

**Business Planning for
Editorial Freelancers:
A Guide for New Starters**

Louise Harnby

in association with
The Publishing Training Centre

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CreateSpace edition

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RECENT REVIEWS

This is exactly the book that would-be editorial freelancers need to read before setting up their businesses. Author Louise Harnby gives practical, straightforward business advice and backs it up with portraits of successful editorial professionals. The case studies are instructive and inspiring. I will highly recommend Business Planning for Editorial Freelancers to all of the editors I mentor.

Katharine O'Moore-Klopf, ELS; KOK Edit, USA

Louise Harnby's Business Planning for Editorial Freelancers is a savvy and realistic guide to what, for new entrants, can be a difficult field to enter. Louise combines a business-first approach with a richly informative overview of the profession that will be invaluable to newbies. In addition, the 'practitioner focus' sections are an outstanding feature and enable the reader to learn from several other highly respected figures in the industry. If you're thinking of setting out on the journey to becoming a freelance editorial professional, make sure this is the first book you read.

Hazel Harris, Wordstitch, UK

[...] invaluable to copyeditors who want to run their own businesses, and you can refer to it frequently as you build your empire. It will even teach something to those of us who have been freelancing for a while ... the book is well worth the investment to succeed with your new business.

Erin Brenner, Copyediting.com, USA

Everybody: if you want to be a freelancer, read this book. If you want to be an editor: read it. If you're well into your career and stuck – in need of a direction: read it. This guide will save you tons of time. It will help you shape the path you are on, so you get where you want to be.

Adrienne Mongomerie, Editing by Catch the Sun, Canada

This guide is essential reading for anyone thinking of setting themselves up as a freelance editor or, as Louise Harnby emphasizes throughout, an editorial business owner. With Top Tips and Learning Goals, every area of how to plan your new business is covered in practical terms, backed up by case studies of some of the industry's most successful freelance editors. For those new to publishing, as well as those moving into self-employment with a publishing background, this guide offers everything you need to know to get your business off the ground and moving in the right direction.

Jen Hamilton-Emery, Salt Publishing, UK

With this e-book, Louise Harnby has created a resource both interesting and useful for editorial freelancers embarking on their businesses. Helpful, hopeful, yet realistic about the challenges ahead, this book will leave its readers better informed, and therefore better prepared, for their entry into this highly competitive field. I feel sure that I can speak for production editors in other publishing houses too when I say that despite a well-populated database to choose from, a qualified, trusted freelance colleague is always sure to find themselves inundated with offers of work. Louise has, so far, declined to look into the possibility of cloning her professional self; this book is a valuable enough resource that I take the liberty of predicting that newer colleagues using it to chart their own trajectories will ensure that she does not need to.

Madhubanti Bhattacharyya, Edward Elgar Publishing, UK

I wish your book had been around when I started out with freelance editing. I especially appreciated the 'case studies'. I think freelancers who are starting out will be able to see themselves in some of those stories ... You've also given freelancers helpful action steps for building their businesses, and all of it in a highly readable package.

Corina Koch MacLeod, Beyond Paper Editing, Canada

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ABOUT THE AUTHOR

Louise Harnby owns an editorial business specializing in proofreading for academic and trade publishers. She has worked in the publishing industry for over twenty years, initially with Williams & Wilkins and then for SAGE Publications. The birth of her child and the resulting desire for more flexible working arrangements led her to set up her own company in 2005.

Louise completed The Publishing Training Centre's Basic Proofreading by Distance Learning course with distinction in 2006 and is now an advanced member of the Society for Editors and Proofreaders. As of April 2013, she has over 300 proofreading projects under her belt.

She is the owner and curator of the Proofreader's Parlour, a blog for editors and proofreaders, dedicated to providing information, advice, opinion, comment, resources, and knowledge-sharing related to the business of editorial freelancing.

She lives in the heart of the Norfolk Broads.

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The Publishing Training Centre

The Publishing Training Centre is an educational charity dedicated to the pursuit of excellence in publishing. It grew from a small department at the Publishers Association more than thirty years ago and remains at the heart of the industry.

