

# The Slice

A Potomac Indexing Quarterly eNewsletter

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## 2009 OUTLOOK: COMING TO GRIPS

WITH THE ECONOMY by Kay Schlembach



As I write this, we welcome a new President, and challenges ahead. Our country remains at war, and the global economy is troubled. My family has had accounts at two

banks that went under, but our accounts were transferred to other banks without a loss (thank goodness for the FDIC). Can't say that for our retirement savings, though. House values in Houston are holding steady, but then, we never had a bubble. I hope the new leadership in Washington, D.C., and our global trading partners come to grips with the underlying problems and develop effective solutions.

Potomac Indexing's business model is pretty lean and flexible. As freelancers, we know flexibility is our biggest asset, and we're ready to adjust to a changing business environment. PI's partners are assuming that our clients' budgets are going to be squeezed in the coming years. We see versatility and creativity as keys to improving our internal efficiency and increasing our value to clients, while simultaneously developing new lines of clients. We value the collaborative attitude, hard work, and high-quality index product offered by our independent associates. Thank you.

We continue to believe that networking is an important ingredient to success, especially through the American Society for Indexing (ASI) and the Australian and New Zealand Society of Indexers (ANZSI). Seth, Mary, and I will be teaching at society events, and Richard continues to serve on the ASI Board.

We will view our business seriously, taking positive action every day, regardless of how much work is on our desk. This includes outreach and marketing, learning/enhancing our skill set, professional development, increasing efficiency, and networking. We also plan to increase our online ... [page 4](#)

## ASSOCIATE SPOTLIGHT

Katie Banks, Eagle-Eye Indexing

Potomac Indexing's Legal Team Leader Katie Banks met Richard ShROUT at an industry conference about two years ago and immediately warmed to the idea of joining the fledgling company. "I liked the idea of having other indexers to connect with, to network with, and to have people as a backup resource," she says.

A prodigious multitasker, Katie doesn't often find downtime in her busy schedule, but even so, she could see the value of affiliating with PI to help even out the peaks and valleys in her own indexing business. "I



haven't had a chance to take advantage of that many jobs from PI because I've been busy with my own business, but it's definitely a plus to know that PI is there if things get slow, or if I get ill or just overloaded."

### How and when did you get into indexing?

While I was in graduate school in the 1980s, I also worked in publishing as an editorial assistant. One year I received a Christmas letter from a colleague who said his wife was taking a course in indexing. A light went on in my head – aha, I hadn't thought about that. In 1997, I took the USDA course and have been indexing ever since.

### How did you come up with the name of your business?

The name comes from my days as a proofreader when an editor called me an "eagle eye."

### Do you index full- or part-time?

I've always done publishing assignments on the side — copy editing, proofreading, and now indexing — for about 28 years now. My real job for the past 18 years is as a professor at University of Northern Colorado (in Greeley), where I teach a full course load in audiology and hearing science. [Katie has a PhD from the University of Arizona, an MS from Florida State, and BS from Michigan State.]

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## GUEST VIEWPOINT:

### WHAT'S NEXT FOR BOOK PUBLISHING?

By Eugene G. Schwartz

As we begin a new year, and the dust has settled on America's watershed election, those of us who have been around awhile can look back with wonder at the remarkable transformations that have taken place in our society as a whole as well as in the publishing industry. We can also look forward with curiosity, if not some concern, at what the future portends. What is the state of our industry, and where is it going?



For indexers, the past, present, and future of publishing as an information art and science should hold some comfort and predictability. It could not have escaped your attention that as digital search techniques and venues have expanded, the fundamentals of indexing have increasingly become the touchstones to information access and transfer. Knowing about keywords is not enough — one needs to intuit which words people will select in their searches, and how to incorporate the most effective selection in titles, captions, tables, and text. One needs an organizing taxonomy to aggregate content for specific purposes and contexts, to provide a checklist of what has been searched and what has not been searched.

Recently, Google announced its new mobile device's Barcode Scanner application that would enable someone to scan the barcode on a book and call up the work on Google's Book Search, where the full power of keyword search would be available. "Why would someone want to do that if they are holding the book in hand and can use the index to search the book?" some have asked. Well, not all books have indexes, and no index, however complete, can reference every keyword on every page. And, "find" on the computer is a faster trip to a reference than is flipping to the page and looking for the right sentence.

The concept of the "wisdom of crowds" is a major recent insight into mining true contextual keywording by drawing on ... [page 3](#)

# Calendar

## April 23–25: ASI Annual Conference, “Scaling the Heights”; Portland, Oregon

Save the Date: PI Associate Appreciation Dinner, Fri., April 24

PI is pleased to invite you to the 2nd Annual Associate Appreciation Dinner, to be held in Portland, Ore., in conjunction with the American Society for Indexing’s annual conference. This event is our chance to thank you for your contributions to PI, as well as an opportunity for you to get to know other associates (and even a few clients!). Dinner this year will be on Friday, April 24 at 7:30 p.m. At press time, we are finalizing arrangements with a venue near the ASI conference hotel, the Doubletree-Lloyd Center Hotel. Details will follow by e-mail and in the spring issue of *The Slice*.

