

# How To Create A Story Workbook

By Stephanie Morrill



# How to Create a Story Workbook

I have the best intentions when I start a new novel.

This time, I tell myself, I'm going to keep track of each character as I write. No more eye colors changing from chapter to chapter, and no more getting to the end of a story and realizing I have three characters named Jack. (*Three.*)

Maybe one of these days, I really will do a good job of keeping track of my story as I write it, but for now that remains a backseat item to be sorted out in edits. That's when I turn to my story workbook and start getting all the details documented in one place.

## What is a story workbook, and why do I need one?

A story workbook is a digital binder (though you could make it with a physical binder too) that helps you keep track of the minutiae of your story. The reason I prefer to make mine a digital binder is that when I'm working with an editor, I always send them pieces so they can double check my details.

With my story workbook, I track things like my characters and plot, but I also document how many hours I put into a story and what needs to be researched.

As I said before, I use most components of my story workbook during edits, but maybe for you it will be part of your brainstorming or first draft. That's the great thing about a tool like this—it's yours!

## Getting Started

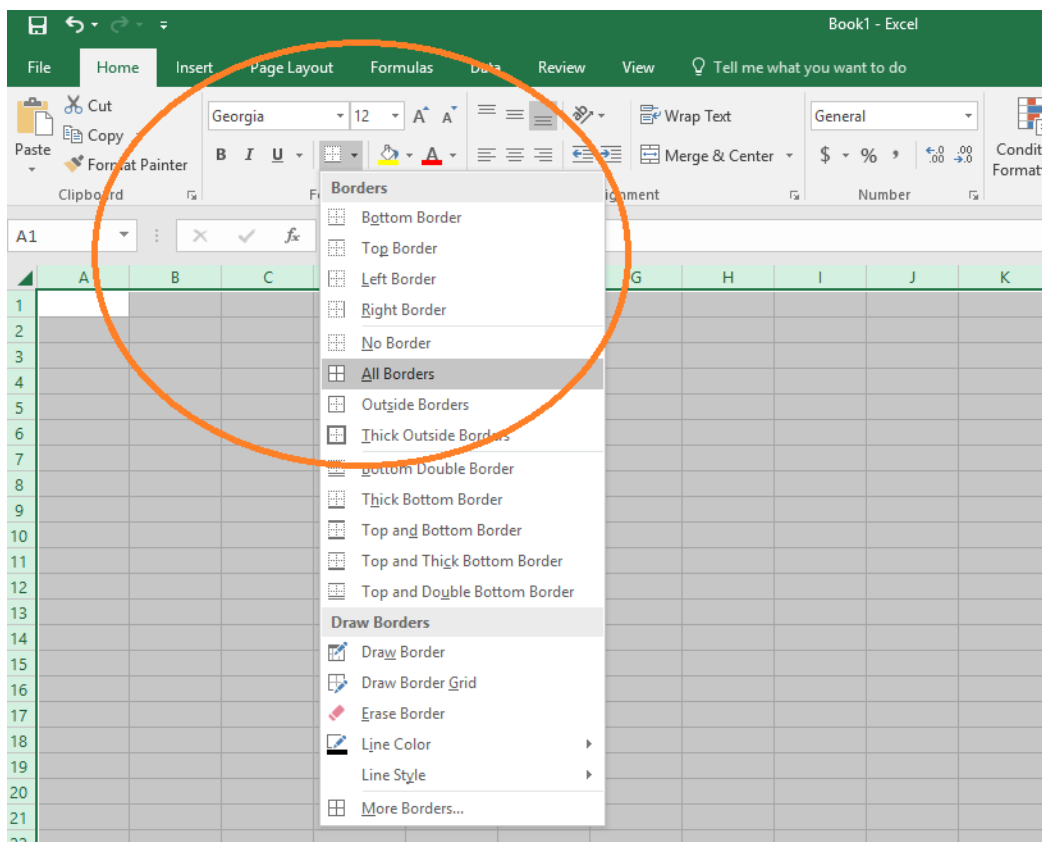
What's worked best for me is to use plain ol' Excel. If you're a Scrivener user, there's probably tools in there you can use (Scrivener and I don't get along great, so I can't help with this) but I like Excel for a couple reasons. **One is that if you don't have Microsoft Excel, you can do many of the same thing with Google Sheets.** To do that, all you need is a Google account, which is free.

Another reason I really like using Excel for my workbook is how easy it is to share the finished product with my editor when the time comes. Using specialty software makes that tricky, but my editor already has Excel.

