

A STEP-BY-STEP OVERVIEW GUIDE TO FIRST TIME INDIE PUBLISHING by DANNY SPRING.

- **Finish self-edits of manuscript.**
- **Send to Beta-Readers.**
- **Use waiting time to research:**
 - **Indie-Publishing process** – join the Alliance of Independent Authors (ALLi), download their excellent indie publishing guide. It’s dense but hugely informative. If you can, leave plenty of time to read it completely before launching. <https://www.allianceindependentauthors.org/>
 - **A note on ALLi** – a lot of services and freelancers offer discounts to ALLi members. My proofreader is a member and offers member discounts; my cover designer offers ALLi discounts on some services (but not services that already have discounts applied).
 - **Research copy and proof editors.** Good resources are:
 - Reedsy.com
 - Publishing Scotland (I’m based in Scotland, hence referencing).
 - Check with local literature and arts organisations to see if they have a database/directory of freelancers.
 - **Research book cover designers.**
 - I used MIBLart and will do so again for Book 2.
 - I also posted on freelancer.com and fiverr.com but became negatively overwhelmed by the volume of irrelevant or inappropriate bidders, who wasted a lot of time and muddled the process for any who might have been appropriate.
 - **Research webhosting costs and packages.**
 - Watch out for offers that seem to be very cheap but then require various additional add-ons. Also watch out for hosts that don’t provide web-building facilities. I had zero web-building skills and couldn’t afford a web-designer so...
 - I used the lowest cost package on GoDaddy, which is more expensive than some other options but provides very easy to use web-building tools/templates.
 - **NOTE: YOU CAN WORK YOUR WAY THROUGH THE RESEARCH ACROSS THE WHOLE OF YOUR EDITING PROCESS BUT I RECOMMEND STARTING EARLY.**
- **Start writing** (or thinking about) **your blurb** – this may take longer to perfect than you think! *You’ll want a copy to go to your proofreader when you send the proof copy.*
- **Write your front and back matter** (copyright page – Reedsy’s formatting tool can help with this; dedication; acknowledgements and author bio). *You may not have decided on your editors and cover designers yet to add to the acknowledgements or bought your ISBNs, but you can add them later. Try to have it all decided by the time you send the manuscript to the proofreader.*
- Make any Beta reader feedback changes, then **send manuscript to copy editor.**
- While working alongside the copy editor, I recommend **starting your book cover design.** You’ll have a reasonable idea of your word count, and the spine size can be adjusted if you end up making larger cuts during the copy edit. *This suggestion is so that you are factoring in miscommunications, decision to change designer etc., all of which*

will impact on the length of time to create the cover. Give it at least 3 months before launch. **You will need to have decided the following:**

- **Trim size** i.e. height and width of book (look at other books in your genre, measure them and check that Amazon and Ingram Spark offer those sizes. NB: Both offer their ‘standard’ sizes but also look at their other options, as the other options are likely to be the publisher standard sizing).
- **Paper type.** Cream is standard for fiction; white is standard for factual/text.
- **Page count.** Just give your designer the Word doc word count and page count for now. Your designer will adjust if necessary, once the book is formatted.
- **NB: Ingram Spark requires a different cover file format than all of the other platforms, so ensure that your cover designer will provide you with the Ingram Spark format as well as the Amazon format** (which will work for any other platforms as well).
- **I opted for a package that provided Amazon and Ingram Spark paperback cover, e-book cover and social media marketing materials** all in the one bundle.
- **If you plan to use purchased ISBNs** (rather than Amazon and Ingram Spark assigned ISBNs), purchase these now (*they can be purchased at any point and it only takes a few minutes, but it’s useful to have them for your proofread and to send to your cover designer to incorporate into the back cover design*).
 - **In the UK, purchase from <https://www.nielsenisbnstore.com/>**
 - **Buy enough ISBNs to assign to each format of the book** (Hardback, paperback, e-book and audiobooks all require their own ISBN, even of the same title).
 - **Purchase your barcode for the physical formats** (if using your own – not required for Amazon and Ingram Spark assigned ISBNs). Note: patronising as it sounds, you do this simply by inputting the ISBN number that you’ve selected from those purchased. *I didn’t even know what went into purchasing the barcode, hence highlighting the obvious!*
 - **Incorporate you ISBN numbers into your copyright page.** NB it is standard to put both the print ISBN and e-book ISBN onto the one copyright page rather than creating separate copyright pages each.
- **Start planning your website** (if you don’t already have one or if you haven’t started already).
- **Once your copy edit is done, send to your proofreader.**
- **Pre pre-marketing.** I didn’t start alerting people to the book’s publishing date until it had published. Start thinking now about how you’ll market the book. Facebook, Instagram and TikTok are (apparently) good resources for indie authors. NB: from my research, the suggestion is to start properly marketing about a month before launch. More on this below. **Start thinking about it all now though!**
- While your proofreader is working through the book, I would suggest that you decide whether you are **publishing wide** (multi-platform), **whether you want to use an aggregator** or just using Amazon and **familiarize yourself with your sales platforms.**
 - **If you use an aggregator, you won’t need to set up separately on all of the platforms below, but it will cost you a fee and lower your royalty yield.** From experience, I would consider using an aggregator when starting out, as setting up was time consuming and some platforms are more complicated than others.

