

The Art of the White Paper

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Executive Summary

High-tech companies produce a lot of white papers, and many IT managers use them—even if no one can clearly explain what they are.

This paper begins by describing the various kinds of white papers, and the various purposes for which they are needed. Although no industry standards exist for white papers, we can make some generalizations. Most white papers are around 10 letter-sized pages with black & white illustrations. They are written with an authoritative, neutral tone. Most are distributed through the Web as PDFs. They can take from 4 to 10 weeks and cost from US\$5,000 to US\$30,000 to prepare.

Marketing departments often turn to writers with a technical writing background to write white papers, because good technical writers are skilled at **U**nderstanding, **S**implifying, and **E**xplaining complex information of the sort that must go into a white paper.

This paper concludes by describing the factors that help ensure success a white paper project. Among these are an 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 by all involved.

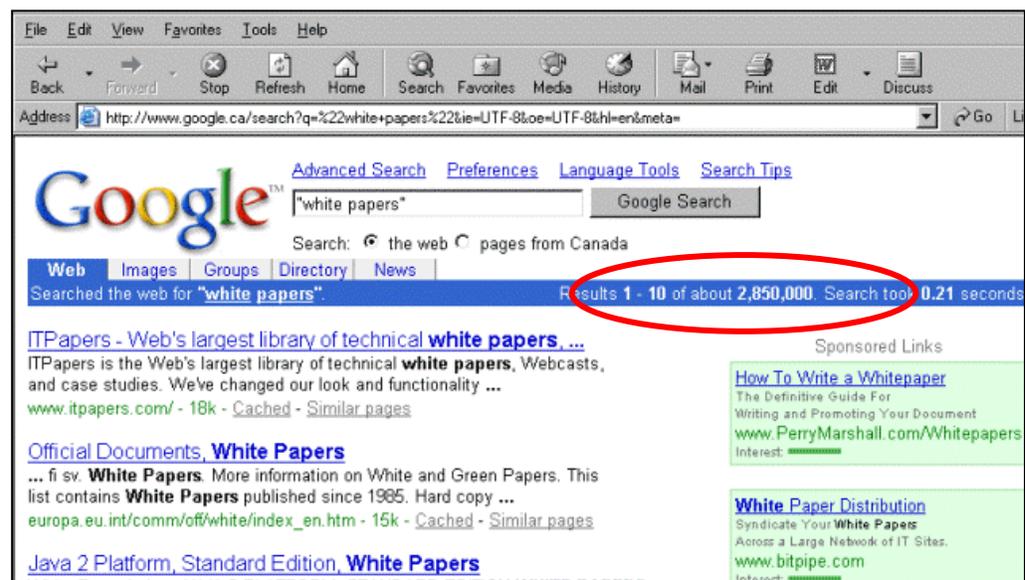


Figure 1: Recent Google Search for "white papers"

What is a White Paper?

As shown in Figure 1, a recent Web search for the phrase “white papers” generated 2.85 million hits! There are clearly a lot of documents labeled white papers, and most of them are about high technology.

But what exactly is a white paper? ¹ Good question. And there is no simple answer.

Several dictionaries offer these definitions:

- “A communication tool used to explain something about your complex product or service to a particular audience.” ² Not bad.
- “A paper written by a lead product designer to explain the philosophy and operation of a product in a marketplace or technology context.” ³ This seems far too specific.
- “A short treatise whose purpose is to educate industry customers.” ⁴ That’s OK.

And recent comments from two high-tech marketing executives reveal some prevailing attitudes:

- “A white paper is that rare tool that can serve many purposes.”
- “A white paper should be all things to all people.”

At Gordon & Gordon, we think of a white paper as:

- **A pre-sales document aimed at potential customers who have not yet made up their minds to buy a certain product or back a certain technology.**
- **A piece of marketing collateral whose form and content lies somewhere between a glossy brochure and a technical manual.**

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

White Papers Come in Many Flavors

Table 1 describes some of the most common types of white papers: ⁵

Type	Purpose
Technology Guide	Explains the product's underlying technology, why this technology is valuable to potential customers, and how this technology is different from and better than similar technologies. May not even 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 not even mention the product by name.
Business Benefits	Explains why potential customers need or want the product.
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 1: Common Types of White Papers

Why Write a White Paper?

