*[NOTE: UPDATE THE LOGO IN THE HEADER TO YOUR OWN, INSERT YOUR COMPANY NAME WHERE INDICATED, AND UPDATE CONTENT AS NEEDED]*

**AUTHOR ONBOARDING TOOLKIT**

TABLE OF CONTENTS

[Contract](#contract)

[Author Information Sheet](#AIS)

[Publishing and Marketing Timeline](#time)

[Publicity Plan](#pbcity)

[Cover Art Input Form](#cover)

[Communication Tracker](#comm)

[Royalty Tracker](#royalty)

[Quarterly Assessment](#quarter)

**COMPANY NAME** **CONTRACT**

**This page serves as a reminder to add your contract with your author to your author folder with everything else from the toolkit.**

**COMPANY NAME** **AUTHOR INFORMATION SHEET**

**Author Name:**

**Email:**

**Phone:**

**Address:**

**Website:**

**Social Media:** Facebook   Instagram   Twitter   TikTok   Snapchat   Pinterest

**Paypal email address:**

**Birthday:**

**Marketing Info:**

|  |  |
| --- | --- |
| Workshops? |  |
| Blogging? |  |
| Podcasts?/Radio? |  |
| YouTube? |  |
| Book signings? |  |
| Table events? |  |
| Strengths: |   |
| Weaknesses: |  |
| Draw to website: |  |
| Work hours/Availability: |  |
| Network: |  |

**COMPANY NAME** **PUBLISHING AND MARKETING TIMELINE**

|  |  |  |  |
| --- | --- | --- | --- |
| BOOK NAME Pub  | Timeline |  |  |
|  |  |  |  |
| **Task** | **Person** | **Date** | ***(Recommended Time)*** |
| Reader magnet, newsletter | Author |  | *eleven months* |
| Content editing | Publisher |  | *nine to ten months* |
| Revisions | Author |  | *seven to eight months before* |
| Line and Copy Editing | Publisher |  | *five months, maybe more* |
| Cover Designed | Publisher |  | *seven to eight months before* |
| Final Proofing | Publisher |  | *five to six weeks before below* |
| Back and front matter | Author |  | *same as below* |
| ISBN, LCCN, barcode | Publisher |  | *day before below* |
| Formatting | Publisher |  | *three weeks before below* |
| **NetGalley, Kirkus, ARCs** | Publisher |  | *four months (drop dead date three months)* |
| Set up launch team | Author |  | *four months* |
| Line up publicity | Publisher |  | *four months* |
| Social Media posting | Publisher & Author |  | *four to six months* |
| Cover Reveal | Publisher & Author |  | *four to six months* |
| Print Proof Process Started | Publisher |  | *two-three months before* |
| PreOrder Up | Publisher |  | *three months* |
| Plan Launch Event | Publisher & Author |  | *three months* |
| Keyword Research, Metadata | Publisher |  | *three months* |
| Book Trailer | Publisher |  | *month and a half* |
| Finalize cover w/ quotes | Publisher |  | *one month, same as below* |
| Place Book Order | Publisher |  | *one mont POD, longer offset* |
| AMS Ads Started | Publisher |  | *two weeks before* |
| PUB DAY!!! |  |  |  |
| Newsletter with link sent | Publisher & Author |  | *pub day* |
| Social Media posting | Publisher & Author |  | *pub day* |
| Mail book to LOC | Publisher | within 1 week |  |
| Post release marketing plan | Publisher | within 3 weeks | *\*reviewed quarterly* |
| Apply for copyright | Author | **within 6 months** |  |

**COMPANY NAME** **PUBLICITY PLAN**

**BOOK NAME PUBLICITY PLAN**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Event** | **Outlet** | **Details** | **Any Due Dates** | **Event Date** |
| ***Podcast interview*** | ***Drinking with Authors*** | ***Contact: 4 Horsemen Publications*** | ***Record on 3/15*** | ***Airs 4/1*** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**COMPANY NAME** **COVER ART INPUT FORM**

Front Cover

Book title:

Subtitle:

Author name:

Quick summary:

Symbols or themes:

Overall look ideas:

Links to covers, Pinterest boards, IG accounts…:

Spine

Book title:

Subtitle:

Author name:

Publisher: name or logo

Back Cover

Heading:

Blurb:

Review quotes:

Publisher logo:

ISBN:

Price:

Barcode:

COMPANY NAME COMMUNICATION TRACKER

Author Name:

Book Title(s):

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Comm. Type** | **Important Notes** | **Follow Up** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

COMPANY NAME ROYALTY TRACKER

Author Name:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Quarter** | **Title** | **Format** | **Retailer** | **No. Sold** | **Total Profit** | **Royalty** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

COMPANY NAME QUARTERLY ASSESSMENT

**Author Name:**

Book Title:

Notes on sales this quarter:

Notes on expenses this quarter:

Marketing plan for next quarter:

Book Title:

Notes on sales this quarter:

Notes on expenses this quarter:

Marketing plan for next quarter: