The little extras: a customer service approach to indexing

Carolyn G. Weaver

Conventional wisdom tells us that it takes at least three years to build a successful freelance indexing business, from one’s first marketing efforts to the point that work must be turned away for lack of time. This strongly argued article asserts that a customer service approach to running one’s business is a key ingredient in attracting new clients and building the relationships that encourage repeat business and referrals from satisfied clients and colleagues.

In my opinion, there are two general approaches to running a freelance business: the Wal-Mart approach, offering good merchandise, low prices, and limited customer service, versus the Nordstrom (or for British readers Fortnum & Mason) approach, where excellent customer service is a major reason that customers are willing to pay higher prices for the merchandise. The name of my business – Weaver Indexing Service – reflects the fact that I have adopted the Nordstrom approach.

My customer service approach to indexing was shaped by my original career as a reference librarian, where I quickly learned that a librarian’s primary role, regardless of job description, is to provide customer service: helping clients find the information they need, as opposed to what they ask for; teaching them how to make use of information resources both inside and outside the library; and – most important – focusing on what one can do for a client, as opposed to what one cannot do. I carried this philosophy over into my indexing career by adopting a customer service approach to client interactions, offering the ‘little extras’ that encourage repeat business. In what follows, I offer some strategies that can make any one of us a Nordstrom-style indexer.

Helping the client help you provide excellent service

Without question, the first principle of good customer service for indexers is to deliver an excellent index, on time and to client specifications. In my opinion, the major components of delivering that service are (1) helping the clients identify their specific needs, and (2) clarifying expectations on both sides of the project about the scope of work and other project details, thus building a mutually respectful relationship that generates repeat business and word-of-mouth referrals.

As a librarian, my customer service role was to provide answers to client questions and teach library users how to find information on their own. As an indexer, my dual customer service role is to write indexes for clients and to promote a better understanding of the indexing process and the role of a professional indexer. As in my library days, I often help clients define exactly what they want and provide answers to the questions they don’t ask.

I believe in treating every inquiry about my indexing services as an opportunity to promote an understanding of indexing, whether the caller is a long-term client, an editor with whom I have never worked before, or a first-time author panicked by the sudden realization when she receives the page proofs that she is responsible for providing her own index. The understanding, of course, has to be mutual, since you cannot expect to ‘sell’ the indexer’s side of the story unless you demonstrate a good understanding of the client’s concerns.

For example, let us assume that you get a call from a long-term client in New York City, asking if you can take a 650-page project right away. The PDFs are ready to ship, and the project will be due at end of business on Friday, three weeks from today.

On the surface, this client needs little advice. The caller is someone with whom you have worked before, you are familiar with the house style, and the schedule is reasonable. However, the client is in New York, and you are located four time zones away in Seattle. Whose end-of-business day is she referring to? If you ship the index by the end of her business day (meaning noon for you), will anyone actually be in the office to work on it over the weekend? In my experience, a client who says that she needs the index on Friday is often quite willing to extend the deadline if assured that the index will be waiting in her in-box when she gets to work on Monday morning. You acknowledge the client’s critical need to receive the index on time, but by asking for clarification of the deadline, you are helping to develop an understanding in the client of the implications from your perspective.

By taking this approach, you are also gently reminding the client that indexers are often unavailable on short notice. While assuring the client that you are happy to accept this job because you ‘just happen to have a hole in your schedule’ (even if you haven’t had a project in the last six weeks!), remind her that it will be helpful to both of you if she can tentatively book jobs well in advance so that you can reserve the time for her. Since you realize how uncertain publishing schedules can be, you will understand if the
original dates don’t work out. Mention that while you will not turn away other work until she confirms the shipping date for the index, you will always factor the needs of a good client into your long-term schedule. That is one of the ‘little extras’ that generates repeat business.