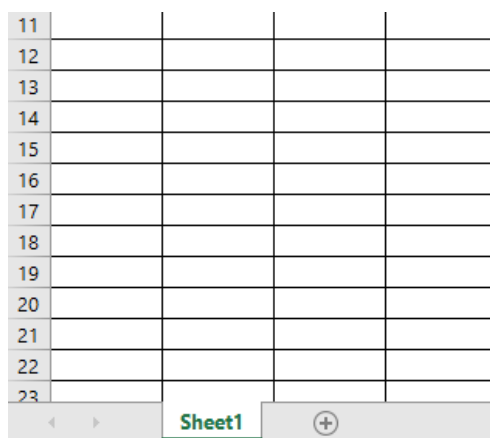
**At the end of this tutorial, you'll find links to formatted templates of this spreadsheet that you can download and customize for yourself, but I'll also walk you through how I format mine.**

When you open up a blank spreadsheet, it can feel overwhelming. The first thing I do is get my font and border preferences set up, because then the spreadsheet starts to feel like it's mine.

Start by selecting all (Ctrl+A) to format all your cells. In the picture below, you'll see where to find your font options (I'm a Georgia 12 kind of girl, and I like my headers bold and centered) and your borders. I always choose "all borders" because I like how it looks when I print it, but you may find you prefer something else:

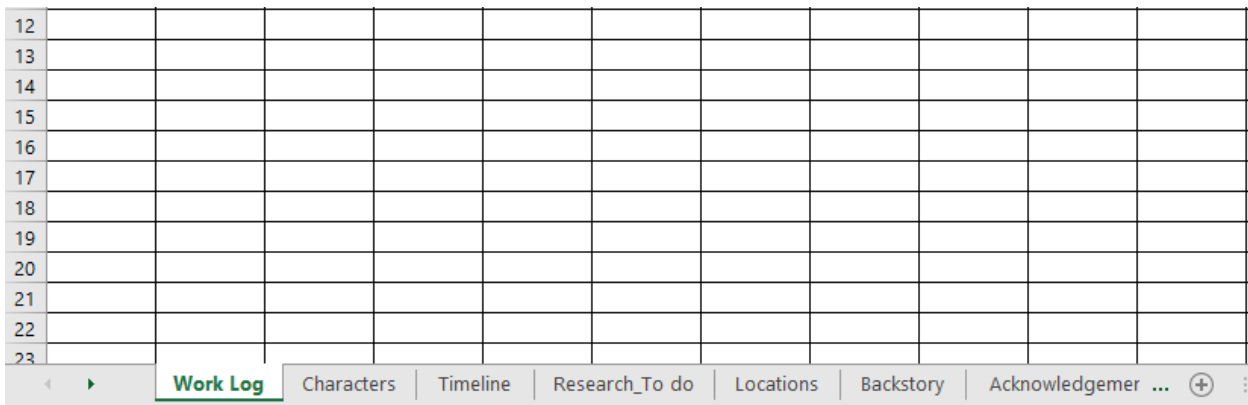


The next thing I do is get my "Tabs" added. At the bottom of your spreadsheet screen, you'll see where it says "Sheet1" and a plus sign for adding more sheets.



I think of these sheets as my binder tabs, and here are the sections I include in mine:

- Work log
- Characters
- Timeline
- Backstory
- Research/To do
- Locations
- Acknowledgements



If you're a fantasy writer, you might also have tabs for your storyworld, or a timeline of the world's history.

**Just remember that the workbook is a tool. Writing tools are only helpful to the extent that they serve the story. If it's not helping you get the story written, then it's not a tool you need.**

Now let's look at what I put in each of my tabs:

## Work Log

The work log is the first sheet in my spreadsheet because it's the one I use the most consistently.

Maybe you're not yet at a place where you want to track how much you're writing. I didn't really see a purpose in it until I had firm deadlines, and lots of things in my personal life pulling me away from writing time. (Primarily very cute, lovable things named McKenna, Connor, and Eli.)

I grew frustrated that I truly had no idea how long it took me to write my books. Yes, surprises happen along the way, but can you imagine operating another kind of creative business and being mostly clueless about how long it took you to do the creating? Florists are amazing artists, but they still need to have an idea of how much time it takes them to create a bouquet, right?

Here are the details I track:

- Date
- Time In
- Time Out
- Starting Word Count (or if I'm editing sometimes I track page numbers because my word count yo-yos)
- Ending Word Count
- Calculated Amount
- Location
- Notes

