Continuing Professional Development

ORGANISING YOUR GENEALOGICAL RESEARCH BUSINESS

An interactive workshop led by Stuart C Coles, FCollP, ASGRA

Friday 4 November 2016
Meeting Room 2, New Register House, Edinburgh,
2-4 pm £ 4.00

It is almost certain that you have enjoyed investigating your own family background; have probably undertaken a formal course of study and are now considering becoming a self-employed genealogist. Based on feedback received from ASGRA's inaugural CPD business event, this short course is designed to help new entrants prepare for this next important step and aims to show

How to design, develop and implement a business plan

How to make effective use of IT systems for

(a) Organising genealogical research
(b) Managing clients from initial enquiry to finished report
(c) Keeping track of finances

How to create bespoke document templates to aid administration/productivity

Course tutor Stuart Coles, will share his recent experience of re-establishing his own business in Scotland, including how to avoid common pitfalls, with illustrations taken from real situations. Participants will be helped to write a personal action plan of things to do after the course.

The main topics to be discussed comprise

Using genealogical and other software for organising research and storing results; charting; diagrams; family group sheets; timelines; subscription research websites etc; copyright.

Dealing with enquiries; agreement of research proposals; estimates and quotations; terms and conditions; contracts; invoices; report writing; feedback and analysis.

Maintaining basic financial records; spreadsheets; profit/loss account; business bank accounts and other payment methods.

To reserve your place, please contact:
Stuart Coles, Secretary, ASGRA: asgra.sec@gmail.com