I've set up on all the main platforms now, so I'm not currently considering that option. Refer to the ALLi guide for their recommended aggregators.

- **If you decide to only use Amazon, you can opt in to their Kindle Unlimited option, which allows you to earn per page read (KENP) for your e-book, but you can't then publish your e-book on any other platform.** I haven't done this but I'm considering doing so and removing from other e-book platforms.
- **If publishing wide (as I have), look at the following platforms:**
 - **Kobo** (for e-books). Easy set up. Apparently good for reach in the Far East and areas not covered by Amazon, but I'm yet to make any sales through it.
 - **Amazon** (for print and e-books). Appears complicated at first glance but is relatively easy once you've familiarised yourself.
 - **Ingram Spark** (I used for print and global distribution only, not e-book). The print set up is quite straightforward but I found the account/payments aspect quite complicated due to the tax information requests. More on **U.S. tax** below.
 - **Don't hit 'Global Distribution' until you have launched/published on Amazon.** I thought it was an option button, not a command. It messed a few things up post-launch. You have been warned!
 - **Barnes & Noble** (for print and e-book in the U.S.). Easy to set up (once you're familiar with the U.S. tax side of things).
 - **Google Books** (e-book). You must set up on Google Books if you want your book to appear in the Google Books library. Check which aggregators set up on Google Books if you use the aggregator option. I struggled a bit with this platform, but it was due to me setting up company details that differed from my home address (which I used at set up). **Lesson: if you're a registered company, use your registered address – not your personal address - at set up!** Quite a lot of documentation was required to set this account up, including incorporation documents, so make sure you have these to hand.
 - **Apple Books** (e-book). Again, you will need to set up on Apple Books if you want to sell the book through Apple. I found this set up extremely frustrating due to it being entirely geared towards U.S. authors and companies. **You will need a U.S. tax number for this platform** in addition to the other tax form completion requirements (see **U.S. tax** below). The phone number to get an ITIN (international tax identification number) is: **+1-267-941-1000**. It's not free to call.
- **U.S. Tax forms.** All of the above require you to fill in either an embedded form or a separate form to register for U.S. tax purposes. **NB: if you are a UK based author, you can – and should - apply for exemption from double-taxation under the UK-US tax indemnity agreement.**
 - I was totally confused by this part of the process!
 - **The tax indemnity form required is the W-8BEN (for individuals) or the W-8BEN-E for companies.**
 - The W-8BEN form is quite straightforward and should be used if you are publishing as an individual (i.e. not a limited company). This form appears to be quite straightforward.
 - The W-8BEN-E form contains questions that even my accountant wasn't familiar with! When I have a bit more time, I will post a copy of the completed form W-8BEN-E that I used, with the confidential information redacted. *NB: this form has been completed using the information that I sourced online and is correct to the best of my knowledge. However, it is the responsibility of each author or*

company to ensure that they have completed their own forms accurately and I do not accept any responsibility for any errors or omissions made from copying the information contained in my example form.

- **In addition to the W-8BEN/W-8BEN-E form, Apple requires you to have a U.S. TIN number (ITIN). See above.**
- **NB: The other platforms accepted my UK tax reference as a Foreign TIN, without the requirement of a U.S. tax number.**
- Barnes & Noble requires you to download and send the completed forms separately to them. The other platforms have either the form or a questionnaire style version of it embedded into the site when setting up your account.
- Ingram Spark asks for tax information relating to individual U.S. states. To the best of my understanding, this is not relevant for authors outside of the U.S. and relates to individuals and businesses physically operating in each state.
- **Formatting.**
 - Once you've got your proofread copy and your editing is all done, your book will need to be professionally formatted. If you're releasing both print and e-book, these will require separate files.
 - If you're using drop caps at the start of chapters, only use these in the print copy. Ask your formatter to not use drop caps in the e-book (I say this from experience – it throws the layout out of whack on some e-readers).
 - **Print formatting:**
 - I used a professional formatter (MIBLart again, as they were still designing the cover and I liked their templates).
 - Reedsy has a free formatting tool, if you want to save costs.
 - My proofreader uses and recommended BB eBooks (based in Thailand).
 - **E-books need to be formatted in a .epub file.** ALLi mentions other e-file formats but I've only needed to use a .epub file.
- **Metadata: Keywords and Categories.** By now, you should be beginning to set up your profile and book details on the various platforms. Some will let you populate supporting information before uploading the book files. Others require you to upload the book files before moving on to the supporting information pages. If you can't input the following yet, start thinking about it.
 - **Keywords are used to pull your book forward when readers are searching for similar projects in the search bar** (you probably already know this). They can – and should – be changed at any time. Don't stress about these. If something doesn't work, change it further down the line. You can always edit these.
 - **Categories are used by platforms but, importantly, also by booksellers/stores and libraries. They are finite categories, not author created.**
 - **Ingram Spark's** categories may seem overwhelming and a little difficult to navigate to start with (or that might just be my experience). There are categories and then subcategories, and you can select up to three. Frustratingly, if you're publishing for a YA audience, you need to provide an age range and a grade range. This is mandatory. I find this limiting for targeting older readers, as, to my eye, it looks like the book is **ONLY** suitable for 13-18 year olds. I've challenged this but to no avail.

