

# Rates, Data Tracking, and Digital Efficiencies

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If you're a proofreader working for agencies or publishers on typeset page proofs, you may believe that you're worse off financially than you used to be. This may be because:

- Your client has increased its rates but **not in line with the cost of living**, so in real terms you're still not being rewarded as well as you were in the past. You're worse off.
- Your client's rates have remained the same year on year, so in real terms, again, you're **not being rewarded as well as you were in the past**. You're worse off.
- Your client has **reduced the hourly rate** — real terms or not, you're worse off.
- Your client offers a fixed fee for the job, based on the number of pages in a set of proofs, and the page rate is the same or slightly higher than in previous years,

*Why proofreading for publishers and packagers doesn't have to be an unprofitable business venture.*

but the font size has decreased and there are, on average, more words on a page.

The increased number of words per page offsets the static or increased page rate such that, overall, you're **proofreading more words for less (or the same) money**. You're worse off.

These aren't the only scenarios but they're the ones I've heard discussed often.

# 1. Tracking the data

If you're not tracking your data, you can't begin to work out whether your business is **sustainable** let alone whether one particular client remains a valuable asset that you wish to retain.

Your data-tracking system doesn't need to be fancy — an **Excel** spreadsheet might be all you need — but it should enable you to evaluate the health of your business, perhaps on a client-by-client and year-by-year basis. The reason I like Excel is because it gives me complete control over which data I collect and how I organize the information.

There are other options that are designed specifically for the job of business-performance analysis, though you'll have to pay for them.

One example, favored by Rich Adin, is **QuickBooks Pro**. Take advantage of free trials before you invest in expensive software, though. There will be things that you can do easily in, for example, Excel that are fiddly in paid-for programs, and vice versa. You might prefer to use different tools depending on what you want to find out.

*The collection of data can help direct your business into the areas that are most lucrative for you.*

**RICH ADIN, AN  
AMERICAN EDITOR**

When you've **recorded your data over a lengthier time frame**, say a year, you'll be in a position to start assessing what works and what doesn't, depending on your circumstances.

For the specialist proofreader this could provide insight into **which areas of work are most profitable** (e.g., academic compared with trade publishing) or which client types (e.g. businesses compared with students or publishers).

See 'The Business of Editing: Recordkeeping II', by Rich Adin.

## 2. What Should You Keep Note Of?

Says Allena Tapia, “The variables that you track will depend on the things that are most important to you. You’ll likely play with these variables over the years, adding some and letting go of others” (‘Bookkeeping for Freelancers — Exactly What Should You Track?’).

Sometimes our clients will be transparent about the changes in the fees being offered for proofreading page proofs, but sometimes changes to, for example, design (and the impact these have on rates) are only discernible if the proofreader keeps track of the data for each project — for example, number of pages, size of page, words per page, hours spent on the job, fee earned for the job.

Think about what’s important to you, or what might be important to you in a year’s time, when deciding what to record.

My project data spreadsheet is Excel-based and tracks every project I’ve worked on in a particular financial year. It includes information such as:

*“The variables that you track will depend on the things that are most important to you.”*

**ALLENA TAPIA**

- month in which the job was carried out
- author
- publisher
- invoice number
- date of invoice
- payment due date
- date of actual payment
- pages
- word count
- £/1000 words
- £/page
- words proofed per hour
- pages proofed per hour
- total hours spent proofreading the project
- agreed total fee
- the (sometimes extrapolated) hourly rate

I can manipulate the cells using **filters** so that I can see monthly and yearly totals. Or I can sort by client and compare particular variables.

Previous years' spreadsheets are similarly designed so I can **cross-compare** to see if there have been changes over a longer time frame.

Collecting data for many **different variables** is essential because I'm not always comparing like with like when looking at various projects.

Some clients offer me **per-page** rates, some offer **flat** rates, some offer **hourly** rates, and sometimes I **set the fee**; page sizes and font sizes differ; and the approximate number of words on a page varies a great deal.

By recording different variables, I can, over time, extrapolate information that enables me to build a picture of where the **financial value** lies in my client base.

I'm always particularly interested in extrapolating **what I earn per hour** because that's the time I could be doing something else (e.g., working for a different client or doing my laundry).

I'm also interested in what I earn overall **per month** and **per year**

because those are the figures that I hold up against my monthly and yearly outgoings — this tells me whether my business is sustainable overall.

