

## A-1. SHOPPING FOR SERVICE PROVIDERS

This worksheet will help you do at-a-glance service/feature comparisons among publishing and print service providers.

1. Enter the names of up to four providers you'd like to compare in the Provider row.
2. Check off the boxes indicating available services/features of each provider.
3. Use the blank spaces in the far left-hand column to write in any services/features not already listed in the worksheet. A blank version of the form is also provided, in case you need to create a custom list of services/features to compare; for example, the blank form will be useful for comparing the availability of a range of trim sizes (4" × 6.5", [10cm × 17cm] 6" × 9" [15cm × 23cm], A5, A4, and square), binding types (saddle-stitched, coil-bound, perfect bound) or e-book formats (Kindle, Sony Reader, .mobi) if these items are important to you.

## INDIE AUTHOR GUIDE: SHOPPING FOR SERVICE PROVIDERS

| Provider >                 |                          |                          |                          |                          |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Setup Fee                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ISBN                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| EAN                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Bar Code                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Editing                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Interior Layout            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cover Design               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hardcover                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| POD                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E-Book Release             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iPhone App Release         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Min. Print Run Discount    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Amazon U.S. Distribution   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Barnes & Noble Distrib.    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Expanded U.S. Distrib.*    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Expanded Foreign Distrib.* | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

*\*catalog listings to make your book available for order by brick-and-mortar stores and libraries*



## A-2. COMPARING PUBLISHER/PRINTER UP-FRONT COSTS

This worksheet will help you do at-a-glance, up-front fee comparisons among publishing and print service providers. Remember that up-front fees are just one piece of the total cost puzzle however; also be sure to complete worksheets A-3 and A-4 for each provider.

1. Enter the names of up to four providers you'd like to compare in the Provider row.
2. Within each Provider column, enter the fee charged by each provider for each item listed in the far left column, or zero (0) if there is no charge for the item.
3. Bundled Items: Enter the fee for the entire bundle next to one of the items included in the bundle, then enter bundled next to all the other items included as part of the bundle.
4. Reduced Royalty Items: Some service providers offer certain services in exchange for keeping an extra percentage of the author's royalty. For example, if your standard author royalty with a given company is 25 percent, they may offer an expanded distribution option to get your book into more sales outlets in exchange for your acceptance of a reduced royalty rate of 22 percent. For these items, enter the extra percentage of royalty the provider will keep (in the example just given, it would be 3 percent).
5. Author Copies: Some providers include a quantity of author copies as part of a bundled package; if this is so for any of the providers you're comparing, enter the quantity of author copies to be provided. Do not enter per-copy cost for you to order copies here, this worksheet is only for calculating/comparing up-front fees.
6. Use the blank item slots in the far left-hand column to write in any additional fee items not already on the form. A blank version of the form is also provided, in case you need to create a custom list of fee items to compare.

**INDIE AUTHOR GUIDE: COMPARING PUBLISHER/PRINTER UP-FRONT COSTS**

|                            |  |  |  |  |
|----------------------------|--|--|--|--|
| Provider >                 |  |  |  |  |
| Project Setup              |  |  |  |  |
| ISBN                       |  |  |  |  |
| EAN                        |  |  |  |  |
| Bar Code                   |  |  |  |  |
| Editing                    |  |  |  |  |
| Interior Layout            |  |  |  |  |
| Cover Design               |  |  |  |  |
| Amazon US Distribution     |  |  |  |  |
| Amazon UK/Canada Dist.     |  |  |  |  |
| Barnes & Noble Dist.       |  |  |  |  |
| Expanded U.S. Dist.*       |  |  |  |  |
| Expanded Foreign Dist.*    |  |  |  |  |
| E-Book Release             |  |  |  |  |
| iPhone App Release         |  |  |  |  |
| Expanded U.S. Distrib.*    |  |  |  |  |
| Expanded Foreign Distrib.* |  |  |  |  |
|                            |  |  |  |  |
|                            |  |  |  |  |
|                            |  |  |  |  |
|                            |  |  |  |  |
|                            |  |  |  |  |
| <b>TOTALS</b>              |  |  |  |  |