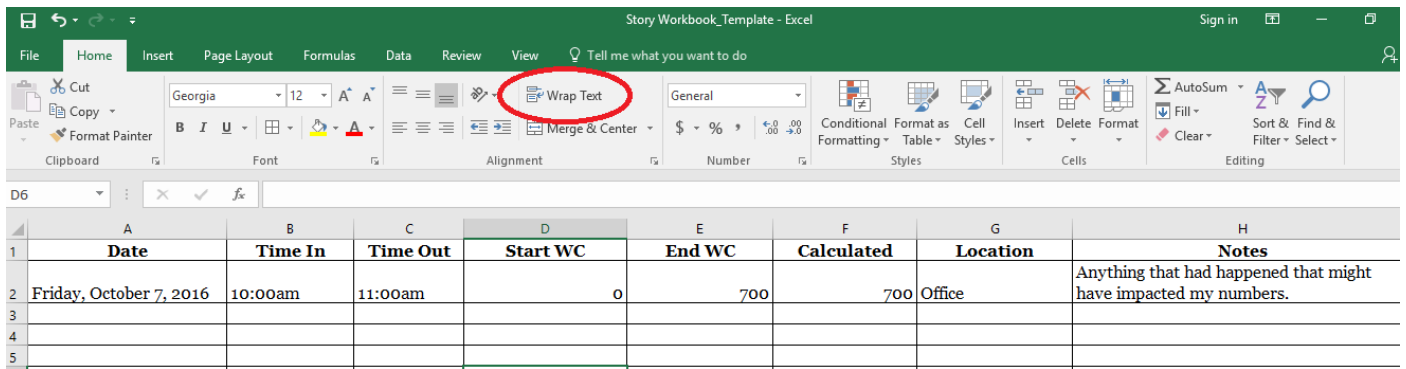
	A	B	C	D	E	F	G	H
1	Date	Time In	Time Out	Start WC	End WC	Calculated	Location	Notes
2	Friday, October 7, 2016	10:00am	11:00am	0	700	700	Office	Anything that had happened that might have impacted my numbers.
3								
4								
5								

The above screengrab is pretty self-explanatory, but I'll try and fill in some gaps.

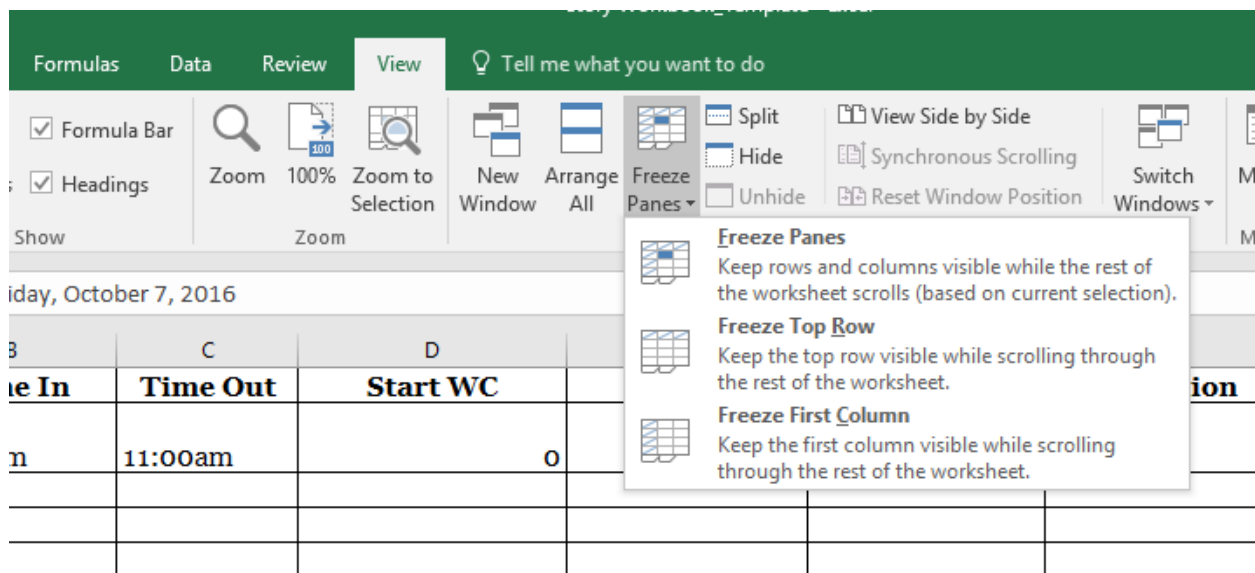
**Why track location?** I mostly write in my office, so I frequently don't, but if you write in a variety of places, this can be helpful. You can look for patterns and see if you maybe work better on the patio than you do in your bedroom, or if having easy access to Wi-Fi makes a difference in your word count.

I use the "notes" column to track any details that may have impacted the data. Like if I have a kid who's home sick, or if I was able to repurpose 1,000 words from an old manuscript, making my word count abnormally high.

Two other formatting things I'll mention is that I like to be able to see all my notes and not have them run off the page. I always select "Wrap Text" to create effects like you see in the "notes" section, where the text takes up two lines:



Also, as a project wears on, it's helpful to be able to see all my headers even when I scroll. To do that, you need to use the "Freeze Panes" tool:



One last note about this section. **At the end of a writing session, jotting down what I accomplished feels like a dorky-but-fun reward.** Something that makes novel writing a particularly difficult art form is how long it takes and how many words there are to write and revise. When I keep track in this way, noting my progress feels similar to the satisfaction of crossing an item off a to-do list.

## Characters

This is the piece of the workbook where it would be really helpful if I kept track of details as I worked on my first draft. Again, it tends to be a task I push off until edits, but you could even use it as you're brainstorming your story.