### Knowledge-Sharing: Knotty Bits, Buddies, and Basics

PI’s U.S.-based partners Kay, Seth, and Richard will play prominent roles again this year at ASI’s annual conference in Portland.

Seth Maislin assumes the mantle from Kay Schlembach for teaching a full-day, pre-conference workshop for novice indexers, “Principles of Indexing,” on Thursday, April 23, 8 a.m. – 5:30 p.m. He underscores his unorthodox approach to the subject by calling it a “practical, theory-based course.”

Seth says his course will challenge indexers to ask questions about accepted theories, because rules often miss the point. But to break rules, you need to know the reasoning behind them, for example, when not to index something important, when to be inaccurate with page numbers, and how to avoid alphabetizing.

The conference website [<http://www.asindexing.org/site/mtgs.shtml>] promises lively in-class discussion, and encourages participants to introduce additional topics, such as tools, careers, and deadlines.



On Friday, April 24, Seth and Kay each will lead one of 12 “Knotty Bit” sessions. These short sessions tackle small but knotty little conundrums that indexers face on a daily basis. They are designed to be informal — lively, controversial, stimulating — with lots of time for discussion. Kay’s session is titled “Metatopic Menace,” and runs

from 8:25 – 9 a.m. The session will attempt to tame this essential indexing concept, delving into several approaches and various solutions. If you have any suggestions or comments regarding this topic, contact Kay at [kay.schlembach@potomacindexing.com](mailto:kay.schlembach@potomacindexing.com). Seth’s is titled “A Is for Arbitrary,” and runs from 9:20 – 9:55 a.m. The discussion will cover the practical reasons, opportunities, and implementations for not alphabetizing in an index.

**Be a Buddy:** Richard ShROUT will reprise his acclaimed position as Buddy Coordinator at the ASI Portland convention, with Kay as his official Buddy Assistant. If you are interested in serving as a mentor or guide to a first-time attendee, please contact Richard at [richard.shrout@potomacindexing.com](mailto:richard.shrout@potomacindexing.com).

## Oct. 15–17, ANZ Society of Indexers Conference, “The Practice of Indexing,” Sydney, Australia

The Australian and New Zealand Society of Indexers has issued a call for papers for its annual conference, Oct. 15–17, in Sydney at the Citigate Central Hotel. The theme this year is “The Practice of Indexing.” The conference committee is particularly interested in practical, how-to presentations on any indexing topic from basic indexing skills, methods, and techniques for beginners to technological developments and specialized indexing for experienced indexers. Anyone interested in presenting a paper, contributing to a panel, or running a workshop should send an e-mail to the ANZSI Conference Committee at [conference@anzsi.org](mailto:conference@anzsi.org). The deadline for abstracts (200 words max.) is Feb. 28. ■



### NEWS FLASH: Got Government Work?

PI is developing a relationship with a company that specializes in assisting companies (like PI) in finding and contracting for work from state and federal governments. If you find out about indexing work at any level of gov-

ernment, please contact one of the partners; we’ll take the hassle and paperwork off your hands. Remember that a referral to Potomac is not a loss of a customer. As with any referral, you will be contacted first for this and any future projects. ■

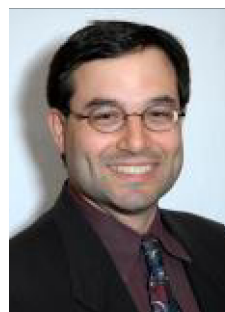
## THOUGHTS FOR THE NEW YEAR

By Seth Maislin

At our Hanukkah party with our neighbors and their kids, conversation turned toward indexing and taxonomy. This isn’t too unusual, because people find the idea different and sometimes intriguing. They ask basic questions, such as, “Do you read the book?” and “Don’t you have to know something about the subject?” and next thing you know, they’re actually very appreciative of my job.

Well, this time the conversation didn’t just turn to talk about indexing and taxonomy and move on. It stayed there, and I

mean really stayed there. On more than one occasion I have kept the indexing conversation going beyond its natural endpoint — but this time I actually tried to let the conversation die several times. I even turned to my wife to make sure that it wasn’t me, that I wasn’t the cause of this prolonged conversation about books, e-books, Google, librarians, public libraries, corporate taxonomy, website information architecture, Google again, Roget’s Thesaurus, writers as indexers, and so on. It

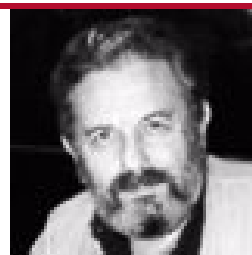


went on and on, for perhaps an hour, punctuated only briefly with the interruptions of our kids. And let me say, none of my neighbors does this for a living. They are all interested because they recognize that indexing is not just those A–Z lists in printed books, but an actual, honest-to-goodness discipline about information, communication, and knowledge.

