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## **Freelance Indexing**

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### **Introduction**

This paper is a practical approach to starting and developing an indexing career.

There is no direct career path into indexing, and most of us discover it through a chance stroke of luck. Indexing is very often done freelance, and getting started is hard as clients are often reluctant to employ someone with no track record of successful work.

Once the work starts coming, you have to develop skills in satisfying clients, which depends largely on listening to their requirements, and making sure you fulfil them. Promoting your indexing service then ensures that you have an adequate supply of work, and, eventually, that you are able to choose the work you prefer at the rates you deserve.

Another benefit of experience is that you have the chance to try a variety of indexing work, dealing with different subjects, clients, and formats.

### **Get started**

It is crucial that indexers have an aptitude for the work. You will discover this early on as you attempt your first projects. Personal characteristics include a reasonable general knowledge, the ability to learn, curiosity, attention to detail, interest in linguistic issues, and the ability to see things from somebody else's point of view.

### **Training**

The next step is to get training. The best way to do this is probably through a formal course run by AusSI or one of the other indexing societies, or as part of training in another field such as Librarianship. Failing this there are distance courses available (eg from the Society of Indexers, UK). A number of fine indexers learnt from their parents or spouses. Indexers working in specialised fields (eg law) and formats (eg databases) might learn on the job.

This training should be supplemented with learning from books, online discussion groups, and personal discussions.

### **Build on strengths**

Most people will not choose to employ a novice indexer unless they have another selling point. This is most likely to be your special subject skills, but could also be your availability, software knowledge or some other skill. Your first marketing effort should be done in the area you are most competent in. If you do not have any special subject knowledge consider your knowledge of users, contacts you have, or anything else that will make you stand out.

I was fortunate that I got my first job as an 'apprentice'; my second came from personal contacts (from an author who was going to do the index herself, until she tried it); my third came in response to an ad for an indexer with a scientific background. From there, it became much easier (although never straightforward).

### **Indexing contacts**

You need contact with other indexers (at least, I do) to have someone to ask questions of, and to share gripes with. Fellow indexers also refer work when they know you. If you are very lucky you might find a mentor when you are starting out. AusSI branches and groups have regular meetings. If you can't make it to these you can have virtual contact with indexers from around the world through Index-L, the Internet discussion group and aliaINDEXERS.

### **Client contacts**

The more potential clients you meet, the more work you will get, and the more you will understand the environment in which you are working. Try attending meetings of the local Society of Editors, or other groups such as Technical Communicators if they work on documents of interest to you.

Try some courses run by these groups for the same reasons – you meet people for a whole day, and you get to learn about things that are important to them. I have been to meetings and a course run by the NSW Society of Editors. I enjoy them, and better still, I have finally met some of the editors for whom I have worked.

Respond to advertisements, even if they don't specifically request an indexer. For example, if a publisher advertises for freelance editorial staff, let them know that you are available for freelance indexing.

### **Advertise**

Advertise your services in documents read by potential clients. This could include periodicals for authors and editors. We have advertised once in the Thorpe Weekly Newsletter (the blue newsletter). An \$18 advertisement brought one new client, for whom we have done 3 jobs. The ad has easily paid for itself. More importantly for me, it has broadened my range of clients to include authors employing me directly.

Join AusSI, become a registered member, and put your name in Indexers Available. Many of my new contacts now come from my listing in Indexers Available.

### **Satisfy your clients**

#### **Find out what they want**

When asked to index a document by a client find out what their requirements are. If you have further queries during the indexing process phone or email them and ask for clarification. Do not assume that there is always a correct answer. Sometimes a decision can be based on a personal preference, and it helps if you know the editor's preferences.

Find out when they need the index. You can also ask for a preferred deadline and an absolute deadline, so you know if there is any leeway (for example if you get sick during the project). Find out if they want you to quote, or if they have a set budget they wish you to fit into.

When you know what they expect, tell it back to them for confirmation. I usually write a letter or email including details of the style and depth of index required, the money agreed to be paid, the number of pages to be indexed, and the deadline.

#### **Tell them if you can't provide it**

If you can't do a job within the deadline or budget available, say 'No'. There might be some leeway to give you more time or money. If there isn't, someone else is better off doing the job. If you don't have the skills to do the job, say 'No'. Far better to wait until you can do a good job, and then keep the client.

#### **Keep records of time and cost**

Keep lists of all the indexes you have created so you can provide details of successful projects if required. Keep records of the time taken and the money paid so you can compare new projects to previous ones. This can also give a useful comparison of indexing speed if you change your approach in some way.

#### **Explore communication options**

Email is a handy way of communicating with clients. We keep an email message open while indexing and type a list of typos and queries as we go. We also send nearly all of our completed indexes by email. If you will be doing this, send a dummy email first to ensure that there are no problems with the transfer.

*Warning: Often the bigger the company, the greater the problems.*

If you buy a fast printer you will also be able to print page proofs instead of having them couriered to you. I know one indexer who routinely does this. We have been asked once to quote for printing at our site, but perhaps the cost of inkjet printing startled them, as they decided to post us the pages instead.

*Shopping list: One fast printer.*

Australia Post Express Post gives cheap overnight delivery to major postal centres.