For characters, I find it helpful to track:

- Hair
- Eyes
- Skin
- General physical description
- Age/Birthday
- Personality descriptions

In addition to those, I almost always track:

- Primary Motivator
- Their role in the main character’s story
- One-word descriptor
- What others say

Let me show you what it looks like, and then we’ll discuss some of those in detail:

	A	B	C	D	E	F	G	H
1		<b>Main Character</b>	<b>Other Character</b>	<b>Other character</b>				
2	<b>Primary motivator</b>							
3	<b>Their role in MC's story</b>							
4	<b>One word descriptor</b>							
5	<b>What MC (or other characters) would say for one-word.</b>							
6	<b>Hair</b>							
7	<b>Eyes</b>							
8	<b>Skin</b>							
9	<b>General description</b>							
10	<b>Quirks</b>							
11	<b>Age and birthday</b>							
12	<b>Personality descriptors</b>							
13								

**Primary Motivator:** What does this character want most and pursue during the story? For my main character in *The Lost Girl of Astor Street*, she wants to find Lydia. That’s what

everything comes back to for Piper. But her friend, Walter, is focused on getting a starting spot on his minor league baseball team.

Tracking this detail for all my important characters does a couple things:

1. It forces me to think through their motivations, and that's a really important piece of delineating your characters from each other. If they are motivated by different things, it automatically prevents them from sounding the same.
2. It helps me identify opportunities for conflict that I might otherwise miss if they weren't all laid out side-by-side. Piper being focused on finding Lydia and Walter being focused on making the starting rotation may not directly pit them against each other, but it definitely grates on their relationship as the story goes on.

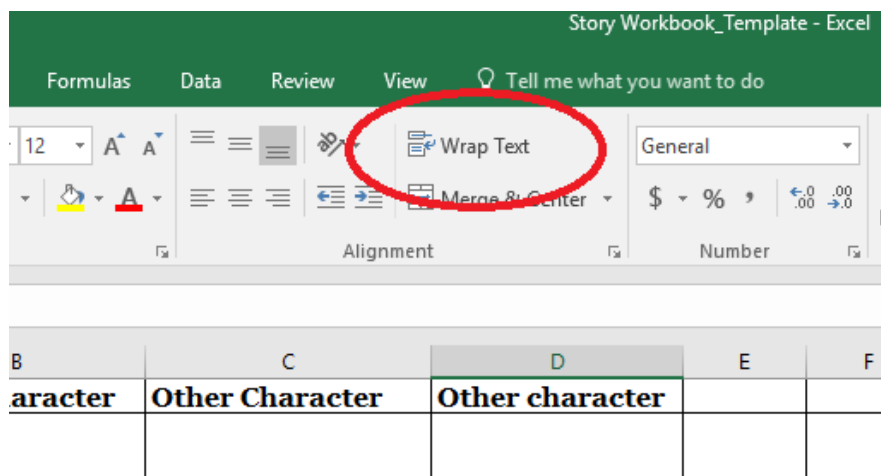
**Their role in the MC's story:** This is where I specify *my* purpose for having this character in the story. I tend to create too big of casts, so this is something that helps me make sure everyone has a clear purpose for advancing the plot. Like for Walter, one of my purposes for him is that he helps Piper see that growing up is going to happen whether she wants it to or not.

**One-word descriptor and what other characters would say for their one-word:** I've blogged about this before, [so here is a link to that explanation](#). Basically, if your character described themselves in one word, what would it be? How do they see themselves? And then how do others see them, and what one word would they use?

