Self-Publishing Resources for Editors & Book Shepherds

Annotated and compiled by Bonnie Britt

for the Bay Area Editors' Forum

November 15, 2011

- What is the difference between self-publishing and subsidy publishing?

- What defines an indy publisher (a true self-publisher)?

- Why are editors increasingly at the center of self-publishing efforts?

- How can editors help self-publishing authors achieve their goals?

- What skills do editors need to produce e-books that meet professional standards?

- How can editors avoid clumsy formatting issues on different hand-held devices?

- What resources can help editors become part of the self-publishing marketplace?

Resources

Print books 'n blogs

- Obtain the free e-book reader from Adobe:
  http://www.adobe.com/products/digitaleditions/
  Download some free or inexpensive books to observe problems that can occur in e-book formatting from Amazon, Goodreads or the Gutenberg Project.
- **http://www.book1blog.com/**
  Marilyn Ross and Sue Collier, co-authors of *The Complete Guide to Self-Publishing: Everything You Need to Know to Write, Publish, Promote and Sell Your Own Book* 5th edition (2010)
- **http://www.selfpublishing.com/**
  Publishing Basics, 4.0 by Ron Pramschufer. Free download in PDF, Mobi or ePub.
  From Amazon, get free Kindle software for PC or Mac:
  http://www.amazon.com/gp/feature.html/ref=kcp_mac_mkt_lnd?docId=1000464931

Keep an eye on Pramschufer's monthly newsletter @ http://www.publishingbasics.com/
Obtain instant quotes for different page counts and trim sizes.
http://www.publishingbasics.com/2011/10/24/ask-ron-how-do-i-write-a-set-of-specifications-to-obtain-a-quote-from-a-printer-for-my-book/

Pay attention to what Aaron Shepard says at http://www.newselfpublishing.com (sign up to be notified of new articles). In particular read this:
http://www.newselfpublishing.com/PlanB.html#PlanB and his post on Trouble in Paradise. Shepard has written three important books on self-publishing. Some of the information is out of date but continue to be reference points.
They are: *Aiming at Amazon* (on Amazon marketing) *POD for Profit* (on Lightning Source publishing) and *Perfect Pages* on the possibilities for using Microsoft Word for book design. The latter is possible but, in my opinion, not advisable. Adobe InDesign offers industry standard layout options.

- *The Fine Print of Self-Publishing, Everything You Need to Know About the Costs, Contracts, and Process of Self-Publishing* 4th ed. by Mark Levine. Major value in the discussion of the ways in which would-be authors can be scammed by vanity presses *aka* subsidy publishers. Levine names names among "self-publishing" ripoffs.
- In addition to Levine's book, see Preditors and Editors, which has been collecting kudos and complaints, mostly complaints since 1997. http://pred-ed.com
- *Developmental Editing: A Handbook for Freelancers, Authors, and Publishers* by Scott Norton. This is an important book for editors, the only one of its kind on this subject.

The Dark Side

Will Amazon Kill Off Publishers?
http://www.nytimes.com/roomfordebate/2011/10/24/will-amazon-kill-off-book-publishers
http://www.nytimes.com/roomfordebate/2011/10/24/will-amazon-kill-off-book-publishers/amazon-offers-writers-new-opportunities

What can be the future of book selling when independent bookstores are fast going out of business and Barnes and Noble is worth $700 million while Amazon is worth $88 billion?
http://www.nytimes.com/2012/01/29/business/barnes-noble-taking-on-amazon-in-the-fight-of-its-life.html

Amazon Pulls Thousands of E-Books in Dispute
http://bits.blogs.nytimes.com/2012/02/22/amazon-pulls-thousands-of-e-books-in-dispute/

When It Comes to Content, Amazon's Kindle Won't Be Undersold
http://bits.blogs.nytimes.com/2010/02/26/when-it-comes-to-content-amazons-kindle-wont-be-undersold/

Online Shoppers Are Rooting for the Little Guy
http://www.nytimes.com/2012/01/16/business/some-shoppers-rebel-against-giant-web-retailers.html

Design & Typography

- *Before & After Page Design* by John McWade
- *Bookmaking: Editing / Design / Production* by Marshall Lee. 3rd edition.
- *Chicago Manual of Style,* 16th edition.
- *Book Design and Production: A Guide for Authors and Publishers* by Pete Masterson, 2005. While a new edition is in progress, the current edition contains step-by-step instructions for using InDesign to lay out books. While InDesign has gone through several upgrades since 2005, nothing's changed to render the instructions invalid.

  The following are helpful. Borrow from library to determine what suits you.

