Author as Publisher: Initial Planning Tasks

|  | **Planning Item** | **Resources and Notes** |
| --- | --- | --- |
|  | **Master project plan** | **Vision, Goals, and Skills in Project Plan Template** |
|[ ]  Master vision statement | Tips in DIY Publishing Project Plan template |
|[ ]  Goals statement: Years 1 - 5 |  |
|[ ]  Manuscript assessment: status, size, gap assessment |  |
|[ ]  Business skills and gap assessment |  |
|[ ]  Publishing skills and gap assessment |  |
|[ ]  Draft initial timeline |  |
|[ ]  Expectations: Desires vs. reality |  |
|  |  |  |
|  | **Master publishing plan** | **Publishing Choices**  |
|[ ]  Select initial print and eBook platforms | Can change this strategy over time |
|[ ]  Determine whether to use a packager / service provider |  |
|  | ***Kindle distribution:*** |  |
|[ ]  Create a KDP account | Requires tax ID, business name, bank account |
|[ ]  Review KDP terms, conditions | TBD in later checklist: … how to get manuscript into Kindle format |
|  | ***If using an ePub distributor:*** |  |
|[ ]  Determine whether to use ePub aggregator service | Smashwords or Draft2Digital  |
|[ ]  Select the ePub distributor  |   |
|[ ]  > Create an ePub distributor account  | Requires tax ID, business name, bank account |
|[ ]  > Review ePub distributor’s terms, conditions |  |
|  | ***If publishing directly to 1 or more ePub store:*** | … repeat tasks for other strategic eStores / not necessary if you use an aggregator service |
|  | **Nook:** |  |
|[ ]  1. Create a Nook Author account  | Requires tax ID, business name, bank account |
|[ ]  2. Review Nook Author terms, conditions |  |
|  | **Kobo:** |  |
|[ ]  > Create a Kobo Writers Life account  | Requires tax ID, business name, bank account |
|[ ]  > Review Kobo terms, conditions |  |
|  | **Apple iBook:** |  |
|[ ]  > Create an iBook Author account  | Requires tax ID, business name, bank account |
|[ ]  > Review iBook Author terms, conditions |  |
|  | ***POD – print on demand:*** |  |
|[ ]  Select POD vendor |  |
|[ ]  Create your POD account  | TBD in later checklist: … how to get manuscript POD ready |
|  | ***ISBN and Copyright tasks:*** |  |
|[ ]  Review POD terms, conditions |  |
|[ ]  Determine ISBN strategy | Use POD-provided ISBNs unless “print in bookstores” & "small press brand" are key to your strategy |
|[ ]  *(If in project plan)* Create Bowker account & buy initial batch |  |
|[ ]  *(If in project plan)* Create your US Copyright account | … If you plan to submit for formal copyright registration (optional) |
|  |  |  |
|  | **Success and Metrics Plan** |  |
|[ ]  Verify expectations  | … costs, timeline, skills required, revenue |
|[ ]  Draft “measures of success” plan |  |
|[ ]   |  |
|  | **Business basics – If you plan to be a publisher** |  Many of these items aren’t necessary if you plan to create only one book … |
|[ ]  Choose unique business name | Search business name on Web to identify competitors and "sounds like" that might confuse people |
|[ ]  If DBA name, register business name with the state |  |
|[ ]  Determine business structure  | (Corporate, partnership, sole proprietor) |
|[ ]  *(If Required)* Set up corporation or partnership agreement |  |
|[ ]  Determine federal tax ID to be used |  |
|[ ]  *(If Required)* Request federal tax ID |  |
|[ ]  Register business with state licensing/taxing offices | Check state laws: may not be required if you are a sole proprietor and will ***not*** sell books ***directly*** |
|[ ]  Create business banking account | If you are in business, you absolutely want to separate this from your personal account! |
|  | ***Processing payments:*** | Can do this as needed |
|[ ]  Set up mechanism for accepting credit cards | Square? |
|[ ]  Set up PayPal account for receipts/payment |   |
|  |  |  |
|  | **Bookkeeping & budget mechanisms** | **Draft Budget Outline in Project Plan Template** |
|[ ]  Determine whether professional advice is needed | Must know: tax reporting rqmts, bookkeeping & records rqmts |
|[ ]  *(If Required)* Meet with financial or bookkeeping consultant |  |
|[ ]  Define categories to track for tax reporting |  |
|[ ]  Define subcategories for budgeting and income sources |  |
|[ ]  Choose bookkeeping mechanism | Spreadsheet? Online software? |
|[ ]  Set up financial records mgmt system | Scanning receipts? Physical files? |
|[ ]  Draft budget for 1st year / 1st publishing project |  |