Help for new editors & writers

With a small-business slant

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Disclaimer: This document is not to be taken religiously. Every editor and writer is different, and the same is true of every client. Sift through the pages, and if you find something that fits, feel free to adapt it to your own business. I'm writing this because of the many letters I've received through the years asking for help, and I enjoy sharing.

Contents

Introduction

When I started my business, I intended to support the needs of local small businesses. Because I knew quite a bit about such businesses, I saw many needs as computers became the mainstay of (almost) every office.

When I got my first computer, I made a fascinating discovery: I could correct any errors right then and there. Goodbye, typewriter! What's not to love? Thus, my long relationship with Word Perfect and Word began. I started taking classes: local and online, and the learning never stops. If I learn and grow, I can help my clients be seen in the best, most authentic, way, and that means everything to me.

I've learned that everything is about the client. Nothing trumps the client. If I take on a job, it's up to me to do all possible to reach my client's goals while keeping my client's tone and style as much as possible. It's important to give more than the client asks for, and to see each piece as a work of art.

But before we go anywhere else, I urge you to create a website if you want to succeed in editing and writing. It is the most inexpensive online (changeable) brochure in the business world, and a way to connect with your prospects and also show credibility.

I used to design websites until I looked in the mirror one day and the image looked back at me and said, "Judy, you do very nicely with words, but you are not a designer."

Aw, snap.

Advertising & Public Perception of Editors

Advertising is just one aspect of marketing, and you will constantly be marketing your work in a number of ways: website, social media, business cards, and networking in various ways.

Give advertising a lot of thought. It doesn't often work for people offering services like editing and writing. Some people might say that having a website is advertising, and I agree.

The largest amounts of money I've wasted are through advertising. I actually believed an entrepreneur (in the mid-90's) who *swore* that what she was doing was so cutting edge that no savvy businessperson could help but be intrigued and impressed. What was it? An advertising piece for my business (along with other businesses that were all winners) put on a floppy disk and given to many, many businesses. Guess what? **Total** flop. Lesson learned. I tried other advertising projects, but it seems that the public perception is that editing and writing are *services*, not products, and unlike many services, there is no cookie-cutter rate for editing a document.

As my business grew, it seemed more and more apparent that a website would be critical in connecting with potential clients. I've been blessed to have some real talent design my websites.

Questions from future editor:

1. **Do you use things like Google Analytics or other paid analytical services to test the efficacy of your advertising interventions?** *I use Google Analytics, but don't have "advertising interventions." Advertising is just one component of marketing, and I market my business constantly on the web without paying for advertising. Why not advertise? In part because of how people perceive editing or writing services. It generally tends to be considered highly personal and confidential, and isn't perceived as a commodity. Also in part because there isn't enough of a profit margin in everyday copyediting to spend money on advertising.*

2. **Also, it'd be useful to get a sense of how you divide your time as a sole proprietor in this venture. How many hours are you spending total on the business in a given week?** *Administrative: perhaps one to two hours a week. Editing itself can be as little as one hour a day and as much as six. This depends on jobs coming in. When there is no work, I spend time learning more about marketing, writing, software, design, networking, and researching. The time spent will differ between editors, the type of editing, and the editor's ability to be isolated. Each editor has a different lifestyle and editing rhythm, so I hesitate to give an amount of time as an average.*

3. **Super curious about the rationale behind finding a good match. What exactly does a good match mean? Matched on expectations, or something else?** *Different in every case. **It's generally wise to give a sample of your work at the outset.** Most clients are a great match. Once in a while you'll find someone who is highly critical of what you have edited, and you may find the best response is to thank that person, indicate regret for not living up to expectations, and say there will be no charge. It could mean the client doesn't like the work, or the client doesn't want to pay for the work. You have to be sensitive and yet stay professional. One client has English as a second language. I worked on some web copy for him. He responded by saying it wasn't professional enough. It took some effort and conversation to discover that what he meant was that he wanted the copy to be "more sophisticated and less casual in tone." Now **that** I could do. We ended up being a great match.*

The time to ask questions is before you make a decision on whether you and the prospective client are a match. So (even though it seems tedious), either create a questionnaire for long projects, or find out as much as you can about the end product along with the person's expectations. Here are some sample questions to use, but only if they apply:

a. Before I give you a quote, may I see the draft, or a sample?

b. What is the best way for you to communicate: phone or email?

c. If you accept my quote, what is the deadline for the finished product?

d. Can you give me a few demographics on the people who will be reading this?

e. How do you want the document edited? Using Microsoft Word Track Changes? Using PDF Sticky Notes? Or do you just want the changes I recommend?