\*Catalog listings to make your book available for order by brick-and-mortar stores and libraries



### A-3. CALCULATING PER-COPY PRODUCTION COST

There are two calculations you need to do to here. First, you need to figure out what your service provider will charge per copy of the book produced. The next table is for calculating “per-copy production cost”; the equation for this is:

$$\text{(# OF PAGES X PER-PAGE FEE) + PER-COPY FLAT BINDING FEE = TOTAL PRODUCTION COST PER COPY}$$

Note that when counting pages, you must count the front and back of each page. In other words, if you were to tear a page out of a book and hold it in your hands, you’d actually be holding two pages of content from the book: one page of content on the front and one page of content on the back. Blank page sides must also be included in this count.

This is a critical calculation you’ll want to do early on, because high per-copy production costs are often the deal breaker that will prevent you from working with a given service provider.

Three copies of the table are provided so you can compare costs for up to twelve service providers on a single page.

## INDIE AUTHOR GUIDE: PER-COPY PRODUCTION COSTS

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Per-Page Fee                       |   |   |   |   |
| x Number of Pages*                 | x | x | x | x |
| <b>= Page Printing Fee</b>         |   |   |   |   |
| + Per-Copy Flat Binding Fee        |   |   |   |   |
| <b>= TOTAL PROD. COST PER COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Per-Page Fee                       |   |   |   |   |
| x Number of Pages*                 | x | x | x | x |
| <b>= Page Printing Fee</b>         |   |   |   |   |
| + Per-Copy Flat Binding Fee        |   |   |   |   |
| <b>= TOTAL PROD. COST PER COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Per-Page Fee                       |   |   |   |   |
| x Number of Pages*                 | x | x | x | x |
| <b>= Page Printing Fee</b>         |   |   |   |   |
| + Per-Copy Flat Binding Fee        |   |   |   |   |
| <b>= TOTAL PROD. COST PER COPY</b> |   |   |   |   |

*\*Remember that the front and back of each page of a book count as a page when doing these calculations, even if one side of a given page is blank.*

## A-4. CALCULATING AUTHOR COPY COST

Next, you need to figure out what you will have to pay per author copy you order. This is necessary because some providers have surprisingly high shipping fees, especially for shipments outside the United States, and if you intend to hand sell many copies or order many for promotional and giveaway purposes, those fees can become prohibitive.

This can be another deal breaker for authors intending to order a lot of author copies, so it's another calculation to do early on, before you commit to service provider.

Four copies of the table are provided so you can compare costs for up to twelve service providers on a single page.

## INDIE AUTHOR GUIDE: AUTHOR COPY COST

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Production Cost Per Copy           |   |   |   |   |
| + Shipping Cost Per Copy*          | + | + | + | + |
| <b>= TOTAL COST PER AUTH. COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Production Cost Per Copy           |   |   |   |   |
| + Shipping Cost Per Copy*          | + | + | + | + |
| <b>= TOTAL COST PER AUTH. COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Production Cost Per Copy           |   |   |   |   |
| + Shipping Cost Per Copy*          | + | + | + | + |
| <b>= TOTAL COST PER AUTH. COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Production Cost Per Copy           |   |   |   |   |
| + Shipping Cost Per Copy*          | + | + | + | + |
| <b>= TOTAL COST PER AUTH. COPY</b> |   |   |   |   |

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Production Cost Per Copy           |   |   |   |   |
| + Shipping Cost Per Copy*          | + | + | + | + |
| <b>= TOTAL COST PER AUTH. COPY</b> |   |   |   |   |

\* If you're ordering a quantity of books, you will have to divide the total shipping cost by the number of books ordered to determine shipping cost per copy.

## A-5. CALCULATING NET AUTHOR ROYALTY PER COPY SOLD BY BOOKSELLERS

Next, if you'll be selling through any bookseller outlets, whether online or brick-and-mortar, you need to finish up your service provider comparisons by getting some idea of what your net author royalty will look like per copy sold, based on the per-copy production costs you've calculated for each service provider candidate in worksheet A-4. The other key factor in this calculation is the retail price you set for your book. In doing these calculations early on you can accomplish two very important things.

