

A Report Card for the Genealogy Software Industry
(We're getting a D+)

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Overview

Recently FamilySearch performed an analysis of how well the genealogical software industry is supporting individuals in their efforts to do family history. The net result of the analysis is that as an industry we are getting a D+. The study also suggests that there are substantial opportunities for players in the industry to grow and differentiate in ways that will not only better meet the needs of current users but also increase the total number of people participating in family history.

Grading the Genealogical Industry

There are many different ways to approach grading the genealogical industry. This recent analysis focused on how well the industry meets the needs of individuals trying to do genealogy. In order to quantify this we measured the capability of leading desktop applications and online web sites in supporting an individual through the process of doing genealogy. In order to perform the analysis we needed two items: 1) a definition of the process of genealogy that could be used as a basis for comparison 2) a list of leading applications and web sites.

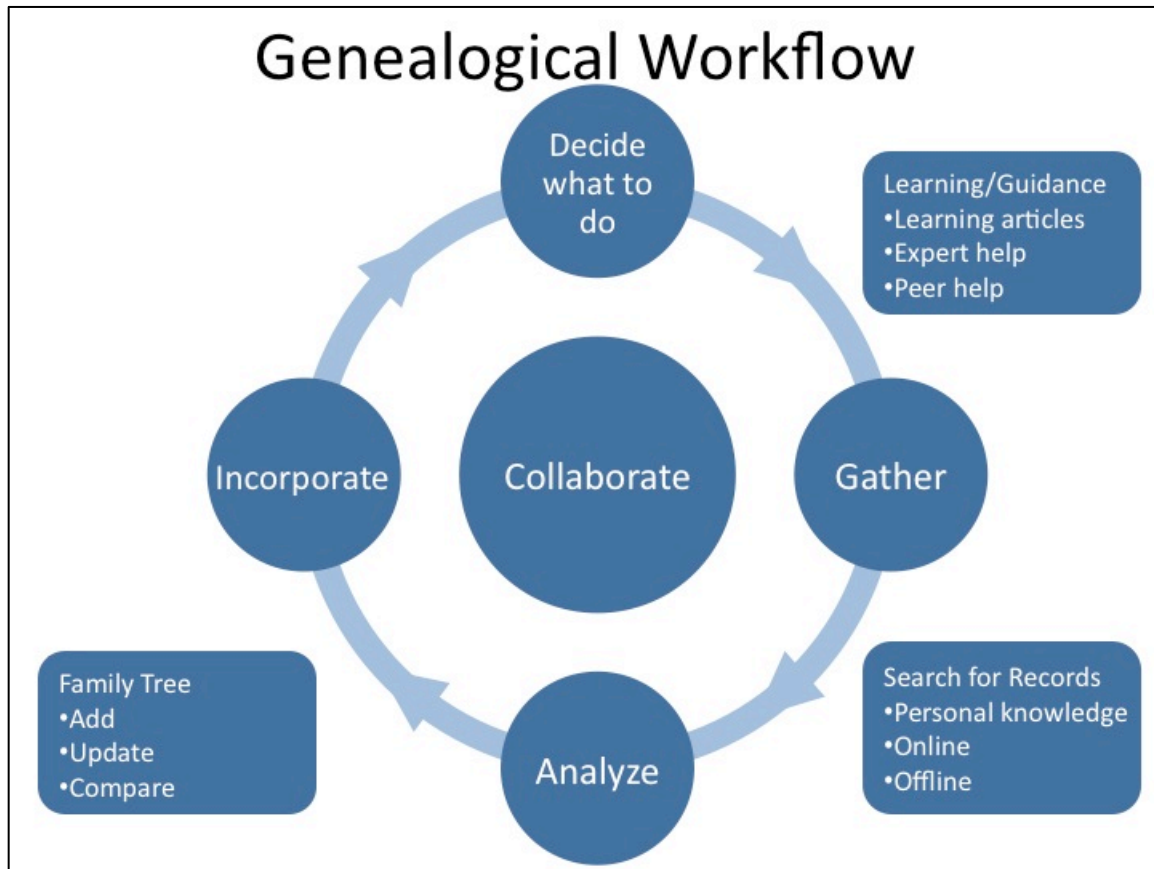
The list of leading applications and web sites consisted of 6 desktop applications and 3 websites. The criteria used to select the industry players consisted of a combination of market presence and momentum. In an effort not to draw criticism or attention to any particular vendor, we have chosen not to disclose the list of applications and sites (with the exception of those provided by FamilySearch: Personal Ancestral File and the new FamilySearch web site). As a result we are disclosing only the average results across all applications and sites included in the analysis and the specific results of Personal Ancestral File and the new FamilySearch web site.

The Genealogical Workflow (explained more in the following section) covers a breadth of activities that a user performs as they do genealogy. Some applications and web sites focus on a particular phase of the workflow while others try to address it more broadly. The Genealogical Workflow was used as a basis of comparison for each of the applications and web sites on the list. Subject matter experts reviewed the applications and web sites against the elements of the Genealogical Workflow and awarded a score in each category. The applications and web sites were scored on a grade point average scale with 0 representing an F and 4 representing an A. Although our subject matter experts tried to be open-minded in their analysis, the methodology can only be characterized as a subjective analysis.

