Self-Publishing Checklist

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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

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- ☐ 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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