Choosing Clients

Any time you have a potential client with a low budget (perhaps as a result of terrible things happening, e.g., just lost a job, etc.), you can be fairly sure that the person can pay very, very little. This person deserves the same courtesy as everyone else, but just be aware that the road you two travel (should you decide to take on the project) may not be the one you expect. That said, sometimes you just know it's the right time to accept a job pro bono.

Also, enquire as to how the client will pay you. In the U.S., companies often mail checks, do a bank transfer or deposit to your bank account, and there is PayPal, but overseas you may have to rely on PayPal, and if the prospect doesn't have a credit card (PayPal accepts credit cards) or PayPal doesn't operate in that person's country, you'll want to point them toward hiring someone in their own area.

You may also want to Google the person contacting you before you respond.

Colleagues

It's a good idea to have a network of colleagues who do complementary work. You need to be able to send people to professional résumé writers, website designers, and perhaps an accountant or CPA.

Definitions of Levels of Editorial Services

Bay Area Editors' Forum is the essence of professionalism, and has an amazing list of editorial services and their descriptions. As they modestly say, the definitions aren't comprehensive or definitive, but they are extremely valuable.

You'll also find that the Bay Area Editors' Forum outlines three levels of copyediting: light, medium, and heavy. Each level has a detailed sub-list that you'll find helpful.

Deposit

Be sure to get a deposit. At least some of the time. It's difficult to say. I've quoted $25 for a job, and the client said, "Great! I'll send a deposit of $15 right away." He did. But he didn't respond when the job was finished and I invoiced for the additional $10. Life is full of adventure.

Editing specialties: ways of presentation

[Take a look at Katherine Williams' writing](#) portfolio, where she breaks down her three main categories into sub-categories. And links each sub-category to a page that gives an example.

Education

There are many ways to learn about your small business, and one that you might find valuable is [Lynda.com](#). They have a Small Business Survival Kit with about 20 courses and over 600 videos. Others include:

1. http://www.wow-womenonwriting.com/55-FC-FreelanceEditingBusiness.html

2. https://larryjordan.com/articles/start-your-editing-business/

3. http://www.ehow.com/how_2223276_start-editing-business.html

4. http://www.the-efa.org/res/rates.php

5. http://beafreelanceblogger.com/editing-side-hustle/

Email

When you are editing or writing a list email for your client, one that is to be used as a marketing tool, consider always having a P.S., and make it interesting. Personal. Many people read subject lines, headings, and the P.S. only. But if you have a great postscript, perhaps they'll go back and read all the content. Also aim for having an interesting, energetic subject line.

Today, most email programs omit the "Read" receipt. When you are sending an important email, like a quote, a completed file, etc., always ask that your email be acknowledged, since so many get lost. Something like this: "Please let me know that you received this message/file/whatever." Or "Please take a moment to let me know you received this message," or "Let me know that you've received this, and thanks!" I wish I had done this more often. If you don't have a response in a day or two, it's okay to contact the person again in case the original was lost in a spam file or trash.

FREE. This is a word you want to flag if you write or edit marketing email messages for your client. Many major email providers automatically trash any emails that have the word "free" in them. They are trying to filter spam for their customers. You can say complimentary, at no cost, or without cost.

Form W-9

(For US residents only) If any one entity pays you over $600 in a calendar year, you must provide them with a W-9 form. Generally, they'll send you one partially filled out, and you only need to add your SS# (if you are an independent contractor) or [employer identification number](#) (EIN) (if you are incorporated

in any way) . . . sign, date, scan/copy, & return. If the company does not send you a W-9, here it is. Fill it out, send it to the client, and keep a record of when you did so. At tax time you will be reporting this company's total payments for services. Keep your W-9 copies so you can always show you're in compliance.