Then there is the ‘new edition with just a few changes’ issue that pops up repeatedly on the indexing discussion lists. An editor asks for a rate quote to index the second edition of a book, and says that she will send you the first edition index as a sample. All you need to do is update the page numbers and index the five new chapters from scratch. Instead of giving in to your initial impulse to tell the caller in no uncertain terms what she can do with her sample, shift into teaching mode. Explain tactfully that even minor textual changes can have major implications for indexing and that, especially when using a different indexer, it is often more cost-effective and faster to index a second edition from scratch. Assure the client that while you would be happy to use the previous index as a guide, you need to approach the task as a separate project. If this is not acceptable, you would be happy to refer her to other colleagues who might be willing to use the ‘updating the existing index’ approach. Hopefully, this will bring home to the client that indexing, far from being a simple clerical task, requires thoughtful input at every stage. You will have made the point that you are a professional acting in partnership with the client to find the best way of meeting her needs: a good index to a revised edition obtained as economically as possible. It is not realistic to expect every client to understand how complex the indexing process is; her assumption that generating an index to a new edition means simply changing a few figures here and there is not unreasonable from her perspective. Explaining that the process is much more complex (ideally with some telling examples) could well be a real eye-opener and make you a friend for life.

In providing a rate quote, I try to answer both the explicit questions (how much will it cost, and how long will it take) and the questions that the client should have asked but didn’t. I always carefully define my terms and try to provide the client with all the information required to make an informed decision about hiring me. For example, here is my emailed rate quote for a project that was not yet in final page layout, with the estimate based on a sample in Word format:

I would be pleased to index New Advances in Biotechnology at the rate of $3.85 per indexable page. Since I haven’t seen the final page layout, my estimate is based on a 7x9” page of reasonable type size (I used 10pt Times Roman for my guesstimate) with an average density of 3–5 index entries per page. While I do reserve the right to revisit the rate if the page or font size is substantially different from the guesstimate, this page and font size is similar to the scholarly project that I’m currently working on.

‘Indexable’ is defined as any page that I have to scan to identify indexable content. This normally includes endnotes and full-page illustrations and tables, but excludes prefatory materials, blank divider pages, and bibliographies, unless you specifically request the indexing of materials such as the preface or a glossary.

Since my normal turn-around time is a week per 200 pages of text, your deadline of December 18 is quite reasonable, assuming that I receive the pages for indexing by December 3. Although I do index from final printed pages (which can be delivered as a PDF file if you wish), I can accommodate minor changes if text edits are still in progress, assuming there are no major page flow changes. Up to two hours of client-requested index changes are included in the basic fee at no additional charge.

This approach is designed to make sure that the client and I have a common understanding of what the job entails. Specifically, I am emphasizing (1) the definition of an indexable page; (2) that rates are dependent on page layout and the complexity of the material and are subject to change if she has provided me with insufficient information to fairly evaluate the sample; (3) that the deadline will be renegotiated if she fails to get the pages to me on time; (4) that it is to her advantage to provide me with final pages; and (5) that if she requests many changes after the index is submitted, there may be financial consequences. By including this level of detail in the initial quote, I am avoiding miscommunication and making it clear that the client and I have shared responsibilities for meeting deadlines and staying within her budget.

In general, good customer service requires a win–win approach to project negotiations. Both indexer and client should feel satisfied with the rate of pay, the deadline, and the working conditions, and both should have a clear understanding of the expectations for the job. Deliberately accepting a project at a less than optimal rate because you need the experience for your resumé or you are interested in the material or you have a hole in your schedule and decide that less money is better than none is just good business. Accepting terms that leave you feeling underpaid, overworked, and resentful is not good customer service, since it will sour you on further interactions with that client – and the client on you if you fail to meet her expectations.

During project negotiation, I often direct potential clients to my business website (www.weaverindexing.com) which includes much of the information that we indexers take for granted but which may never have crossed the minds of potential clients. One page provides an overview of the indexing process, with links to relevant information about indexing on other sites. Another page summarizes how rates are calculated and includes a link to ASI’s recommended indexing agreement. I direct clients to the ‘Index specifications’ page if the press has no preferred house style, and encourage them to consult the ‘Index styles’ page, which provides examples of run-in and indented formats, different alphabetizing options, and different cross-reference styles, in making the appropriate format selections (see Figure 1). This approach is not only a time-saver for me but also hopefully encourages a better understanding for clients of what professional indexing is all about. The educational content on my website is designed to bridge the information gap between what clients think they want and what best meets their needs.