There are many reasons ⁶ why a company may issue a white paper:

- To educate potential customers.
- To educate the sales force (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 be offered as free content to trade magazines or business publications. In this case, the white paper is usually signed by a senior executive.
- To be offered as a "fulfillment piece" in advertisements, direct mailings, and the Web ("Register here to receive a free white paper on..."). This helps gather leads for the sales force.
- To redefine the market or the "playing field."
- To help give the company an aura of credibility and authority in its market.

Industry Standards for White Papers

One of the biggest challenges in this area is the fact that there are **no** industry standards for white papers.

But we can make a few generalizations about the typical format and content of white papers today, as listed in Table 2.

Length	White papers can be from 4 to 24 (or more) pages long. They are most often around 10 pages.
Tone	Most white papers take a neutral, authoritative tone. Some contain a marketing "spin" to boost a certain product or technology. It's been said that "a white paper is like quality popular science writing, balancing accessibility and accuracy while telling a good story." ⁷
Illustrations	Most white papers have illustrations to supplement the text. The illustrations are usually better than you would see in a technical manual or specification, but not as good as in a magazine advertisement.
Production	White papers can be produced in full color, but they are more often in black and white. Many white papers make careful use of color, so that they are attractive on the screen, but are still quite readable when laser-printed in black and white. Nearly all are produced as letter-sized pages. Most are desktop-published to use attractive fonts and columns.
Distribution	Most white papers are downloadable from the Web as PDFs. HTML is less often used, because it gives less control over layout. White papers are also given out as printed documents to potential customers, and at trade shows, industry events, and in press kits.
Time to prepare	One company says that a white paper takes an estimated 4 to 10 weeks to prepare. ⁸ In our experience, a white paper usually takes as long as the client has before running into their real-world deadline.
Cost to prepare	Companies pay anywhere from US\$5,000 to US\$30,000+ to commission a white paper from an outside firm. ⁹

Table 2: Typical White Paper Form and Content

Who Reads White Papers?

White papers are usually aimed at senior IT managers. White papers with a less technical focus are often aimed at CFOs, operations managers and other non-IT managers. Sometimes these people will make the decision to buy or not to buy the product in question. Sometimes they are “technical recommenders” who advise the decision-makers elsewhere in the company.

What is very clear is that managers actually read white papers. In fact, according to a recent survey of 2,500+ IT managers: ¹⁰

- More than 3 out of 4 say they use white papers to get preliminary information about products and vendors
- 60% say they look at 1 white paper a month, while 75% look at 1 every 2 months.
- 93% pass along white papers to others in their organization, including 2 out of 3 who pass them to their higher-ups.

To sum up, IT people read white papers when they’re interested in a new technology or need to select a technology for their organizations.

As the survey confirmed, people look at white papers at the **start** of their search for a complex product. As shown in Figure 2, in terms of what Gordon & Gordon call the universal tasks for complex products, white papers are used for the first two tasks: Research and Selection.

In other words, a potential customer uses a white paper to find out what is available in the marketplace, and to select one of the available products or technologies for his organization.

The Universal Tasks	
Research	These two tasks often involve white papers.
Selection	
Installation	These five tasks do not often involve white papers.
Configuration	
Learning / Training	
Using	
Troubleshooting	

Figure 2: Universal Tasks for Complex Products

Who Writes White Papers?

Most white papers are prepared on the request of a marketing department.

While a strong advertising campaign can be prepared without fully understanding a complex product, marketing managers realize they cannot pass off emotion-laden “fluff” as a white paper.

Marketing writers and advertising copywriters can create the sizzle. But they need help delivering the steak.

The project leader from R&D may understand the product better than anyone else, but may not have the necessary writing skills or marketing savvy.

Companies often turn to marketing writers with a technical writing background, because a white paper demands technical understanding and clear expression. Good technical writers can **USE** information: that is, they can **U**nderstand, **S**implify, and **E**xplain complicated information to diverse audiences.¹¹

The technical writers may be in-house or from an outside firm. They may work alone or together with a product manager or an in-house marketing writer.

And a good illustrator is almost always a necessary part of the team. Again, this can be an in-house person or someone from the outside.

Success Factors for White Papers

A white paper project is much more likely to succeed when it meets the success factors listed in Table 3.