**Quirks:** I especially try to note body language they use or expressions that are unique to them.

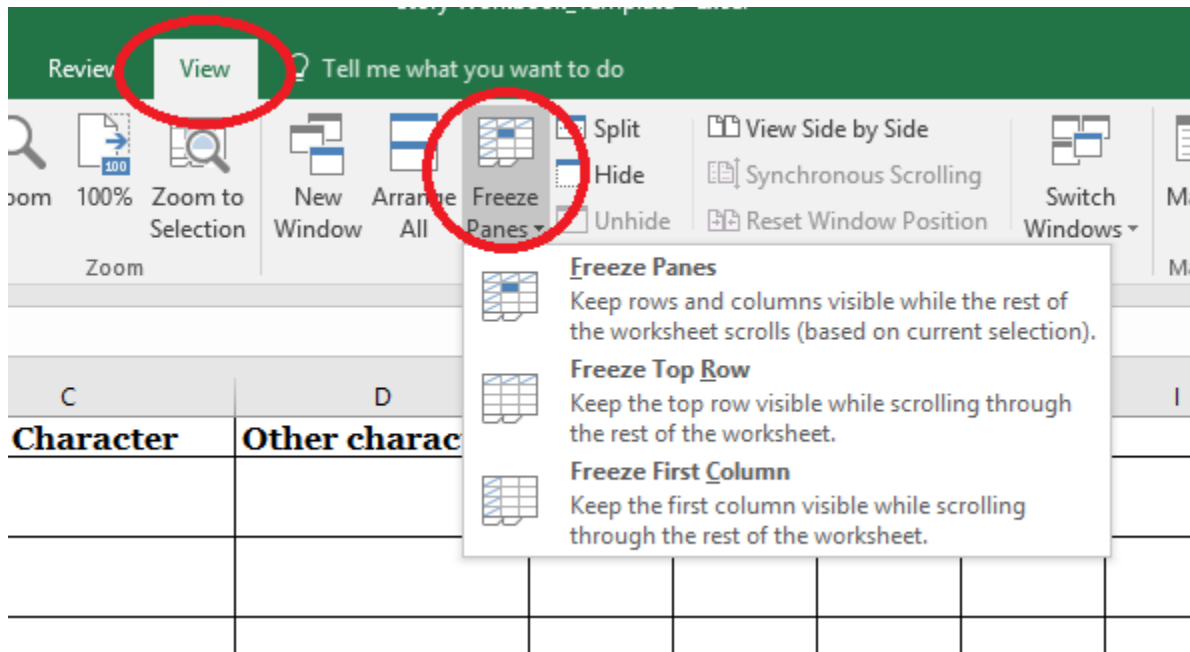
**Personality descriptors:** I mostly use this section to note the main character's observations. It helps me to make sure I'm being consistent and that any changes in her feelings toward that character are intentional rather than an oversight.

And then, just like with the work log, you'll want set cells to "Wrap text" for ease of use:





And then under the “View” option, you’ll want to freeze your panes as the document grows:



Again, these are the things that I track because it’s helpful to me as a writer. You only want to use the tool to the extent that it’s helping you write the story.

## Timeline

As I’ve transitioned into writing historical mysteries, this has become the most useful tool for me. I have a lot of information about specific dates and clues, and I need to keep it organized for the story to work. Especially by the time I’m on my fourth rewrite, and I can’t really remember if my character already knows something ... or if that was the last draft where she found that out, or...

Here’s what mine looks like:

The image shows a screenshot of a Microsoft Excel spreadsheet. The spreadsheet has a header row with columns A through G. The header row contains the following text: 'Chapter', 'Historical Details', '1924', 'Main Character', 'Secondary Character', 'Villain', and 'Others'. The first row of data contains the text: 'Before the story opens', 'Chapter 1', 'Scene 1', and empty cells for the remaining columns. The second row of data is empty. The third row of data is empty. The fourth row of data is empty. The fifth row of data is empty. The sixth row of data is empty. The seventh row of data is empty. The eighth row of data is empty. The ninth row of data is empty. The tenth row of data is empty. The eleventh row of data is empty. The twelfth row of data is empty. The thirteenth row of data is empty. The fourteenth row of data is empty. The fifteenth row of data is empty. The sixteenth row of data is empty. The seventeenth row of data is empty. The eighteenth row of data is empty. The nineteenth row of data is empty. The twentieth row of data is empty. The twenty-first row of data is empty. The twenty-second row of data is empty. The twenty-third row of data is empty. The twenty-fourth row of data is empty. The twenty-fifth row of data is empty. The twenty-sixth row of data is empty. The twenty-seventh row of data is empty. The twenty-eighth row of data is empty. The twenty-ninth row of data is empty. The thirtieth row of data is empty. The thirty-first row of data is empty. The thirty-second row of data is empty. The thirty-third row of data is empty. The thirty-fourth row of data is empty. The thirty-fifth row of data is empty. The thirty-sixth row of data is empty. The thirty-seventh row of data is empty. The thirty-eighth row of data is empty. The thirty-ninth row of data is empty. The fortieth row of data is empty. The forty-first row of data is empty. The forty-second row of data is empty. The forty-third row of data is empty. The forty-fourth row of data is empty. The forty-fifth row of data is empty. The forty-sixth row of data is empty. The forty-seventh row of data is empty. The forty-eighth row of data is empty. The forty-ninth row of data is empty. The fiftieth row of data is empty. The fifty-first row of data is empty. The fifty-second row of data is empty. The fifty-third row of data is empty. The fifty-fourth row of data is empty. The fifty-fifth row of data is empty. The fifty-sixth row of data is empty. The fifty-seventh row of data is empty. The fifty-eighth row of data is empty. The fifty-ninth row of data is empty. The sixtieth row of data is empty. The sixty-first row of data is empty. The sixty-second row of data is empty. The sixty-third row of data is empty. The sixty-fourth row of data is empty. The sixty-fifth row of data is empty. The sixty-sixth row of data is empty. The sixty-seventh row of data is empty. The sixty-eighth row of data is empty. The sixty-ninth row of data is empty. The seventieth row of data is empty. The seventy-first row of data is empty. The seventy-second row of data is empty. The seventy-third row of data is empty. The seventy-fourth row of data is empty. The seventy-fifth row of data is empty. The seventy-sixth row of data is empty. The seventy-seventh row of data is empty. The seventy-eighth row of data is empty. The seventy-ninth row of data is empty. The eightieth row of data is empty. The eighty-first row of data is empty. The eighty-second row of data is empty. The eighty-third row of data is empty. The eighty-fourth row of data is empty. The eighty-fifth row of data is empty. The eighty-sixth row of data is empty. The eighty-seventh row of data is empty. The eighty-eighth row of data is empty. The eighty-ninth row of data is empty. The ninetieth row of data is empty. The ninety-first row of data is empty. The ninety-second row of data is empty. The ninety-third row of data is empty. The ninety-fourth row of data is empty. The ninety-fifth row of data is empty. The ninety-sixth row of data is empty. The ninety-seventh row of data is empty. The ninety-eighth row of data is empty. The ninety-ninth row of data is empty. The hundredth row of data is empty.

