

Making Everything Easier!™

White Papers

FOR
DUMMIES[®]
A Wiley Brand

Learn to:

- Plan, create, and promote effective white papers
- Pick the perfect style of white paper for your next project
- Manage a white paper project with a 12-step process

Gordon Graham

That White Paper Guy





by Gordon Graham



White Papers For Dummies®

Published by
John Wiley & Sons, Inc.
111 River St.
Hoboken, NJ 07030-5774
www.wiley.com

Copyright © 2013 by John Wiley & Sons, Inc., Hoboken,
New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, the Wiley logo, For Dummies, the Dummies Man logo, A Reference for the Rest of Us!, The Dummies Way, Dummies Daily, The Fun and Easy Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc., and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons,

Inc., is not associated with any product or vendor mentioned in this book.

Limit of Liability/Disclaimer of Warranty: The publisher and the author make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation warranties of fitness for a particular purpose. No warranty may be created or extended by sales or promotional materials. The advice and strategies contained herein may not be suitable for every situation. This work is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If professional assistance is required, the services of a competent professional person should be sought. Neither the publisher nor the author shall be liable for damages arising herefrom. The fact that an organization or Website is referred to in this work as a citation and/or a potential source of further information does not mean that the author or the publisher endorses the information the organization or Website may provide or recommendations it may make. Further, readers should be aware that Internet Websites listed in this work may have changed or disappeared between when this work was written and when it is read.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

For technical support, please visit
www.wiley.com/techsupport.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2013932119

ISBN 978-1-118-49692-3 (pbk); ISBN 978-1-118-49704-3 (ebk); ISBN 978-1-118-49705-0 (ebk); ISBN 978-1-118-49707-4 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

About the Author

Gordon Graham is an award-winning writer who has worked on close to 200 white papers for well-known companies, like Google, Rackspace, and Oracle, plus many smaller firms with big dreams. Gordon wrote his first white paper in 1997, and by 2001, he decided to specialize in this unique form of content. His versatile experience as a journalist, technical writer, marketing executive, and independent copywriter helps him look at white papers from all different angles: as a reader, a sponsor, and a creator.

Gordon finds most white papers not nearly as engaging or persuasive as they could be, and he thinks that's a shame. He continues to do research, write articles, and give presentations to professional marketers and writers on how to make their white papers more effective. His website, ThatWhitePaperGuy.com, is top-rated in Google, thanks to the dozens of how-to articles available on his site.

Gordon has taught writing at two universities and given more than 50 workshops, including in-house training at Cisco, Ericsson, and Sprint. As a freelance journalist, he wrote close to 1,000 magazine articles on technology for everyone from accountants to woodworkers. And for five years, he was the editor of SoftwareCEO.com, interviewing dozens of software executives on the secrets of their success.

Unlike most writers, Gordon has first-hand experience as a marketing executive. He served as the vice president of marketing for a wireless startup, where he helped grow sales from \$250,000 to \$14 million and then sell the company in three years. He did this, in part, by

sponsoring white papers that helped his firm “eat the lunch” of much larger competitors.

Gordon lives with his family and two ginger cats a few steps from the shore of Lake Huron in northern Ontario, Canada. In the summer, he likes to run, paddle, and cruise the river on his boat, *The Thessalon Queen*. In the winter, he is happy to confirm that you can get high-speed Internet in an igloo.

Dedication

This book is dedicated to my wonderful partner, Angie Gallop, the woman I dreamed of since I was a teenager. Her love, insight, and sense of humor are a constant delight to me and all who know her. And to our daughter, Cassidy Rain, who helps us welcome every day with a toothy smile and a strong desire to go “outside.”

Author's Acknowledgments

It takes a village to write a book, even if only one person's name is on the cover. This book took a village of colleagues, creatives, and clients over the past 15 years to come into being.

Thanks to my fellow white paper writers Michael Stelzner, who blazed the path with meteoric brilliance, and Jonathan Kantor, with whom I spent many intriguing hours discussing the past, present, and future of white papers. Thanks to Manny Gordon for your ongoing wit and wisdom, not to mention working together on our first-ever white papers, lo these many years ago. Special thanks to Louise Audren for the design and cover, and to Britt Brouse, Elizabeth Creith, and Jonathan Kantor for helpful reviews of the original version of my "ice cream" report. Thanks to Jef Keep for keeping my website humming along smoothly. Extra-special thanks to Steve Matthews, who designed the logo and website for That White Paper Guy and helped set all this in motion. And many thanks to my brother, Greg Graham, who helped research the global market for white papers and has been a fine coconspirator in the world of self-employment.