Giving Quotes/Publishing Rates

A future editor asks, **"What's your thought process for adjusting your quote after seeing the document? What things should I look for as justifications for raising/lowering the price?"** *In almost every instance, I **never** give a quote until I have seen a document or the text to be edited. I like the flexibility of being able to quote what I think is the best rate for the client. Sometimes it's hourly, sometimes by the word, and sometimes by the project. I also may choose to give an organization or an educator a discount. So, if you quote ahead of time, and later see that you made a mistake in not reviewing the source, you may have to go with your original quote..*

The fact that there are levels of editing means you may want to switch back and forth depending on need. It's one reason to not publish rates. However, if you know exactly what your editing level is, and have decided on (for example) an hourly rate only, you might want to publish your rate.

Insurance & IRS

If you're working from home, and have homeowner's insurance, you'll need to mention this to your agent and accountant (or whomever handles your taxes). Make sure you have the total square footage of your home and what portion you are using for your business. This is important for insurance and for the IRS. A CPA can be a huge help.

International Work

When quoting service rates to someone from a country outside the US, it is simple and gracious to make very clear the dollar amount. I recently quoted $50.00 and the potential client asked if I meant $50 or $500. So next time, I'll say: *My quote is US$50 (fifty dollars).*

If you should ever want to send (for example) online condolences or congratulations to someone from outside the US, and you're sending an illustrated card, Google first to determine what flowers and colors are acceptable and unacceptable as symbols of the occasion.

Invoicing

You can create an invoice in Word or Excel, but if you want a program that tracks payments, etc., you'll probably like a simple version of QuickBooks, Quicken, or a nifty little program called Busy Bee Invoicing. Your best bet is to download Busy Bee right from the company, although other sites will let you download it. Problem is that those other sites may have other files that download at the same time, which may not be good for your operating system.

WordPress now has plugins so you can invoice right on your website. Here's a good article on the Elegant Themes website with this type of plugin and other things that help. And here's a link for the Elegant Themes website newsletter.

Long or complex document/project

- Is there a style guide? Most of the time, it's just a matter of using good grammar and punctuation, etc., but if the client stipulates a style guide, it's up to you to know how to use it. So, if it's a style guide you're not familiar with, you may want to look at all of your options *before* you commit. Generally, scientific, educational, and medical articles are going to be submitted for publication, and the client has already checked out the rules for writing the manuscript according to a specific format. But not always. And references must be handled according to detailed instructions. You must decide whether to pass this on to someone who is skilled in this particular area, or spend time/money learning something new. Just don't let it be at the client's expense.

- Be sure to do a test run to make sure you're both on the same page. I often send a paragraph or two that I've edited to ensure this project will work. Because of the differences in language and culture, even in the US, it's not uncommon to misunderstand your instructions. Take time at the beginning to get things straight.

Microsoft Word

Reveal Codes

The best Word can do is show you the inner coding, which you find by either clicking the large Paragraph icon which should be in the top Home ribbon, or go to File/Options/Advanced/Display and see the choices you have. You may not want to leave the paragraph/reveal codes on because they can be visually confusing, but they can give insight when a formatting issue appears.

Shortcuts

Use that little strip at the top of most Word screens, the **Quick Access Toolbar**. This feature is wonderful. I have icons for Open File, Close File, Save As, Paste Special, Show Paragraph Dialogue Box, Track Changes, Show/Hide Editing Marks, Comments, and Print. These stay constantly in view.

1. Perhaps you're editing a document that has **two spaces between sentences**. In 99% of the situations, you only need one space (the other was when there was only monospace typesetting). Press Ctrl+H, then in "Find What," type ".spacespace" (meaning press the period, then the spacebar twice). Tab down to the "Replace With" box and type ".space" (meaning press the period, then the spacebar once) – which then gives you the option of making a global change or finding and changing them one at a time. This works well with plain text, but be careful if you have numbers in the document.