The PTC's courses are focused on providing specific learning outcomes that are designed to thoroughly prepare freelancers for the work they will be asked to do. All the tutors are practitioners first and foremost, which means that they bring their real-world

experience with them to the courses they teach, enriching the experience for students and making the training more practical.

In addition to its distance learning programmes, The Publishing Training Centre also offers a full range of classroom-based courses covering all aspects of publishing.

Visit its website at www.train4publishing.co.uk for full details.

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INTRODUCTION

If you are considering setting up your own editorial freelance business, this guide is for you. It has been written for those with no publishing background or prior editorial experience – the completely new entrant to the field.

While there are many distinct functions to editorial freelancing – project management, indexing, rewriting, fact checking, language localization, translation, copywriting, editing and proofreading – for simplicity, this guide refers primarily to editing and proofreading, since they are two of the most common points of entry.

Creating a business plan before you do anything else will help you to make the right decisions. Too often I receive cries for help from people saying they've 'gone freelance' but desperately need to work out how to acquire clients, or they're wondering about what training is necessary to get them started. I firmly believe that these issues (and others) need to be addressed before you embark on your business, not after. If you're not convinced, let me share the words of one of the case study freelancers featured in Chapter 10: 'If I did it all over again, I'd do all the business planning and courses before ... I was doing my editorial training, not after. I think this would have given me more confidence in the beginning and prepared me for the reality.'

This guide offers one way of thinking about the steps you need to take to build your editorial freelance business. Your business plan may look very different and that's absolutely fine; after all, people order their thoughts and ideas in different ways. The point, though, is to ask the necessary questions at the beginning, to focus your thoughts strategically, and to think about substantive ways in which you will get your business off the ground. There is too much competition out there to risk not doing so.

Business owner first, freelancer second

It's difficult to imagine a bank, venture capitalist or other financier agreeing to support a business start-up if there's no business plan. The information in the plan demonstrates that the business owner has researched their market, is qualified to offer the service(s) they're selling, has developed a set of realistic financial projections, and understands what tools and skills will be required. This information gives the financier confidence that the business owner knows what they are doing before any capital is invested. It helps them assess risk.

The good news is that setting up an editorial business is unlikely to require external assistance – you will be your own financier. This doesn't mean the approach should be any different, though. Instead, you need to have confidence in you; you need to do your own risk assessment.

Think about the business professionals you have contact with: the electrician, the plumber, the window cleaner. Perhaps you know someone who owns a publishing company, a shop, a mobile hairdressing business, or offers bookkeeping and accountancy services. Like you, they have decided to work for themselves. But do any of them refer to themselves as freelancers? To my knowledge, they don't. Creating a business plan puts your head in the space of business owner first and freelancer second.

Editorial freelancing and beyond

There's nothing wrong with the term 'freelance' as long as you are clear about what level of business acumen is required to run an editorial freelancing company, even if you are the only employee. It's not just an ability to make sound judgements and take the right decisions, but also about embedding a business culture in your way of thinking. If you don't think of yourself as a professional business owner first and foremost, you could be in danger of not acting like one. And if you don't act like one, why would anyone else think to treat you as one?

Being an editorial business owner is more than just a being a proofreader or copy-editor. Business owners take care of their own

accounts; we have a solid understanding of the market in which we are competing and the methods we are going to use to get noticed in order to generate business leads and paid work; we do our own financial forecasting; we organize all of our training and continued professional development (CPD) to keep our skills up to date; and we take responsibility for our tax and National Insurance liabilities to ensure legal, healthcare and pension provisions are met.

In short, we are the owners, marketing directors, sales managers, web development officers, training coordinators, distribution managers, IT executives and financial controllers. And after all of that's sorted out, we do some proofreading, copy-editing, project managing or indexing, too!

Writing a business plan is therefore the way in which we prepare ourselves for the many hats we have to wear.

