

Third Annual Research Report

The State of the White Paper, 2004

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Executive Summary

Technology companies publish a lot of white papers, and most IT buyers use them regularly. Yet there are no accepted standards for how to prepare a white paper. This means both writers and readers sometimes have expectations about white papers that are not fulfilled.

Gordon & Gordon defines white papers this way. In content, a white paper provides useful information for potential customers seeking to understand a certain technology. In form, a white paper is a piece of marketing collateral somewhere between a technical manual and a glossy brochure.

Most white papers today are:

- 8 to 10 letter-sized pages long (and getting shorter)
- Illustrated in black & white (although tending toward more color)
- Written in a neutral tone (although there is constant pressure to inject marketing hype, which readers dislike)
- Distributed through the Web as PDFs
- Prepared either in-house or by an outside writer with a solid mix of technical, marketing and writing backgrounds.

Beyond this, white papers come in many different flavors: technology guides, position papers, business benefits, competitive review, evaluator's guide, thought leaders and others.

Six key factors that help ensure success for any white paper project are an effective in-house sponsor, an immovable deadline, a thorough understanding by the writer(s), ready access to subject matter experts, joint ownership of the project by all participants and a shared sense of urgency.

Since our research began in 2001, the number of Google hits for "white papers" has increased by nearly 600%. Unfortunately, some thinly veiled sales pitches are now called white papers. This irritates readers who are seeking truly useful information.

The Purpose of this Document

This report defines a white paper and identifies key trends in how vendors create white papers and how potential buyers use them. This report is intended to provide useful information and practical advice for anyone responsible for creating a white paper.

We have updated this research every year since 2001. This year we studied close to 50 articles on white papers, and interviewed four key industry figures who contributed to this literature.

We credit all our sources in footnotes. We are not just being academic: to build credibility for this report, we back up our assertions with supporting details and sources. So should every white paper writer.

All Web sources were refreshed in June 2004. Please be aware that Web links can change without notice.

What is a White Paper?

What precisely is a white paper? There is no simple answer.

The term "white paper" arose early in the 20th century in England. It was used to distinguish shorter government position papers with white covers from longer, more detailed reports with blue covers.

Today, various sources offer different definitions of the term:

- "A communications tool used to explain something about your complex product or service to a particular audience."¹
- "A short treatise whose purpose is to educate industry customers."²

Many of those who write white papers have their own spin:

- One marketing executive commented that "a white paper should be all things to all people."
- In a telephone interview, white paper specialist Perry Marshall called a white paper "a company's manifesto on how to solve a problem."
- Another frequent writer of white papers, Randy Cronk, calls them a "way to freeze-dry your ideas."

These far-flung definitions indicate the profound difficulty in describing a white paper.

At Gordon & Gordon, we think of white papers in this way:

Content	A white paper provides useful information for potential customers seeking to understand a certain technology.
Form	A white paper is a piece of marketing collateral somewhere between a technical manual and a glossy brochure.

Never confuse a white paper with a brochure.

A brochure's purpose is to capture attention and to promise benefits. Brochures are much shorter and less substantial than white papers, and have far less credibility in the eyes of IT managers. Hype, color graphics, glossy paper and high production values are common in brochures. Prospects view them as advertising, and treat them accordingly.

¹ page 3, *The White Paper White Paper*, 1997 available from <http://home.comcast.net/~alanradding/white.pdf>

² from the *Free On-line Dictionary of Computing*, referenced by <http://www.dictionaty.com/>

Who Reads White Papers and Why?

The short answer to this question is “almost anyone contemplating the purchase of a complex, high-priced technology.” This includes IT people who must give an opinion on a certain technology (technical recommenders) and executives who must sign the check for a major purchase (decision-makers).

Survey after survey confirms that white papers have a high readership. One study concluded that the only type of document that knowledge workers refer to more often than white papers is the company phone book!³

Another study showed that IT professionals download an average of 30 white papers every year.⁴

As for why people read white papers, a recent survey of IT managers showed the following reasons:⁵

- To stay on top of new and emerging markets or trends (76%)
- To get information about products and vendors (69%)
- To compare products (50%)
- To help justify potential buying decisions (42%)
- To develop a short list of qualified vendors (33%)

A more recent study published by MarketingSherpa found that 67% of recipients will pass a high-quality white paper to a colleague and 36% will pass it to their manager.⁶ This pass-along rate is another reason why white papers are considered so powerful.

³ *Top 10 Information Content Types Used by Corporate End-Users*, a study done by Outsell, Inc. in February 2001

⁴ page 1, *Readership and Usage of White Papers in the IT Buying Process*, February 2003 from <http://www.bitpipe.com/>

⁵ Joint research by Bitpipe, Forbes.com and insightExpress quoted on www.eMarketer.com on March 22, 2004

⁶ page 12, *IT Marketing Metrics Guide*, May 2004 from <http://www.marketingsherpa.com/>

White Papers and Your Sales Cycle

During the 1970s, IBM and Burroughs outlined the **Universal Tasks**, a predictable set of steps that all customers follow when implementing complex technology. Table 1 shows how white papers relate to the Universal Tasks.