I regard referring work to other indexers as customer service, since it tells the client what I can do – help her find another qualified indexer – rather than what I cannot do.
Following are examples of variations in index style.

**Indented Format:**

Middle class
  children central to, 105
  internalized family roles, 107
  Victorian norms, 125
  welfare reform and, 199

**Run-In Format:**

Middle class: children central to, 105;
  internalized
  family roles, 107; Victorian norms, 125; welfare
  reform and, 199

**Alphabetization:**

<table>
<thead>
<tr>
<th>Word-by-Word</th>
<th>Letter-by-Letter</th>
</tr>
</thead>
<tbody>
<tr>
<td>cat diseases</td>
<td>catalase</td>
</tr>
<tr>
<td>cat scratch fever</td>
<td>cat diseases</td>
</tr>
<tr>
<td>catalase</td>
<td>catfish</td>
</tr>
<tr>
<td>catfish</td>
<td>cats</td>
</tr>
<tr>
<td>cats</td>
<td>cat scratch fever</td>
</tr>
</tbody>
</table>

**Cross Reference Formats:**

Felines, see Cats
Canines. See Dogs.
Cats, see also Persians
Dogs. See also specific breeds.
Dogs. See also specific breeds.
My referrals are usually to online resources such as ASI’s Indexer Locator and Jobs Hotline, or to the indexer registries of the other indexing societies, although I will occasionally recommend two or three qualified indexers whose work I know personally. When making referrals to individuals, I usually check on their availability first, just to save the client time. While I rarely make referrals to people whose work I am unfamiliar with, I may occasionally say something like, ‘Sally Smith is a retired veterinarian whom I recently met at a local indexers’ meeting. Although I have never seen her work, I’m sure she would appreciate being considered for your index on veterinary pharmacology.’ In that case, the referral is to someone whose subject background seems appropriate, even though I cannot speak to her skills as an indexer.

A few months ago, there was a posting on one of the indexing discussion lists that asked, ‘Why would I ever post the names of other indexers on my own website? Isn’t that referring work to my competitors?’ My personal reply: ‘The indexers whose names are posted on my website are not my competitors; they’re my backup system!’ Not only have I never had another indexer ‘steal’ one of my clients, the referral usually pays dividends in terms of reciprocal referrals to me in the future.

In a similar vein, I consider the time I spend talking about indexing as a career to newcomers or groups to be promotion on behalf of the profession as a whole. While I am not providing customer service to my clients, I am supporting the profession by encouraging the entry of newcomers into the field. My usual response to inquiries from newcomers is to refer them to appropriate online resources such as ASI’s ‘So you want to be an indexer’ page at www.asindexing.org, or Martha Osgood’s ‘Novice notes for prospective indexers’ at http://www.backwordsindexing.com/Novice/NoviceNotes.html. I ask novices to check the online information first, and then to contact me again with specific questions. I will agree to meet for coffee or lunch to talk to newcomers or two replies to these messages saying something like, ‘You said you’ll be gone the last week in April for the ASI conference. Can you handle a project for us the first two weeks in May?’

Providing ‘added value’ on your website

While a business website can be a useful marketing tool for any indexer, a site is only as effective as the effort that goes into its design and maintenance. Many freelancers treat their websites as ‘virtual resumes,’ offering little more than their background, contact information and a list of publications indexed. This type of site is often pretty to look at, but provides no incentive for repeat visits, particularly if it is not regularly updated.

A business website with added value, in contrast, offers reasons for visitors to bookmark it, visit again, and link to it from their own websites. For example, my own site includes the usual information about my experience, background, and titles indexed, with links to sample indexes that can be viewed at Amazon.com. In addition, I provide the educational content mentioned previously, plus links to reliable sources of health information on the Web (my core indexing specialty), and to other sites offering information about indexing and working with indexers.

Indexers around the globe are developing added-value websites that effectively market both their personal services and the indexing profession. Some notable examples are listed in the appendix to this article. These sites all have interesting and individualized designs, with substantive content that both clients and other indexers will be inclined to return to repeatedly – which means that the sites will move up in the rankings of Google and other web browsers and be more likely to be found by new clients.