This is my inspiration: that people really DO care about what we do, and what it means ... even if they wouldn’t know a good index if it landed on their foot (with the rest of the book). ■

the actual phrases people use when searching for and identifying information and concepts. Wikipedia is founded on this premise — that with enough people commenting on and contributing to a citation, with accountable mediation, the closest thing to an accurate definition can be arrived at. The now-common practice of blogs and other social networking sites to aggregate the keyword searches that visitors have used for an article, and to rank them by type size so that the most frequently used tags are highlighted, provides indexing cues as to how the “crowd” thinks of accessing a subject or theme.

So, what does this mean to the book industry? All of its new directions are based on technologies that are driven by algorithms that can distinguish the structure as well as the definitions of content based on these intelligent search insights. These insights are what make possible all of the developments I will be discussing.



Eugene Schwartz

The book, whether in its printed or electronic form, endures as a container that captures narrative, imagination, instruction, compilation — sacred or profane — in words or in pictures and even with embedded sound and animation. So, it would be fair to say in any review of book publishing industry trends that while its content formats and delivery systems are being radically transformed by disruptive technologies, we should not be thrown off balance. The fundamental editorial purpose of the book remains, whatever its form — and authors, artists, editors, and publishers (or whatever they might be called — a rose is a rose) will continue to provide and shape that which everyone is busily indexing and keywording in this new age of search. The problem is how to make a living at it.

### By the numbers

The Book Industry Study Group describes a \$37.3 billion industry in 2007, which moved 3.13 billion net units (books) into the marketplace. Bowker reported more than 400,000 new ISBNs issued to over 80,000 self-identified publishers for the year — clearly a reflection of the explosive growth of independent, self-issued, and on-demand publishing in the last five years. Ten years ago, new title output was around 60,000.

Growth in sales volume over the next five years is estimated at an average of around 2.5 to 3 percent per year — but unit sales will remain practically flat at 0.3 percent per year growth. This data only marginally reflects electronic publishing revenues — especially in the reference market — and only portions of the more than \$1 billion audio book market. This year, the BISG has embarked on a major revision of its data reporting to take into account the new media and distribution channels that have emerged in the past ten years and whose dynamics are not measured by traditional unit print sales metrics.

While conventional publishing is projected to remain static or decline as a proportion of our population and gross national product growth each year, the internal dynamics of the industry are bubbling with possibility and invention. The Internet and Web 2.0 social networking are the new marketplace for ideas, information, and stories.

So, here are **ten of the most significant events and trends on the horizon:**

1. Self-publishing and print on demand (POD) services, made possible by file-transfer technologies and such online publishers as Lulu, Blurb, Author House, iUniverse, and xLibris, and POD services such as Lightning Source and Book Surge.
2. Reinvention of the bookstore through on-site book production and sales in book stores and libraries; one such mechanism is the Espresso Machine, now being installed in bookstores, libraries, and airports, which enables paperback titles to be printed to order in minutes. The ABA has recently launched a program under which a bookseller can publish and sell on demand classic, out-of-print books.
3. The Book Rights Center, an ASCAP-like agency resulting from the landmark Google Book Search settlement, to be operated by the AAP and the Authors Guild as a clearing house for payments to publishers and authors by Google and others who are providing search access to copyrighted books. This agreement has also set the pattern for electronic rights business models.
4. Book Industry Study Group's active role in developing and facilitating adoption of data management and transmittal protocols. Examples are the new Start with XML initiative to redefine publishing work-flow standards from a print-based to a digitally based platform, and its new Product Data and Product Label certification program for qualifying publishers.
5. Integration of conventional and electronic distribution of inventoried books with print on demand and electronic format services. The latest such initiative is by Perseus, the largest U.S. independent distributor to provide a digital asset management and POD distribution service. The University of Chicago has operated Bibliovault, a similar service for university presses, for years.
6. Cloud computing, in which data (in the case of publishing, content files) and software applications are stored and provided as an outsourced service through global data storage servers operated by aggregators such as Google, Amazon, and Microsoft, as well as by smaller targeted outsourcers.
7. E-book readers, such as Amazon's Kindle, whose e-ink technology and wireless downloads have advanced from a limited special interest device to a more popular mobile device. Sony and other European firms are building markets for dedicated e-book readers as well.
8. Website widgets, enabling owners of content to plant a window with access to their intellectual property, that they can control, on any web site that will accept it.
9. Web 2.0 and social networking tools that create content through feedback to authors and publishers, by anthologizing, customizing, and mashups.
10. Simultaneous multimedia publication of books in print formats, e-book, and audio form, with free online content (chapters or whole books) as promotional tools for sale of print products.

