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Honoring Our Ancestors Genealogical Cold Calling

by Megan Smolenyak Smolenyak

www.ancestry.com

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At some point in the course of our research, almost all of us encounter a situation requiring us to call a stranger—perhaps a second or third cousin we've never met. We may be seeking family details, hoping to recruit a DNA testing candidate, trying to locate the family Bible, or pursuing some other genealogical agenda. I know this is an uncomfortable experience for some because I occasionally receive e-mails asking about this cold-calling aspect whenever my articles on orphan heirloom rescues (that is, tracing the descendants of original owners of family treasures in order to return it to the family of origin) appear.

While it's admittedly not my favorite part of genealogy, I call strangers with some frequency. Sometimes it's for my own family research, and sometimes it's for the orphan rescues. But I also do it on almost a daily basis for my work with the U.S. Army's Repatriation Project. As part of this effort, I locate the families of soldiers who were killed in Korea (and occasionally, WWII and Southeast Asia). In most cases, I'm the first contact the family has had with the Army in 30 to 60 years. As you might suspect, reactions vary, so I've dealt with just about everything that can happen when you pick up the phone and dial the number of someone who has no clue who you are. So I thought it might be worth sharing a few suggestions I've developed for genealogical cold calling.

DON'T HIDE YOUR IDENTITY – If at all possible, it helps to ring in under your own name and number. This won't be possible for the roughly 35 percent of you who are unlisted, but if you're still publicly listed and have been considering taking your number private, you might want to think twice. Many people have caller 1D and will be intrigued by a call coming in from someone of their own surname or, at least, a long distance number that's not familiar to them. It's true that there are plenty of call screeners who won't pick up the phone for anyone who's unknown to them, but curiosity sometimes gets the better of these folks. After they've seen your name and number ring in several times, they will occasionally call you! It happens to me from time to time on my army cases.

AVOID LEAVING MESSAGES – This brings us to the issue of voice mail. Because of the nature of my army work, I'm reluctant to leave messages, so my policy is to avoid leaving them. I'll call many times before I accept the fact that I'm dealing with a serious call screener and need to reconsider. The same applies to general genealogical research. If you leave a message, you're forcing even an interested individual to make a long distance call (in most cases). Particularly to elderly people living on a tight income, this alone can be a hindrance. Add to this the fact that we all have busy lives, and even those with the best of intentions might fail to call back. And there's always the possibility that someone in the household will accidentally delete or otherwise prevent your message from getting to its intended recipient.

Having said that, if you've called ten times and still haven't reached a person, it's probably time to bend this rule. If you must leave a message, do your best to leave enough detail to give them reason to call back.

DON'T OVER PREPARE – Yes, you want to know who you're calling, how they're connected to you, and why you're calling, but don't sound too polished. Even if you've cold called dozens of distant relatives before, my experience is that it's best to sound a little halting and even apologetic. If you're too rehearsed, you'll come across as a telemarketer. Be sure to ask early on if this is a good time for them and ask for a better time if it isn't. You never know when someone who genuinely wants to speak to you might have company or be immersed in a playoff game on TV. Don't force them to choose between you and whatever they were doing.

EXPLAIN THE CONNECTION – I usually open with a comment along the lines of, "This is a little unusual. You don't know me, but I think we may be distant cousins. My name is X and if you're the person I'm looking for, your grandparents would have been Y and Z." The key here is to immediately share some family details in order to arrest the hang?up impulse some of us have. For better or worse, we've become very suspicious. Many people hang up without taking time to learn who you are, so you need to get past this barrier. Fortunately, it's a little less pronounced now due to the do?not?call list (those on the list no longer expect calls from telemarketers, and if they suspect you of being one, they'll probably stay on the line long enough to find out who to be angry with!).

With my army cases, I make it a point to give the soldier's name as soon as possible. In a few cases when I wasn't quick enough the first time, I've redialed and just shouted out the soldier's name without any preamble. That always gets me at least a little more time.

ASK FOR A REFERRAL – Once you've established that you have a legitimate reason for calling, it's a good idea to offer a graceful "out." This can be easily accomplished by asking if there's someone in the family who's into genealogy. This gives them a chance to pass you and your questions on to another relative (and you an alternative contact if they truly aren't interested), but few people will take advantage of this offer. Most will appreciate your consideration of their time and continue talking with you.

GIVE BEFORE YOU GET – To help erase any lingering concerns, it helps to share fresh details before asking for any in return. In fact, if you can discipline yourself, make the contact a three?step process: 1) call, 2) e?mail or snail mail some family charts or photos, and then 3) call again. It takes longer, but it works wonders in terms of raising their comfort level with you. If you just can't wait, at least take the time to verbally share data you have before moving on and asking for information.

ASK FOR CONFIRMATION – Assuming you've made it past the preliminaries, you're ready to seek information from them. To help ease into this, start by asking for confirmation of a few bits and pieces that you already have. For example, you might try, "I have that your grandmother died in 1954 and is buried in Cemetery X. Does that sound right?" This allows you to underscore the fact that the call is a genuine genealogical inquiry and not some scam (after all, how many scam artists would take the time to learn where their intended victim's grandmother is buried?) and gives you a chance to demonstrate that you already know plenty and they're not giving away family secrets by speaking with you.

LEAVE YOUR CONTACT INFORMATION – Always leave your contact information (all of it—phone, address, and e?mail) even if you don't necessarily expect to communicate with this person

again. This may sound like a blinding flash of the obvious, but, particularly when the conversation flows right from the start and you wind up chatting for an hour, it can be easy to forget this rather important step. You might change your mind, they might happen across some treasures in the attic and think of you, or someone else might contact them about genealogy. Then they're in the position to play middleman, and a surprising number will be kind enough to do so. I was recently fortunate enough to have this happen with a distant relative in Ireland.

HAPPY DIALING! – Calling strangers can be a little intimidating, but the potential rewards far outweigh the worst-case scenario of being hung up on. Here's hoping these suggestions make your next cold calling experience a little more pleasant and successful.

© WC-PUG. PO Box 910187, St. George, UT 84791
dixielarsens91@skyviewmail.com