Thanks to all my colleagues at Wiley, starting with acquisitions editor Stacy Kennedy, who glimpsed the need for this book; to project editor Vicki Adang, who coaxed, cajoled, and inspired me with brilliant suggestions on how to reorganize and refine the manuscript; to technical editor Russell Willerton, who made many wise suggestions and helped me remove my foot from my mouth in a few notable places; and to copy

editor Jennette ElNaggar, who made hundreds of eagle-eyed comments on how to improve the text. And, of course, thank you to my agent Carole Jelen from Waterside Productions for all your cool-headed advice.

Thanks to my fellow writers, including all the members of To the Point, the Thessalon Writers' Group, who inspire me in every possible type of writing, and to my fellow readers in our book club, who remind me what's important in life: friends, laughs, eats, and drinks. To my many friends in PWAC, you know who you are, especially Anne Douglas, Kathe Lieber, Paul Lima, Pippa Rispin, Bruce Wilson, and many more. Extra-special thanks to Steve Slaunwhite for years of encouragement, wise counsel, and helpful coaching.

Last but certainly not least, thank you to all my clients from Australia to Finland, who saw the potential of marketing with the unique form of content called white papers and who weren't content to publish "just okay" efforts but urged everyone involved to do our very best. Special thanks to Ben White and everyone at MJ Impulse for your understanding as I delayed your white papers to get this book completed. This book contains the many lessons I learned from working with all of you. And I trust our learning isn't over yet.

Publisher's Acknowledgments

We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

Some of the people who helped bring this book to market include the following:

Acquisitions, Editorial, and Vertical Websites

Senior Project Editor: Victoria M. Adang

Acquisitions Editor: Stacy Kennedy

Copy Editor: Jennette ElNaggar

Assistant Editor: David Lutton

Editorial Program Coordinator: Joe Niesen

Technical Editor: Russell Willerton, PhD

Editorial Manager: Michelle Hacker

Editorial Assistants: Rachelle S. Amick, Alexa Koschier

Cover Photo: © John Wiley & Sons

Composition Services

Project Coordinator: Sheree Montgomery

Layout and Graphics: Carrie A. Cesavice, Jennifer Creasey, Joyce Haughey

Proofreaders: Melissa Cossell, Bonnie Mikkelson

Indexer: BIM Indexing & Proofreading Services

Publishing and Editorial for Consumer Dummies

Kathleen Nebenhaus, Vice President and Executive Publisher

David Palmer, Associate Publisher

Kristin Ferguson-Wagstaffe, Product Development Director

Publishing for Technology Dummies

Andy Cummings, Vice President and Publisher

Composition Services

Debbie Stailey, Director of Composition Services

White Papers For Dummies[®]

Visit

*www.dummies.com/cheatsheet/whitepapers to
view this book's cheat sheet.*

Table of Contents

Introduction

[About This Book](#)

[Conventions Used in This Book](#)

[What You're Not to Read](#)

[Foolish Assumptions](#)

[How This Book Is Organized](#)

[Part I: Getting Started with White Papers](#)

[Part II: The Three Flavors of White Papers](#)

[Part III: From Foggy Idea to Finished Document](#)

[Part IV: Succeeding with White Papers](#)

[Part V: The Part of Tens](#)

[Icons Used in This Book](#)

[Where to Go from Here](#)

Part I: Getting Started with White Papers

Chapter 1: Unleashing the Power of White Papers

Seeing a White Paper for What It Is

Getting the scoop on the three flavors of white papers

Following a proven system for creating white papers

Declaring White Papers the “King of Content”

Seeing the growing trend to white papers

Spotting three flaws in many white papers

Using a mantra to avoid problems

Understanding Today’s Complex Sale

B2B marketing has evolved quickly

Today’s B2B buyers do their own research

Profiting from White Papers

At the top of the funnel

Throughout the funnel

At the bottom of the funnel

Discovering Who Uses White Papers and Who Should

Chapter 2: An Exciting Opportunity for Writers

Sizing Up the Possibilities

Looking at three trends pushing white papers to the top

Understanding why marketers can’t find qualified writers

Calculating the earning potential for a white paper writer

Discovering who uses white papers

Wondering whether the white paper opportunity will last

Coming into White Papers from Three Common Paths

Copywriters and white papers

[Journalists and white papers](#)

[Technical writers and white papers](#)

[Finding White Paper Clients](#)

[Avoid most of what you hear](#)

[Getting started with the basics](#)

[The secret of freelance success](#)