1. Eliminate any service providers whose per-copy production costs are so high that working with them will force you to price your book higher than a comparable mainstream-published book.
2. Zero in on the lowest retail price you can set while still earning an author royalty of at least 15 percent—a royalty comparable to what mainstream-published authors earn—or ideally 20 percent or higher.

The worksheet can also be useful for doing what-if calculations to forecast your author royalty in cases where the service provider offers expanded distribution options in exchange for a higher discount, or bookseller percentage, which signifies what percent of your retail price the bookseller will keep on each sale.

The worksheet has enough spaces to compare up to eight service provider/pricing scenarios.

INDIE AUTHOR GUIDE: NET AUTHOR ROYALTY PER COPY SOLD BY BOOKSELLERS

|                                    |   |   |   |   |
|------------------------------------|---|---|---|---|
| Provider >                         |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| x Bookseller Percentage*           | x | x | x | x |
| <b>= Bookseller Cut</b>            |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| - Per Copy Prod. Cost              | - | - | - | - |
| Provider >                         |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| x Bookseller Percentage*           | x | x | x | x |
| <b>= Bookseller Cut</b>            |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| - Per Copy Prod. Cost              | - | - | - | - |
| Provider >                         |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| x Bookseller Percentage*           | x | x | x | x |
| <b>= Bookseller Cut</b>            |   |   |   |   |
| Proposed Retail Price              |   |   |   |   |
| - Per Copy Prod. Cost              | - | - | - | - |
| - Bookseller Cut                   | - | - | - | - |
| <b>= TOTAL PROD. COST PER COPY</b> |   |   |   |   |

\* Standard is 40 percent, or .40 in this calculation.

## A-6. CALCULATING NET AUTHOR ROYALTY PER COPY HAND SOLD FOR MAIL ORDER

Many authors make the mistake of thinking their net royalty on mail-ordered copies of their books is equal to selling price minus the price the author paid for the book, but this leaves some expenses out of the equation. This worksheet will help you take the added expenses of order fulfillment via mail order into account.

First, there's the shipping expense incurred for the service provider to ship the books to the author. This expense is included in worksheet A-4, Calculating Author Copy Cost, so if you take your calculated Total Cost Per Auth. Copy from that worksheet, the service provider's shipping expense will already be included here.

Next, there's the packaging expense. You must acquire padded envelopes, or possibly small boxes and packing peanuts or other padding material, to pack up your books for shipment to mail-order customers. Generally, you'll have to pay for these items.

Then comes the shipping expense involved in getting the books from you to your mail-order customers. This may vary from shipment to shipment, but you can get an estimated average to work with on your postal or shipping service's website. In the United States, the U.S. Post Office Web address is [www.usps.gov](http://www.usps.gov). The Web address for United Parcel Service (UPS) is [www.ups.com](http://www.ups.com), and FedEx is [www.fedex.com](http://www.fedex.com). These are just the three largest shipping service providers in the United States; there are many more, and it may pay to do some hunting around online for more providers to compare.

INDIE AUTHOR GUIDE: NET AUTHOR ROYALTY PER COPY HAND SOLD FOR MAIL ORDER

|                                       |   |   |   |   |
|---------------------------------------|---|---|---|---|
| Provider >                            |   |   |   |   |
| Total Cost Per Author Copy            |   |   |   |   |
| + Packaging Cost Per Copy             | + | + | + | + |
| + Avg. Shipping Cost Per Copy         | + | + | + | + |
| <b>= Total Cost Per Copy Sold</b>     |   |   |   |   |
| Selling Price                         |   |   |   |   |
| Provider >                            |   |   |   |   |
| Total Cost Per Author Copy            |   |   |   |   |
| + Packaging Cost Per Copy             | + | + | + | + |
| + Avg. Shipping Cost Per Copy         | + | + | + | + |
| <b>= Total Cost Per Copy Sold</b>     |   |   |   |   |
| Selling Price                         |   |   |   |   |
| Provider >                            |   |   |   |   |
| Total Cost Per Author Copy            |   |   |   |   |
| + Packaging Cost Per Copy             | + | + | + | + |
| + Avg. Shipping Cost Per Copy         | + | + | + | + |
| <b>= Total Cost Per Copy Sold</b>     |   |   |   |   |
| Selling Price                         |   |   |   |   |
| - Total Cost Per Copy Sold            | - | - | - | - |
| <b>= Author Royalty Per Copy Sold</b> |   |   |   |   |