The aforementioned trends have yet to make a significant dent in anyone's revenue or profit margin base.... [page 4](#)

“I liked the idea of having other indexers to connect with, to network with, and to have people as a backup resource.”

**What are your hobbies?**

I live out in the boonies — LaSalle, Colo., a rural area south of Greeley. I have six horses — I used to show carriage horses, now they’re retired — and I have eight goats — angora and cashmere — that I shear, and then spin and knit or weave their wool into scarves and shawls. I’m still learning the knitting and weaving crafts.

**Describe a typical day in the life of Katie Banks.**

I get up at 4 a.m., work on indexes for three or four hours, then feed the animals, and go into the university and put in a full day. I work another hour or two at night. When I have a lot of indexing work, I’ll index all weekend.

**How have you developed your indexing business?**

I started out marketing myself in my own field, allied health sciences. Now I do a lot of legal indexing work, and my business is about evenly split between health sciences and legal books, with occasional sideline projects in other interesting fields. One of my favorite clients publishes spinning and weaving books. My goal is to retire from the university and index full-time; that’s why I’ve been building up my indexing in recent years. Last year I did 30 indexes, about two or three a month. That’s up from about 20 a year for the past 10 years.

**How would you describe your indexing style?**

For nonlegal books, I go through one chapter at a time and mark it up first, then I digest it, organizing it in my head before working on the index. For legal books, I typically index as I work through the material.

**What is your role as PI’s Team Leader for legal indexing?**

Right now we’re putting out feelers to various legal publishers, but no big projects have come in yet. The material is cut and dried, but indexes have to be readily accessible to lawyers who use a lot of terms that are not in our normal vocabulary. So you have to learn the new language and become fluent in it. Legal indexes are more cross-referenced, more repetitive.

**Do you belong to ASI?**

Yes, I like to compare notes with others and I’ve been to the national conference almost every year for the past five years. I’m a member of the Rocky Mountain chapter of ASI, where I was on the board for many years. I like the networking, getting to know other indexers, making contacts for referrals, and taking course. In our chapter, we work on our skills by doing peer reviews of each other’s indexes. We also host a fall conference where we bring in an expert in one area or another for education. I believe lifelong learning is a good thing — you’re never done. ■

**YOUR OPINION, PLEASE: THE ECONOMY**

While Potomac Indexing is starting off the year with steady incoming work and a relationship with a stable bank, we are aware that the current economic situation is serious and could have a significant impact on our clients and associates.

We recognize that we must adapt to the changing economic climate to remain healthy as a company. So as 2008 drew to a close, we polled our partners and associates for suggestions and answers to the following questions:

- How are you reacting to these economic challenges?
- What help could PI provide in that regard?

- Is there a new skill you’d like to learn?
- Is there a market we could develop or expand?

We were thrilled with the high response rate; nearly two dozen associates sent thoughtful responses. What follows is a summary of the key themes that emerged.

PI’s partners think the economic downturn is accelerating a paradigm shift in the profession, challenging us to go beyond the borders of our comfort zone. Seth Maislin sees opportunity beyond the borders of the book: by applying the principles of indexing to new media and larger projects, using new technologies. Mary Coe, our partner in Australia, would like PI to expand beyond country borders and current ... [page 5](#)

**GUEST VIEWPOINT: WHAT’S NEXT ? ...**

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The future revenue-generating power of these innovations lies in the hands of the younger Internet generation for whom all forms of information access are equal as long as they are immediately at hand.

Of this I am certain: There is an exciting and creative future ahead. ■

*Eugene G. Schwartz is a writer, columnist, and business consultant to independent print and online publishers. He is Editor at Large of Foreword magazine, and a regular columnist for Book Business magazine. He is founder and Publisher of Worthy Shorts, a start-up online publishing service for professionals (www.worthyshorts.com). He can be reached at eugenegs@aol.com.*

**2009 OUTLOOK ... continued from page 1**

presence, using website optimization.

We also plan to increase our online presence, using website optimization.

In this issue, we are honored to welcome Eugene Schwartz as a guest columnist. Eugene brings a half-century of writing and publishing experience to his feature for *The Slice*.

I got to know Eugene while creating the most exhaustive indexes of my career for his anthology of the National Student Association. Eugene melds his extensive experience with a willingness to embrace new technology and industry changes as he predicts the key trends shaping the future of publishing industry.

This issue is also authored by you, our PI associates. Your opinions in response to our survey [See “Your Opinion, Please: The Economy” below] are helping to shape our focus and our business. We appreciate your views and feedback.

Best wishes for a happy and prosperous 2009. ■

**CORRECTION**

Attentive readers of *The Slice* may have noticed that the masthead of the first issue referred to it as a “Monthly eNewsletter,” while the footer called it a “quarterly electronic newsletter.” The latter is correct. For the first year, each partner will helm one issue apiece. As we grow, we may increase the frequency. Stay tuned.