In-house sponsor	The project has a strong 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, such as a trade show. "When a man knows he is to be hanged in a fortnight, it concentrates his mind wonderfully." ¹²
Through understanding	The writer begins with a thorough understanding of the product, the technology, the company, or all of the above.
Ready access to Subject Matter Experts	The writer has ready access to Subject Matter Experts, reviewers, and approvers. This can be a special problem for outside consultants, who must rely on the in-house sponsor to champion the project.
Joint ownership	The writer(s), illustrator, development lead, marketing manager, product manager, and all other participants all assume joint ownership of the project. They work together as a team, discuss differences openly, and settle disagreements quickly. ¹³
Sense of urgency	There is a shared sense of urgency among all the participants. Everyone must think the project is sufficiently urgent to make time for it in their crowded schedules.

Table 3: Success Factors for White Papers

A Gordon & Gordon Success Story

Gordon & Gordon recently worked on a white paper for a Montreal software firm called Connectware. Since all the success factors were in place, this project turned out very well.

Let's review how this project went, and why it succeeded so well.

At the time, Gordon Graham was working as the full-time VP, Marketing for the firm. He served as the **in-house sponsor** and editor of the white paper, and helped push it through every stage of production.

There was a **real-world deadline** looming: a trade show featuring the company's most important product, an add-on to Oracle Applications. Originally GG thought he could write the white paper in-house with the VP of Sales, but as time slipped by everyone realized this was impossible.

With only two weeks until company executives had to leave for the trade show, the white paper was urgently needed. It was needed to explain the fundamental architecture of the company's product to several audiences: to the company's own sales force, to prospects at the trade show booth, and to their partners at Oracle in Silicon Valley.

GG was able to get a PO and a contract signed on short notice, and hire Manny Gordon to research and write the white paper. Manny brought a deep grounding in databases and client/server technology that enabled him to quickly develop a **thorough understanding** of the product architecture. In fact, he was able to debate and refine some of the nomenclature that company developers were using to describe their product, and bring it in line with industry norms. So Manny displayed a fine ability to **Understand, Simplify and Explain** the product.

One of the most successful aspects of this project was the high degree of teamwork displayed. The team held a number of meetings with the VPs of R&D, Sales, and Marketing plus the team leader for the product all squeezed into the same little room. Through an animated exchange of views, a consensus emerged on how to diagram and describe the basic architecture and the key selling points of the product.

The company premises were accessible, with no passes or locks on any of the interior doors, so Manny could range freely through the offices. With **ready access to Subject Matter Experts**, he was able to engage everyone in the project for spontaneous quick discussions. There was a good sense of people working together on a project and **joint ownership** of the emerging results.

The two-week deadline underscored the **sense of urgency** and kept the reviews flowing. The white paper team was able to generate new iterations of the white paper with more and more details filled in on each version.

At the same time, a skilled illustrator, Steve Matthews, was working on the graphics and submitting them rapidly. GG assembled the text and graphics into pages and gave it all a final polish.

The results were very positive. The white paper was completed and unveiled at the trade show. The sales force began to put it into the hands of their prospects. They found that the number of repetitive questions they were asked fell off sharply, since most of the answers were contained in the white paper.

The same white paper was used without changes for two years.

Footnotes

Many thanks to **Adair Byrd** for suggesting many of our sources.

- 1 The term "white paper" apparently arose in the early 20th century in England. It was used to distinguish shorter government position papers bound in white covers from longer, more detailed reports bound in blue covers called "blue books." We have located a British government white paper dating from 1922.
- 2 page 3, *The White Paper White Paper* from www.trihouse.com
- 3 from www.whatis.com
- 4 from the *Free Online Dictionary of Computing*, referenced by www.dictionay.com
- 5 Adapted from a similar table in *The White Paper White Paper*.
- 6 Adapted from *How to Publish: A guide to contributing articles to high technology publications* by Randall D. Cronk available from www.tradespeak.com/resources.asp
- 7 from *White Papers* at www.batnet.com/forward/
- 8 page 8, *The White Paper White Paper*
- 9 Ibid.
- 10 page 4, *Executive Survey of IT Professionals*, September 2000 from www.bitpipe.com
- 11 See Manuel Gordon's article *Technical Writers Must USE Information* at www.gordonandgordon.com/USE.html. Versions of this article have appeared in several publications of the Society for Technical Communication, including *Intercom*.
- 12 Samuel Johnson, quoted in James Boswell's *Life of Johnson*.
- 13 Gordon & Gordon call this process Joint Documentation Development. See *Good-Enough Documentation* at www.gordonandgordon.com/good_enough_workshop_details.html