Obviously, you'll be tailoring this to your use, but here's what's worked for me.

I usually track three-ish characters in their own columns, and then for other not-as-important characters, I throw their info into that last "Others" column. If you're telling a story from multiple points of view, you'll probably want a column for at least each POV character.

You'll notice in that second row, I have designated a space for "before the story opens." Some stories have loads of backstory that I have to keep straight. (More on that when I get to the "Backstory" tab.) Others don't have a lot, or they just have one or two things that I want to make a note of.

The historical details are obviously only useful if you're writing a historical novel. I use this column to keep track of big world things that are taking place outside of the main plot of the story. If you're writing any kind of novel that involves a war going on, this can be a really helpful way to keep track of those important dates alongside the story details.

Where it says 1924, you would obviously put whatever year your story is being told in. Or, if your story spans many years, you can put "Date." I put the specific year because I didn't want to bother with typing it out every time.

Here's a peek at the timeline I made for *The Lost Girl of Astor Street* so you can see what this looks like in action, and then I'll talk about how I use the character columns:

A	B	C	D	E	F	G
Chapter	Historical Details	1924	Piper	Mariano	Villain	Others
			Piper purchases a replacement shirt and hat for Walter.		Villain does villain stuff	
3	There are mafia territory battles going on around them within the Torrio-Capone group. Need to look	Tuesday, March 25th	Lydia shows up at the house to tell Piper her parents are sending her to the Mayo Clinic in Rochester. She tells Piper she's going to talk to		More actiony villain stuff	There are some notes here about things others are doing, but they would give away some big plot stuff
			Father tells them he's getting remarried. Dr. LeVine calls looking for Lydia.		There is more villain stuff going on.	
4		Wednesday, March 26th	Jeremiah asks Piper out for that Friday. Detectives arrive at school and question Piper.	Gets assigned the LeVine case. Meets Piper. Knocks on neighbors doors and talks to them.		
			Mariano questions Piper, Piper goes to the LeVine's house and speaks to Lydia's parents.	Meets with the LeVine family. Admires Piper's honesty in contrast with Zola.		
			Piper questions Matthew He denies knowing that Lydia had feelings for him.			
			Now that she knows Lydia didn't elope, Piper journals about Lydia in hopes of helping the investigation. She calls Mariano to schedule a get together the next		Villain keeps on truckin'.	

For this story, my main character is Piper. Her column is where I'll track most of the plot. Thus far, most my stories are told from just one point of view, so for me this ends up being where all the big action is. If you have multiple POV characters, that might not be the case.

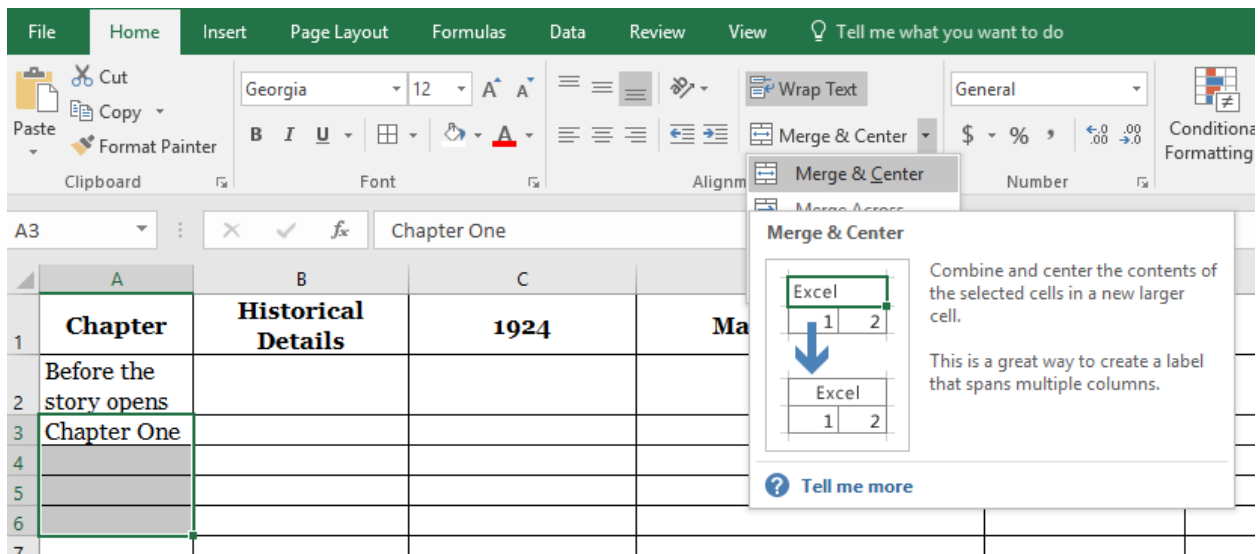
I have found it super important to track what my villain is doing. Because after I sent the original draft of *The Lost Girl of Astor Street* to my agent, she was like, "What is your villain doing while your main character is doing her thing?" And I discovered I had huge chunks of