[Chapter 3: The Past, Present, and Future of White Papers](#)

[Where It All Began: Generation 1.0 \(1910s to 1990s\)](#)

[Characteristics of Gen 1.0 white papers](#)

[The closest model: Business reports](#)

[Forcing White Papers to Evolve](#)

[Where White Papers Are Now: Generation 2.0 \(1990s to Today\)](#)

[Characteristics of Gen 2.0 white papers](#)

[Two close models: Annual reports and science magazines](#)

[But aren't white papers old-fashioned?](#)

[Still evolving, not dying](#)

[Where White Papers Are Going: Generation 3.0 \(Coming Soon\)](#)

[Some trends to watch](#)

[Four possible paths to the future](#)

[Chapter 4: Just the FAQs on White Papers](#)

[Working Out the Whats of White Papers](#)

[What is a white paper anyway?](#)

[What are the industry standards for white papers?](#)

[What else do people call white papers?](#)

What's the difference between white papers and other marketing materials?

Figuring Out Who Writes and Reads White Papers

Who publishes white papers?

Who reads white papers?

Who hires people to write white papers?

Who writes white papers?

Understanding Why White Papers Are So Useful

Why do companies publish white papers?

Why do prospects read white papers?

Why do writers write white papers?

Pinpointing the Wheres of White Papers

Where do B2B prospects find white papers?

Where do people read white papers?

Where did white papers first come from?

Where are white papers going in the future?

Tracking the Whens of White Papers

When do companies publish white papers?

When do B2B prospects read white papers?

When should a company use each type of white paper?

Figuring Out the Hows of White Papers

How do people read white papers?

How long does a white paper take to create?

How much does a white paper cost?

How much can a writer earn doing white papers?

How can you tell whether a company needs a white paper?

How many white papers are "enough" for a company?

Part II: The Three Flavors of White Papers

Chapter 5: Picking the Perfect Flavor for Your Next White Paper

Recognizing the Three Purposes of White Papers

Defining the Three Flavors: Vanilla, Strawberry, and Chocolate

Zooming in on the product: Plain vanilla

Making points quickly: Scrumptious strawberry

Finding a solution: Rich chocolate

Making two tasty mash-ups

Getting messy with other flavor combinations

Choosing the Right Flavor

Reflecting on your purpose

Considering your target audience

Thinking about your target sector

Choosing between a pure flavor and a mash-up

Figuring out what to do if your idea doesn't fit any flavor

Developing Your Topic

Sizing up your ideas

Giving readers something new

Getting ideas from prospects and clients

Chapter 6: The Backgrounder: As Basic As Vanilla

Introducing the Granddaddy of All White Papers

Defining a backgrounder

[Spotting a backgrounder](#)

[Understanding this flavor's appeal to sales and marketing types](#)

[Deciding When to Use a Backgrounder](#)

[Promoting an undisputed leader](#)

[Supporting a technical evaluation](#)

[Supplementing a product launch](#)

[Looking at the Pros and Cons of Backgrounders](#)

[Pro: Easy to research](#)

[Pro: Easy to write](#)

[Con: Short-lived](#)

[Con: Not good for generating leads](#)

[Planning a Backgrounder](#)

[Gathering essential information](#)

[Allocating pages](#)

[Choosing an effective title](#)

[Setting a factual tone](#)

[Going Beyond Text in a Backgrounder](#)

[Adding graphics](#)

[Using rich media](#)

[Repurposing a Backgrounder](#)

[Press release](#)

[Slide deck](#)

[Demo](#)

[Webinar](#)

[Chapter 7: The Numbered List: As Fresh As Strawberry](#)

[Introducing the Lightest and Liveliest of All White Papers](#)

[Defining a numbered list](#)

[Spotting a numbered list](#)

[Five reasons numbered lists are popular](#)

[Deciding When to Use a Numbered List](#)

[Getting attention with provocative views](#)

[Nurturing prospects already in the funnel](#)

[Casting FUD on competitors](#)

[Looking at the Pros and Cons of Numbered Lists](#)

[Pro: Easiest to write](#)

[Pro: Fastest to read](#)

[Pro: Easiest to repurpose](#)

[Con: Most superficial](#)

[Con: Easiest to dismiss](#)

[Con: Can be overused](#)

[Planning a Numbered List](#)

[Gathering essential information](#)

[Allocating pages](#)

[Choosing an effective title](#)

[Setting a provocative tone](#)

[Going Beyond Text in a Numbered List](#)

[Adding graphics](#)

[Using rich media](#)

[Repurposing a Numbered List](#)

