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White Papers

FOR
DUMMIES[®]
A Wiley Brand

by Gordon Graham

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A Wiley Brand

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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.”

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Introduction

When I tell people I write white papers for a living, most look at me with a blank expression. The bravest manage to ask, “Um, what are those again?” I usually give a short answer like, “White papers are fact-based marketing pieces for companies — a lot like the essays we wrote in college.” Then we get back to talking about more-interesting topics, like who’s the greatest rock-and-roll band, why anyone would ever drink light beer, and our favorite oxymorons (mine is currently “jumbo shrimp”).

But in my mind, I’m thinking, “White papers are a time-tested format for long-form copy that combine expository and persuasive writing, whose roots go back more than 100 years and whose future stretches ahead for as long as companies sell anything relatively new, complex, and expensive that needs explaining to a B2B prospect.” But I don’t actually say all of that.

When I first commissioned a white paper, I was the marketing manager in a fast-growing technology company. Before that, I’d spent many years as a computer journalist and technical writer. I’d seen many white papers from other companies, so I figured we needed one, too. I looked around for advice, a book, or some helpful material on the web. Back in 1997, the web was just getting started, and Google wasn’t available yet. I didn’t find much guidance, so in two weeks, my team and I put together something partway between a slide show and a specification. Amazing to all, it turned out well enough that it helped close sales and won an award for technical communication.

I rang in the new millennium with my first-ever assignment to write a white paper. By then, I was working as an independent copywriter. (No, I wasn’t fired for wasting money on white papers! The company did so well that a competitor bought it out.) Once again, I scoured bookstores and the web. By 2000, a little more material existed, including a few articles called “How to Write a White Paper” and a couple of e-books for \$99 each. I read them all and learned a little, but clearly not quite enough. My first freelance white paper project went around in circles and dragged on for months.

That experience spurred me on to do better. Ever since, I’ve been devouring everything I can find about white papers. In 2005, I set up my website at ThatWhitePaperGuy.com and started posting articles there; today, it features almost 100 how-to articles plus a white paper FAQ. And by now, I’ve written close to 200 of these documents for companies all the way from one-person startups to Google.

Not many people have studied, pondered, debated, and worked on so many of these challenging documents. In this book, I share tips, advice, and anecdotes

about the wonderful world of white papers. When I first started writing white papers, I would have loved a book like this one, packed full of real-world tips and advice. Without it, I've spent 15 years learning on my own, reading everything I could get my hands on, making every possible mistake, and comparing notes with the handful of other writers struggling to develop high-quality white papers for the 21st century. This book sums up my knowledge so you can plan, produce, and promote your own white papers effectively without going through all of that.

About This Book

White Papers For Dummies strives to clearly explain the theory and practice of using white papers in B2B content marketing. This book is organized to make everything easy to find and simple to apply. It starts with an overview of the power of white papers and the huge opportunity they present to marketers and copywriters. Then it drills down into the details, including the main flavors of these documents; a proven step-by-step process for creating them; and a wealth of practical, tactical advice on how to research and build an argument, express your points in clear and accessible language, and promote your finished white paper to the four corners of your market.

You won't find this kind of detailed treatment of white papers in any other book. I know, I've read them all. And whether you're just getting started with white papers or you've already created and published many of them, *White Papers For Dummies* has something for you. If you're a marketing manager, this book reveals the benefits that white papers can deliver to your company and shows you how to choose and develop the best format to meet any marketing challenge. If you're a writer, this book is packed with tips on how to plan, research, write, and even design a compelling document that stands head and shoulders above most other white papers being circulated today.

Conventions Used in This Book

This book uses the following conventions to make things consistent and easy to understand:

- ✓ **Bold** highlights key words in bulleted lists and the action parts of numbered steps.
- ✓ New terms appear in *italic*, followed by an easy-to-understand definition. And speaking of terms, here are a few I use consistently throughout the book:
 - *B2B* means “business-to-business” or selling to other businesses, the total opposite of . . .

- *B2C*, which means “business-to-consumer” or selling to individual consumers.
- *FUD* means “fear, uncertainty, and doubt,” a classic marketing tactic used to undermine the competition.
- *Offering* means any B2B product, service, technology, or methodology being sold by a company.
- *SME* means “subject matter expert” or someone who serves as a source for a white paper, usually from the sponsoring company.

✔ **Web addresses** appear in monofont.

White papers are an extremely versatile form. You can write one about any product, service, technology, methodology, regulation, policy, or ethical or philosophical position on any issue. And beyond B2B vendors, almost any type of organization can publish white papers.

So if you work for an agency, association, foundation, government ministry or department, hospital, institute, military command, municipality, nongovernmental organization (NGO), nonprofit, political party, school, college, university, or yourself, substitute whatever term works best for you whenever you see the words *business*, *company*, *enterprise*, or *vendor* in this book. Don't worry: You can apply virtually all the tips and ideas in this book to your white paper projects, no matter what type of organization you work for.

What You're Not to Read

I know you're busy, so I don't expect you to read every word of this book. To save you time, feel free to skip over the following elements:

- ✔ If you're a B2B marketing person whose management team is already completely sold on using white papers, you can skip Chapters 1 and 2.
- ✔ If you're a writer who's already convinced of the vast opportunity in writing effective white papers, you can skip Chapter 2.
- ✔ You can also skip any sidebars, the shaded text boxes that go into more detail than you may need on certain topics.

Foolish Assumptions

You know what they say about assumptions, right? But I have to start somewhere, so here goes. My main foolish assumption about you, dear reader, is that you're either a B2B marketing person or a B2B copywriter (or someone who aspires to become one).

✔ If you're a B2B marketing person, I assume the following about you:

- You want to use white papers to build recognition, generate leads, nurture prospects, and help close sales for your company.
- You're quite interested in how to plan or promote white papers effectively.
- You're less interested in how to research and create a white paper, although this knowledge will help you be a better client when you hire a white paper writer or designer.
- You have a basic understanding of marketing with content.

✔ If you're a B2B copywriter, I assume the following:

- You're keen to understand how to create white papers and offer that service to your clients.
- You work as an independent freelancer — although if you work as an in-house writer, 95 percent of this book applies to you, too.
- You're quite interested in how to research and write effective white papers because these marketable skills are in high demand.
- You're less interested in how to plan or promote a white paper, although this knowledge can help you be a better supplier when a client engages you.
- You're a seasoned writer, who has no need for me to point out one end of a sentence from the other.
- You're willing to go back to school and rediscover how to dig for solid research to help prove the points of your arguments. If you need a refresher on research techniques, check out Geraldine Wood's excellent book *Research Papers For Dummies* (Wiley).

How This Book Is Organized

This book has five parts, which you can read in any order. The five parts start from a high-level overview and zoom down into more detail. For example, the first chapter sketches in how B2B marketing uses white papers, while the last shows ten ways to pump up a white paper title.

Part 1: Getting Started with White Papers

White papers have been called “the king of content” because of their profound ability to engage B2B prospects through a complex sales cycle. This part describes how white papers have become a standard marketing tool for B2B vendors in a growing number of sectors and shows the untapped

demand for writers who have mastered this format. It also looks at where white papers emerged more than 100 years ago, where they are now, and the most likely possibilities for their future. And this part is where you find the answers to the most common questions about white papers, organized by the five *w*'s (and one *h*): who, what, why, where, when, and how.

Part II: The Three Flavors of White Papers

This part simplifies the vast possibilities of white papers down to a simple choice of three flavors of ice cream:

- ✔ Vanilla is a plain and predictable backgrounder, a detailed description focused on the technical or business benefits of a specific offering.
- ✔ Strawberry is a light and lively numbered list, framed around a set of tips, questions, concerns, or points about some issue.
- ✔ Chocolate is a rich and satisfying persuasive essay that delves into a nagging business problem and a new, improved way to solve it.

These three flavors cover 90 percent of all B2B white papers in the world today. This part explains how to pick the perfect flavor for your next white paper, depending on your purpose and audience. And for each flavor, I recommend what to include, what to leave out, when to use it for best results, and how to repurpose that content into further marketing pieces. This part also describes what happens when you mash up different flavors of white papers: Two possibilities turn out well, while two make a mess that's tough to stomach.

Part III: From Foggy Idea to Finished Document

This part describes a step-by-step process for transforming a vague idea into a polished, effective white paper — even if you've never done one before. This process grew out of my hands-on experience with close to 200 white papers over the past 15 years. Some steps will be familiar to anyone with writing or publishing experience; others are new and unique, designed to help you avoid the most common pitfalls in any white paper project.

Part IV: Succeeding with White Papers

This part shows how to succeed in writing white papers by following three simple maxims: Think like a lawyer, write like a journalist, and promote like a madman. This part explains how to research a white paper and build an

open-and-shut case with a mountain of irrefutable evidence and ironclad logic. Then it describes how to write clear, crisp, and compelling text as fast as any reporter — and with more accuracy. Then it describes how to get the word out about your white paper, using your choice of 40 promotional tactics with tips and insights on each one.

Part V: The Part of Tens

This part provides a summary of key pointers to follow to make sure your white papers succeed. Topics include problems that can strike when you're writing, designing, or naming a white paper and what to do about them; how to design a white paper effectively; and how to give it a title that gets noticed.

Icons Used in This Book

To make this book easier to read and simpler to use, the following icons mark off different sections of the text.



This icon points to advice you can use to help make your next white paper more persuasive, more readable, or better designed, or to help the whole process run smoother.



Any time you see this icon, remember: What follows is so important that it's worth reading more than once. Think of these as the key take-away messages from the book.



This icon appears next to any personal anecdote from my years as a marketing manager and white paper writer. These stories often show me bumbling my way through some project and seeing the real solution only in hindsight.



This icon flags any serious danger to the health of your next white paper. Pay attention: The white paper you save may be your own.

Where to Go from Here

This book is organized so you can dip in anywhere and find useful tips and advice. For more guidance, use the table of contents to find broad categories and the index to look up specific topics.

If you're not sure where to begin, start with Part I for an introduction to white papers and answers to the most common questions about them. If you're just starting a new white paper, you may want to begin with Chapter 5 for help picking the perfect flavor. Then review the specific chapter for that flavor in Part II to see what to put in and what to leave out. After that, Part III lays out a step-by-step plan for developing your white paper. If you have a white paper drafted and ready for design, check out Part V to make sure you've avoided all the common problems with content and titles and to find some useful design tips to pass on to your designer. And if you have a finished white paper that you need to start promoting, Chapter 16 is your best bet.



Part I

Getting Started with White Papers



Visit www.dummies.com for access to great Dummies content online.

In this part . . .

- ✔ See how white papers are revolutionizing B2B marketing.
- ✔ Find out how the demand for white paper writers outweighs the supply and how much you can earn writing them.
- ✔ Take a look at how white papers are shaping decision making today and how they're likely to influence business practices in the future.
- ✔ Discover who writes and reads white papers, when it makes sense to use these persuasive essays, and how to figure out if you need one.