Universal Task	Role of White Papers
Research	Potential buyers often look at white papers during these tasks.
Selection	
Installation	Customers perform these tasks after they purchase the product.
Configuration	
Learning / Training	For these, they need documentation, training and technical support, not white papers.
Using	
Troubleshooting	

Table 1: How White Papers Relate to the Universal Tasks

White papers are only used during the first two tasks: Research and Selection. In other words, a potential customer uses white papers first to find out what is available in the marketplace, and then to select one of the available products or technologies for his organization.

In fact, some say there are two main types of white papers: positioning/information-sharing documents and influencing/selling documents.

Potential buyers in the **Research** stage need a thorough overview of the features of a new technology or product. At this point, a white paper that provides useful information will build mindshare and credibility for a vendor. But hype of any kind will turn readers off. In fact, some white papers used in this stage never mention any product name.

Prospects in the **Selection** phase are likely to be drawing up a short list of vendors. At this point, a white paper can introduce persuasive arguments about the benefits of the product. But any assertions must be backed up by supporting details such as case studies, ROI figures, research results, industry statistics and other compelling evidence. Simply claiming that your product "integrates seamlessly with the existing infrastructure" is not enough. You must prove it with facts.

After the sale, white papers are usually not required. Technical manuals and similar documents may be shown to prospects during the sales cycle, but these documents are not white papers.

White Papers Come in Many Flavors

With our working definition in mind, let's look at the wide range of documents called white papers today.

For prospects in the **Research** stage, vendors must provide white papers that share useful, factual information in a neutral tone. Some of these flavors of white papers are listed in Table 2.

Type	Purpose
Technology Guide	Explains the product's underlying technology, why this technology is valuable to customers, and how this technology is different from and better than similar technologies. May never mention the product by name.
Position Paper	Explains and advocates a standard, trend or technology. Explains why this standard is important to the potential customer. May never mention the product by name.
Thought Leader	Defines a market space, sets an agenda or specifies a design philosophy. Intended to establish the vendor or product as a leader.

Table 2: White Papers Used During Research

For prospects in the Selection stage, vendors may provide white papers that distinguish their products from the competition. These documents usually have more persuasive content but are still based on facts. Some of these flavors of white papers are listed in Table 3.⁷

Type	Purpose
Business Benefits	Explains why potential customers need or want the product, whose name is given. Sometimes shown in the form of an ROI calculator, either paper-based or online.
Competitive Review	Positions the product and differentiates it from competitors.
Evaluator's Guide	Provides a thorough explanation of the product's features and functionality.

Table 3: White Papers Used During Selection

⁷ Thanks to *The White Paper White Paper* for providing us with a starting point.

Industry Standards for White Papers?

There are **no** industry standards for white papers. But we can make a few observations about the typical format and content of white papers today, as listed in Table 4.

Factor	Observations
Length	White papers can be any length, although most are now 8 to 10 pages. As white papers proliferate, we've seen a tendency for them to get shorter.
Tone	Most white papers take a neutral tone. Others contain a marketing "spin" to boost a certain product or technology. But surveys and anecdotal evidence suggest that readers intensely dislike any hype.
Illustrations	Most white papers have illustrations to support the text. These illustrations are usually better than in a technical manual, but not as good as a brochure or advertisement. More appear in color today.
Production	Most white papers are still produced in black and white. White papers must balance careful use of color on the screen with legibility when laser-printed in black and white. Nearly all are letter-sized with 1 or 2 columns.
Distribution	Most white papers are downloadable from the Web as PDFs. HTML is used less often. White papers are often given out as printed documents on sales calls, at trade shows, industry events and in press kits.
Time to prepare	A white paper usually takes as long as the vendor has before running into their real-world deadline: anywhere from 2 to 12 weeks
Cost to prepare	Vendors pay anywhere from US\$3,000 to US\$30,000 to commission a white paper from an outside writer. Divided by the average length, this yields a range of US\$375 to US\$3,000 per page.

Table 4: Typical White Paper Form and Content

In the past three years, as white papers proliferate, we've seen the typical document get a little shorter and more colorful. There is no evidence that color graphics and high production values add to the effectiveness of a white paper.

Remember: a white paper is not a brochure.

Why Vendors Create White Papers

All vendors who sell new, high-priced technology need white papers to help explain it.

In a recent survey of close to 300 technology vendors, 75% reported they created white papers in 2003 and even more (82%) planned to use them in 2004.⁸ White papers were the top-rated item for generating sales leads online, with 87% of marketing people saying they are important and only 2% not important.⁹

Vendors create white papers for many reasons:

- To gather leads for the sales force.
- To educate potential customers, either technical recommenders or decision-makers.
- To serve as a selling tool to be passed around a buying committee by an in-house champion.
- To educate the sales force or channel partners, who may not fully understand the product and its benefits.
- To educate the media by providing a background document for a press release or press conference. The media in turn will inform potential investors, potential customers, and the public.
- To offer as promotional content to a trade publication or Web site. In this case, the article is usually signed by a senior executive.
- To redefine a market space in terms more favorable to the vendor.
- To help give the vendor more credibility or mindshare in its market.