[Blog post](#)

[Guest blog](#)

[E-newsletter article](#)

[Placed article](#)

[Chapter 8: The Problem/Solution: As Complex As Chocolate](#)

[Introducing the King of Content](#)

[Defining a problem/solution](#)

[Spotting a problem/solution](#)

[Understanding why this flavor appeals to executives](#)

[Deciding When to Use a Problem/Solution](#)

[Generating leads at the top of the funnel](#)

[Educating salespeople and channel partners](#)

[Educating analysts, bloggers, and journalists](#)

[Redefining a market space](#)

[Building mindshare](#)

[Looking at Pros and Cons of Problem/Solutions](#)

[Pro: Generates the most leads](#)

[Pro: Lasts the longest](#)

[Pro: Makes the best investment](#)

[Con: Hardest to create](#)

[Con: Slowest to create](#)

[Con: May heighten internal conflicts](#)

[Planning a Problem/Solution](#)

[Gathering essential information](#)

[Allocating pages](#)

[Choosing an effective title](#)

[Setting a dignified tone](#)

[Going Beyond Text in a Problem/Solution](#)

[Using graphics in a problem/solution](#)

[Using rich media](#)

[Repurposing a Problem/Solution](#)

[Blog post](#)

[Placed article](#)

[Slide deck](#)

[Webinar](#)

[Conference presentation](#)

[Chapter 9: Mashing Up Different Flavors](#)

[Understanding Why You Need Mash-Ups](#)

[Supporting a product launch, plus attracting attention](#)

[Generating leads, plus raising your company's profile](#)

[Creating Tasty Mash-Up #1: Backgrounder + Numbered List](#)

[When to use this mash-up](#)

[What to include and what to leave out](#)

[Creating Tasty Mash-Up #2: Problem/Solution + Numbered List](#)

[When to use this mash-up](#)

[What to include and what to leave out](#)

[Avoiding Two Messy Combinations](#)

[Messy mash-up #1: Backgrounder + problem/solution](#)

[Messy mash-up #2: All three flavors in one](#)

[Fixing a Mash-Up That Doesn't Taste Right](#)

[How to tell when you've made a mess](#)

[Separating the flavors](#)

[Reconfirming your purpose](#)

[Using the ingredients that belong](#)

[Chapter 10: Special Ingredients for a White Paper](#)

[Sprinkling on the Special Ingredients](#)

[Positioning blurb](#)

[Synopsis-style executive summary](#)

[Numbered lists](#)

[Buyer's guide](#)

[Case studies](#)

[Conclusions](#)

[Call to action](#)

[Leaving Out the Bitter Ingredients](#)

[Hype](#)

[Marketing speak](#)

[Groupthink](#)

[Vagueness](#)

[Product mentions](#)

[Direct attacks on competitors](#)

[Part III: From Foggy Idea to Finished Document](#)

[Chapter 11: A Proven Process to Complete Your White Paper](#)

[Benefitting from a White Paper Process](#)

[Not all white paper projects go smoothly](#)

[Many companies lack a publishing process](#)

[A process you can use for your own](#)

[Getting an Overview of the Process](#)

[Stage 1: Planning a white paper](#)

[Stage 2: Producing a white paper](#)

[Stage 3: Promoting a white paper](#)

[Getting an Edge with Six Success Factors](#)

[Success factor #1: In-house sponsor](#)

[Success factor #2: Firm deadline](#)

[Success factor #3: Deep understanding of the topic](#)

[Success factor #4: Cooperative SMEs and reviewers](#)

[Success factor #5: Joint ownership](#)

[Success factor #6: Sense of urgency](#)

[Taming Four Maddening Pests](#)

[The scope-creep](#)

[The tug-o-warrior](#)

[The no-see-em reviewer](#)

[The dyslexic designer](#)

[Chapter 12: Planning an Effective White Paper](#)

[Step 1: Assembling the Team](#)

[What the client does in this step](#)

[What the writer does in this step](#)

[How to hire a white paper writer](#)

[Step 2: Holding a Kickoff Conference Call](#)

[What the client does in this step](#)

What the writer does in this step

Resolving differences during the conference call

Step 3: Preparing a Plan

What the writer does in this step

What the client does in this step

Putting together a white paper plan

Step 4: Gathering Research

What the client does in this step

What the writer does in this step

Step 5: Preparing an Executive Summary

What the writer does in this step

What the client does in this step

Crafting the executive summary

Dealing with comments on the executive summary

Chapter 13: Producing a Powerful White Paper

Let the Writer Write!