time where my villain was just hanging around. So, it's really important to keep track of your antagonists, even if they're off stage!

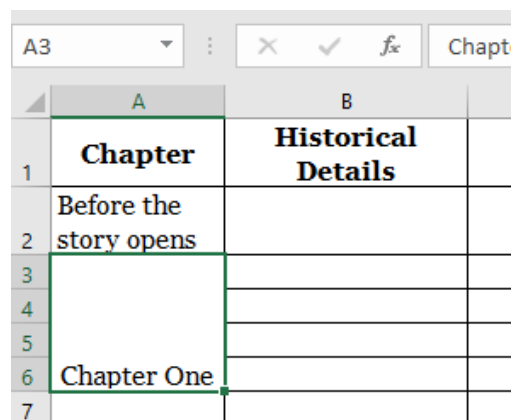
The "Others" column is a great way to make sure that clues are getting planted early on, and that you don't have people doing something in town when they were supposedly gone for two weeks, or whatever.

**A note about color coding:** You'll also notice that a lot of that screen is grayed out. That's because I used this to show myself when something happened off stage. Another way I've used color coding is if I'm adding a plot thread. I'll pull up the timeline and start plugging in the actions, but I'll make the cells bright yellow or something. That way it's easy for me to make sure the new stuff is going to jive with the old.

You also might have noticed that when I marked the chapters (in the first column) and the dates (in the third column) some of my cells were longer. I did that by merging the cells. To merge cells, select the cells you want to combine, and then select "Merge and Center."



Afterward, it'll look like this:



**Something else you might consider tracking is the weather.** Even if this is a fantasy world with your own created weather patterns, it can still be helpful to make notes.

**I know I'm starting to sound like a looped playlist, but don't lose sight of the purpose of the timeline: To help you write your story.** While it's a worthwhile investment of time to make your timeline readable and useful (if your editor asks you for anything of this nature, it'll be the timeline and your character details) it's easy to get obsessive about tracking and color coding every detail.

## Backstory

I don't always need to include this tab, but I've written stories with very tangled backstories that involved different locations and character ages. I have yet to need this timeline to be as detailed as the actual story timeline, so I usually have just these columns:

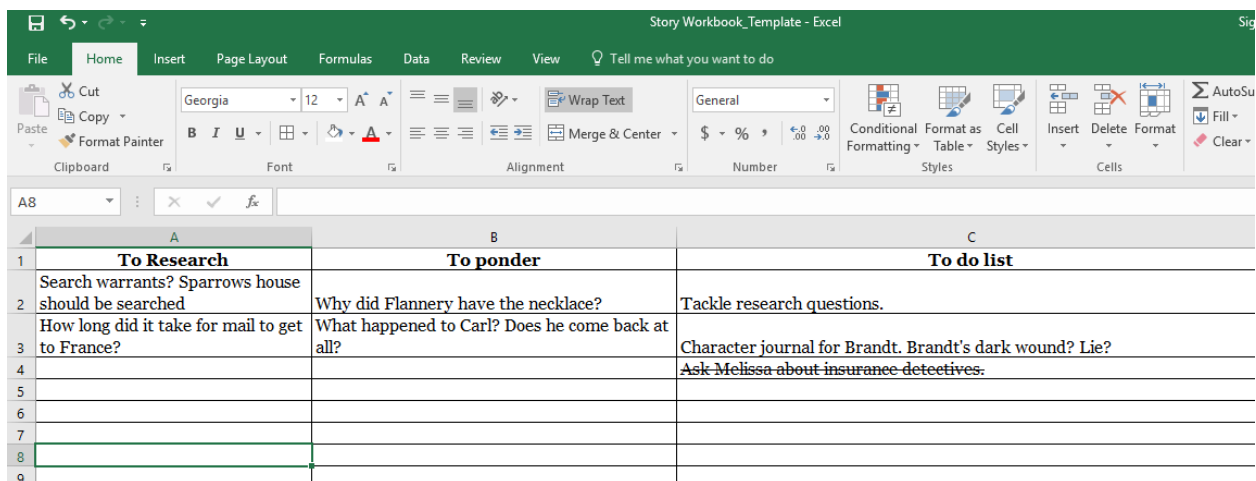
- Date
- Event
- Location
- Other Details

A separate tab for the backstory can be super helpful for tracking details like a big family history, the development of a technology, or the history of your storyworld.