## Partners, Associates Share Strategies for Future: Cross Borders, Embrace New Technologies, Learn New Skills

specialties. Richard Shroul agrees with both, and adds that by leveraging the creativity and contacts of all the associates, PI can build business beyond existing borders: in the e-marketplace, in new countries, and in new subjects.

### **"Indexing is deeply fun"**

Maislin says that for years he's believed indexing is something far greater than books. "The reason indexing is deeply fun is because it's about information: learning and teaching, talking and listening," he asserts. "Indexing talents can be applied to everything in the world; it's library science, but applied only in short bursts the size of books and websites. And so it's in this space, where written communication and knowledge retrieval are a necessity, that I've been keeping my ear to the ground. Can indexers truly learn to index without pages?"

Maislin frames his views with a quote he came across recently: "Producing higher-efficiency light bulbs is a fine way to reduce power consumption, but learning to see in the dark is much better." Take books, for example. "Even with recycled paper and cheaper overseas production costs, the amount saved will never catch up the growing amounts needed," he says. "Instead, people need to learn to read without paper. And, of course, we're seeing more and more published online."

Yet, he points out, most traditional publishers haven't brought online publishing into their mix. "They're still cranking out paper books, selling them on wooden shelves, and charging printed book prices. Not one of my regular clients even writes e-books." Most of the content published online today is written by self-empowered individuals: mailing lists, blogs, wikis, etc.

For the individual indexer, his advice is to think bigger. "When you index a chapter, imagine having that chapter reused in another book. When you index a single book, think of that book as one of many. Stop thinking about each index as existing within its own comfortable space. Imagine that the words and headings in your indexes are building rapport with other words and headings in other indexes. Think about big projects. It's from this expanded model that you will find for yourself how to embrace these

changes and grow as an information specialist.

"Your skills have far greater value than your clients understand," he says. "I'm not saying that you should be paid more for the indexing you already do; I'm saying that you might be selling yourself short by just writing indexes. The market hasn't caught up to us yet; we're still living primarily among printed books. But when it does, I want indexers — I want us — to be ready."

### **Go global**

Mary Coe agrees with Seth that it's time for a paradigm shift, and her focus would be more on globalization and marketing. "Focusing entirely on the U.S. market would be a mistake, in my view. If we want to survive and prosper as a company, we would be wise to think bigger," she says. "We've talked before about training opportunities in India and about expanding PI to Australia. From my perspective in Australia, there is not the same degree of panic and fear [about the economy] as in the United States.

"I think that PI's biggest strength in this environment may be its ability to adapt to changes. If we can continue to do that, either through new technologies or new markets, we will be a strong company," she adds. "Another opportunity is through diversification: We've talked about adding editing or proofreading services, as we have several associates with those skills, although I would certainly maintain a focus on indexing."

She's also a believer in marketing. "We have not really begun to market PI in any structured way. Developing a larger list of clients and more publishing streams would be a step in the right direction. I would even suggest hiring a marketing consultant to get us on the right track."

### **Maximum flexibility**

Richard Shroul says of the current economic crisis, "We didn't plan our company organization for these reasons, but clearly Potomac Indexing is organized to handle periods of economic chaos. Since our fixed expenses are minimal because of having no employees, no inventory, and no property ownership, PI's financial exposure is much lower than a typical brick and mortar or even a typical Internet company."

"We can proceed with maximum flexibility to pursue really great customers throughout the world," he adds. "Globalisation, whether spelled with an 's' or a 'z,' is a lot easier without overhead. Remember that there are always opportunities in times of chaos and even in times of despair. Right now is the right time to emphasize marketing."

Developing new streams of work is a major focus of the partners, and something the associates can help with, he explains. "Our unique organization can allow us all to work together for the good of our community. Associates have been the source of several of our best customers already during what has really been a very short lifespan for a company. Specific areas that we are developing include international law, medical indexing, additional computer book publishers, scholarly presses, and school textbooks.

"Plus, we are seriously exploring new ways of engaging our skills in the e-market. We want to be the leaders in any kind of paradigm shift affecting indexing. With your help, I am confident that we can not only survive these times but actually emerge as a stronger company and community."

### **Associates chime in**

In response to our survey about how PI should respond to the shifting economic landscape, several associates echoed these themes and offered a few suggestions of their own. Many recommended stepping up marketing — both as individual indexers and as a group — and learning new skills. Embedded indexing and tapping into the growing e-book market were common themes. Several associates commented on the need for PI to highlight its flexibility and diversity of talent; in the words of Thea Teich: "the breadth of capabilities [PI] offers in all dimensions: subject matter knowledge, process, and delivery method."

One associate is already thinking beyond the borders of the book, as Maislin puts it. Joanne Sprott spies a potential market in a project she undertook to index a major cell phone manufacturer's technical documents, creating a standardized vocabulary for them and training their tech writers in indexing. "There are tons of substandard indexes for cell phone manuals, software products, server tech manual series, consumer ... [page 6](#)

electronic products, and more,” she says. “The difficulty is finding the right contact person within large companies. Then we need to convince them that good indexing is important for end consumers and that we can tailor the embedded indexing to the single-source technical writing environment, where modules of text are cobbled together in different documents.” She adds, “I’ve got all the tools and processes set up for this if we can find the market, and I can teach other folks.”