- **To avoid an upper age limit on Amazon**, don't select an age range when setting up.
 - **If you are publishing as YA, you should use YA as your main category and then the relevant subcategories rather than a mix of YA main category and General Fiction main category. Ingram Spark will not let you publish if you combine those categories.**
- The different platforms offer different set ups for keywords and categorisation. Some allow up to six keywords or phrases, some allow more. Think about what keywords will be best for your book.
- **NB: the key is not stress. You can make changes to both the keywords and the categorisation at any time, even after publishing.**
- **When you have your completed cover and formatted files, it's time for pre-launch checks.**
 - You should now have everything you need to set up fully on the platforms.
 - **Ensure that your cover fits correctly into the cover guide tool on Amazon** (mine didn't and needed resizing after seeing the proof copy).
 - **Also ensure that your barcode meets the sizing requirements on Amazon.** The site won't let you complete set up if it doesn't. NB Your cover designer is responsible for this, but it might be worth confirming with them during the design process. I had issues with the barcode sizing when the cover had to be resized.
 - **Order your print proof copies from both Amazon and Ingram Spark.**
 - When they arrive, check that the cover fits (see above!) and read the full book. Your copy editor and proofreader will have picked up most errors but there will likely be some things that you all missed!
 - My formatter was very patient and happy to make corrections – but be very clear on what and where those changes are.
 - **Check that your e-book formatting is correct.**
 - Look out for:
 - Embedded cover showing on readers when first opening file.
 - Margin lines are correct (i.e. that the indent lines aren't all over the place!).
 - NB: some app readers will mess with the formatting regardless. It drove me a bit nuts, so I compromised my pursuit of perfection by focussing on ensuring that the document looked correct on the bigger-named e-readers.
- **Pre-launch marketing.** I didn't get this right as my own process bottlenecked close to my launch date. Try to start your social media and mailing list (if you have one) campaigns about a month ahead of launch. If you're not on TikTok, gear yourself up to joining and don't fear it. Find your 'thing'. Watch other authors – look at their earlier videos and see how they progressed from clueless to finding their groove. I'm still finding mine but check out @dannyspring on TikTok and see how I've progressed and found a couple of niches. Also, give me a follow, please! It's a number's game on that platform...
- **Advanced reader copies (ARC).** ARC readers receive a free advanced copy of your ebook and write a review. I didn't do this with book 1 but am considering it for book 2. My

understanding is that ARC readers should do this service for free. Google suggests finding them on sites such as:

- **BookSirens**
- **BookSprout**
- **BookFunnel**
- **Publishing Day!** Congratulate yourself. Treat yourself. This is a huge achievement.
 - **Make sure you publish first on Amazon***. See note above about Ingram Spark's 'Global Distribution' button. Don't press it until after you've published on Amazon!
 - *I accidentally published first via Ingram Spark, and it's caused issues with my Amazon metadata that I still haven't been able to rectify. Remember what I said about reading age limitations...?
- **Registering the book.**
 - **BRITISH LIBRARY. It is mandatory** to submit a copy of your published book to the British Library **within one month** of publication.
 - **AGENCY FOR THE LEGAL DEPOSITS LIBRARIES (ALDL).** As above, this is also **mandatory within one month of publication**. You will need to send 5 copies.
 - **Nielsen Title Editor.** I found this very difficult to navigate as an uninitiate. This form contains terms for publishing professionals i.e. category coding that meant nothing to me. I didn't realise, but **you don't need to fill this in. As the book info from Amazon and Ingram Spark is released, that information is automatically migrated to Nielsen Title Editor.** It may take a few weeks, so you may want to complete it yourself, but you don't have to.
- **Marketing.** I'm still learning this. I haven't paid for any marketing yet, other than doing a giveaway on Goodreads, but if you can find a bit of extra cash for a targeted marketing campaign, it's possibly money well spent. Watch out for bogus or inexperienced marketers trying to take advantage though – I've had a couple of approaches in my junkmail that might be genuine but their marketing of their own services isn't very good, so not a good sell for marketing my work! I'm considering an Amazon campaign, but the recommendations are that you have a certain amount of reviews before doing so. The key is to try to build reviews. I'll update in a separate marketing post once I've learnt a bit more.
- **FINALLY:**
- **DON'T GIVE UP MOMENTUM...** But don't let it consume you. I work a full-time job and then create my TikTok, other social media and website content in the evenings and weekends, alongside working towards publishing book 2. It can be all consuming and exhausting, so remember to pace yourself. I am only now learning that to be able to do this longer term requires pacing. Whilst I aim to post 3 x per week on my social media, my aim is to continue to build a fanbase and engagement that can grow as I release more books in the series. If I'm too exhausted to write because I'm only focusing on marketing, that's no use to anyone! **GOOD LUCK, GOOD LUCK, GOOD LUCK!**