The Slice

A Potomac Indexing Quarterly Newsletter

PI Years and Counting

By Seth Maislin

After more than pi years of steady growth, Potomac Indexing has proven that its model of collaborative project-sharing among independent freelance professionals can be successful in the indexing profession.

We have earned the trust of a growing list of publishers and content producers who are impressed with our ability to manage projects of all sizes, in a wide variety of fields, with consistently high quality and, if necessary, under rigorous or unexpected business requirements. Not surprisingly, more and more indexers have joined PI as associates, and for several reasons: in order to tap into a group of fellow skilled indexers with whom they can share projects, to use the group as a backstop when they're too busy, and to refer new business to them when they have a gap in their workload.

So where do we go from here, and how?

Continuing the pace of growth that PI has achieved so far requires branching out. Our vision for PI's future has always included becoming the trusted brand name in more than just indexing. As we keep growing our indexing business, the PI partners are discussing and researching some natural fields to branch into. At the same time, we plan to scale up the model by asking associates to step up and manage projects. This agenda should present more opportunities for associates to both step up into project management roles and to apply their skills in new areas.

We'll also be looking at the reality of bringing on new people to help expand our scope. As we diversify our operations, we need to free up the PI partners to spend more time on business development and on new initiatives. That means we need indexers to be more active in maintaining and deepening client relationships in indexing.

While many of these ideas are about looking to the future, the business reality is that we need to widen and strengthen our foundation. Taking on new business re-

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FINDING BALANCE, PART II:
ASSOCIATES SHARE WORK-LIFE STRATEGIES

Back in the spring, PI partner Kay Schlembach asked her fellow PIPs and PI associates to send in a few paragraphs describing their strategies for maintaining a healthy work-life balance. There were too many responses to run in just one issue of The Slice, *so we are presenting them as a regular feature. Thank you all for sharing such a diversity of ideas and insights—there's something here for everyone. If you don't see yours in this issue, keep an eye on future issues.*

Liz Schlembach
Elizabeth Schlembach Indexing Services, Quincy, IL

Kay asked me to write "a few lines" on "getting it all done." Then she asked for it by the end of the week. I asked her if I could be grouchy, because I'm a bit rushed on a job, and she said yes. But I can't be grouchy with Kay (she's too nice), so by the associative property of communication (I just made that up), I can't be grouchy with you, either.

So how does one "get it all done?" One doesn't. One *prioritizes*. My basis for priorities is to do the most good for the people (human and feline) whom I love most. The means to do good for them comes from working (and making money!), so work comes first. The second priority is "everything else" for them. This includes duties to said loved ones (spending time with them, doing things for and with the elderly relatives at the nursing home, cooking, cleaning, laundry, shopping, household financial).

Obligations to others and activities come third. They are ranked in order of how necessary I am for them. Red Cross duties and bridge games require me to fulfill a specific role or number. Chorus and miniatures club allow more leeway with attendance.

Fun comes last, if at all. I treasure the few moments I can spare for reading, ironing sheets, and working on my dollhouse (a 33-year project, so far!).

This is probably typical of indexers. We are responsible and dependable people, so we do what we have to do before what we want to do. We make lists and cross

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ASSOCIATE SPOTLIGHT:

Joanne Sprott
AfterWords Editorial Services

Born into an air force family while they were stationed in New Mexico, Joanne Sprott can't give a short answer to the question, "where are you from?" Since her parents had roots in New Hampshire, she was drawn to the University of New Hampshire to pursue a degree in linguistics, on her own way to joining the air force in 1979.

She enjoyed the air force lifestyle and stayed on for seven years training intelligence officers, doing situation analysis, and briefing air crews, including a stint in England during the Cold War. That's where she met her husband, who wanted to go to graduate school. Joanne gave birth to her son, John, left England and the air force, and found work at Brown University, in Providence, RI.

An avid reader, Joanne discovered a slim volume, *Careers for Bookworms and Other Literary Types*, which outlined career options in bookstores, libraries, and publishing, including indexing. The flexibility of the career was appealing, because her husband, a geologist, soon moved the family to Houston, where her second child, daughter Marion, was born.