The Genealogical Workflow

The Genealogical Workflow is an artifact of a contextual inquiry and contextual design process (CI/CD), a process used by FamilySearch to understand the needs of individuals doing genealogy. More information about CI/CD can be found on Wikipedia.org (http://en.wikipedia.org/wiki/Contextual_design). One of the valuable tools created by this CI/CD process is called a consolidated workflow. A consolidated workflow is created by observing people performing an activity and

then carefully documenting the process they go through to perform the particular job or task being observed. The results of the observation are then combined or consolidated into one workflow representing the composite observations of many people. The Genealogical Workflow shown below is the result of more than 60 such observations of persons located in different countries worldwide doing genealogy. A more detailed version of the Genealogical Workflow can be found in Appendix A.



One interesting way to analyze the Genealogical Workflow is to correlate it to the Genealogical Proof Standard adopted by the Board for the Certification of Genealogists. The Genealogical Proof Standard is a standard that can be used to judge the credibility of a genealogical conclusion based on the following elements:

- a reasonably exhaustive search
- complete and accurate source citations;
- analysis and correlation of the collected information;
- resolution of any conflicting evidence; and
- a soundly reasoned, coherently written conclusion

More information about the Genealogical Proof Standard can be found here:

<http://www.bgc certification.org/resources/standard.html>.

The workflow has five major phases represented as circles in the chart above. These phases and their relationship to the Genealogical Proof Standard are described in the following list.

1. Decide what to do. During this phase an individual must decide what to do. This often involves formally or informally setting a research objective, plan

and strategy. The outcome of this phase has a correlation to the likelihood of an individual performing an exhaustive search as recommended in the Genealogical Proof Standard.

2. Gather. In software systems the Gather phase is tightly related with search. It is also where information is captured. This is the phase where an exhaustive search is performed. It is also where source citations must be captured and where some analysis occurs as described by the Genealogical Proof Standard.
3. Analyze. During the analyze phase evidence is evaluated, conflicting evidence is resolved, conclusions are formed and an explanation is created. Individuals often bounce back and forth between the Analyze and Gather phases. At times this occurs very quickly. The analysis, dealing with conflicting evidence and explanation of conclusions are aspects of the Genealogical Proof Standard which happen during this phase.
4. Incorporate. Once conclusions and explanations are created, the conclusions, explanations and evidence can be incorporated into the genealogical record or tree. Often additional analysis is required as new information is merged in and carrying forward the evidence, citations and explanations is essential. The incorporation of evidence, citations and explanations and the additional analysis which occurs in this phase are all elements of the Genealogical Proof Standard.
5. Collaborate. Throughout the Genealogical Workflow individuals have a need to collaborate with one another. This collaboration may be with peers, mentors, friends, family or complete strangers.

A series of articles describing these phases is currently being published on the FamilySearch Labs blog. Articles about the first two phases have already been published and can be found at the following URLs:

- <http://labs.familysearch.org/blog/?p=436>
- <http://labs.familysearch.org/blog/?p=460>

Industry Analysis

If the desktop applications and web sites used in this analysis are indeed representative of the best the genealogical industry has to offer then the average grade for our industry is a D+. We aren't failing nor are we excelling. The table below summarizes the results of the analysis. A more detailed table containing a complete break out of all the sub-categories that were analyzed can be found in Appendix B.

Phase	PAF	new FamilySearch	Industry Avg.
Decide What to Do	0	2	1.2
Gather	1	1	1.6
Analyze	0	1	1.4
Incorporate	1	2	1.8
Collaborate	0	1	1.0
Overall:	0.4	1.4	1.4

Raising Our Grade

Given the results of the analysis, the question must be asked, “What can we do to raise our grade?” We would like to propose three things FamilySearch and vendors might do to improve the score.

1. Do a self-scored test to see how your application or web site is standing up to the industry average..
2. Use the self-scored test to determine opportunities for you to improve your application or site support of the Genealogical Workflow process of doing genealogy.
3. Consider a strategy that more broadly supports the entire genealogical workflow or alternatively, a strategy that allows you to excel at a particular phase in the workflow. The analysis shows that there are consistent weaknesses across the industry in all phases of the workflow with a greater need in the Collaboration, Decide What to Do and Analyze phases. These represent opportunities for the industry.

Conclusion

In conclusion, the process an individual must go through to do genealogy is complex and difficult. Substantial effort has been made by the genealogical industry to provide tools that facilitate and simplify this process. While much progress has been made, this analysis suggests that on average we are slightly below average at really meeting the needs of those trying to do family history. There are still substantial opportunities for improvement that translate into more individuals participating in family history, more ancestors being found and more opportunities for commercial vendors.