### **Economic impact varies**

Associates’ experience with the economic downturn varied widely. Some were as busy as ever when they answered the survey in November. Others already were seeing signs of a deeper economic downturn than they’ve experienced before. A few associates have seen downward pressure on their rates, or slower payment cycles from publishers.

Jan Wright, who specializes in tech indexing, predicts that in six months we’ll find out whether indexes are “a luxury.” She recalls that after 9/11 and the collapse of the tech bubble, it was “six months later when everyone tightened their belts...when the projects that had been funded before the disaster had been completed, and everyone was hesitant to fund new ones.” In 2002, she was forced to diversify her business, and saw virtually all the online help index gigs dry up, but now she’s doing them full-time again. She recommends that PI develop an internal schedule to know when associates with certain skill sets and topic backgrounds are available.

### **Diversify, deepen relationships**

Wright also sees diversification as critical, along with developing skills in web site development, controlled vocabularies, folksonomies and taxonomies, and user-based tagging systems. She reports that she’s taken a risk over the past year in relying heavily on a single large client, at the expense of referring away some of her smaller clients, but she’s optimistic about deepening her relationship with a large software company that needs to standardize indexing across vertical departments.

In contrast, another veteran indexer, Thea Teich, recommends “building up relationships with a broader array of publishers (and others who use indexing services) so there is less dependence on a smaller number of clients during ‘challenging’ times.”

Associate Margy Olmstead wonders if relationships with clients could be cemented by offering discounts for commissioning all indexes from PI. She also sees an opportunity in rush jobs, as difficult as they can be. “Perhaps PI could enlist a few indexers to function as a special ‘rush jobs team’ to ensure that these jobs can be accepted by Potomac with the assurance that they will be done by deadline.” These could even command a premium price.

However, Susan Cohen warns, “We must encourage people to resist the lure of low-paying jobs. I admit I’ve taken a few of them, to fill in a gap in my schedule. But I also know that those rates will never increase as long as there are people willing to take on the jobs.”

Associate Ina Gravitz, who has seen rates stagnate, says, “I am finding that my indexing has become much more of a ‘feast or famine’ situation. Indexes that are expected around a certain time are delayed, and occasionally even canceled. On the other hand, all of a sudden clients call and need the index in a short time frame. I’m finding rates have flattened for the first time for me.

Associate Janet Mazefsky is fine for now, but worries about signs that times are going to get tougher. “I do have projects, but nicely spaced out. The economy hasn’t seemed to affect me that much, so far. But I have heard that one of the companies I do work for is concerned about their finances. I had also noticed this company has begun lowering their rates. Plus another large company that I may do projects for has lowered their rates. I had worked for them 10 years ago and now their rates are lower! So maybe the economy is affecting me a bit.”

### **Still busy...for now**

Also seeing her workload and pay fluctuate, Judi Gibbs says, “In the last few months, I have noted some definite changes in my work flow. Early in the summer, I was slammed with work. Recently there has been very little. A client who has been a regular for several years recently took more than 90 days to get a check to me. And it came with a message that it was late because their clients had been slow to pay.

Another associate [name withheld] says, “For the first time in a while, I have my hands full with work at the moment. I have three jobs due next week.” How-

ever, she continues, “This has not been my favorite year in terms of work. I have not been busy enough at times, so I am actually happy for the current overload. This is the first year (since 1990) in which I have had actual blankness in my schedule. I’ve had gaps in my schedule before, and they’re often welcome breathers, but before I have always had something scheduled ahead. This year there have been times when I literally did not know where my next job was coming from. That’s a first.” She has noticed a troubling indicator “that I can attribute to the current economic turmoil: My bank is now putting a five-day hold on every check I give them.”

Bob Pfahler is preparing to be more accommodating. “As the markets return [to health], money will be tight in the short term, so we may have to be more patient with receiving payments from publishers. I plan to be very flexible, especially with authors. It might be that both authors and publishers will opt for no indexes,” he says. “Talk to your customers and find out what problems they are having and work with them for solutions.”

### **Comfort in “family”**

Helping smooth out the feast-or-famine phenomenon is one of the benefits of joining PI, according to Linda Dunn, “It is a comfort to know that you all are there and available. It will help all of us go through whatever is going to happen in these crazy times.” Denise Carlson noted, “As an associate, it really helps to maintain regular contact with the partners. I am so glad to be a part of the PI family. That’s how it feels — like a family of indexers!”

Several associates shared that sentiment. Part-time indexer Maria Sosnowski says, “I haven’t seen any slowdown in work. The opposite is true, in fact. I turn down work regularly and haven’t marketed myself in some time. I get enough repeat work from regular clients, along with the occasional subcontract or referral to stay as busy as I want. And sometimes I have to turn down a project I would like to take, but simply don’t have time for.”