The tradeoff: leads vs. mindshare

Often a marketing team makes a white paper available through advertisements, direct mail and the Web in exchange for the contact information from the recipient. But most people dislike giving contact information to vendors. One study showed **89% more people** will download a white paper if they don't have to register for it!¹⁰

There is a clear tradeoff here. A vendor can gather more leads by asking for contact information, but fewer people will read its white paper. A vendor can create more mindshare by making its white paper available with no strings attached, but it will not capture any leads. The vendor's challenge then becomes finding creative ways to engage prospects beyond the first white paper they download.

⁸ page 5, *2004 IT Marketing Trends Study Results*, December 2003 from <http://www.bitpipe.com/>

⁹ Ibid, page 9

¹⁰ page 12, *IT Marketing Metrics Guide*, May 2004 from <http://www.marketingsherpa.com/>

Who Writes White Papers?

Finding someone to write an effective white paper is not easy.

The skills needed to write white papers “differ significantly from those required for marketing and advertising copy or for technical documents such as user manuals,” says one marketing agency that often prepares white papers.¹¹

Project leaders from R&D may understand the vendor’s product better than anyone else. But they seldom have the writing skills or marketing savvy to write an effective white paper. More often they are cast in the role of the Subject Matter Experts who work with the white paper writer.

A vendor’s **regular copywriter** or PR firm may be able to create sizzle for technologies he barely understands. But they can seldom deliver the steak in the form of useful technical information.

In fact, writing an effective white paper demands a rare mix of talents. The ideal white paper author provides a combination of:

- Deep technical understanding
- Solid appreciation of the customer and the marketplace
- Excellent communications skills.

This mix of skills may or may not be found among the vendor’s technical writing staff. In many cases, vendors turn to **outside firms** that specialize in very technical marketing writing.

¹¹ Page 4, *The Steak Behind the Sizzle: Effective Marketing Using White Papers*
on request from http://www.hoffmanmarcom.com/best_practice.html

Six Key Success Factors for White Paper Projects

Creating a successful white paper is a big challenge. Vendors start many white papers, but not all of them are ever completed.

There are many reasons for this. Company priorities may change. Staff may be shuffled. Explaining a technology in detail may reveal flaws that the vendor does not want to acknowledge. Executives may lose interest. Or they may have conflicting opinions that cannot be resolved. The writer may never turn in an acceptable draft.

A white paper project is much more likely to succeed when it meets all the success factors listed in Table 5.

If you are responsible for a white paper project, you must get as many of these factors as possible working in your favor.

Factor	Observations
In-house sponsor	The project has an effective in-house sponsor or co-author who can help the writer navigate through company politics and personalities.
Time box	The project has a desperately short timeframe with an immovable deadline like a trade show. "When a man knows he is to be hanged in a fortnight, it concentrates his mind wonderfully." ¹²
Deep understanding	The writer has a deep understanding of the product, the technology, the company, the potential customers or all of the above.
Ready access to SMEs	The writer has ready access to Subject Matter Experts, reviewers and approvers as required.
Joint ownership	The writer(s), illustrator, engineer(s), marketing manager, product manager and other participants assume joint ownership of the project. They work together as a team, discuss differences openly and settle disagreements quickly.
Sense of urgency	There is a shared sense of urgency among all the participants. Everyone thinks the project is sufficiently urgent to make time for it in their busy schedules.

Table 5: Six Key Success Factors for White Papers

¹² Samuel Johnson, quoted in James Boswell's *Life of Johnson*

The End of the White Paper?

A recent Google search for the phrase "white paper" generated 8+ million hits. This number has grown almost 600% from 1.4 million three years ago.

Clearly the Web is awash in documents being called "white papers." Far too many of these are thinly veiled sales pitches. By being over-used, the term "white paper" is becoming devalued.

"These days white papers are so common that it's hard for yours to cut through the clutter. And many are so badly done that prospects who've been burned by boring or sales-y content in the past have stopped responding," says one Web site for professional marketers.¹³

Over time, this trend may worsen to the point where "white paper" is actually a pejorative term that falls into misuse. In the next few years, we may witness "the end of the white paper" as we know it today.

Therefore, we recommend that vendors find a more specific name for each of their white papers, such as technology guide, evaluator's guide and so on. For example, we call the white paper you are now reading a "research report."

About Gordon & Gordon

Gordon & Gordon is a partnership of two award-winning writers who specialize in high technology, Gordon Graham and Manuel Gordon.

Gordon Graham is a seasoned journalist who has written hundreds of articles on technology, served as VP of Marketing for a successful software firm and is now an award-winning marketing writer.

Manuel Gordon is a technical writer, programmer, and computer science professor who has worked on every technology from mainframes to Web frames.

Our clients hire us to explain complex products and to persuade demanding customers. Since 1997 we have contributed to several dozen white papers, one of which won an award from the Society for Technical Communication (STC). And we've given successful workshops and lively presentations on three continents.

Please visit our Web site at www.gordonandgordon.com.

¹³ *Five Steps to Create White Papers That Impress Prospects and Reporters*, February 18, 2003 available from <http://www.marketingsherpa.com/>