### **Find out if you supplied them with what they want.**

Indexing must be almost unique among the professions (or aspiring professions) as it can be done totally alone. It would be possible to index for a lifetime and never meet a person you have worked for. (This, of course, is one of the benefits, although it also has its downside).

Because we have so little contact with our clients, it is crucial that we establish communication channels to give and get as much feedback as possible. We have started sending a feedback form (half A4 size) with the completed index or invoice, asking clients if they were happy with the time, cost, and quality of indexing.

Most of the feedback has been positive; all of it has been useful. The most significant finding for me is that what I think is important, and what my client thinks is important, is not necessarily the same thing. Some of the feedback was on areas where there was no right answer, but different approaches. It is crucial to confirm that our approach to a text as the indexer (which we might even assume is the only possible approach) is, in fact, the approach the client wants or expects.

I, and I think most indexers, focus on analysis of the text, choice of appropriate indexing terms, and editing the index to show these terms in the best way. While I am sure clients would say these are important, I don't think they assess them much. Editors focus very much on consistency, and this is also something very easy to check in an index. So an easy way to provide a better product is to ensure that the index is as consistent as possible.

Other feedback has discussed the emphasis given to different areas of a book. It is important to clarify this at the beginning of a job. If a textbook on technology contains text and activities, it is important to check whether they should be indexed equally, or if one part is considered more important than the other.

### **Promote your indexing service**

#### **Provide a quality service**

The best way to keep getting work is to do good work. Editors might remember your name for years even if they haven't needed an indexer.

#### **Remind people what you do**

On the other hand, editors might forget you even if you did a great job for them just last year. Remind past clients that you are still available. (I must admit that I don't do this, but I should. I don't like the idea of losing a good client just because they misplaced my phone number. If I lost them for another reason I would like to hear it).

#### **Keep current clients up-to-date with your availability.**

#### **Tell new people what you do**

It is amazing how many people write books, or know people who write books. So let your friends and acquaintances know what you do. If you are in a literary or academic environment, this would work even better.

#### **Network with indexers and clients**

Network with other indexers as much as you can. Try and pass work on to colleagues if you can't do it. Take your business card to meetings of editors and other potential clients, and gently promote your services.

### **Provide promotional packages**

#### **Brochures, samples, resumes, websites**

Create a simple brochure or handout with details of yourself and your indexing service. Photocopy the first page or pages of published indexes so you can provide samples. If required by clients, tailor a resume for indexing work. (However, most clients are more interested in specific indexing experience than a general resume).

Consider setting up a website with information about your indexing service. The advantage of this is that you don't have to print and post details; clients can choose to look at as much or little information as they require; and you might even get extra work from people who find your website by chance.

#### **Suggest indexes for unindexed materials**

Don't just look for work that exists: create some opportunities yourself. Two people I know indexed periodicals as exercises when learning indexing, and then went on to sell them to the magazine publisher.

Identify documents within your field of interest that should have an index. Prepare a proposal with a brief sample index and a rough quote for the job and send it with a covering letter to the publisher of the document. Try not to spend too long, as it is very likely that the project won't go ahead, but make a decent sample and write a convincing letter.

I have tried this with a university newsletter. I thought it had a chance as they were funding projects for a 50th anniversary celebration, but there were far too many applications and my one failed. I am also planning to try it with a journal in my undergraduate speciality.

### **Vary your work**

#### **Vary subjects, formats, clients**

While I think an indexer should certainly start with their strengths, I would get bored if I only ever indexed in my speciality. The thing I like best about indexing is the variety. I like to dip into the fields of history, pharmacology, management and gardening. I now go past the Northern Beaches, the flour mill on the Lane Cove River, and the Opera House with a special knowledge I gained from indexing books on these places.

My indexing career started entirely with books, usually for commercial publishers. I now have a much broader client base including authors, universities, government departments, corporations, and still (fondly), commercial publishers. I have also, after ten years, had opportunities to index books, databases, periodicals, and websites.

#### **Keep open to new opportunities**

I have found that the opportunity for variety in indexing comes with time. There are not a lot of database or pictorial indexing jobs around (in NSW, in my experience), so you just have to wait for the opportunities to arise. Similarly with web indexing. I'm sure it will increase, but it needs vigilance to identify and catch the jobs which are available.

When you sniff a new opportunity check whether you have the basic skills and then grab the opportunity and give it all you've got. Remember that in a new field such as website indexing you might not have a lot of experience, but then, neither does anyone else.

Indexers might also branch out into editing, bibliography, and thesaurus construction, just as editors and technical writers branch out into indexing.

### **Create new opportunities**

Occasionally indexers create 'after-the-fact' indexes to published works and try to sell them.

One innovative indexer created an index to an inadequate computer book, unfortunately just before a new version of the computer was brought out.

People on Index-L thought that there would be potential to sell an index to a work of cult fiction such as a book by Ayn Rand or Ann Rice, but that there would be problems caused by different issues having different pagination. As more texts move into electronic formats this problem may disappear.

In genealogy there are opportunities for innovative indexing projects, although many of these are done on a voluntary basis.

### **Develop your career**

Increasing experience enables you to command better rates for indexing, to choose varied and interesting jobs, to create new opportunities where you see a need, and to expand the definition of indexing beyond traditional boundaries. Good luck!