2. If you find that **Word isn't showing the top and bottom margins of a document,** go to either Display/Options or File/Options/Advanced/Display/**Show white space between pages** in Print Layout view. *Voila!*

3. Sometimes clients from the Middle East copied and pasted bits and pieces of Right-to-Left Text Direction. Discover how to change back to Left-to-Right Text. Tip 1. and Tip 2.

4. Keystroke for **Undo**: Ctrl-Z. Can be very handy.

5. Keystroke for **Change case**: Shift+F3. Keep Shift held down and tap F3 to get the option you want.

6. Keystroke for **Closing the current document**: Alt+F4.

7. Keystroke to **Repeat last action**: Ctrl+Y or F4 (you may need to use the F-Lock key, introduced by Microsoft in 2001. Or not).

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Styles

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Since Word documents are made up entirely from styles, it's a good idea to know how to use styles. **If you're starting a document from scratch**, and know what you want in terms of setup for the entire document, you can click on Styles/Normal/Modify and go in and make the changes in Fonts, paragraphs, tabs, etc. Later, if you don't like the look, go back and modify Normal rather than the text itself. You may have to highlight certain areas and click "Normal," but that's life. Also, that's why it's good to have things planned (in terms of styles) ahead of time.

Important: Any change in the Styles should affect the entire document. Headings are important. Modify if necessary, and also click "Automatically Update" for all modifications except to Normal. Thus, any time you make changes in a heading, all the headings of that name will automatically change.

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Templates

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Word has TONS of great templates, so if you're asked to do certain types of documents from scratch, by all means go to File/New/Templates and see if there is one that's appropriate for the situation.

Monitors

If you focus mainly on editing and formatting, you'll discover that having two monitors will make a huge difference in your efficiency. You learn how to move files and browser windows back and forth for comparison purposes.

This is kind of tricky, because your posture comes into the picture. If you have two extremely horizontal monitors, you may find that (over time) your neck and shoulders protest. I use one monitor that is almost square, and the other is more horizontal than vertical. I tried having two horizontals, but it didn't work for me.

Pricing, Procedures, & Profits

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Pricing

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How much should I charge? [Definitely download this pdf from Writer's Digest.](https://www.writersmarket.com/assets/pdf/How_Much_Should_I_Charge.pdf)
https://www.writersmarket.com/assets/pdf/How_Much_Should_I_Charge.pdf

How many different ways are there to charge? The above link is full of great information for writers and editors. It will help you understand how rates are created: by the word, page (Word document only, *not* a web page), and double spaced . . . about 250 words), hour, or project. Figure out your hourly rate, then make the others correspond.

I recommend that you do not publish your rates on your website, since you want to have the ability to negotiate. And sometimes you may decide on different levels of charges (for example, for nonprofits and educators). Not publishing rates just gives you more flexibility and an opportunity to visit with prospective clients who may want your services.

Also, look at Cultural Issues in this document.

Procedures

Paull Editing Services spells out some of its procedures, and they are excellent. "Note that Paull Editing Services offers to improve your writing, not to compose text for you. Paull Editing Services reserves the right to refuse any submission," it says. *Kudos!* I sometimes get people who want me to *completely write* a paper or series of papers for a college or university course, but I don't do someone else's homework.

The one concept that heads an editor's list is to try to edit the document to reflect the tone/style of the writer/organization.

Profits

Questions from a future editor on earnings: How much can a self-employed editor reasonably expect to make in this sort of venture? *This is completely out of my range of expertise, as there are many levels of editing, and they can demand various rates.* Bay Area Editors' Forum outlines three levels of copyediting. *Again, this is another reason not to quote rates, as you may be switching from one level of copyediting to another. You won't really know until you see the source. Writing is another issue, and well covered by the following Writer's Digest publication:*

https://www.writersmarket.com/assets/pdf/How_Much_Should_I_Charge.pdf

Punctuation

Compounds:

http://www.chicagomanualofstyle.org/16/images/ch07_tab01.pdf

Quotations in American English and British English:

http://editingandwritingservices.com/quotations-american-english-british-english/

Punctuation Tree

http://grammar.ccc.commnet.edu/grammar/marks/marks.htm

Questionnaire/Questions for potential clients

Consider creating a questionnaire for people who want you to work on a good-sized project. Use any of the questions below that seem to fit the situation. Many of the questions relate to editing website content, and may not be relevant. Create little tables like this so they can respond:

Or copy and paste any questions that might work for your particular situation to start your relationship with your prospective client.

