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White Paper Spec

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This document describes a general approach to writing white papers. It answers questions like:

- What is the objective of a white paper?
- How is it different from other documents with similar content?
- How does it “work”?
- What are the key parts of a white paper and how are they organized?

I recognize that different authors have different views on this subject and that no one size fits all. This is simply my view of a “best practice” for writing white papers. It provides a brief overview for clients who want to know my answers to the questions listed above. It’s designed to be a quick read for busy decisions makers or content experts looking to address a critical marketing need.

My approach is based on my 25+ years as a professional technology and business writer. It reflects both my own writing experience working for 225+ clients and what I have learned from other professionals — while working at PR and marketing firms (Hill and Knowlton, Regis McKenna), as a member of professional associations (Public Relation Society of America, International Association of Business Communication), and by researching the topic.

What is the objective of a white paper?

A white paper is first and foremost a marketing document. Like a brochure, it exists to sell, but does so in a different way. It sells by: 1) defining the playing field (yours, your customer’s, or both); 2) identifying a strategy for success; and 3) positioning you — either implicitly or explicitly — as a relevant enabler of that strategy. Rather than sell a particular brand of mousetrap, it sells a strategy for catching mice given the current environment (as you have defined it) — thus making your particular mousetrap an obvious choice.

How is it different from other documents with similar content?

A white paper is different from an industry analyst research report (like a Gartner) — although in many ways it has the look of a research report. It provides: 1) factual information about the reader’s environment; 2) a trends analysis based on those facts; and 3) conclusions. However, unlike a research report, the facts, trends, and conclusions are not unbiased (although they should appear that way). The idea is to make a logical argument and win it.

The writing style of a white paper is also different from most analyst reports. The first is more of a *Business Week* or *Harvard Business Review* style while the latter has more of an academic or formal style. You want shorter sentences, more active voice, more bullets and sidebars, a "pyramid" journalistic structure, and greater use of captions and headlines for skimming. The goal is to make the information as accessible as possible while establishing an authoritative voice.

A white paper is also different from other sales literature like brochures. A brochure is an explicit call to buy. It defines the product or service up front as the ideal solution for a particular problem — stated in a way that makes it easy for the reader to self identify. A brochure also employs advertising copy techniques that are out-of-bounds in a white paper — taglines, emotionally loaded imagery (both graphic and text), extended metaphors, and deliberate violations of spelling, grammar, and other conventions. In fact, it is by breaking conventional boundaries that brochures (and other advertising) "break through the clutter." Such devices, used in combination with white papers, play across the complete range of humans' psychological receptors from the emotional to the logical.

How does it "work"?

White papers work by making a bargain with the reader. In exchange for useful information about a critical subject, the reader is willing to spend time on the receiving end of your messages. That's why white papers make excellent incentives as fulfillment for direct mail or websites. In direct mail, white papers become a way to extend the conversation with the prospect. In websites, visitors who register for white papers can turn into active sales leads. In pubic relations, white papers make excellent articles because they do what editors want — cover a trend or discuss a problem and then present a class of solutions (as enabled by a product or service with a relevant set of attributes). No hard sell is involved.

White papers fill two needs of business buyers: in-depth information and reduced risk. By providing in-depth information, the company establishes itself as a subject matter authority. Buying from such an authority (especially one you have "gotten to know" via a white paper) feels less risky than buying from someone you only know from advertising or even word-of-mouth.

The incentive value of white papers is perhaps best demonstrated by web search engines. White papers, in making their case, necessarily must be full of the keywords readers search on. More importantly, as search engines become more sophisticated, they look for those keywords — not simply in isolation — but in the same logical context in which a white paper is likely to present them. White papers have therefore become a key method for increasing the size of your search engine visibility without actually increasing the number of web pages on your site — so your site stays smaller and easier to navigate.

What are the key parts of a white paper and how are they organized?

Most white papers should be between six and 10 pages with approximately 400 words per page. Shorter papers than that can lack "heft" — i.e., readers want to know you have rich content even if they don't personally feel they have time to read it. Longer papers require multiple themes to hold them together — each of which is an opportunity for its own white paper. To make the paper visually interesting, it's important to break up the main body with graphics and sidebars — there should be at least one of these on every other page.

White papers consist of seven key sections:

- Title
- Deck
- Second deck (optional)
- Introduction
- Main body introduction
- Main body development
- Conclusion

Title

The title should be one line long and convey a complete idea that: 1) draws readers in; and 2) sets up a premise that drives the paper. Note that the title by itself does not have to state your case (although it can). The point is to draw the reader in and raise an issue or state a truth that the reader will find intriguing on its own merits. In doing so you must name the problem or opportunity. By naming it you claim it, and — if nothing else — that's the message readers get.

Deck

Under the title, two lines. Restates the title in another way so as to amplify or expand the premise. You can state why the premise matters — how readers should act or could otherwise be in trouble or miss an opportunity if they don't. This drama between good acts and potentially bad consequences is one of the ways to make a premise intriguing and the white paper a good read. Another example of drama would be the conflict between conventional wisdom ("everybody does it this way") and your recommended best practice.

Second deck (optional)

Under the deck, two to four lines. States what's been happening in the environment that has created the need for the company's solution and how the strategy is a natural response to these trends.

Introduction

Extends to the first subhead, typically one page. A summary of the white paper, starting with the premise and ending with the action readers should take — i.e., adopt a technology, deployment model, best practice, or business strategy that your company enables.

Subheads, by the way, should be actual content — like a business benefit or a customer quote — not generic placeholders — like "Conclusion." They should also be short — seven words at most.

Main body introduction

The main body introduction begins where the main introduction leaves off. The main introduction has just presented a solution. Now the body introduction overviews in some detail what's been going on in the world to create the need for that solution. So it transitions naturally to the next section.

Main body development
This is a narrative, punctuated by sidebars and exhibits, that logically links together a number of key facts that add up to the argument previously summarized. Facts may include but are not limited to:

- Market data
- Business methods
- Technical descriptions and specifications
- Pros and cons of various approaches
- Proof points of business trends, technology trends, and solutions
- Key insights
- Case studies

The body needs to maintain a balance between the content presented in sidebars and exhibits and the content presented in the main narrative. The key ideas should come across even if one just skims headlines and exhibits (including captions). On the other hand, having too many sidebars and exhibits can create a fragmented look that's confusing. One should be able to read the main narrative thread start to finish and see a story with a beginning, middle, and an end.

Good candidates for sidebars are case studies, summaries of industry standards, and explanations of how a piece of technology works. These are things that could slow the narrative if inserted into the main copy. But they should still be available if needed to fill whatever gaps you might reasonably expect to exist in the knowledge of your target audience. Sidebars are also a very good way to attract search engines — as sidebars tend to have more reference type content, which is "hotter" for search engine algorithms than marketing type content.

Conclusion
A conclusion is not a summary of the key points in the paper. It is simply a short one or two paragraphs that make readers feel like they have reached the end. On the one hand you want the reader to go away satisfied that there is nothing left hanging. On the other, you don't want the reader wishing he or she had stopped reading 30 seconds sooner.

Conclusions can be handled several ways. One is to simply revisit the main premise but in a different way. For example, if this is mostly a technical white paper, you can restate the premise in a business context, as in: "That's good news for customers who can now …."

Another approach is to have a call to action, as in: "As organizations continue down this path, partnerships with the most expert technology providers will stay high on their lists of priorities."

And now let me conclude by saying again that these rules are not hard-and-fast for every situation. But they do provide a framework for turning topics into white papers that your sales prospects will want to read and for which your content experts will feel prepared to provide great content.