Don't forget that by tracking the data more broadly you'll become a **better estimator**, too, as Adrienne Montgomerie reminds us in 'Track Your Pace to Estimate with Confidence' (Copyediting.com, 2014).

For a more thorough discussion of tracking, see Rich Adin's "Business of Editing: What to Charge (Part III)" (An American Editor, 2013). In it, Adin takes readers through the process of how he tracks the data necessary to determine his **'effective hourly rate.'**

Adin has addressed issues of what to charge, how to track data, and how to extrapolate an effective hourly rate extensively on his blog.

There's a great deal to absorb but it's a wise editorial professional who'll take the time to do so.

See also Melanie Thompson's **Pricing a Project** (Society for Editors and Proofreaders, 2013).

### 3. 'But the Rate's Not Fair ...'

Considerations of whether your client is being fair are of little help.

**Publishing is a fluid industry.** It's operating in a climate where there are ways for authors to publish that bypass mainstream publishers, and in a world where what it means 'to publish' is constantly being redefined by both the presses themselves (e.g., online vs. print; journal vs. article; bundle vs. single product; open-access initiatives) and the authors.

This article, "The State of the University Press," is a case in point (BookBusiness, 2014).

Furthermore, publishers are businesses facing the same challenges that all businesses face — how to keep costs low and quality high in a way that means they can continue to do what they do both now and in the future.

*More important than fairness is necessity.*

*Considerations of whether your client is being fair are of little help.*

The impact can be felt directly by the freelance proofreader because keeping editorial production costs as low as possible is one (and only one) way in which some publisher clients and agencies might seek to address the economic challenges of publishing.

More important than fairness is necessity. What I **need** to earn and what I **want** to earn are two different things.

And even if a client's rates are meeting my requirements, I may still think that the fee is not in line with the value I bring to the table.

**But what can we do if earnings are below what we either need to earn or want to earn?**

## 4. In-house Project Manager (PM)

You might be able to negotiate a better fee for the job with in the PM.

Even if your negotiations don't end up in the rate increase you wanted, at least you'll have a clearer understanding of why the press's rates have either decreased or not risen in line with the cost of living.

Any decision you make thereafter will be informed by knowledge of the press's business concerns.

One mistake inexperienced editorial professionals make when setting about negotiations is lack of preparation. The 'it's not fair' approach is unlikely to be persuasive.

Your PM may be sympathetic to your plight, may even acknowledge that many of her freelancers are feeling the pinch and that the editorial fees she's offering are

*Use maths not fairness to justify fee increases.*

*Don't make the mistake of being ill-prepared for the negotiations.*

making it difficult for editors and proofreaders to sustain a viable business.

However, unless you can give her substantive reasons why she needs to go down the negotiation route (as opposed to simply offering the job to some other freelancer who won't quibble about the fee), your frustrations are likely to get you nowhere.

Instead, tell your PM why the project is worth more money. **Do the sums** where necessary so that she understands why she should pay more.

An example might be if there's been scope creep on the project because the book hasn't been copy-edited sufficiently.

## 5. Elect Not to Work for the Press

As independent business owners, proofreaders have the right to choose with whom they work. If I'm unhappy with the rates a publisher is offering, I can decline the work and seek out better-paying clients.

Though I'm constantly marketing my business in a bid to make myself discoverable and interesting to new and better-paying customers, letting go of an existing client is an option I only want to employ when all others have been exhausted.

## 6. Introduce Digital Efficiencies

This is my preferred option.

Finding efficiencies is especially important if I'm dealing with a long-term client who provides regular proofreading work that I enjoy doing and that adds value to my portfolio.

Not all of my publishers provide me with an income-per-project that works out at my preferred rate (what I want to earn) or, more importantly, my required rate (what I need to earn)

However, I absolutely love the books they send me and I therefore want to find a way to continue the relationship with them.

*There's nothing  
wrong with finding  
ways to work with  
lower-paying clients.*

### Introducing Digital Efficiencies...

Recently, I chatted with a colleague about rates. We have a common client and he'd noticed that the page rate had decreased — so we're proofreading the same number of words per page as two years ago, but for less money. In theory, we're worse off. He certainly thought he was worse off.

However, I looked at my project data spreadsheet and it told a different story.