- *Envisioning Information* by Edward R. Tufte (1990)
- *The Elements of Typographic Style* by Robert Bringhurst
- *The TypEncyclopedia: A user's guide to better typography* by Frank J. Romano
- *The Visual Display of Quantitative Information* by Edward R. Tufte (2001)
- *Type Rules! the designer's guide to professional typography* by Ilene Strizver 2nd edition. 2006.
- *Using Type right: 121 Basic No-nonsense Rules for Working with Type* by Philip Brady (1988)
- *Visual Explanations: Images and Quantities, Evidence and Narrative* by Edward R. Tufte (1997)

Free classes online

CSS layout with HTML5
http://multimedia.journalism.berkeley.edu/tutorials/css-layout/

Learn Basic Photoshop
http://graphicssoft.about.com/popular.htm
http://graphicssoft.about.com/od/photoshop/l/bllps5out.htm

Basic Photoshop
http://graphicssoft.about.com/c/ec/1.htm

Basic Web Design Class
http://webdesign.about.com/c/ec/75.htm

XML 101
http://webdesign.about.com/c/ec/7.htm

Use search engine to find stock photos and textures both free and low cost. high res vs. low res.
Dreamstime.com is one. **iStockphoto.com** is another.

Learn the basics of WordPress
http://multimedia.journalism.berkeley.edu/tutorials/cat/wordpress

Design toys

Galaxy Gauge
http://www.galaxygauge.com/p_set_adr.html
I love the Art Director's set ($48). The Pocket Toolbox ($15) is good too. The color wheels and maps and measuring tools are indispensable for design work.

E-books & blogs

Kindle Formatting: The Complete Guide by Joshua Tallent available in non-DRM ePub, Kindle, PDF, or print format. **http://kindleformatting.com/** (helpful info & links)

EPUB Straight to the Point by Elizabeth Castro
http://www.pigsgourdsandwikis.com/ (e-book must-read, cutting edge blog)

International Digital Publishing Forum
(**http://idpf.org**)—the organization that maintains EPUB specifications.

What Is EPUB 3? By Matt Garrish 10/19/2011. O'Reilly Media is giving this away free to those who register for access.. **http://shop.oreilly.com/product/0636920022442.do**

5 things you need to know about Kindle Format 8 (KF8), Amazon's new e-book format
http://blog.taleist.com/2011/10/27/5-things-you-need-to-know-about-kindle-format-8-kf8-amazons-new-ebook-format/

The difference between e-book conversion and e-book formatting
http://aprillhamilton.blogspot.com/2010/10/ebook-madness-dont-confuse-ebook.html
by April L. Hamilton

For e-book conversion quotes to give you an idea of market rates
http://www.paperlesspub.com/equote.html

Illustrated e-books are not as profitable as straight text.
http://www.idealog.com/blog/searching-for-the-formula-to-deliver-illustrated-books-as-ebooks

E-book process—an overview
What could go wrong? by Matt Buchanan Mar 10, 2010
http://gizmodo.com/5478842/giz-explains-how-youre-gonna-get-screwed-by-ebook-formats

e-book formatting basics

If you do not own a mobile device, you can approximate the Mobi experience by downloading Kindle for PC (or Mac) from Amazon. You can approximate the ePub experience by downloading Adobe Digital Editions.

Neither free program duplicates the experience of examining your work product on hand-held devices but, on a larger screen, they do show what your layout looks like. You can read books using this software and catch things like bad sentence breaks or unintended page breaks on the big screen. In the end, it is best to make friends with people who own one or another of the different devices to see exactly what your output looks like.

Elizabeth Castro's *EPUB Straight to the Point* addresses formatting images for the iPad and other e-readers. Joshua Tallent does the same for the Kindle in his book on formatting. I don't know whether he's updated it for Kindle Fire but, except for some proofreading errors, his instructions are clear and well-written. Both Castro and Tallent's websites are respected sources of information on these topics as are their Twitter feeds. Tallent's is especially useful for nonfiction indexing. His book contains step by step directions and I haven't seen that elsewhere. Castro's website is cutting edge for ePub insights and innovation. While Castro's print book is indexed, it does not address indexing in e-books.

The Smashwords Style Guide (a free download) recommends using Microsoft Word's compress feature to dramatically reduce file sizes and to compress pictures to 96 dpi. I have not found Word to be the best tool for e-book layout or for compression. I avoid Smashwords' meat grinder when I can. SW's Style Guide recommends restricting image widths to 500 pixels and keeping the file itself to no more than five megabytes. Smashwords uses the least common denominator approach and this often shows in the results.