## A-7. CALCULATING NET AUTHOR ROYALTY PER COPY HAND SOLD IN PERSON

You can't do this calculation until you've settled on a publishing services provider and one or more sales venues (such as conferences and speaking/signing events) because you must know your actual cost per author copy and the actual costs associated with each particular sales venue.

The costs associated with different hand-selling situations will differ. For example, hand-selling copies to people at work won't carry any additional expense since you'd already be going to work, but traveling to a brick-and-mortar store to do a reading and signing will.

It's not possible to provide a one-table-fits-all set of calculations for hand selling in person. The expense items listed in the worksheet provided here won't apply to every situation, but they provide a good starting point to get you thinking about, and including, all the expenses incurred in hand selling. You may want to use the worksheet to help you decide which hand-selling events will be most cost-effective for you, before committing to any.

Columns are provided for you to compare or track expenses for two different hand-selling events. Enter the appropriate expense in the row for each expense item, then total them at the bottom of each column. Leave any nonapplicable items blank. It's fine to pencil in estimates before a hand-selling event, but be sure to go back afterward and enter actual expenses in ink. That way, you can keep a copy of the worksheet with actual expenses listed for reference at tax time, or for comparing against other hand-selling opportunities in the future.

If you find the first version of the worksheet doesn't cover the expenses involved in your particular hand-selling situation, use the second or third version supplied, and fill in the expenses that are applicable.

A final note: Remember that if your primary purpose in attending a conference or similar event is to hand sell books, you must record all the expenses incurred for the event in a worksheet like this one. All of those expenses must be deducted from any income you receive while hand selling at the event in order to calculate your true net profit for the event.

INDIE AUTHOR GUIDE: NET AUTHOR ROYALTY PER COPY HAND SOLD IN PERSON

|                                                   |   |   |
|---------------------------------------------------|---|---|
| Sales Venue/Event >                               |   |   |
| Location/Address >                                |   |   |
| Date >                                            |   |   |
| Total Cost Per Author Copy                        |   |   |
| x # of Copies Ordered For Event <sup>1</sup>      | x | x |
| <b>= Total Expense For Books</b>                  |   |   |
| Booth/Table Rental or Event Fee                   |   |   |
| Mileage Expense, if Traveling By Car <sup>2</sup> |   |   |
| Parking Fees                                      |   |   |
| Public Transport Expense                          |   |   |
| Flight Expense                                    |   |   |
| Hotel                                             |   |   |
| Taxis, Other Ground Transport                     |   |   |
| Meals or Snacks, Drinks                           |   |   |
| <b>Total General Expenses</b>                     |   |   |
| Venue Cut, for Store/Library Events <sup>3</sup>  |   |   |
| x Number of Books Sold                            | x | x |
| <b>= Total Venue Cut</b>                          |   |   |
| Total Gross Income from Book Sales                |   |   |
| - Total Expense for Books                         | - | - |
| - Total General Expense                           | - | - |
| - Total Venue Cut                                 | - | - |
| <b>TOTAL EVENT PROFIT/LOSS</b>                    |   |   |

1. To prepare for the event, you may have to order author copies of your book. Note that while you may not sell all of the books you've bought for the event, you have incurred significant expense in buying them. Your total expense here is based on the total number of books ordered, not sold, because what you must pay when ordering author copies is a fixed expense regardless of how many you actually sell. If you ultimately go on to sell leftover copies later, you will record your income for them in another worksheet, but the expense for ordering them in the first place belongs here.

