

# Self-Publishing Checklist

Created by Lisa A. Alzo, Copyright, 2018-2024

Print out this checklist to keep track of the key steps for your self-publishing project

## Plan

- Outline or storyboard your idea, prepare chapter titles.
- Decide on a format (print, ePub, iBook, Kindle Direct Publishing, or multiple formats).
- Research publishers (online, print, etc.) and select one.
- Set a budget (if applicable).
- Decide to offer copies for free or to charge for your book. Calculate price per copy.
- Determine whether your book will be color (usually more expensive), black & white
- Decide whether or not to include photographs (color, b&w,) and what to use on your front and back cover.
- Set a goal (deadline).
- If a print book, purchase ISBN from ISBN.org (Bowker) or have service assign it (usually for free) when you create a project.
- Use this line for notes, or add your own items**

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## Prepare

- Write the book! Add photographs, citations, references, index, etc.
- Prepare an author bio (especially important for books you plan to sell)
- Set up free account with online publishing service, or consultation appointments with publishing service
- Set up a PayPal account (if required) or direct deposit if getting royalties
- Complete tax/other forms (if you are planning to sell books)
- Make sure you have the appropriate software for word processing and creating graphics and PDF files (see Tech section below)
- Use templates for interior and covers, if applicable (see Tech section below)
- Follow guidelines/specifications for fonts, margins, headings, etc. (if not using template)
- Create your front and back cover (including ISBN) and copyright page
- Convert text and covers to PDF file (This is usually required for online services. You can skip this step if you are contracting a third party to do this for you)
- Review text for obvious typos, formatting errors, etc. and check images/photos
- Consider hiring an editor or asking a family member or colleague to proofread the book
- Use this line for notes, or add your own items**

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## Publish

- Sign in to online account and create a new project (follow guidelines) or submit project files to the publishing service

- Upload cover files
- Upload text file (PDF)
- Wait for approval (some online services show you errors immediately; some have a waiting period of 24-48 hours)
- Fix any flagged errors and upload revised version (some services make you go through approval again)
- View electronic proof and/or order a hard copy proof for printed books (HIGHLY RECOMMENDED); some services charge you for printed proofs and/or for shipping/handling)
- Make revisions as necessary **OR** approve the proof and finalize the publishing process
- Choose distribution options (if using online services)
- Use this line for notes, or add your own items**

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## Promote

- Complete author profile and/or create author page (online services)
- Decide on where/how to distribute
- Tell your family, friends, associates about your book and how to obtain copies
- If selling your book, create a press release and other marketing materials
- Consider a Blog or Author website in addition to your Author page on chosen platform
- Advertise (if applicable) print or electronic
- Get your book reviewed (media, bloggers, etc.)
- Use social media (Facebook, Twitter, Instagram, YouTube, etc.)
- Use this line for notes, or add your own items**

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## Technology

- Online account set up (Lulu, Amazon KDP, Smashwords, Blurb, etc.)
- Word processing software (Word, OpenOffice, Pages, etc.)
- Photo editing software (Photoshop, Photoshop Elements, other check online)
- PDF creation software (Adobe Acrobat Professional, Primo PDF or other free PDF creator)
- Conversion software (such as Calibre or Sigil) if need to go from one format to another.
- Social media accounts and/or website
- PayPal/Online deposit setup
- Use this line for notes, or add your own items**

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## Personal

- Know your audience (family, a society, the public, or various)
- How to calculate price if selling and knowledge of profit margin (most online services offer price calculators on their sites)
- If printing hard copies, what is your budget? Are you willing to front the money and store copies in your home?
- Technology skills (word processing, photo editing, working with online sites, website management, blogging, social media, etc.) **OR** access to someone who can assist you
- Writing skills (grammar, punctuation, style, etc.)
- Sources for images (personal photos, royalty-free image collections)
- Copyright and Permissions (permission to publish, copyright law for text and images) – see US Copyright office <http://www.copyright.gov> (research foreign copyright laws if applicable)
- Knowledge of differences between Print-on-Demand, eBook formats, etc.
- Understanding of restrictions if you choose one service over another (check the guidelines or online forums on each individual service's website)
- Access to editor/proofreader
- Marketing and promotion skills
- Make a list of all the people/groups who might be interested in your book and target them with your announcement(s)
- Availability of review copies (willing to send some books for free)
- Venues for distributing book (family reunions, or other family gatherings), community, library, or others
- Venues for selling your book (if applicable) – e.g. speaking engagements/vendor tables at conferences, societies, etc.
- Cross-promotional strategy (lectures, courses, other related books or book series)
- Use this line for notes, or add your own items**

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## Miscellaneous (additional items special to your project)

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