Now remarried (to Matt), Joanne still lives in Houston, and in addition to indexing, standard vocabulary building, and copy editing, uses her training skills to mentor budding indexers and train technical writers in indexing.

How did you get into indexing professionally?

I think I was a natural-born indexer. At age 11, I indexed my parents' *National Geographic* collection on 3"x5" index cards, because they refused to buy the

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quires us to know that our existing business can be maintained. Looking at new industries requires us to clarify our brand. And freeing up partner resources means promoting to responsibility from within.

To find an example you need look no further than the late date of this issue of our newsletter; it's probably even visible at the bottom of this page. We're way behind schedule with this issue and the reasons include every reason you'd predict: production challenges, personnel challenges, authoring challenges. Frankly, publishing this issue didn't stay at the top of our to-do list. But everything I've ever read about marketing says that you just shouldn't drop the ball like that, that communications like this require constant vigilance.

Successful growth demands stability, and so we are examining how we can prepare ourselves for where we want to go. Here are a few of our current initiatives:

More project management. We are looking beyond the partners to our associates so that we can manage more and still-larger projects.

Ventures into emerging fields. Business taxonomy, tools-driven indexing, and other related arenas beyond indexing require new training and new marketing if we're going to raise PI's brand visibility with new audiences and potential clients. We need to grow into these areas, even as some of us are tempted to just jump in and hope for the best.

Adding and developing business skills. Business development, bookkeeping, software development, marketing (including web and social media) are all critical factors in running a business. We're all indexers first, but we can't pretend there's no administrative overhead. All of us have spent considerable effort exploring relationships with business professionals who aren't indexers, such as management consultants and marketing experts, and experimenting with different administrative tools that will improve the speed, quality, and security of our many necessary business tasks.

Adding professional skills. We want to further our growth into consulting and training, and include support of training for both associates and partners. For example, PI has trained several associates in XML indexing and embedded indexing, and we've been increasing our indexing output in Adobe InDesign (thanks to Jan Wright's session at the ASI's 2010 national conference). Two of our partners recently attended a conference focused on taxonomy; at a different conference in 2011, we'll be presenting on ebook indexing. We must (and do) look seriously at the development of new tools that make indexing easier, richer, and more integrated with publishing and information distribution processes.

In past issues of *The Slice* we've talked about putting tools in place to provide infrastructure for expansion. Now, we're looking at human resource infrastructure, scaling up to explore new opportunities. We are formalizing the process to make more project managers out of indexers who are ready to move beyond just indexing. We are bringing in experts with skills far different from ours. And we are allowing our indexing business to flourish even as we continue to cultivate our existing relationships.

Before I close, but on a related note, I want to alert our associates that PI has recently purchased a liability insurance policy. We now have access to the kinds of clients and projects that traditionally aren't available to independent contractors, who rarely carry such policies thanks to their cost and administrative nuisance. Associates who are interested in subcontracting through PI to take advantage of our policy are encouraged to do so. Together we can accomplish more than we ever could as individuals.

Four years is not a long time, but for a company—any company—surviving beyond the first year is a legitimate milestone. And to grow during the Great Recession is also an accomplishment. Potomac Indexing is now looking at the next milestone, the five-year anniversary, so we have necessarily started to lay the groundwork. We thank you, our associates and clients and fellow collaborators, for your strong support, your personal involvement, and the shared optimism in keeping this company both a reality and a success. ∎

Potomac Indexing is looking to our indexers for 2010 Wilson Award submissions. If you feel you worked on something even semi-Wilson-worthy, we want to support you. We will sponsor selected indexes for the Award by: obtaining a physical copy of the book, paying the submission fee, and shipping the materials to ASI's Wilson Committee.

To accomplish this, we need you to do two things:

• Find a final [published] version of your index, for all partners to review. This includes online at Amazon.com or at the publisher's website. If you can't, let us know, and we will contact the client directly. (Write the PI partner you worked with.) We need this to determine whether the client edited the index before publication.

• The final index will be vetted by the PI partners. If we all agree that your index has a shot, then we'll ask you to complete the application on our behalf.