If you sell copies from stock-on-hand, pencil in the number of copies you intend to bring before the event, then write the actual number sold in the worksheet in ink after the event is over and adjust *Total Expense For Books* accordingly.

2. The Internal Revenue Service standard for this is \$0.55 per mile; this includes gas and vehicle upkeep expense; remember to include all miles for the round-trip.

3. When hand selling at a retail store or library, instead of having to pay a booth or table rental fee, you will typically be asked to pay the venue a percentage on each sale (usually 10 to 40 percent). Calculate what this percentage will cost you per copy sold based on the price at which you'll sell the book, and enter that figure here.

**INDIE AUTHOR GUIDE: NET AUTHOR ROYALTY PER COPY HAND SOLD IN PERSON**

|                                                  |   |   |
|--------------------------------------------------|---|---|
| Sales Venue/Event >                              |   |   |
| Location/Address >                               |   |   |
| Date >                                           |   |   |
| Total Cost Per Author Copy                       |   |   |
| x # of Copies Ordered For Event <sup>1</sup>     | x | x |
| <b>= Total Expense For Books</b>                 |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
| <b>Total General Expenses</b>                    |   |   |
| Venue Cut, for Store/Library Events <sup>3</sup> |   |   |
| x Number of Books Sold                           | x | x |
| <b>= Total Venue Cut</b>                         |   |   |
| Total Gross Income from Book Sales               |   |   |
| - Total Expense for Books                        | - | - |
| - Total General Expense                          | - | - |
| - Total Venue Cut                                | - | - |
| <b>TOTAL EVENT PROFIT/LOSS</b>                   |   |   |

INDIE AUTHOR GUIDE: NET AUTHOR ROYALTY PER COPY HAND SOLD IN PERSON

|                                                  |   |   |
|--------------------------------------------------|---|---|
| Sales Venue/Event >                              |   |   |
| Location/Address >                               |   |   |
| Date >                                           |   |   |
| Total Cost Per Author Copy                       |   |   |
| x # of Copies Ordered For Event <sup>1</sup>     | x | x |
| <b>= Total Expense For Books</b>                 |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
|                                                  |   |   |
| <b>Total General Expenses</b>                    |   |   |
| Venue Cut, for Store/Library Events <sup>3</sup> |   |   |
| x Number of Books Sold                           | x | x |
| <b>= Total Venue Cut</b>                         |   |   |
| Total Gross Income from Book Sales               |   |   |
| - Total Expense for Books                        | - | - |
| - Total General Expense                          | - | - |
| - Total Venue Cut                                | - | - |
| <b>TOTAL EVENT PROFIT/LOSS</b>                   |   |   |

## A-8 CALCULATING YOUR BREAK-EVEN POINT

Here is where you will calculate how many books you must sell to recoup all the up-front expenses incurred in bringing the book to market. The point at which you've sold enough copies to zero out all the up-front expenses is your break-even point, and every book sold after that starts earning you a profit on the book. The worksheet for this is fairly self-explanatory. Just fill in the various expense items, skipping any that are nonapplicable to your situation and using the blank spaces in the left-hand column to add any expense items not already listed, and do the calculations listed on the worksheet.

Note that this calculation will vary depending on how you are fulfilling book orders (whether through booksellers, by mail order, or hand selling), because your net profit/royalty for each different fulfillment type will vary. Therefore, a column is provided for each fulfillment type.

As before, a blank version of the worksheet is provided for fulfillment situations that don't fit the standard three types covered by the first worksheet.