Structure of the guide

This guide is structured as follows:

- what a business plan is and why you should create one;
- the many worlds of editorial freelancing;
- getting yourself ready for market with training;
- client focus;
- getting experience;
- financial assessment;
- getting noticed – promotion;
- networking;
- the practicalities (hardware, software and tools for the job); and
- case studies: three relatively recent entrants to the field share their editorial business-building stories.

Each chapter begins with a task and a learning goal. These aim to focus your attention on the actions you need to take and the desired outcome. Additional features include:

Practitioner Focus: real-world examples that enable you to see how practising editorial freelancers have applied the learning goal (s) discussed.

Top Tips: useful ideas, resources and tools for you to consider when planning your business.

Key Points: provided at the end of each chapter to highlight core messages for you to consider at planning stage.

Resources: lists of organizations, social media networks, tools, books, online materials and training providers.

Meet the practitioners

In addition to sharing my own experiences, I've also drawn on those of some of my editorial friends/colleagues for the material in the Practitioner Focus boxes. Between us we have a range of educational and career backgrounds, and we specialize in a number of different client types and subject/genre specialisms.

Kate Haigh is the owner of Kateproof. With previous in-house experience managing production (including copy-editing and proofreading) of magazines, she started her freelance business specializing in proofreading for corporate clients, students and academics, though now works for a variety of publishers as well.

Louise Harnby is the owner of Louise Harnby | Proofreader. She specializes in proofreading for social science and humanities books for academic presses, and fiction and commercial non-fiction for trade publishers. Formerly a senior marketing manager at SAGE Publications, she has over twenty years' experience of working in publishing industry.



Top left to right: Kate Haigh. Louise Harnby and Liz Jones; centre right: Nick Jones; bottom left to right: Janet MacMillan, Anna Sharman and Marcus Trower.

Liz Jones owns Liz Jones Editorial Solutions. She has worked as an editor since 1998, and has been freelance since 2008, carrying out all kinds of editorial tasks from project management to proofreading. She specializes in non-fiction trade and educational publishing, with an emphasis on design-led titles, and also works for non-publishers.

Nick Jones owns Full Proof. He started out as an in-house proofreader for Yell in 2004 and built his own freelance business up in his spare time. He left Yell in 2010 to concentrate on Full Proof. He specializes in proofreading for academic and corporate clients. He also provides copywriting services to businesses.

Janet MacMillan is the owner of Janet MacMillan Wordsmith | Editor | Proofreader | Researcher. Having been a practising lawyer for twenty years she offers specialist legal editing services for publishers, law firms and academics. In addition, she specializes in editing and proofreading social sciences, humanities and business books, articles and conference papers for academic presses, researchers, NGOs and think tanks.

Anna Sharman owns Anna Sharman Editorial Services. She specializes in biomedical science journal papers, offering editing, proofreading and editorial consultancy for publishers and independent researchers. Following a PhD and postdoctoral research in developmental/evolutionary biology, she was a journal editor on three different journals before setting up her own business.

Marcus Trower is the owner of Marcus Trower Editorial. He specializes in editing genre fiction for independent authors and publishers, including 47North and Thomas & Mercer. Formerly he was a journalist, writing and sub-editing for magazines and national press.

1 WHAT IS A BUSINESS PLAN AND WHY SHOULD YOU CREATE ONE?

Any editorial freelancer who made a success of their business without some sort of initial business plan (1) was extremely lucky or (2) already had experience in the field and some ready-made contacts. I would put money on the second. If you are a new entrant to the field of freelance editorial work, developing a business plan is definitely sensible, and probably crucial.

A business plan is a document written by you that clearly outlines the tasks ahead, the objective/goal of each task, and some information about how you are going to achieve each one. It can be as detailed as you need it to be. It's also a dynamic tool – you can add to it as you complete each step or as you come up with new ideas and information.

Business planning isn't just about implementation; it's about consideration. By giving yourself the space to plan, you provide yourself with the opportunity to think about the different options available to you both now and in the future. Some of your ideas will be acted on, while others will be discarded as you embark upon your editorial freelancing journey. The decisions you make will reflect your business needs, your personal history and your personality.

