



Conference Momentum Pack – Thirty Days of Small Wins

One Session → Three Actions: A Simple Way to Make Conference Learning “Stick”

If you’ve ever finished a conference session feeling inspired and then watched that inspiration dissolve into a pile of bookmarks, you’re not alone.

Online events like RootsTech are amazing, but they can also be a lot. When there are hundreds of sessions available, it’s easy to slip into “content collecting” mode: watch, save, star, bookmark... and then never circle back.

So for conference season, I’m trying something different: **turn every session into three clear actions**—one tiny, one deeper, and one saved for later. That way, even if I only watch a few sessions, I still end the week with real progress.

The method: Quick Win → Deeper Task → Someday

After a session, I pick:

1) A Quick Win (15 minutes)

Something small I can do *today* that creates momentum—like testing one search filter, renaming 10 downloads, or adding one citation.

2) A Deeper Task (60–90 minutes)

A focused block where I apply the idea to one real research problem—one person, one place, one question.

3) A Someday Item (park it on purpose)

This is the secret weapon. Instead of keeping the idea floating in my head, I file it somewhere specific with a tag so I can find it later—without feeling guilty.

The next two pages of this handout will let you capture every aspect of a session. What the main point was, any questions you had – and the three next steps I described above.

For RootsTech 2026, I’m coupling that with the goal of completing one quick win every day for thirty days. It’s my RootsTech Challenge! Check out the sheet on page 4.

And of course, no conference would be complete without discounts & freebies! Instead of scribbling discount codes on random pieces of paper, use our organized list on page 5. It will make sure you don’t miss a thing!



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Session Info

Session Title _____ Speaker(s) _____
Date Attended _____ Live or Replay? Live ☐ Replay ☐
Link or Playlist Name _____

Screenshots I have saved are located: _____
Handouts I have saved are located: _____

The 10 second summary (what was this session really about?)

Top Three Takeaways

1. _____

2. _____

3. _____

Next Steps

Follow-Up Questions

Q1: _____
Q2: _____
Q3: _____

Resources To Investigate Later (Tools, Websites, Books, etc.)

Resource #1: _____ What it's for: _____
Resource #2: _____ What it's for: _____
Resource #3: _____ What it's for: _____



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One Session - Three Actions

Quick Win (15 minutes) Do something small today that creates momentum

Pick ONE:

- ☐ Save the session link to a “Watch Later” playlist *with a note about why*
- ☐ Test one search/filter in a database using a real ancestor
- ☐ Add one new source/citation to a person in your tree
- ☐ Rename and file 10 downloads using your naming system
- ☐ Create one “research question” note for a brick-wall person

My quick win: _____

Deeper Task (60-90 minutes) Apply the idea thoroughly to one real research problem.

Pick ONE:

- ☐ Work one person from “clue” → “record search” → “note your findings”
- ☐ Build a mini timeline for one person/place using 3–5 records
- ☐ Try the tool/method on 2–3 searches and compare results
- ☐ Audit one folder or one surname group and clean it up
- ☐ Write a short proof-style paragraph for one conclusion

My deeper task: _____

Save it for Someday: Save the idea *without letting it clutter your brain*.

Pick ONE:

- ☐ Add it to my “Someday” list with a tag (DNA / maps / AI / photos / etc.)
- ☐ Save it as a future webinar/topic to revisit
- ☐ Keep it as a “when I’m stuck” strategy
- ☐ Hold it until I have the right records/software/subscription

My someday item: _____ **Tag:** _____

Where I saved it (exactly): _____



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Designed for conference season: one small action a day beats 47 bookmarks you never revisit.

Remember: Keep tasks tiny. Examples: test one search filter, re-name 10 files, add citations to one record, try one new tool feature

Conference/Focus: _____ Start Date: _____ End Date: _____

Day/Date	15 Minute Task	What I Tried	Results/Next Steps
01			
02			
03			
04			
05			
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Trials, Tests and Try-Outs

(for all the goodies and freebies you pick up)

1. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
2. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
3. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
4. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
5. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
6. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
7. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____
8. Tool Name and purpose: _____
Link/URL: _____
Discount/Sale Amount: _____ Discount Code: _____ Sale End Date: _____