Note: You do not have to limit yourselves to books that you worked on through Potomac Indexing. If you have an index you wrote that we don't know about, we'd still be happy to consider sponsoring it for the 2011 award.

things off as we accomplish them. We do things in a certain order, based on logic. We may not "get it all done," but we do enough. (Poor Kay obviously married into a boring family. I'm the funny one.)

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Carolyn Weaver, *Weaver Indexing Service,* Bellevue, WA

My attitude toward balancing work and life is based on my definition of full-time indexing: having all the work I want to do *in the amount of time I want to do it.* That definition gives me "permission" to turn down jobs that will *force* me to work nights and weekends (e.g., a three-day turnaround for a 600-page medical text), although I often *choose* to work weekends to leave free time in the middle of the week for high-priority items, such as trips to the gym or lunch with friends.

I maintain a master calendar showing all commitments—indexing, ASI, family, and social—and factor in all obligations when deciding whether to accept a job. I'll take work-in-progress with me on a scheduled RV trip, but won't book a new project to arrive the day before we're due to hit the road.

When I am indexing on the road, I have a deal with my husband: work in the morning; play in the afternoon—even though "play" may consist of driving 50 miles from a wilderness campground to the nearest town with WiFi access in order to ship the index. And the campfire at night burns even brighter when I know that the rest of that trip is deadline-free.

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Sandi Schroeder, *Schroeder Indexing,* Bluffton, SC

Combining life as a freelance indexer with your personal life has always been a challenge. It should have eased when we retired to Hilton Head Sun City, but I made it worse when I became social chair of my 271-house neighborhood

We have no children living at home and can pretty much do what we want, such as going out to eat when we are busy. But it seems that there is always someone saying, "ME next." We schedule trips back to Illinois, vacations, and the ASI conference around my work schedule and the social activities I am planning in Sun City. Life gets interesting. But I wouldn't have it any other way.

magazine's annual index. I thought it would be useful for school projects. My mother still has the box in her attic.

When I found out you could do indexing at home and make a living, I was excited. I took both USDA courses and joined the American Society for Indexing, which was a great way to learn about the career and network. It also gave me my first volunteer job, indexing 10 years of ASI's *Keywords* newsletter.

In 1995, when my youngest was three and in pre-school, I had time to work on a part-time basis. I marketed myself to 10 publishers, in a very targeted way, focusing on subjects I was interested in. It took nine months to get my first assignment, which was from Texas A&M Press, still a client. The only marketing I do now is an annual postcard to established clients and to prospective clients. E-mail is less effective, like cold calls, but a postcard stands out.

How has your business evolved over the years?

In 2001, I got divorced and had to build my business up to full-time status, which took about three years. For a while, I found a full-time job in an office as a technical documentation editor, but got laid off and went back to indexing freelance work.

Now, I'm usually as busy as I want to be. My clients are about half scholarly and half technical documentation or textbooks. Publishing used to be seasonal, but not any more—it's all peaks and valleys, very random. This year I established a relationship with a client for nursing textbooks—where I copyedit, index, and proofread. I manage the whole process. It keeps me busy in between other assignments. I do most of the editing myself.

How do you recommend building an indexing business?

Be a generalist. You can find a niche eventually, but if you have advanced academic training in a field, that might give you enough work. Most people need to try out different subjects and learn more about them—it's important to challenge yourself and learn new fields. I find it better mentally to alternate scholarly books with easier material, like computer and how-to books. I also do copy editing and proofing for a break.

What do you like best about indexing?

I like editing and building structure for an index. My approach is evolving these days. I used to prefer highlighting phrases and terms on paper, then entering them into a program. Now I work almost entirely from PDF documents. First, I go through and highlight sections and insert comments—to get a feel for the structure of the book. Then, I go through and edit the structure, thinking about the concepts and creating a more detailed structure.

I work in Cindex, highlighting phrases and words on a PDF, then dragging them using the text edit tool to import them into the indexing program, which keeps accents and makes data entry go faster.

I find data entry tedious, so I try to farm that out. My kids help me sometimes – they're whizzes, and I usually have a mentee who can take on my overflow or assist on projects. I won't work with mentees until they have taken a basic indexing course of some kind. It's really worth the investment.