Judi Gibbs asks whether “PI can help individual members improve their marketing? This is important because individual marketing will result in a certain number of projects that associates don’t personally want and can refer on to PI.”

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Galen Schroeder is stepping up his networking: "I have become quite active in my local chamber of commerce (serving now as an 'Ambassador') as well as in Business Networking International (BNI). Those efforts have yet to produce a paying job, but it has generated some business referrals/leads. It also has raised local awareness about what indexing — the skill, the profession, and the product — might offer as a value-added feature in business documentation."

He also sees opportunity in the growing e-book market. Recently, "Oprah gave away and promoted the Kindle e-book reader. Granted, the primary use for the near term will be fiction, but looking long-term, my belief is that non-fiction e-books will catch on, and embedded indexing will create a demand that indexing (as an industry) will be unable to meet. I would like guidance on what embedding software to purchase and help in learning how to use it. With embedded indexing, PI would have the resources to go after more and bigger projects and the ability to 'lock down' long-term contracts with e-book publishers."

Bob Pfahler, another fan of e-books says, "There is a growing market with the e-books. I use Kindle and Sony and find that very few e-books have embedded code for text notes and none has a workable index. Kindle now prints some indexes without any locators so the buyer gets a list of words at the back of the e-book. So far I've not been able to find out who prepares those e-books for publication." It's made him more eager to do embedded indexing with MS Word documents or TIM.

### **Diversify skills**

Many associates are interested in expanding their skill sets, particularly embedded indexing and electronic media. Judy Reveal, who identifies herself as a "quasi-retiree," says, "I am spending more time honing my various skills, such as editing, writing, indexing, and abstracting, in order to increase my value."

She says "the best thing that happens to me with PI is the feedback I get regarding my indexes. I respect the experience of the PI leaders and look forward to the comments that help me improve my skills." Down the road, she'd like to learn more about web indexing.

Ina Gravitz says, "I tend to grab all training opportunities: every little bit more that I learn makes me a better indexer and makes the work more fun. And that includes Cindex skills for me. Increasing my MS Word skills is also important." And Janet Mazefsky says, "I would love to learn website design. Or, at least, updating a website once someone else has designed it."

Computer skills are key. Associate Sherry Smith says, "Another idea that has been rattling around in my head is figuring out how to do an online macro learning experience. Macros are always taught in the abstract because we are sitting at desks, not computers."

Training alone isn't enough. Linda Sloan says, "There are various areas that we could use both training and opportunities in: beginning taxonomy development, periodical indexing, document indexing for databases or document management systems, and embedded indexing. Any training for these should be backed up with either hands-on use of the technology and/or projects using them. I know this is a challenge but in this economy we need an expansion of our opportunities to make a living."

Rose Coad agrees that application should follow quickly on the heels of training. "I would like to become more familiar with periodical indexing so that I can feel confident in taking on that kind of project. Also embedded and web indexes. I'm reluctant to spend much time learning about these unless I'm fairly certain I will be able to put the new skills to use soon."

### **Market key strengths**

Several associates offered ideas about marketing PI's or one's own key differentiators. One associate suggests, "A former indexing group used to play up the fact that they screened [indexers], so clients who used their indexers had some assurance of getting an experienced indexer who could provide quality work. PI also screens, and that's a point that could be played up. Another component for PI is the ongoing 'peer review' offered by each of the partners. I have never had a client unhappy with my work — until this summer. Seth mediated the situation in a way that worked for both the client and me. That kind of mediation is worth a lot in a competitive marketplace."

"PI can also play up other strengths of its indexers. For example, early in the summer, I indexed a ... high-quality textbook. In the process, I caught some really major errors in the book. Later, I received a personal note from the editor saying she was losing sleep over the thought of what would have happened if I hadn't caught those errors — and thanking me profusely for catching them. The professor also thanked me and said he will be in touch with me for the next book."

Nadine-Rae Leavell says, "I have not seen any real evidence of cutbacks yet with my regular clients, thankfully, but I get concerned that more indexing work will be sent overseas, or domestic indexing budgets will be greatly diminished. I have spent a little time this year exploring other areas of indexing that would appear to be in consistent demand. Medical indexing seems to fall within that category." She also has experience in creating abstracts, and offers it as a specialty that PI could use to expand or enhance its current client base.

An outsourcing trend that is promising is the area of legal indexing, according to Maria Sosnowski. She notes, "However, many of those publishers want to know who is doing the index and not have it farmed out to someone they don't have a relationship with. The major publishers also prefer and/or require a law degree. So while that is a growth area, it really is pretty specialized. I seem to be getting more work from packagers as well. I think that is also part of the outsourcing trend."