Initial Consultation Interview Questions

Note: answering the following questions are gives me a better picture of you and your business or organization. The more I understand you, the better I can guide you so you can reach your target market. Don't hesitate to skip those questions that don't relate to you.

Today's Date:

Your Business name:

Your Name:

Your Email:

Your Phone Number:

Do you need simple proofing and editing for documents or for a website? Or both?

How will you use my services? Do you have a special way you want me to notate my proofing/ editing/ writing (whatever you hire me to do)? Examples: Track Changes in Microsoft Word; place original words and edited words near each other so you can see the difference; or just make the changes in a Word document and send.

Describe your business in a few sentences.

What are the primary goals for your business?

Do you have a written business or marketing plan?

Do you have a mission statement?

Do you have any paperwork or website links that will help me understand the project?

Describe your target audience/target market (the people you want to become your customers or clients). What are the demographics (income range; age range; professions; interests; etc.)? List anything that will help me understand them.

Please list sites that you especially like, or that are of your competition (if applicable).

What is there about you and your background that sets you apart from the competition? (What gives you a special niche?)

Why should people do business with you rather than with the competition (if there is competition)?

Describe your ideal client(s) What problems do your prospects have that your business solves? What frustrations are they faced with?

What work (or life) experiences do you have that gives you a competitive edge in your business? Include community service, talent, skills, and hobbies.

Do you have a business slogan or "tag line" that clearly describes what you offer in terms of benefits or features? If so, what is it?

What have I missed that will help me help you build a stronger online business or edit your documents more thoroughly?

References

People/Newsletters/Blogs

Richard Becker ~ [Copywrite Ink. Blog](#)

Danny Brown ~ [Blog](#)

Andrea Glass Newsletter ~ [Writers Way Newsletter](#)

Seth Godin ~ [Blog](#)

Audrey Owen, Writer's Helper ~ [Newsletter](#)

Lynette Smith ~ [Website](#)

Articles

[Does Vocabulary Matter?](#) ~ Seth Godin

[Polished Presentations](#) ~ Article about typography/formatting/desktop publishing by Judy Vorfeld

[The simple way to get better at business writing](#) ~ Seth Godin

[The Teaser of Uniqueness](#) ~ by Danny Brown

Résumés and other specialties

There are standards (think style guide) for writing of all kinds, and this includes résumés. I used to include them in my portfolio, but haven't for some time. Human Resources departments are very picky, and I don't want to be responsible for anyone's not getting the right résumé and cover letter done exactly as the latest guidelines dictate. Make friends with someone who belongs to a professional résumé organization and provides evidence of being a competent writer.

Saving Files

You'll have a number of client folders with the clients' names, and in some cases will need to break things down by the month. One of the most important things on your list is this: **once you have downloaded the client document onto your hard drive, do a *Save As* and give it an identifiable name, and put the date in for good measure.** I use one that identifies a file I've modified: i.e., jv-081515-BlogPost-3. You will **always** be safe if you do a Save As, but if you start editing the original, you'll need to download the original again if you Save under the original file name.

Style Guides

[A style guide is a set of standards](#) for the writing and design of documents, either for general use or for a specific publication, organization, or field. (It is often called a style sheet, though that term can have other meanings.) A style guide establishes and enforces style to improve communication.

Definitely visit the above-mentioned Wikipedia link, see how style guides work, and take a look at the titles of some of the best known. Then take a few minutes to Google "style guides for offices." You may be surprised.