Staying in touch with clients

Another exceedingly important part of customer service is staying in touch with your clients, aka marketing. We tend to think of marketing as attracting new business, but it also includes the care and feeding of existing clients.

Although I am constitutionally incapable of making cold calls and never call a client without a good reason, I have no hesitation using email for casual ‘Hi, remember me?’ notes. For example, I routinely send email messages early in the year to editors who regularly give me a lot of work, listing the time periods that I expect to be unavailable for extended vacations or business trips. Almost without fail, I receive one or two replies to these messages saying something like, ‘You said you’ll be gone the last week in April for the ASI conference. Can you handle a project for us the first two weeks in May?’

Similarly, I have a client who publishes a series of radiologic atlases that are very easy to index, and very profitable. I email the project manager in the first quarter asking when they expect to be releasing titles for indexing that year, and generally end up with one or two tentative bookings from that message.

Early in 2008 I had the perfect excuse to email my clients, since I was cancelling my fax line and needed to tell them to send contracts and other documents as PDFs in the future. I also noted, ‘By the way, I happen to have an opening in my schedule at the moment if I can help you with anything.’ Result: two profitable projects from that email message.

Another way that I stay in contact is to send holiday calendar cards to everyone I have worked for in the last five years or so, plus a few older clients that I have not heard from recently. Every year I hear from clients thanking me...
NOVICE NOTES

RESOURCES FOR PROSPECTIVE INDEXERS

When I was just starting out, I could have used some general guidance, but it wasn't available and everyone seemed so intimidating. So here are some resources for more info about indexing, including discussion lists to lurk on, sites to visit, preparations to consider if you are looking into becoming an indexer.

Table of Contents of All Six Novice Notes pages:

1. Resources to help you decide whether you want to index books or not - profiles of indexers in general, ASI, PNW, AUSSI, SL and chapter sites, discussion lists, software sites, indexing courses, income expectations, kinds of indexing, Is Indexing Really for YOU?

2. Let me talk you OUT of it - expenses, equipment, cost of courses, speed of indexing, brain agility ("Quick, give me three perfectly nuanced synonyms for XX"), moonlighting, self motivation, slowness of getting started, marketing yourself, irregular income, most index as supplemental income, organization, details, no feedback...

3. What does indexing look like from the inside? Sample step-by-step process of indexing (not a lesson in indexing), indexing sins, strategy, secret notes to yourself in the draft versions of the software, groups/grouping, other editing processes, timing, deadlines, some aspects are boring and solitary. Consider indexing a whole favorite book (and then asking your friends to use it while you watch) before investing in software or courses...

4. The Business of Indexing - a sample business plan (very informal), what to do between USDA lessons, skill building practice ideas, your desk, administrative background tasks, pricing and productivity, reference books.

5. Marketing Yourself - creative marketing ideas, one of several accepted processes for marketing your indexing business.

6. Peer reviews of indexes for purposes of continuing education, determining one's progress, quality control, submitting a more polished product to a publisher, etc.

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for the calendar (which fits nicely on bulletin boards), and I typically get at least two to three jobs from that mailing.

**Adopting a ‘no excuses’ approach to deadlines**

The first rule of customer service for indexers is to adopt a ‘no excuses’ approach to deadlines. Although clients will forgive many errors, a missed deadline is the one unforgivable sin. So the first strategy for ensuring good customer service is to turn down a job if you suspect that you may not be able to meet the deadline, or to negotiate an acceptable alternative deadline. Treat qualified colleagues as your backup system, and refer the job to someone else if you have any doubt that you can meet the deadline.

A corollary to this rule is, ‘Never let the editor be surprised.’ Stay in contact. If the deadline is looming and you are running behind, email or call the editor to ask if there is any flexibility in the schedule. Can you have an extra day, or an extra weekend if the deadline is on Friday? Phrase it in terms of, ‘I’m almost finished with the data entry, but really need an extra day to do the best edit possible.’ At worst, the editor will say no and you will still end up pulling that extra day, particularly if she knows and trusts your worst, the editor will say no and you will still end up pulling really need an extra day to do the best edit possible.’ At worst, the editor will say no and you will still end up pulling an all-nighter; but in all probability the editor will give you that extra day, particularly if she knows and trusts your judgment – and that you rarely ask for extensions.