### **Increase outreach**

A few associates have worked through economic hard times in the past. Pam Whittle recommends "cultivating new business relationships by connecting with: former employers, business associates, and varied professionals that work within specific (target) industries. This allows [for] expanding business relationships on beyond the publishing world. Step out of your comfort zone by extending 'reach' toward other professions, e.g., take a business patron to lunch; attend other publishing/business-related events; and attend continual learning seminars relevant to a particular field of interest. In essence, think: exposure and personal growth."

Sherry Smith is stepping up the personal touch. "I'm planning to consolidate personal relationships with .... [page 8](#)

editors and publishers. Short, friendly notes on real paper have gone a long way to keep me at the top of their lists of indexers. If I have less work on my desk, I also have more time to regularly ‘drop in’ with an e-mail to check on project availability. These strategies have produced work in the past. It will be interesting to see if they retain their effectiveness during this particular economic crunch.

“The second is to market to specific publishers that I’m interested in working for. This process is something I haven’t done for many years now. Government and corporate documents are two areas in which I would like to do more work but haven’t attempted any marketing.”

Denise Carlson notes, “I think marketing is the key. So far, my workload has not decreased. If anything, I’m too busy. However, we always have to market. So maybe associates could share ideas about certain subject areas that seem to be ‘hot’ right now,

or ways that we have changed or increased our marketing efforts.”

Associate Sara Lynn Eastler echoes that experience. “I’ve found very few of my regular clients have decreased their indexing needs. Even with outsourced books, I’m still getting clients that source their indexing back to the U.S. from India and China. I do have one client that has implemented a new policy of asking their authors to provide the indexes. What I usually do when there seems to be a lag is to increase my marketing and look for the opportunity to attend another medical conference.”

She added a very positive note: “I have noticed though that the PI website has increased visibility in search rankings over the last few months, which is very encouraging. I do hope to have the time this year to accept a PI job but in the meantime, I probably send in more references for jobs than I’ll be able to take.” ■

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## RE: SOURCES – TIPS AND IDEAS

### Glossary Entries: To Index or Not To Index

Should glossary information be included in the index? *The Chicago Manual of Style* instructs not to index glossary entries. However, Kay Schlembach, Seth Maislin and Richard Shroust often advocate for the glossary information to be included in the index, usually under an obvious subheading such as “defined.”

Some client-specified index guidelines request that glossary entries be included in the index. Schlembach even has a client who prefers a hybrid “glin-dex,” which combines the two into one document.

In Schlembach’s view, “as with many indexing issues, the choice to include or exclude these entries is often a matter of style.” She personally finds definitions to be helpful, when they lead not only to an explanation in the text, but also a concise definition in the glossary. “It’s a question of usability,” she says. “Text topics are often jargon-heavy, and finding the definition listed in the index can be very helpful to the reader. Glossaries are usually nicely constructed, and deserve to be better utilized. Many readers may not even realize that there is a glossary.”

Therefore, she often encourages her clients to pick up the glossary entries in the index. “It usually does not add many lines, or much cost,” she points out.

At the point you’re indexing the glossary, Seth Maislin recommends using automated tools to turn those glossary entries into index entries to keep the cost down. “There might be a bit of editing

involved in the end, but for glossaries of exceptional size, the time savings is enormous,” Maislin says. Most glossaries can be converted into lists of index entries within 20 minutes, “and without introducing typographical error.” This kind of innovation is one of PI’s specialties.

Shroust is also a firm advocate of including glossaries in the index. He explains, “One of the major purposes of an index is to pull together in one place all references to specific terms, including their definitions. Usually glossary entries are definitions of pertinent terms.

“In fact,” he asserts, “when a glossary is available, I like to key in the glossary terms first. When dealing with synonyms, I will use the glossary term as the primary term in the index and use ‘see references’ from the synonym(s).”

### De-clutter the glossary

Indeed, the very structure of an index is another reason to put the glossary terms in the index. “It saves the writer from cluttering up the glossary with ‘see’ and ‘see also’ references if that person knows the indexer will include the terms in the index,” Shroust says. “Sometimes the only definition for a particular term is found in the glossary. Omitting glossary entries from the index means that these definitions most likely will not be found by the reader.”

Publishers’ objections to the practice fall into two camps, neither of which Shroust finds convincing. The first argues that since a glossary is already in alphabetical order, why repeat the terms in the index? “This argument assumes that the reader is always going to select the term that is in the glossary, not a synonym,”

Shroust says. “This view also ignores the importance of correlation between the index and glossary. If I am not indexing the glossary, there are quite likely to be significant differences between the terms selected in the glossary versus the index.”

The other reason has to do with production schedules at some publishers. Sometimes, while the index is being completed, the editor in charge is still laying out the glossary, and the glossary just isn’t available to the indexer soon enough.

Shroust says an unindexed glossary is a significant flaw: “I get very suspicious of the quality of an index when I notice that obvious things like glossary definitions are not included in the index. I start to lose confidence in its completeness.” ■



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