THE INDEPENDENT PUBLISHING CHECKLIST

A practical, step-by-step guide from finished draft to book launch

FORD MOUNTAIN PUBLISHING
Publishing with heart, for dreamers of every age.

Use this checklist as a working document. Not every step applies to every book, and some steps may happen in a different order depending on your publishing route.

Project: _____ **Target publication date:** _____

Publishing route: ☐ Traditional ☐ Independent / self-publishing ☐ Small press / hybrid services ☐ Still deciding

Before you begin: five decisions to make before you spend money

- ☐ **Why am I publishing?** A family keepsake and the first book of a planned series need very different budgets.
- ☐ **How much control do I want** over the cover, price, and release date?
- ☐ **What is my timeline,** and is there an event or date the book must be ready for?
- ☐ **Which formats, and where?** Ebook only, paperback, hardcover, Amazon only, or bookstores too.
- ☐ **How much can I spend without needing it back soon?** Write the number down before you talk to any service provider.

1. Finish and assess the manuscript

- ☐ Complete the draft and save a separate backup copy.
- ☐ Revise for structure, pacing, clarity, continuity, and intended readership.
- ☐ Confirm that permissions are in place for quoted, reproduced, or adapted material where required.
- ☐ Decide whether you need beta readers, a manuscript assessment, developmental editing, copyediting, or proofreading.
- ☐ Finish developmental, line, and copyediting before final formatting. Save proofreading for the formatted pages (step 5).
- ☐ Run a final consistency check for names, dates, terminology, headings, and chapter order.

2. Set your budget and production plan

- ☐ Choose a realistic publication window and build in time for revisions and proof corrections.
- ☐ List one-time costs, per-copy costs, recurring subscriptions, and optional marketing costs separately.
- ☐ Get written quotes for professional services and confirm what each quote includes.
- ☐ Decide what you will do yourself and where professional help is worth the expense.
- ☐ Set aside a contingency amount for unexpected revisions, shipping, or reprints.

3. Prepare the book's identity and metadata

- [ ] Finalize title, subtitle, author name / pen name, series name, and series order.
- [ ] Write a concise book description and author biography.
- [ ] Choose relevant categories and keywords based on the book and its intended readers.
- [ ] Confirm trim size, approximate page count, interior ink, paper, and binding.
- [ ] Prepare a master metadata sheet so details remain consistent across platforms.
- [ ] Confirm that cover art, fonts, photographs, and other assets are licensed for the intended use.

4. Copyright, ISBN, and legal details

- [ ] Understand that copyright protection and formal U.S. registration are different things.
- [ ] Decide whether formal copyright registration is appropriate; check current U.S. Copyright Office fees and instructions.
- [ ] Decide whether to use a platform-provided ISBN or purchase your own through the official U.S. ISBN agency.
- [ ] Check ISBN requirements separately for each edition and format; do not assume one ISBN covers every version.
- [ ] Prepare the copyright page with accurate rights, edition, publisher, ISBN, and credit information as applicable.
- [ ] Check whether the Library of Congress Preassigned Control Number program fits your book. If it does, apply before publication; the number goes on the copyright page.
- [ ] Review permissions, disclaimers, image licenses, and any applicable privacy or defamation concerns.

5. Format the interior and cover

- [ ] Clean the manuscript file and use consistent chapter and paragraph styles.
- [ ] Format the ebook and print interior for the chosen platforms and trim size.
- [ ] Check front matter: title page, copyright page, dedication, contents, and other applicable material.
- [ ] Check back matter: acknowledgments, author bio, other books, newsletter or website link, and calls to action.
- [ ] Create or commission a cover that meets the chosen platform's technical specifications.
- [ ] Use each platform's current cover calculator or template after page count and trim size are stable.
- [ ] Export the correct files: usually EPUB for ebook and a print-ready PDF for print interiors, subject to platform requirements.
- [ ] Proofread the formatted print PDF and the ebook preview, and correct every error before you upload.

6. Upload and review on Amazon KDP

- [ ] Create or verify your KDP account and tax/payment information.
- [ ] Enter title details, author name, description, keywords, categories, rights, and territories.
- [ ] Choose formats, ISBN options, trim size, ink, paper, and other print settings.
- [ ] Upload the interior and cover files.
- [ ] Use the online previewer and correct every flagged or visible issue.
- [ ] Order and inspect a physical proof when available; check cover, margins, page breaks, images, and readability.
- [ ] Decide whether to enroll the ebook in KDP Select. While enrolled, the ebook can be sold only through Amazon.
- [ ] Set pricing after checking printing costs, royalties, and marketplace rules.
- [ ] Review all details carefully before submitting for publication.

7. Decide whether to use IngramSpark

- [ ] Decide whether wider wholesale distribution fits your goals and budget.
- [ ] Compare current setup terms, print costs, wholesale discount options, returnability, and shipping.
- [ ] Confirm ISBN and imprint decisions before creating the listing.
- [ ] Prepare files and metadata that meet IngramSpark's current requirements.
- [ ] Review the digital proof and order a physical proof where appropriate.
- [ ] If the same paperback ISBN will be distributed through IngramSpark, leave KDP Expanded Distribution turned off for that edition, so the two services do not compete for the same wholesale listing.

8. Final quality-control sign-off

- [ ] Verify title, author name, ISBN, edition, price, and metadata everywhere.
- [ ] Check ebook navigation, links, images, table of contents, and device readability.
- [ ] Check the print proof from cover to final page, including blank pages and page numbering.
- [ ] Confirm that the cover barcode and ISBN match the intended edition.
- [ ] Save final source files, exports, proof notes, receipts, licenses, and platform settings in a backed-up folder.
- [ ] Record the publication date and any post-publication corrections that may be needed.

9. Launch, events, and ongoing marketing

- [ ] Choose a launch approach that fits the audience: online, library, bookstore, cafe, community venue, or event.
- [ ] Ask venues about fees, sales arrangements, setup time, promotion, attendance expectations, and cancellation terms.
- [ ] Budget for author copies, travel, parking, display materials, refreshments, and payment processing.
- [ ] Calculate the number of copies required to break even before committing to a paid event.
- [ ] Prepare a short pitch, event description, social posts, email announcement, and a way to collect reader interest with consent.
- [ ] Check inventory, payment method, signage, and packing list before each event.
- [ ] After launch, track sales, expenses, reader feedback, and which marketing efforts lead to meaningful results.

A note on changing requirements

Platform requirements, fees, and eligibility rules change. Verify details with the official provider before paying or uploading files. This document is educational, not legal, tax, or financial advice. Copyright and ISBN notes are written for a U.S.-based publishing context; authors publishing elsewhere should check their local rules.

Official starting points: copyright.gov · myidentifiers.com · kdp.amazon.com · ingramspark.com · loc.gov