**INDIE AUTHOR GUIDE: BREAK-EVEN POINT**

| Fulfillment Type >                                                                  | Bookseller | Mail-Order | Hand-Sold |
|-------------------------------------------------------------------------------------|------------|------------|-----------|
| Total Up-Front Costs (see A-2)                                                      |            |            |           |
| + Total Cost of Author Copies to Be Used for Promo, Reviews, or Giveaways (see A-4) | +          | +          | +         |
| + Cost to Package & Ship Author Copies Listed Above                                 | +          | +          | +         |
| + Cost of Promo Materials (postcards, bookmarks, etc.)                              | +          | +          | +         |
| + Cost of Paid Advertising                                                          | +          | +          | +         |
| + Cost of Author or Book website                                                    | +          | +          | +         |
| + Cost of Book Tour                                                                 | +          | +          | +         |
| + Cost of Listings on Showcase Sites                                                | +          | +          | +         |
| + Cost to Register Copyright                                                        | +          | +          | +         |
| + Cost to Set Up Your Imprint or Business                                           | +          | +          | +         |
| + Cost for Catalog/Wholesale Listings Not Already Included in Total Up-Front Costs  | +          | +          | +         |
|                                                                                     | +          | +          | +         |
|                                                                                     | +          | +          | +         |
|                                                                                     | +          | +          | +         |
|                                                                                     | +          | +          | +         |
| <b>Total Up-Front Costs</b>                                                         |            |            |           |
| <b>Divided by Net Author Royalty Per Copy Sold</b>                                  | B          | B          | B         |
| <b>TOTAL NUMBER OF COPIES TO BE SOLD TO BREAK EVEN</b>                              |            |            |           |



## A-9. TRACKING SALES

The purpose of this worksheet is to provide you with a place to track your sales from various outlets so that over time you can get an idea of which sales outlets are, or aren't, working for you, and record notes about your sales. For example, you can make a note of it if you are running a coupon or discounted price at the time certain sales took place, or if certain sales are the direct result of a specific promotional campaign or activity.

You will need to make a copy of this worksheet for each different sales outlet, venue, or event where you've sold books in a given month. For example, if you offer both hard copy and Kindle books for sale on Amazon, you would keep one copy of this worksheet for the hardcopy sales and another for Kindle sales, to better track how each format is selling. Also, you'll start a new set each month so keep additional blank copies of the form on hand.

Many publishing services providers and sales outlets provide real-time sales reporting. For these, you can just look up your sales report and copy down the figures shown. For those who don't report sales in real time, you'll need to fill out this worksheet some time after sales have been reported to you.

Some outlets will report sales per day, others on a per-week basis. Either way, enter the number corresponding to the calendar day for which sales are being reported in the far left-hand column. For instance, if Bookseller A reports sales on a daily basis and your first sale in a given month occurs on the 5th, you would enter 5 in the far left-hand column. If Bookseller A reports sales on a weekly basis, and your first sale in a given month occurs on the 5th, but the last day of that week is the 8th, you would enter 8 in the far left-hand column.

It doesn't matter what weekday you want to count as the first day of the week (Sunday versus Monday), so long as you count each week as seven days and are always consistent in which day you use.



## A-10 TRACKING EXPENSES

Like the previous worksheet, the purpose of this worksheet is to provide you with a place to track your expenses from various sources so that over time, you can develop an accurate picture of where you're spending money on your book project on an ongoing basis. Once you know that, and have a history of sales tracking for at least a few months, you can determine where you're getting the most bang for your buck in terms of promotional and sales activities.

As with the previous worksheet, you'll want to keep blank copies of this worksheet on hand so you can set up a separate sheet for each category or source of expense incurred in a given month, and to start a new set at the beginning of each month. Here are some common expense category/source examples:

- Author Copies for Promo
- Advertising Giveaway/Review
- Sales/Promo Event Registration
- Travel Expense
- Monthly Fees for Website/Maintenance
- Fees for Catalog/Blog Website Listings
- Association/Club Dues
- Professional Magazine Subscriptions
- Contest Entry Fees
- Class/Workshop Fees
- Up-Front/Promo/Platform Expenses When Publishing a New Book  
(see A-2, A-4)

This is only a partial list; your specific expense items and categories may differ. Consult a tax professional for more information on which expenses will be tax deductible in your specific circumstances. Keep some blank copies of the form on hand, and anytime you incur an expense that doesn't fit the category or source listed on worksheets you're already using, start a new one.



## A-11. PROFIT AND LOSS

Here is where you'll total up your monthly earnings and expenses for each month, then total them up at the end of the year for tax filing purposes. This worksheet should be updated with your total royalty and expense figures at the end of each month, according to your sales-tracking and expense-tracking records.