Step 6: Creating First-Draft Text and Graphics

What the writer does in this step

What the illustrator does in this step

Expanding the executive summary

Creating graphics without an illustrator

Reviewing graphics

Step 7: Gathering Initial Comments

What the client does in this step

Dealing with comments on the first draft

Step 8: Creating the Second-Draft White Paper

What the writer does in this step

What the illustrator does in this step

Step 9: Gathering Final Comments

What the client does in this step

Dealing with comments on the second draft

Step 10: Collecting and Checking Sources

What the writer does in this step

What the client does in this step

Saving source material as PDFs

Keying sources to footnotes

Spot-checking sources

Handling unused sources

Step 11: Preparing the Final Document

What the illustrator does in this step

What the writer does in this step

What the designer does in this step

What the client does in this step

Proofing final pages

Putting keywords in the PDF

Step 12: Wrapping Up the Project

What the client does in this step

What the creatives do in this step

Making payments — the faster, the better

Getting permissions

Transferring copyrights

[Doing a postmortem](#)

[Part IV: Succeeding with White Papers](#)

[Chapter 14: Doing Research: Think Like a Lawyer](#)

[Your Goal: Building an Open-and-Shut Case](#)

[Digging Up Solid Sources and Extracting Relevant Points](#)

[Evaluating sources](#)

[Finding sources for a white paper](#)

[Understanding what makes good evidence](#)

[Keeping Track of a Mountain of Research](#)

[Writing out index cards](#)

[Typing and printing out a Word file](#)

[Putting them together: Word plus index cards](#)

[Managing content with Evernote](#)

[Choosing Footnotes or Endnotes](#)

[The immediacy of footnotes](#)

[The finality of endnotes](#)

[The tidiness of in-text citations](#)

[Formatting citations](#)

[Chapter 15: Write Like a Journalist](#)

[Reading for Fun and Profit](#)

[Reading white papers](#)

[Reading related research](#)

[Reading for inspiration](#)

[Keeping a “swipe file”](#)

Writing Winning White Papers

Getting to the point

Handling dialogue and sources

Creating text enhancements

Writing for translation

Choosing one metaphor and sticking with it

Controlling your material

Rewriting Before You Submit

Avoiding throat-clearing

Having your computer read your draft

Getting readability statistics on your text

Changing passive voice to active voice

Writing with Style

Learning from style guides

Following house style

Refining Your Writing Process

Figuring out your best time to write

Wearing the right hat at the right time

Allowing ideas to ferment

Tricking yourself to get started

Using a mind map

Writing in short bursts

Using positive affirmations

Challenging the myth of writer's block

Chapter 16: Promote Like a Madman

Recognizing the Need for Promotion

Promoting a white paper like a product launch

Measuring your results

Digging up sales and revenue numbers

Repeating the most effective promotions

Continuing your promotions

Choosing the Right Promotional Tactics for Your White Paper

Beginning your promotion at home

Using cost-effective e-mail

Talking it up through social media

Getting it to the influencers

Promoting it through third parties

Using a slide deck

Talking about it face to face

Advertising, online and offline

Part V: The Part of Tens

Chapter 17: Ten White Paper Problems and How to Solve Them

Boring, Nondescript Title

No Summary at the Start

No Conclusions at the End

No Call to Action

Not the Right Length

Sales Pitch in Disguise

Not Enough Proof to Back Up Claims

[Not Enough, or Not Good Enough, Graphics](#)

[No Logical Flow of Ideas](#)

[Not Written by the Right Person](#)

[Chapter 18: Ten Tips on Designing a White Paper](#)

[Design to Enhance the Content](#)

[Consider Your Readers' Eyesight](#)

[Realize That Text Isn't a Graphic](#)

[Make Every Page Count](#)

[Control Page Breaks](#)

[Avoid a Wall of Gray](#)

[Leave Lots of White Space](#)

[Avoid Smug Shots](#)

[Control Hyphenation](#)

[Refine a Corporate Template](#)

[Chapter 19: More Than Ten Ways to Spice Up a White Paper Title](#)

[Stressing the Benefits to Readers](#)

[Using Active Verbs, Not Passive Labels](#)

[Identifying Your Target Reader](#)

[Converting a Weak Title to a Subtitle](#)

[Why Not Try a Question?](#)

[Recasting Your Paper As a Numbered List](#)

[Using "How to" Phrasing](#)

[Leaving Out Product Names](#)

[Cutting Out Jargon and Buzzwords](#)

[Using Selected Keywords](#)

[Testing Titles in Advance](#)

[Cheat Sheet](#)