Creating a business plan is something you do for yourself and for the future success of your business. Freelance editorial work is highly competitive, and you are more likely to succeed if you are clear about where you are going and what you need to do in order to get there. Your business plan forces you to think strategically about the field you are entering, who your target market is, what training and skills are needed, how long it may take you to build up your enterprise so that you have the amount of paid work you need, what resources are required, and how you will sell yourself.

In essence, a business plan is a like a roadmap – it allows you to explore and plot the various routes you can take to reach your destination.

The following statement from Lee McQueen, 2008 winner of *The Apprentice UK*, is often quoted, but I wholly endorse the philosophy and feel it encapsulates the aims of this guide:

‘Business planning is important to making the right decisions for your business, whatever the size ... It shouldn’t need to be complicated, but [it should] be effective so it can be followed and tweaked along the way – the fact is, if you fail to plan you plan to fail.’

2 THE MANY WORLDS OF EDITORIAL FREELANCING

Task: decide which aspects of editorial freelancing you want to focus on.

Learning goal: to ensure your further planning is targeted with the appropriate roles in mind.

2.1 Understanding the field

For convenience, I discuss editorial freelancing in terms of copy-editing and proofreading because these are two of the most common entry points. However, the field extends well beyond these functions: project management, indexing, substantive editing and rewriting, developmental editing, copywriting, fact checking, language localization, translation, manuscript assessment, editorial consultancy and document formatting are all aspects of editorial freelancing.

Investigate the differences between these roles if you are unsure of what they mean. Your national/regional editorial society will offer advice.



TOP TIP

The UK's Society for Editors and Proofreaders, for example, offers some sound guidance on the differences between copy-editing and proofreading in the FAQs section of their website. However, it's worth being aware that, particularly outside of the mainstream publishing industry, the line between the two roles can blur.

2.2 What's your focus?

Some freelancers offer all, some or only one of these roles. I am strictly a proofreader. Anna Sharman offers proofreading, editing, formatting, consultancy and assessment services. Liz Jones offers project management services in addition to proofreading and editing. Nick Jones includes copywriting in his portfolio. Which services you decide to offer will depend on your experience and interests.

- Perhaps you are intrigued by the intricacies of indexing, in which case you could build your business planning around this as well as, say, proofreading.
- If you like the idea of working more in-depth with a manuscript, over a longer period of time, and with regular and intensive author contact, you may be more suited to editing than proofreading.
- If you have a journalistic, writing or marketing background, you may be able to diversify your business by offering substantive editing, rewriting or copywriting services.
- If you are new to editorial freelancing but already run your own business in an unrelated field, or you've worked for a company where your key responsibilities included controlling multiple deliverables, you may feel that will want to explore offering project management services further down the line.
- If you have proficiencies with particular software packages (e.g., InDesign) you should consider incorporating these into the skill set you advertise.

Use your business plan to review your interests and skills and decide what you are going to focus on. This will determine your training requirements, client focus and market research.

2.3 Multi-skilling

Having a number of strings to your editorial bow can help you access multiple revenue sources. Take care not to run before you can walk, though. Substantive editing and project management are probably only advisable for the more experienced freelancer who knows their way around their core clients' business and understands how that section of the market operates. On the other hand, it would be foolish not to take advantage of an already-existing skill set. If, for example, you're confident in your writing ability, are fluent in a second language, or you have experience of delivering sharp, product-focused copy, then use the opportunity to expand your business remit accordingly.

To review some of the training opportunities for a range of editorial freelance roles, take a look at the Resources section at the end of the guide.



PRACTITIONER FOCUS

Marcus is an editor who specializes in working for independent fiction authors. Marcus refers to the service he offers as copy-editing and, for him, this includes a level of developmental work that others working in different subject areas might consider beyond a copy-editor's remit. So Marcus will attend to aspects of scene setting, characterization and point of view (POV) and flag any issues that are still apparent at copy-editing stage. His aim is to help writers consistently apply decisions they've made. For example, they may not realize that they've described all the characters physically in a scene except one. Or they may not realize that they've slipped into