

Self-Publishing Checklist

Whether you're new to the publishing process or an old pro, it's helpful to have a to-do list to guide your self-publishing project to completion, to ensure you don't miss any important steps, and also to help you plan well enough to hit your target pub date.

Below I detail the distinct stages of the editorial, production, and sales/ distribution process. My goal is to help you understand some assumptions I've made about the publishing process, and where you can save time and expense.

The Editorial and Production Process

This process can be broken down into roughly three stages:

1. Editing

- a) I recommend seeking a developmental editor and if you need something a little lighter then focus on getting an editor who will focus on style, grammar, and consistency issues—and might do light fact-checking if needed (very useful for nonfiction).
- b) A typical copyedit for an 80,000-word manuscript takes two weeks, but good copyeditors usually need to be booked a month in advance. Authors should give themselves at least a week, if not two, to review and make changes after the copyedit is returned.

2. Design

- a) Depending on your project, you'll have several stages of book design.
- b) **Front cover design.** While the manuscript is being copyedited, you can begin on the cover design. Some authors can put together their own cover designs using tools such as [Canva](#), but since your cover is often the number-one marketing tool for your book, hiring a professional designer is wise. Before you hire a cover designer, I recommend doing some research and studying bestselling books

similar to your own in genre, theme, or audience. If you haven't already, also finalize the title, subtitle, and book description that will be used at all retailers and on the back cover (for a print edition). It's ideal if you have two or three versions of the book description: a very short one (25–50 words), a short one (50–100 words), and a longer one (250 words).

- c) **Back-cover design.** Most ebooks have only a front cover design and no back-cover design. If you're producing a paperback or print-on-demand edition, then you'll also need a back cover and spine. (Hardcovers will require yet another cover design to account for the flaps and increased spine width.)
- d) **Print interior design.** If you're planning a print edition *and* you have the time and money to invest, you may also want to hire a designer for the interior of your book. This might be the same person who designs the cover—it depends on the freelancer and their skill set.
- e) **Ebook design (EPUB file preparation).** There's not really an ebook design process—at least not for typical, reflowable ebook files (EPUB files). If your title has lots of special illustrations or visuals—or needs to have a fixed page layout—then you'll want to hire a professional to prepare your ebook files for you. You'll likely go through a process similar to the print interior design process—budget extra time in your schedule for this.

3. Proofing

- a) As you reach the end of the design process, you must decide how thorough your proofing process will be. If you think your files are clean, and very few errors have been introduced during the production process, then you might skip hiring someone. However, if you skipped the copyedit, and you're the only person who has ever looked at the files aside from the designer, then it's a smart idea to pay for a proofer before publishing.

The Sales and Distribution Process

This process can be broken down into roughly two stages:

1. Preparing your metadata

- a) Before you head off to Ingram or Amazon to publish, best to do all your research and legwork in advance as to how you will describe the book, how it will be categorized, what pricing you will use, and so on. That way, when you reach the publishing interface, you'll have all the data at your fingertips and you won't have to stop, think, go searching for missing information, or feel pressured into deciding.

2. Uploading your files and going on sale

- a) This is perhaps the easiest and quickest part of the entire publishing process: making your book available for sale. Usually it won't even take you an hour to get your book into the system and under review. With Amazon your book is often available and on sale in twenty-four hours. If you're not ready to go on sale, then you can set the book as a preorder and input whatever pub date you want.
- b) You should have these files ready to upload for your print-on-demand edition:
 - i. Full cover layout file (PDF): if you're using *both* Amazon KDP and IngramSpark, you will need a different cover layout file for each, since they each will provide different measurements for you to use
 - ii. Full interior layout file (PDF)
- c) You should have these files ready to upload for your ebook edition:
 - i. Front cover image: JPG, PNG, or other image format
 - ii. Ebook file: EPUB will result in the best quality, but most retailers/distributors allow you to upload a Word document, among other common file formats