A popular discussion on Kindle's DTP (desktop publishing) forums focuses on image dimensions to take advantage of hand-held devices. Amazon's DTP administrators suggest 450 pixels wide by 550 pixels high. Guido Henkel, an experienced e-book formatter, has more to say at **http://guidohenkel.com/category/formatting/**

When considering image size and number, economics come into play when using Amazon as an e-book distributor. The math is here:
http://authoradventures.blogspot.com/2011/12/new-kdp-list-price-requirements.html

E-book formatters are aware of the conflicts among what the four generations of Kindle devices "see" in terms of images and other content. Owners of the older Kindles, which likely make up the majority of Kindle owners, don't see color. Kindle Fire, the first to accept color, was released in the fall of 2012. Owners of the earlier three Kindle generations are not likely to discard their devices for the latest model. Guido Henkel has written about this on the formatting section of his website, including a four-part series with e-book formatting information.

When formatting images or tables, it is useful to think about the "liquid" nature of the experience on hand-held devices. When an iPhone is held horizontally, for example, the images may display differently than when held vertically.

At this writing, Adobe says it has improved InDesign in version 5.5 such that it can be used to format e-books. Maybe version 6.0, due for release in the spring of 2012, will perform better than 5.5. I've tried Calibre and Sigil too and decided to look further.

Currently, my favorite way to convert text and a few pictures to e-book is with an inexpensive program called Jutoh. The manual, available as a free download in six different formats is at **http://jutoh.com/book.htm.**

Jutoh was developed at a small company in Scotland where the developer, Julian Smart, responds promptly to queries at **http://tech.groups.yahoo.com/group/anthemion-writingtools/**. Jutoh produces valid ePub, and in conjunction with Amazon's KindleGen, it facilitates the production

of Mobi editions for Kindle. Jutoh offers quite a bit of control in formatting, especially with images and an alphabetical index.

While anyone can save a Word document as .odt (open document text) in preparation for import into Jutoh, some bloated code will still need to be stripped out. Julian Smart suggests using the free and open source Open Office from **http://www.openoffice.org/download/index.html** for the initial conversion as it leaves much less bloated code residue than Word. (You can open any Word document in Open Office.) Jutoh performs better with .odt than html, which several of the other text-to-e-book converters use.

The FAQ states: "Jutoh is suitable for creating e-books… with relatively simple formatting requirements and light use of images. So, it's great for novels and self-improvement books, but less so for (say) books on photography or mathematics textbooks."

You may need the free unzip program 7-Zip in converting files to e-books, which are essentially zipped html files. **http://download.cnet.com/7-Zip/3000-2250_4-10045185.html**

E-book distribution channels

This list is not exhaustive although it provides examples of where e-books may be uploaded for sale.

- 1 Place for Romance ("Passion delivered, one download at a time.") 1placeforromance.com
- ABEBooks which does e-book, but it's clunky
- Amazon Kindle via DTP/KDP
- ARe (All Romance) is the sister site to OmniLit that shares uploads. What is sent to ARe automatically appears on OmniLit
- B&N Nook (PubIt)
- Books on Board
- Bookstrand
- Coffeetime Romance
- Fictionwise (not open to new publishers)
- Goodreads (a place to stimulate buzz, hold giveaway contests, build an audience, and sell books)
- iBookstore (which you can reach through OmniLit or Smashwords if the publisher for whom you are working does not qualify to upload individually.)
- *iTunes/iBookstore* (slow, clunky)
- Kobo (via Smashwords unless publisher lists 10 books)

- Lightning Source (LSI). Access the iBookstore through Lightning Source.
- Manic Readers (to upload review copies or chapters, *not to sell)*
- OmniLit
- Smashwords (cumbersome and restrictive; solely for purpose of accessing Kobo and perhaps iBooks)
- Sony
- Trapezium

Be careful not to lose control of your e-book at places like Book Baby, which does good work at a reasonable rate but assumes the position of publisher and makes it difficult to adjust the e-book pricing. The same issue exists at Smashwords.

Uploading to Kindle

https://kdp.amazon.com/self-publishing/help?topicId=A2J7LFVIIC06SQ
Getting started

https://kdp.amazon.com/self-publishing/help?topicId=A37Z49E2DDQPP3
https://kdp.amazon.com/self-publishing/help?topicId=A2RYO17TIRUIVI

Pricing options and what Amazon calls "royalties"
https://kdp.amazon.com/self-publishing/help?topicId=A30F3VI2TH1FR8

Be aware of the 35% and 70% "Royalty Options"
Note that Amazon persistently misuses the term "royalties" as if Amazon were the publisher.
Pricing comparisons
https://kdp.amazon.com/self-publishing/help?topicId=A29FL26OKE7R7B

Where can editors find work? Go where the writers are.

Make friends with seniors. Many have at least one good story to tell and some even have the money to pay an editor and book shepherd. Rather than wide distribution for their writing, many are interested in leaving their life stories and pictures to their descendants.

The Author's Rhythm … Do You Know Yours? By Judith Briles
http://authoru.org/wp-content/uploads/2011/02/feb2011.pdf

The Association of Independent Authors
http://www.independent-authors.org/?page=About
http://calwriters.org/membership/how-to-join/

These are examples. Please, come up with your own ideas for finding potential self-publishers.