Appendix B: Industry Analysis

Genealogical Workflow

Support - Product Scorecard

Phase and Tasks	Products								
	1	2	3	4	5	6	7	8	9
All									
Lots to do	0	1	0	0	0	0	2	3	3
bounce between core phases	0	0	0	2	0	0	1	2	1
I'm smarter, learned new trick/tool/process/hint	0	0	0	1	0	0	1	2	2
<i>subjective phase summary</i>	0	0	0	1	0	0	2	3	3
Entry									
What's new?	0	0	0	0	0	3	0	4	4
Invite	0	0	0	0	0	3	0	0	0
<i>subjective phase summary</i>	0	0	0	0	0	3	0	3	3
Decide What to do									
What do I already know?	0	0	0	1	0	0	1	1	1
What artifacts do I have? *1	1	1	1	0	0	0	0	1	1
What do relatives know?	0	0	0	0	0	1	0	0	1
What do other sources know?	0	0	0	2	0	0	2	4	4
Where do I go?	0	0	0	2	0	2	3	4	4
What should I do?	0	1	1	2	0	0	2	4	4
<i>subjective phase summary</i>	0	0	0	2	0	1	2	3	3
Gather									
Reports, copy to use in field	2	3	3	0	0	0	4	4	4
Visit Website, person, relative, place	0	0	0	0	0	0	2	3	3
Search for sources, info	0	1	0	0	1	0	1	3	3
- Re-search for new info *1,3	0	2	1	2	0	0	2	2	2
- Exhaustive search *1	0	0	0	1	0	0	2	2	3
Discover, see sources	0	2	0	1	1	0	1	2	2
Need to get film book, site access	0	0	0	0	0	0	0	0	0
Decide if I want to capture	0	0	1	0	1	0	1	2	2
- unsure, future fodder, lead for others	0	0	0	0	0	0	0	4	4
- Filter out	0	0	0	0	1	0	0	2	2
Capture source (photocopy, link)	1	1	1	0	1	0	1	4	4
"	0	0	0	0	0	0	0	2	2
Capture source citation *2	1	1	1	0	1	0	2	4	4
Annotate the source	0	0	0	0	0	0	0	4	4
Make a theory *4	0	0	0	0	0	0	0	2	2
<i>subjective phase summary</i>	1	2	1	1	1	0	2	3	3
Analyze									
Analyze, compare, juggle *3,4	1	2	1	2	3	0	3	3	3
" Compare to mine, new *3	0	2	1	1	3	0	3	3	3
Annotate the source with notes *5	0	0	0	0	0	0	1	3	3
Decide usefulness	0	0	0	0	0	0	0	2	2
- Use it *5	0	0	0	0	1	0	1	4	4
- Theorize *4	0	0	0	0	0	0	0	2	2
- Trash it	0	0	0	0	1	0	0	1	1

Use helpers (translate, expert, research)	0	1	0	0	0	0	1	2	2
Track my process, did this/that	0	0	0	0	1	1	0	2	2
<i>subjective phase summary</i>	0	1	0	1	2	0	3	3	3
Incorporate									
Consult with others, ask for help	0	0	0	0	0	1	2	1	1
Create/edit/recover conclusion	2	2	2	1	2	1	2	3	3
- Merge in new info*3, gedcom from other	0	2	0	2	3	1	4	4	4
- updating public data	0	1	1	1	0	1	1	0	0
- updating private data	2	2	2	1	1	1	2	3	3
- Reference source & citation *2	2	2	2	2	1	0	2	3	4
- Preserve source/evidence *2	1	1	1	0	0	0	1	4	4
- Explain *5	2	2	2	1	0	0	1	2	2
- Not sure yet, Theorize *3,4	0	0	0	0	0	0	0	2	2
- Ask for approval	0	0	0	0	0	0	0	0	0
Share/Publish to others (seeCollaborate)	-	-	-	-	-	-	-	-	-
<i>subjective phase summary</i>	1	2	1	2	1	1	2	3	3
Collaborate/Help									
I have a problem	0	0	0	0	1	1	1	2	2
Ask for help (expert, local, skill, relative)	0	0	1	1	0	0	2	1	2
Receive help/Info	0	0	1	1	0	0	2	1	2
Share/Publish to others	0	1	1	2	1	2	2	1	3
"	0	0	0	1	0	3	0	0	2
"	0	0	0	1	0	1	0	0	2
Work with others	0	0	1	0	0	1	2	1	2
Invite, viral	0	0	0	0	0	3	0	1	1
Google-able content	0	0	0	0	0	0	0	0	0
Need a referral to a helper	0	0	0	0	0	0	0	0	0
Other agrees to help me	0	0	0	0	0	0	0	0	0
Prove my worthiness to gain trust	0	0	0	0	0	0	0	0	0
Give the helper info to help me	0	0	0	0	0	0	1	0	0
<i>subjective phase summary</i>	0	0	1	1	0	2	2	1	2
overall summary	0.4	1.0	0.6	1.4	0.8	0.8	2.2	2.6	2.8

*Genealogical proof standard item	
1. Exhaustive Search	
2. Source Citations	
3. Analysis of evidence w/conclusion	
4. Conflicting evidence	
5. Conclusion explanation	