My spreadsheet showed that my extrapolated hourly rate for this client was higher than it was two years ago, to the extent that I was **better off in real terms**.

Importantly, it was in excess of my required effective hourly rate. Even though I was earning less per page, I was still getting a higher overall reward for the time I spent working for this client. How could this be? I didn't think I was worse off.

Something that emerged from my discussion with my colleague was that I was **utilizing digital tools**, whereas he was not.

I believe that this is how I've managed to ensure that my extrapolated hourly rate has increased to the extent that I'm better off.

I've become **more accomplished at using these tools**, too, so any efficiency gains aren't one-off — there are marginal benefits to be accrued.

*Always ask for a  
PDF when  
proofreading for  
publishers.*

### **PDFs, Proofreading, and Saving Time ...**

Not all my publisher clients want me to mark up the PDF version of a proof; some still want hardcopy annotation. But all of them send me a PDF, and that means I can still introduce efficiencies. Here are just some of the ways that I think working with a PDF saves me time:

- **Chapter headings/drops:**

The PDF proof usually comes with each chapter bookmarked. If it hasn't, I do this myself.

Clicking through those bookmarks enables me to check in seconds that the chapter drops, and the font and size of the chapter headings, are consistent.



- I don't waste valuable time thumbing manually through, say, 350 separate bits of paper, sticking Post-it tabs to the chapter-title pages, and measuring or cross-comparing the pages, while trying to ensure the whole lot doesn't end up on the floor (it has happened!).
- **Reference checking:** Even if you don't use something like the fabulous ReferenceChecker (one of my favorite tools — though you'll need to dump the text from the PDF into a Word document first), it's much quicker to search for an author's name in the PDF, and click straight through to the references/bibliography, than manually fiddling with bits of paper.
- **Global searches:** We can do superfast searches for erroneous spaces before colons, semi-colons, and full points; and for possible problematic words such as 'pubic', 'manger' and 'asses'.
- **Other layout issues:** Using a PDF, it takes seconds rather than minutes to search for and check the positioning and styling of figures and tables, running heads, page numbers, and word breaks at the end of recto pages.

*Ask if you can do onscreen markup using stamps or the PDF editor's onboard tools.*

The same applies to checking that the text on facing pages is balanced, as well as spotting widows and orphans.

### **Other Digital Efficiencies**

- **Onscreen markup:** Ask your client if they'll accept onscreen markup of PDFs.

Even if they don't like the idea of extensive use of the comment boxes, you can utilize proofreading stamps.

These enable you to provide a digital version of a paper markup.

For more information on PDF proofreading take a look at Roundup: 'PDF Proofreading Stamps (quick-access links)' (Proofreader's Parlour, 2012); it includes further valuable links to relevant resources

(and advice) published on the websites of my colleagues Adrienne Montgomerie and Katharine O'Moore-Klopf.

- **Digital delivery:** Following on from that, if your client allows you to mark up onscreen, you can simply email the marked-up proofs.

Consider how much time you spend dropping projects off at the post office or waiting for couriers to arrive.

If you are proofreading on a fixed-fee basis, that's a cost to you, and it's time you could be doing other billable work or drinking your favorite tea.

- **Utilize online dictionaries** to check word-break preferences, spelling, hyphenation, and style preferences. It's quicker than thumbing through printed reference guides.
- Use **additional digital tools** such as macro suites, word-list generation tools like **TextStat** (See 'Revisiting an old favourite: TextSTAT, word lists, and the proofreader', and consistency checkers (e.g., **PerfectIt**) when it's appropriate to do so. They save you time while increasing your hit rate.

## **Toyota Does It; Shouldn't We?**

UK readers may recall an episode of Digby Jones: 'The New Troubleshooter' (BBC, 2014).

In a bid to help a Durham-based electronics manufacturer, Ebac, British business ambassador Digby Jones took the owner to a Toyota factory to learn how staff have introduced even the smallest efficiencies to improve their productivity and profitability.

Nothing in the factory was left out of the mix — from the layout of the factory floor to the use of high-tech equipment.

If a change in process could help turn minutes into seconds, it was considered worthwhile. In other words, it's about marginal gains.

If Toyota does it, why shouldn't the proofreader?

When we track and add up all our saved minutes, the total can have a significant overall impact on the time it takes us to complete the work we do.

**Using digital tools isn't the only way to introduce efficiencies, but it's an obvious one to start with!**