When I started my business, the most popular guide for my particular clients was the APA (the American Psychological Association). However, in due time, I had fewer students as clients, and more businesspeople. I lost touch with APA, so I began referring anyone needing APA style to an amazing colleague who knows it upside down and inside out (another reason to seek out other editors). Little by little I immersed myself in style guides, and even had my own generic list if people didn't specify one. These days I edit many medical/scientific journal articles, and the style guides vary with each publication. Great challenge and good fun.

Sometimes a company will hire you and announce that they have a house style guide. This can be a big help. You can then start the document and change the existing Word styles to match those of the house guide. Or the contact person may say "We follow [Chicago](#)." You'll discover that the Chicago Manual of Style is perhaps the most popular and respected style guide in the industry. You can also subscribe to an online version of this superb resource.

Often writers of educational, scientific, medical articles, etc. will let you know that they plan to submit an article to a specific print journal. They should provide links to the author's guidelines, but if they do not, you need to go to the online home of the journal and pull out the journal's writers/authors guidelines. This entire experience can be creative and educational, as you will discover that most publications have special rules for organizing the article, creating acceptable references, and creating tables, etc.

Speaking of scientific/medical/educational style guides, if you work with articles in any of these fields, you will need help with references. An amazing tool for references and citations is [Google Scholar](#). Bookmark it. Play around with it and learn all it has to offer. It could make a difference in your efficiency.

Most clients don't know (or care) what a style guide is, so it's up to you to make sure you follow some guide. For example, if you're working for journalists, and editing many press releases, you definitely

want to use the AP (Associated Press) Stylebook. The U.S. Government has its own style guide, the U.S. GOVERNMENT PRINTING OFFICE STYLE MANUAL.

No need to get obsessed with styles, but it's good to know where to go for guidance. For example, the Gregg Reference Manual draws heavily from Chicago, and it's a wonderful reference. It also has lots of samples of how documents should look. If you can afford only one style guide at first, I recommend Gregg. You can use online resources if Gregg doesn't help. Here are a few good links that have to do with style from my Webgrammar.com website.

1. Addressing People of Title

2. American Medical Association Citation Style

3. APA (American Psychological Association

4. Associated Press Stylebook (they now have an e-newsletter)

5. Chicago Manual of Style Online

6. Citing Electronic Sources

7. Complete Discipline Listing: Purdue Online Writing Lab

8. Council of Science Editors Quick Citation Guide: Penn State

9. Elements of Style

10. The Gregg Reference Manual

11. MLA Style

12. National Geographic Style Manual

13. National Library of Medicine Styleguide

14. Net Lingo Internet Dictionary

15. Spoken and Written Forms of Address for U.S. Government Officials, Military Personnel, Foreign Officials, Nobility, and Religious Officials

16. Webopedia: online dictionary for computer and Internet technology

Website

See the introduction. In the 21st Century, you need a website to properly showcase your abilities . . . and to reach people in need of your specific types of services. WordPress is excellent, because most people can learn to operate it, and it's very user friendly. And even if you need to hire someone to put the site together, chances are the upkeep won't be that much. As always, there are exceptions.

Your Specialties

Be sure to make note of your specialties, if you have any, e.g., banking, finance, construction, wellness, nutrition, technology, transportation, science, medicine, STEM, ecology, education, manufacturing, defense contractors, tourism, sports, restaurants, health, chemistry, economics, nonprofits, religion, media, language, law, engineering, architecture, independent living, human resources, arts, music, etc. Often just a word will resonate with a prospect and give you a chance to show what you can do.