Use the Notes column to keep track of anything you'd like to remember about a given month's sales and/or expenses at the end of the year. For example, if you raised the book's price, offered a discount coupon, temporarily suspended sales, or did a signing event, these will be important things for you to know when you're looking over your monthly and annual totals later on.

INDIE AUTHOR GUIDE: PROFIT AND LOSS FOR YEAR: \_\_\_\_\_

BOOK TITLE: \_\_\_\_\_

| Month          | Expenses | Royalties | Notes |
|----------------|----------|-----------|-------|
| Jan            |          |           |       |
| Feb            |          |           |       |
| Mar            |          |           |       |
| Apr            |          |           |       |
| May            |          |           |       |
| Jun            |          |           |       |
| Jul            |          |           |       |
| Aug            |          |           |       |
| Sep            |          |           |       |
| Oct            |          |           |       |
| Nov            |          |           |       |
| Dec            |          |           |       |
| <b>TOTALS:</b> |          |           |       |

**TOTAL ROYALTIES – EXPENSES = NET EARNINGS ON THIS BOOK FOR THE YEAR**

\_\_\_\_\_ - \_\_\_\_\_ = \_\_\_\_\_

## A-12. CONTACT FILES

Use these sheets to keep information about your book- and publishing-related contacts in a single organized location.











## A-13 AUTHOR PLATFORM ADMINISTRATIVE RECORDS

In this section, you'll find worksheets upon which you can record information pertaining to your author platform activities.

Note that because these worksheets will include website login information, you should keep them in a secure place, apart from your binder of other worksheets.

**A-13.1 AUTHOR OR BOOK WEBSITE (see instructions, next page)**

|    |                                   |  |
|----|-----------------------------------|--|
| 1  | Website Name                      |  |
| 2  | Website URL                       |  |
| 3  | Website Registrar Name            |  |
| 4  | Website Registrar URL             |  |
| 5  | Website Registrar Support Phone # |  |
| 6  | Registrar Site Login              |  |
| 7  | Site Registration Date            |  |
| 8  | Registration Expense              |  |
| 9  | Registration Renewal              |  |
| 10 | Website Host Name                 |  |
| 11 | Website Host URL                  |  |
| 12 | Website Host Support Phone #      |  |
| 13 | Website Host Login                |  |
| 14 | Hosting Setup Date                |  |
| 15 | Hosting Expense                   |  |
| 16 | Hosting Renewal                   |  |
| 17 | Site Admin Name                   |  |
| 18 | Site Admin Phone/Cell             |  |
| 19 | Site Admin E-Mail                 |  |
| 20 | Admin Expense                     |  |
| 21 | Notes                             |  |
|    |                                   |  |
|    |                                   |  |
|    |                                   |  |

1. Enter the domain name of your website.
2. Enter the website address of your site.
3. Enter the name of your domain registrar (examples: Network Solutions, MyDomain).
4. Enter the website address of your registrar.
5. Enter the support phone number of your registrar.
6. Enter your login name and password for your registrar account.
7. Enter the date on which you originally registered your domain.
8. Enter the price you paid for domain registration; this will usually be a dollar amount per year, for the number of years to which you've committed.
9. Enter the date on which your registration expires and must be renewed.
10. Enter the name of your website host (examples: HostGator, Gate); note that in some cases, this may be the same company as your domain registrar.
11. Enter the website address of your host.
12. Enter the support phone number of your host.
13. Enter your login name and password for your hosting account or Control Panel.
14. Enter the date on which you initiated hosting with this host.
15. Enter the price you paid for hosting; this will usually be a dollar amount per month, per quarter, or per year, for the term to which you've committed.
16. Enter the date on which your paid hosting expires and must be renewed. You may prefer to simply enter monthly, quarterly, or annually, as appropriate.
17. If you've hired a site administrator to run the site for you, enter his or her name.
18. Enter the site admin's phone number.
19. Enter the site admin's e-mail address.
20. Enter the rate you're paying the admin; this will usually be a weekly, monthly, quarterly, or annual figure.
21. Use the space provided to enter any notes about your site.