I've mentored six or seven other indexers since 1997, who help do the data entry as they learn. My goal is to help them become independent; I'm not interested in taking on a partner.

Have you held any official roles in ASI?

I helped to found the South Central chapter of ASI in 1996—it's a large geographical zone, so it has been hard to keep going because people don't want to travel for meetings. I served as chapter president a couple of times.

When did you join Potomac Indexing, and why?

I've been an associate of PI since Kay asked me, within about a year of when they got started. I worked on the Wiley *For Dummies* series, which Kay was managing. I've also done some work with Seth.

The reason I like PI is I don't have to do a lot of marketing, and it gives me more opportunities for work. I've done quite a few projects for them over a year's time. I've also been able to farm out work to several PI associates who specialize in scholarly work, usually when the nursing books are keeping me busy.

Where do you see the future of the profession heading?

Embedded indexing. The tools are horrendously bad, but with ebooks and iPad coming into

One essential is a supportive spouse. Ken started doing my business books many years ago, along with hiring an outside accountant to handle certain functions. It is expensive, but you have to protect yourself at tax time and make sure you are never paying more than your fair share. Ken worked in production and understood the meaning of the word deadline and so that has never been a problem. The only part of the business I do is the actual invoicing.

Another essential is a good cleaning person. When the house becomes impossible to live in, this affects my ability to concentrate. But I never get to the point that I would want to do it myself. The person I have now is good, but not as good as Maria, my housekeeper in Illinois. She took care of the entire house, even taking the dog home with her when we went out of town.

I have several companies that I basically index every book they produce; sometimes they don't let me know the scheduling as well as they could. But they are generally willing to work with me when there is a conflict. I've tried various scheduling devices and they help, but generally I am able to remember what is out there.

I am trying to cut back, and Potomac has been a big help here. Last year I worked on and managed an 18-volume series. Potomac has now taken on the management of this project, allowing me just to work on indexing several of the volumes. I have referred other projects to Potomac and I know that they are always there to help out. My clients have always been very important to me and I want to make sure that their interests are being served as I slow down.

Deadlines are sacred and must be met. Take advantage of all of your time. It is easy not to do this. But I get up early, while my husband sleeps late. I can get a lot done before the telephone rings and the e-mail starts. Take proofs to appointments; you might be amazed at what you can get done this way.

I also have a typist who does all of my input. This allows me to concentrate on the creative end of indexing. I choose the terms to be included and I finish up the final project. But I rarely do the work of inputting the files into the computer. So there are almost always two people working on any one project.

I had retired to Hilton Head Sun City and had planned on stopping indexing. But my enjoyment of indexing, my relations with certain clients, and the current economic scene has pushed that off into the

INDEXING DOWN UNDER

Four years ago, I moved from Washington DC to Sydney, Australia. PI was formed six months before my move, and I remained a partner in the company after relocating. I also started a sole proprietorship in Australia. I am often asked to compare working as an indexer in Australia with indexing in the US. The intellectual work is the same, and indexers in both countries use the same software and tools, BUT there are differences in the business environment. Here's a brief list of them:

• Indexers in Australia are generally paid on an hourly rate. The Australian and New Zealand Society of Indexers' (ANZSI) recommended rate is AU$65 per hour, which is published on the society's website. I am usually given a budget by the editor when contracting for a job and then asked to either stay within that budget or contact them if I find that more work is involved. Indexers in Australia may also be responsible for collecting GST (goods and services tax) on their work. This is is not too complicated, but does require some extra paperwork.

• In Australia, I work most often directly for managing editors at publishing houses or directly for authors and am rarely contacted by "packagers." I find that business relationships are very important in Australia and the majority of my work has come from networking. The "Indexers Available" feature on the ANZSI website has also been useful, but work is more likely to come from that source during the busy periods. There seems to be a relative lack of supply of indexers in Australia as compared to the US.

• I am usually scheduled for projects several months in advance in Australia and am not expected to work over weekends or holidays. I find that to be one major difference between my work in the US and Australia—in the US, the "lead time" and also project schedule is much tighter. I have had rush jobs in Australia, but they are generally recognised as rush and the hourly rate is increased accordingly.