Comments from new editors

1. I recommend a long, high-quality copyediting course. This is essential in providing information about what references to use, styles, marketing, and techniques of good editing. I took the certificate course from the University of California, which was one year and approximately $1,500 for the six required courses, but there are several good ones out there. **Heather**

2. Mentoring: Your advice has been so helpful, and having a copy of your contract has been great, since that's a complicated document. Thanks again! **Heather**

3. [Editorial Freelancers Association (EFA)](): It has been very helpful being part of this group, especially the discussion forum. It's so nice to have access to a whole group of editors with years of experience who are happy to answer questions of all kinds. I've asked a couple questions and gotten some really good answers. **Heather**

4. Sessions with a senior business advisor/financial specialist: These sessions are offered for free by the chamber of commerce in my town. **Heather**

5. Sessions with a career counselor and communications specialist: I've had a couple of sessions with a counselor who has been helping me get ready for phone calls: preparing a list of things to say and practicing it. **Heather**

6. Rates: Setting rates was difficult and still is. The rates on the EFA website weren't very helpful because they are for experienced copyeditors. I needed to know what beginning editors should charge. Also, they had a discussion on the EFA discussion list about rates, and it seemed that people weren't charging as much as the chart showed. So I found an article on the Internet that suggested beginning copyeditors should charge $20 per hour (http://mirandamarquit.com/how-should-you-charge-for-freelance-editing/). That seemed right to me so I went by it. **Heather**

7. Judy's guide is helping me to prepare for a career in editing--and a jump-start to creating my own business--that I never thought was previously possible. Thanks for all of your guidance, Judy! **Michelle**

8. This guide is an amazing tool for anyone looking to start an editing business. The guidance on basic topics such as invoicing, deposits, pricing and advertising is super helpful. These areas are easy to overlook, and are probably the most crucial parts of creating a sustainable operation.

My biggest takeaway relates to the use of advertising in driving volume. Plenty of dollars can be wasted on silly marketing campaigns that do nothing to increase sales. Make sure to read that section to get some great tips on how to sell and market your services. **M. K.**

9. What a helpful website for prospective editors! Thank you. I am contemplating starting my own editing business and found a wealth of great information on your site. I made a list of things I found especially helpful (to me). **M.U.**
   - The Advertising Advice
   - Email Advice
   - W-9 Info
   - Invoicing
   - Templates
   - Blogs
   - Style Guides
   - Samples

10. The things you talk about in the ebook can save a writer or editor a ton of time and money they would otherwise have spent on failed actions. For myself, it was pleasing to finally have a good definition of various levels of copyediting services. I was aware there were different levels, from proofreading for grammar to well-nigh ghost writing, but hadn't had clear distinctions. **WB**

Forms for your use

Please feel free to use any of the forms you see below, and turn them into your own creations. If you need help, [let me know](#).

Your business name

PROPOSAL

Your tag line

disclaimer: I am not an attorney

Jane Doe, dba Your Chosen Name
Street Address
City, State, Zip
Phone: (623) 555-5555
Website:
Email: Alt. email:

DATE: **11/16/15**

Quotation for: company name/name of person to contact
Address or Website or Email or Phone

Project Description of Services and Method of Charging for Services

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In this document, _____ shall be referred to as the "Client" and the party providing the services shall be referred to as "Jane Doe."

PAYMENT FOR SERVICES   Client will compensate Jane Doe for Services based on a $/hr (or $/project). This service includes all support needed. A deposit of $ is required before project start. Subsequent billing will be at the end of the project.

COPYRIGHTED WORKS Client is responsible for giving Jane Doe clean (original) content that is only copyrighted by Client or comes under the Fair Use exemption.

PROOFREADING   Client has the final right of-and is fully responsible for-approval as it relates to content. If Client is not satisfied with the final result, although that result is grammatically correct, revisions may be billable.

RELATIONSHIP OF PARTIES   It is understood that Jane Doe is an independent contractor according to Internal Revenue Service Publication 1976, and is not an employee of Client. Client will not provide fringe benefits, including health insurance benefits, paid vacation, or any other employee benefit, for the benefit of Jane Doe.

WORK PRODUCT OWNERSHIP   Any works, ideas, discoveries, products, or other information (the "Work Product") developed in whole or in part by Jane Doe in connection with the services shall be the Client's exclusive property.

CONFIDENTIALITY Jane Doe will not at any time divulge or disclose in any manner any information that is proprietary to Client. This provision shall continue to be effective after the termination of this Agreement.

TERMINATION. This Agreement may be terminated by either party upon two (2) days written notice to the other party.