## Research/To Do

This tab often gets added during the first read-through, but sometimes I keep a running list during the first draft or brainstorming process.

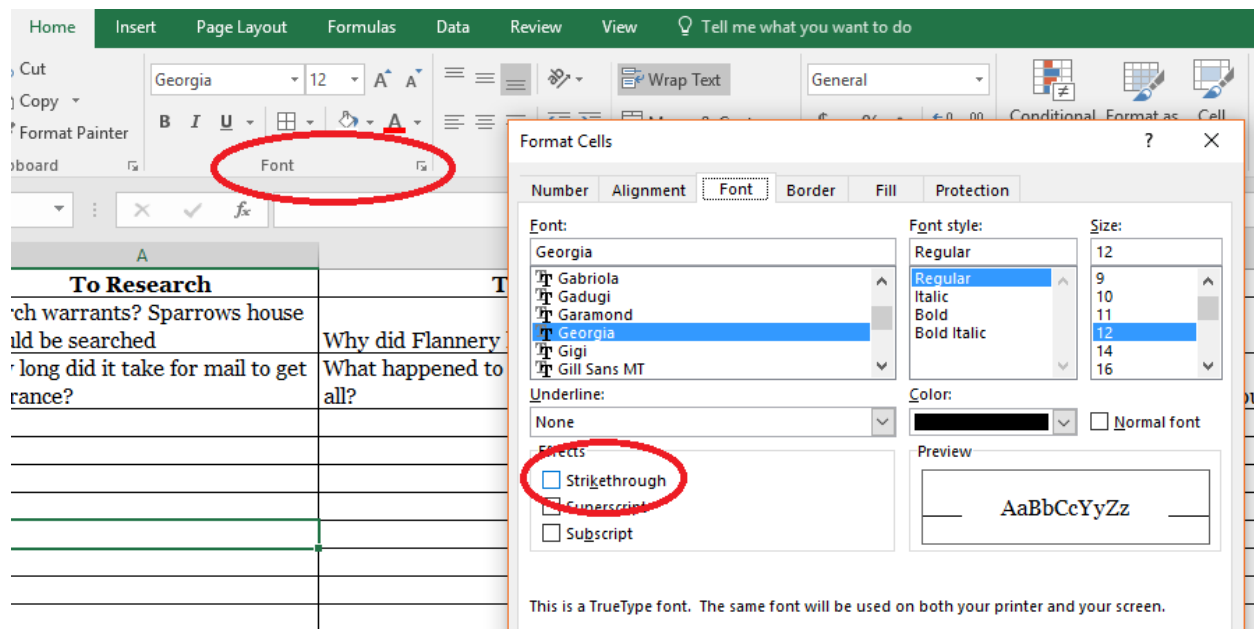
I create columns for details I need to research, story questions I'm pondering, and things I need to do. For the example, I left in a few from a work-in-progress so you can see:



The screenshot shows an Excel spreadsheet with the following table structure:

	A	B	C
1	<b>To Research</b>	<b>To ponder</b>	<b>To do list</b>
2	Search warrants? Sparrows house should be searched	Why did Flannery have the necklace?	Tackle research questions.
3	How long did it take for mail to get to France?	What happened to Carl? Does he come back at all?	Character journal for Brandt. Brandt's dark wound? Lie? <del>Ask Melissa about insurance detectives.</del>
4			
5			
6			
7			
8			
9			

The best part of making a to-do list is, of course, crossing items off. I use the strike-through feature rather than just deleting them because it gives me a greater sense of accomplishment:



## Locations

Your story may not need this tab. When I wrote contemporary fiction, I didn't find it useful, but with historical fiction I do. Anytime I reference an address, or I have a person living in a specific house or neighborhood, I spend a lot of time on Google Maps finding the right place.

The sheet I use for tracking these locations is very basic with just two columns. One that says what it is ("Piper's house") and the other that lists the address. If I can, I also include a link to a picture.

## Acknowledgements

Along the way, people help me with my stories. They give me information I need or encouragement, and I keep a running list so that I can thank them publicly in the back of the book. This is the simplest of all the spreadsheets, with one for the name, and the other for how they helped me.

**I hope you find the story workbook to be a tool that helps you edit more effectively!**

**[Snag your free template download here.](#)**

**If you have problems, please email me!  
Stephanie@StephanieMorrillBooks.com**