• On a broader level, there are some differences in being self-employed. Because Australia has a universal health care system, I do not have to purchase private health insurance. The government also provides a pension, but encourages everyone to maintain a private retirement fund, which in in Australia is known as "superannuation." Employers are required to pay 9% of an employee's salary into a superannuation fund of the employee's choice. Technically, contractors are required to pay 9 percent into subcontractors' super funds, but I have yet to see this rule enforced (see the latest ANZSI newsletter if you want to read more about this!).

I will be back in the US in April for the ASI conference. I am looking forward to catching up with my PI partners and with our associates as well. If you have any questions about Australian indexing, I would be happy to give you more details. Hope to see you in Providence or, better yet, come join me at the 2011 ANZSI conference in Melbourne in September (http://www.anzsi.org/site/2011Conference.asp)!

—*Mary Coe* ∎

CALENDAR — UPCOMING 2011 EVENTS:
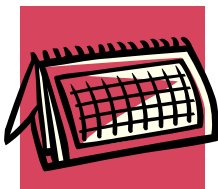
February: Kay Schlembach and two-time Wilson award winner Margie Towery will present a workshop on "Hunting the Elusive Wilson" at the ASI So. Central chapter meeting in Houston, Texas on February 26, 2011. Victoria Agee will be hosting.

March:

PI Day is March 14.

The ASI/ H.W. Wilson award committee will be meeting to evaluate and (hopefully) decide on a winner March 19, 2011, at the home of Kay

Schlembach. Do you have a book with a fabulous index which should be evaluated? See the submission guidelines at http://www.asindexing.org/i4a/pages/index.cfm?pageid=3339

April: Seth Maislin and Kay Schlembach will be teaching workshops at the 2011 ASI Annual Meeting in Providence, RI. Our very own Richard Shrout has been instrumental in planning this *transformational* meeting, April 28-30. Visit www.asindexing.org

SAVE THE DATE: the 2011 Associate Appreciation dinner will be held in Providence, RI on Friday, April 29 at about 7:30.

future. I don't want the long hours I used to put in. I want time for myself, the golf course, the beach, and more. I am also involved in planning monthly social outings for my neighborhood, such as progressive dinners, golf outings, and Caribbean cruises. I design most of the flyers.

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Richard Shrout, PI partner, Rockville, MD

I was originally thinking of this topic in terms of having to balance children's needs and work, until Kay reminded me that I balance my work with table tennis, singing, international travel, and a little family history.

Trying to get better at table tennis keeps me physically much younger than my actual age. I play people of all ages, from little kids to people even older than myself. Three years ago, I lost a tournament match to a 92-year-old. And I have lost to 10-year-old kids too. And every once in a while I win a match. But what is important is trying to get better. That motivates me to practice and take lessons three times a week: Monday, Wednesday and Friday. At least once a week I go to a fitness center. My legs are now the strongest that they have ever been.

A physical therapist taught me a trick regarding leg conditioning. If you are doing leg exercises with two legs—try them with one leg. You might find an imbalance, meaning one leg is much stronger than the other. If you have an imbalance and do the exercises with both legs, the result will be an even more pronounced imbalance. I did find that I had one leg that was stronger and one set of leg muscles in particular that was very weak. I can feel a big difference already as I have begun slowly to correct these situations.

Given the sedentary nature of our profession, it is very important to find some physical activity to balance that. Table tennis is perfect because it is a lifelong activity. I know other indexers who swim, perform martial arts, and walk or run. If you do not have an exercise program—something that you really like to do—please find something. You will feel better.

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Skype (www.skype.com) is amazing! It allows PI to function virtually and internationally, and its services are almost all free. Skype is technically a VoIP (voice over Internet protocol). Skype works on PC and Mac and is available on iPhones, Blackberries, and Droid smartphones, among others.

PI has been using Skype for more than three years. We use the four free levels: chat messages, audio calls, video calls, and file transfers. We use chat messages the most and audio a lot.