Send payments via PayPal to account: – or make checks payable to Jane Doe and mail to address at top of page.

OWNER The above terms are agreed and accepted this _____ day of _____ 2015

Owner Signature:_____

CLIENT: The above terms are agreed and accepted this _____ day of _____ 2015

Client Signature:_____

Note from Judy: you can easily change this to one page by changing the margins, but this gives you an idea of what a simple proposal might look like. I'm using one inch margins and Calibri 10 font.

And be aware that this is a simple agreement between two entities. I'm not a lawyer. **If you want a 100% legal proposal/contract, you will need to hire a lawyer.**

You might want to create your own graphic signature and insert it under "Owner Signature." Make sure the signature is cropped very near the edge so it will fit into the Word line where you'll insert it.

Work Order/Client Sheet

Your company info in this area

Date	
Client Name	Company
Address	
Office Phone	Cellphone (if different)
Email Address	URL
Availability	Preferred communication method
Style Guide	Preferred software

Project Description

Website Name – Business Name		
Start date	Proposed finish date	Charge/hr/job
Host company	URL	
Contact name	Email	Available
Date proposal sent to client	Date signed proposal received	

Client Preferences & Dislikes, etc.

Other Contractors Involved, Contact Info, Email Addresses, Hours, etc.

Estimated Job Cost	$	Fixed Job Cost	$
Less Deposit	$	Less Deposit	$
Approx Balance Due	$	Balance Due	$

COMMENTS

Conference Agenda

[Click to select date]

7:00 pm to 9:00 pm	Registration and Reception

[Click to select date]

7:30 am to 8:00 am	Continental Breakfast
	Opening Ceremonies
8:00 am to 10:00 am	Keynote Addresses:
	[Name, Company]
	[Name, Company]
10:00 am to 10:30 am	Break
10:30 am to 12:00 pm	Presentation: **Sales and Marketing**
	Lunch
12:00 pm to 1:30 pm	Keynote Address:
	[Name, Company]
1:30 pm to 3:00 pm	Presentation: **Competition in the Industry**
3:00 pm to 3:15 pm	Break
3:15 pm to 4:45 pm	Presentation: **Quality Assurance**
6:00 pm to 8:00 pm	Evening Reception

[Click to select date]

7:30 am to 8:00 am	Continental Breakfast
	Keynote Addresses:
8:00 am to 10:00 am	**[Name, Company]**
	[Name, Company]
10:00 am to 10:30 am	Break
10:30 am to 12:00 pm	Presentation: **Employee Motivation**
	Lunch
12:00 pm to 1:30 pm	Keynote Address:
	[Name], [Company]
1:30 pm to 3:00 pm	Presentation: **Running a Tight Ship and Still Having Fun**
3:00 pm to 4:00 pm	Break
4:00 pm to 5:30 pm	Closing Ceremonies

New Company Setup Checklist

COMPANY INFORMATION

Company name:	
Address:	
Telephone number:	
Fax number:	
Date business started:	
Number of owners:	

CHECKLIST

☐	Choose type of business entity. Business entity type: [Sole Proprietorship/LLC/Corporation]	
☐	Select end of fiscal year. Fiscal year-end: December 31	
☐	Apply for IRS Employer Identification Number (EIN), if applicable.	To obtain Form SS-4 to apply for an EIN, go to irs.gov
☐	Register with state as a business.	[Licensing contact information]
☐	Obtain county and city business licenses.	[Licensing contact information]
☐	If corporation, file letters of incorporation. If partnership, create and sign partnership agreement.	[Attorney contact information]
☐	Purchase insurance plan(s).	[Insurance agency contact info]
☐	Create company Web site. Web site address:	
☐	Choose an accounting method: [Cash/Accrual]	
☐	Select and purchase accounting software.	[Software recommendations]
☐	Install and set up accounting software.	
☐	Open a business banking account.	
☐	Obtain a business credit card.	
☐	Consider contracting with payroll processing firm and/or record-keeping firm.	[Payroll service information]
☐	Establish a salary agreement for each owner.	
☐	Establish a retirement plan.	