There are a limited number of circumstances under which editors probably will be understanding if you let them know that you are going to miss a deadline: a death in the family, serious accident or illness of yourself or an immediate family member, or the total crash of your computer. They will be sympathetic and may even give you an extra couple of days if you are lucky. But the bottom line is that the crisis is yours, and that you must deal with it if you want to retain that client. Which leads to the second customer service strategy: backup plans.

**Backup plans for dealing with emergencies**

We all think of ‘backup’ in the context of our computer files, which is why prudent indexers back up data regularly to an external hard drive or other secure location. But how will you deal with a catastrophic hard drive failure, or an extended power outage, or a health crisis that requires immediate hospitalization when you have a index on deadline and two others in the pipeline? If you are providing excellent customer service, you will have a backup plan for those contingencies as well, starting with (1) notifying any clients that are immediately affected, and (2) shifting into emergency mode.

Emergency mode for physical disasters is relatively simple if you keep your data backed up and portable. Ideally, you will have another computer in the house that is already loaded with your indexing software. If you don’t have a second computer, make arrangements in advance with a friend or relative to let you use their hardware while yours is getting fixed, or know where to find the nearest public facility with computers that you can use for an extended period. Always know where the disk copy of your indexing software is and figure out the bare minimum needed to get your business up and running on a new system if you have to set one up immediately; and if your hard drive is exhibiting symptoms of near death, purchase and set up the new one before the old one dies.

For disasters that are not hardware-related, your best emergency backup system is the colleagues you know and trust. If you are facing a personal or family health crisis that will sideline you for several weeks or months, call (or have someone else call) your colleagues to find out who is available to complete the projects that are in progress, and to take over the ones that are in the pipeline. Then call the clients affected, explain the situation, and provide a solution by recommending trusted associates who can take over for you. The classic use of this strategy was by an indexer in the mid-1990s who ended up in intensive care with a heart attack. From her hospital bed, she directed her husband to call in favors, handed off several indexes in progress, and was able to recover without the stress of knowing her business was threatened.

An essential part of the backup plan for a freelancer is ‘estate planning’ for one’s business. Essential information needs to be readily accessible to a trusted individual who can act on your behalf if you are physically incapacitated or otherwise unavailable to access critical information in your office or on your computer. Make a list of your projects in process, with client contact information; upcoming projects that might need to be cancelled or referred; an index to your filing system (print and online) for locating important records such as invoices due; and contact information for trusted colleagues to whom work could be referred. In essence, maintain an up-to-date list of all the information needed to let someone you trust deal with your clients in your absence, whether you are physically incapacitated or simply inaccessible while traveling.

**Fixing the client’s mistakes and accepting responsibility for your own**

Everybody makes mistakes – authors, publishers, and indexers. How we deal with those mistakes reflects our personal attitudes toward customer service. For example, when do you report an egregious textual error that will embarrass the author if it slips through, or a serious editorial problem like endnote numbers that do not match those of the actual notes? Do you report these problems immediately, report them when you submit the index, or do nothing, assuming somebody else will catch the errors?

In these instances, good customer service simply requires using common sense. Tell the editor immediately if there’s a serious problem that is within her power to fix. Don’t let a ‘not in my job description’ attitude embarrass the author or the press. Report egregious textual errors and layout goofs immediately, especially when those errors will affect the quality of your own work, as in the case of mis-numbered endnotes.

Another example: What do you do when you find a large number of typos in the text? (1) email the editor asking if you actually have the final pages, (2) proofread the text at no...
additional charge (or offer to provide proofreading for an additional fee), (3) make a note of the errors that you happen to notice and submit them as an errata sheet, along with any errors that specifically affect the index, or (4) purposely ignore any error that doesn’t affect the index, assuming that somebody else will notice it, since you’re not being paid as a proofreader. How you respond reflects your attitude toward customer service.

