** (Name, Place, and Time).

#10 New Strategies Using AI

- Browser Search
 - History (time) of Locations (place)
 - When borders changed.
- Handwriting Recognition is Here
- Search Techniques
- Combining Search with Handwriting Recognition
- Use FamilySearch's new Full Text Search Feature
- County Records Online or in Person

#11 Transcribe & Abstract Documents

- Don't skip this step. It is vital that you **transcribe documents**. It makes you pay attention to the details.
- You'll want to transcribe primary documents. (Court documents, Wills, Bibles, handwritten documents, original documents).
- Abstract secondary or derivative documents
 - Birth, Marriage, and Death certificates are typically copies, thus derivative.
 - Technically to properly abstract a document, you should first transcribe it exactly. However, items like forms and census records are challenging to transcribe and can be abstracted instead. You'll want to note every detail about your ancestor into your research notes.
- Add abstracted details to your Research Notes.**

#12 Research F.A.N. Club Members

- Research the Immediate Family** with the same method as listed here. You may find clues to your target ancestor in other family records.
- Research key Friends, Associates, and Neighbors** (a.k.a. the FAN club). It is often in the FAN club that we see how records tie together.

Final Research (At any level)

#13 Member Trees

- This is the **last thing** I look at when researching an ancestors record and that is the other **member trees**. By the time you go through this process, you'll likely have more records than anyone else.
- Look for photos**. Often members will photograph documents and add them to the gallery without any transcriptions or searchable data.
- Look on **other platforms** for members searching for the same ancestors.

#14 Review DNA Matches

- If you have **DNA Matches** that connect to your Target Ancestor, review their trees for additional clues and records.

Wrapping it Up

Once you have gone through this process, you likely have more records than anyone else. You will likely have confidence in your connections from one generation to another.

Is this the end of your search? Absolutely not. You likely did not set foot outside your home and **visit the places your ancestors lived**, but you are now armed to do so on location at **archives, libraries, cemeteries, historical and genealogical societies** in the area where your ancestors lived.

Lastly, **KEEP UP YOUR RESEARCH NOTES AS YOU GO!** Your Research Notes are a living breathing document that is constantly being updated.