Industry intel
Mike Shatzkin's idealog is a must-read to keep up with publishing trends. Example: True "do-it-yourself" publishing success stories will probably become rare.
http://www.idealog.com/blog/true-do-it-yourself-publishing-success-stories-will-probably-become-rare

Internet lists for book shepherds and self-publishers

Sign up for daily digests for skimming. While heavily trafficked, there's lots of good information on the first two lists.

Print on Demand: http://finance.groups.yahoo.com/group/pod_publishers/
Look for replies by Aaron Shepherd.

Self-publishing: http://finance.groups.yahoo.com/group/Self-Publishing/
Look for replies from Pete Masterson and Walt Shiel.

Jutoh list where questions receive quick replies from the developer.
http://tech.groups.yahoo.com/group/anthemion-writingtools/
Jutoh is inexpensive tool for converting manuscripts into e-books.

Marketing
In a field overloaded with hype, Dana Lynn Smith is thoughtful and worth reading.Dana Lynn Smith, Savvy Book Marketer
http://bookmarketingmaven.typepad.com/

Advise author to collect email addresses on author's website. This is a key to successful marketing. To promote a book, send occasional newsletter focused on the particular audience.

Derek Halpern's web marketing tips. Halpern works for Thesis, which is a paid version of WordPress. He freely shares great marketing ideas.
http://diythemes.com/
http://diythemes.com/thesis/nonverbal-website-intelligence.pdf

Promoting Your Book — Are Traditional Book Trade Channels Good Choices?
http://www.book1blog.com/2011/03/promoting-your-book-are-traditional-trade-channels-good-choices.html

Tips for planning a blog tour
http://bryanthomasschmidt.net/2011/09/28/10-tips-for-planning-a-blog-tour/

Metadata
Editors can help in identifying e-book and print book metadata and ensuring it is uploaded to where it needs to be.

Getting paid by credit card
https://squareup.com/
One-inch square device that connects to iPhone, iPad or Android.
Fast setup; 2.75% per swipe for major cards
Next-day direct deposit to your bank account.
Free reader, free app.

Print-on-demand book distribution
Learn about the differences between Lightning Source and CreateSpace.

CreateSpace books are thicker because they use #60 paper compared to #50 that LS uses. Always get proof copies. Quality is about equal and neither is as good as offset printing although most readers will not notice the difference.

If the publisher uses Lightning Source as a printer, listing with Ingram, its parent company, is automatic. Ingram also accepts small publishers who are members of International Book Publishers Association (IBPA). It is easier to sign up with Createspace than it is to be accepted by Lightning Source where there is no newbie hand-holding. Lightning Source, however, ensures the possibility of broad availability at retail stores at a reasonable price.

New Self-Publisher's FAQ
http://www.creativemindspress.com/interior.htm

Publicity
Respect newsroom time. By Paul Krupin.
http://www.directcontactpr.com/free-articles/article.src?ID=12

Shepherding books

How Book Shepherding Works
http://thebookshepherd.com/judith-katherine-services/how-book-shepherding-works.html

Working with a book shepherd
http://1106design.com/news-you-can-use-working-with-a-book-shephers/

What is a book shepherd? Do you need one for self-publishing?
by Sue Collier, December 14, 2009
http://selfpublishingresources.com/what-is-a-book-shepherd-and-do-you-need-one-for-self-publishing/

Should you self-publish— or wait for a traditional deal?
by Sue Collier, August 19, 2011
http://selfpublishingresources.com/author/sue-collier/

Pete Masterson: What Editors Need to Know About Self-Publishing
http://editorsforum.org/forum_index_articles/publishing_04-22-03.php
Pete Masterson spoke to the Bay Area Editors' Forum in an event arranged by Diana Young and reported by Dawn Adams.

New Roles for the Freelance Editor in Self-Publishing
http://editorsforum.org/forum_index_articles/publishing_04-25-07.php
Mark Weiman, publisher at Regent Press, was the speaker.
Nancy Faass arranged this program and Micah Standley reported what was said..

The Editor's Electronic Toolbox
Forum organized by BAEF South Bay Coordinators David Couzens and Annie Belt
http://editorsforum.org/forum_index_articles/technical_04-22-08.php

Web (to publicize book project)

WordPress tutorials
http://multimedia.journalism.berkeley.edu/tutorials/cat/wordpress

Web Design Principles Slideshow
http://multimedia.journalism.berkeley.edu/blog/2010/may/20/web-design-principles/

Web Design Development

http://multimedia.journalism.berkeley.edu/tutorials/cat/webdev

Video

http://multimedia.journalism.berkeley.edu/tutorials/cat/video

More CSS

http://css.maxdesign.com.au/selectutorial/

Revised February 23, 2012