The PI partners conduct partner meetings weekly on Skype. We are able to have good discussions for an hour or two at no cost. We can also use the chat capability during the audio meeting (something we could also do during video calls); someone who is not talking can send a message to everyone. And we can send documents on Skype or on e-mail during the meetings.

Right now, as I sit at my computer in Maryland, I know that Kay (also in the Washington DC area) is at her computer; Seth (in Boston) was recently online but has left his computer; and Mary (in Australia) is not online. Knowing Kay is online, I have several options for communicating with her: (1) send her a message on Skype and get a rapid reply; (2) call and get better quality audio than on a telephone land line; or (3) initiate a video call of excellent quality.

There are limitations to Skype. Although it is supposed to allow up to five persons on that one video conference, we have not found it to work well. And occasionally, one of us will get dropped from our audio discussions.

Also, using Skype is not totally risk-free. Skype uses proprietary peer-to-peer technology that bypasses firewalls. Skype does not own its central servers. The software makes you think things are happening centrally and one can move from computer to computer and track message threads to the same person. But all this processing is happening somewhere out of the network on a random computer, possibly yours, even when you have Skype turned off. I say this up front to let you know Skype is not a free lunch.

If you use Skype as your only phone service, the level of risk goes up because Skype is well-known as not being customer-service friendly. You want to avoid having a billing problem with them that is difficult to resolve.

It is possible to subscribe to international calling at a cost of around $12 a month or you can pay as you go.

PI has found that the benefits are worth the risk. Without Skype, I doubt our company model would be as successful as it is. And we expect to implement more of Skype's capability as our company grows. We invite more associates to Skype with us. ■

ASSOCIATE SPOTLIGHT—Joanne Sprott *continued from page 3*

their own, we need to figure out how to create flexible indexing that can go to the right point in the book, even without page numbers. The tools are clunky now, but that's where the future is. Anyone in the field better learn it now.

The problem then becomes, how do you compose an index if you can't see what the index will look like until you finish? The tools won't let you edit the index and automatically update the tags on the page— you have to go back to the individual entries and change each one. Even using the new tool, XML, you still have the problem that you can't change it after you've created the index and backflow into the individual tags.

For the foreseeable future, indexing will still need human intervention because the computer doesn't have semantic understanding. A computer can make concordant associations, but can't relate how important a term is. We have to figure out how to make indexes work in a context where the page is no longer fixed.

Linking back and forth is as important as ever, even in a digital context. There might be a revival of indexing for websites because search engines can't help you find what you don't know to look for. Website indexes are a potential new area for indexers.

Speaking of technology, what kind of tools do you work on?

I only have a semi-smart phone, and my laptop recently died, so I don't read a lot of ebooks. Having done indexing both on paper and on screen, I find paper is easier on the eyes, because of density of resolution (better definition).

I'm now considering a shift to Macintosh. I started with PCs in 1983, then switched to using a Mac from the late '80s to 1995. When Apple looked like it was dying, I switched back to Windows. My kids are avid Mac users. You can fit more on a Mac screen than on a Windows screen of the same size and can read smaller print more comfortably. Cindex also has a Mac version.
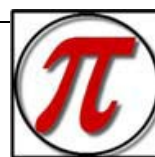
When you're not indexing, what are your interests?

I have a long-time interest in acoustic and folk music, and there are lots of interesting venues for live music in Houston city limits.

I'm an extrovert, and I love social networking, keeping up with Facebook friends and Twitter, and using it for visibility in my creative work.

I've been writing poetry since 1999, submitting work to various contests and publications, even to the *New Yorker*. I recently submitted a chapbook with 16 or so poems to a small-scale poetry publisher —still waiting to hear. There are lots of different websites for the poetry community, and I get a lot of satisfaction from getting other people's responses.

I also have a creative website that I'm trying to build visibility for and I do some life-coaching and more people-oriented things. I've been a career counselor for a long time on an informal basis. I like to help people bring creative things to the forefront in their lives, even if it's not a way to make a living. I really got inspired by the book, *What Color Is Your Parachute*, which helped me figure out indexing was something I really liked to do—it helps you look at past, present, and future to figure out what you like to do and how you like to work. ■