In the case of messy texts that badly need proofreading, I may indeed ask if I have the final pages, just in case somebody sent me the wrong PDF. Since I am not being paid to proofread, I do not attempt to find and report every error. But I do report every error that potentially affects the index, pointing out the title conflicts that need to be resolved, the variant spellings of a name or term (specifying which version I used in the index, and asking the editor to correct it if I guessed wrong), minor factual errors that the editor or author may want to review, and so on. My clients know that they can trust me to report the critical errors, but that there are limits on how much error-checking I am willing to do without additional compensation.

Page reflows are another common issue. I personally have no problem working with temporary page numbers and doing global repaginations, and I factor that time into my rate quotes. But if repagination due to reflows takes more than an hour or so, I do let the client know that I will be charging an additional fee for this. While I believe strongly in customer service, I do not believe in martyrdom. My customer service philosophy requires that I help the client correct her errors—not that I have to take a financial hit to do so.

And then there are those 12-page single-spaced sheets of author corrections and comments, some of which are reasonable (terminology variants or missed concepts, overlooked typos) and those that are debatable, such as indexing of passing mentions, cross-references and double-postings that violate indexing rules. I make author-requested changes that do not matter, honestly admit it when I make a mistake, gently explain why I believe the way I did it is the correct way, and occasionally ask the editor to intervene if the author’s complaints are totally out of line and/or contrary to good indexing practice. I also adhere to my rule that up to two hours of client-requested edits are provided without charge, since most reasonable requests can be accommodated in less than two hours. For outrageous lists, I let the author know that I will be happy to follow her instructions, but that I estimate it will take eight hours at $50 per hour added to the original fee to comply with her requests. Often, that cost estimate will help an author who is paying for the index decide that perhaps not all her requested changes are necessary.

Recognizing when saying ‘No’ to a client is the right choice.

Finally, there are occasions when saying ‘No’ to a client is the best form of customer service. When you recognize that you are simply not qualified to index a particular subject, turn down the project. If there is no way that you can do justice to the material in the time or space allotted, or if accepting the project means that you will have to make unacceptable personal sacrifices, such as canceling a long-planned vacation or missing your daughter’s wedding, turn it down; the money just isn’t worth it. If the material is personally offensive to you or conflicts with deeply held political or social beliefs, just say ‘no’ if you feel that you cannot approach the material objectively. Or if the client creates unacceptable working conditions such as demanding multiple interim samples or expecting daily updates on your progress, it may be time to walk away.

In every case, turn down the job in a way that exemplifies good customer service, either by referring the job to another qualified indexer, or by honestly admitting why you cannot accept it. Even a bad book may deserve an index, and your duty is fulfilled if you point the client in the right direction to get help from others.

One of my favorite library supervisors once told his staff, ‘Keep in mind that you’re not working for this job; you’re working for the next one.’ And that statement is true for indexing, as well. The customer service you provide for the current project lays the foundation for the ones to come.

Note

Appendix: Indexer websites with added-value

Canada
Buchanan Indexing & Editing (Patricia Buchanan): http://www.index-edit.ca/index.html
DMS Indexing Services (Dagmar Ismail): http://www.dmsindexingservices.com/index.htm

Germany
Indexetera (Jochen Fassbender): http://www.indexetera.de/index.html

Netherlands
ISB&Index (Pierke I. S. Bosschieter): http://www.isbnindex.nl/index_bestanden/Diensten.htm

United Kingdom
Hill, Gerard: http://www.much-better-text.com/indexing.html
Johncocks, Bill: http://www.technicalindexing.com/
Linford, Rebecca: http://www.rebeccalinford.co.uk/indexing-service.html
Merrall-Ross International Ltd. (Jan Ross): http://www.merrall-ross.co.uk/

United States
Back Words Indexing (Martha Osgood): http://www.back-wordsindexing.com/
Hedden Information Management (Heather Hedden):
Carolyn Weaver has been a freelance indexer since 1991, specializing in health, behavioral, and social sciences books and journals. She was a medical librarian for more than 35 years and served as President of the American Society for Indexing, 2007–8. She runs Weaver Indexing Service from her home in Bellevue, Washington.

Email: cgweaver@weaverindexing.com

INDEXING SPECIALISTS (UK) LTD
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