HOFFMAN
MARKETING COMMUNICATIONS

The Mother of all White Papers

by Steve Hoffman

EXECUTIVE SUMMARY

This white paper describes ten best practices for creating effective white papers. Hence, it serves as "the mother of all white papers." Hoffman Marketing Communications gathered and refined these practices during client engagements over a 30-year period. The practices are based on lessons learned during the client process, client feedback of what works, and an ongoing review of peer expertise in this area. Several white paper experts, who offer additional information on this subject, are quoted and referenced in this paper. This white paper also "practices what it preaches" by implementing all of the recommended practices in this paper. Key aspects of white papers covered in this paper include length, tone and point of view, organization and structure, range of target audiences, use of third-party information, design (look and feel), objectivity, development process, writer selection, and others.

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BACKGROUND

The fundamental premise of a white paper is to provide useful information to target audiences. The goal of a white paper is to demonstrate thought leadership so that businesses will ultimately buy what the white paper author is selling. Michael Stelzner summarizes this white paper strength: "If you give readers something of value, they will give you their loyalty, and ultimately their business" [1].

This premise works. Studies have shown that white papers are the information source that business and technical decision makers seek. For example, in 2014, Eccolo Media surveyed 500 IT professionals on the influence of marketing communications. Respondents ranked white papers as the most consumed type of content (among 17 categories) and the most influential type of content in the purchase process [2]. According to the Content Marketing Institute and Marketing Profs, 68% of organizations use white papers as a business-to-business (B2B) content marketing tactic [3].

Studies like these illustrate that white papers are in wide use for B2B marketing. However, clients that have hired Hoffman Marketing Communications to develop white papers relate that all white papers are not created equal. Many of these clients have found that simply assembling a few pages of content and calling it a white paper does not guarantee success. Using lessons learned from developing white papers for these clients over a 30-year period, this white paper lists ten best practices for developing effective white papers.

1. SPECIFY AN APPROPRIATE LENGTH

When readers click on a link to a white paper, most expect the paper to inform them on a topic, saving them the time to research and synthesize information from various sources. Raising the reader's expectations by calling a document a white paper but delivering only two pages might disappoint the reader. Failing to provide information that the reader needs to make decisions may drive them to competitors' websites. On the other hand, white papers that are excessively long can challenge the reader's attention span.

A sweet spot of about 6-10 pages (roughly 2000-3000 words), including summary, illustrations, and contact information, provides sufficient space to cover a complex subject area in a readable length for most audiences. Some situations may call for a longer paper, such as a highly technical audience that demands more in-depth information. However, in Kevin Gault's WhitePaperSource blog post, Gordon Graham of ThatWhitePaperGuy.com suggests that companies resist the temptation to write one long paper – by writing two shorter ones instead. "It's more effective in every way to publish two shorter, more-focused white papers than a longer, less-focused one," he says. "This gives you more options in terms of publishing and targeting the documents" [4].

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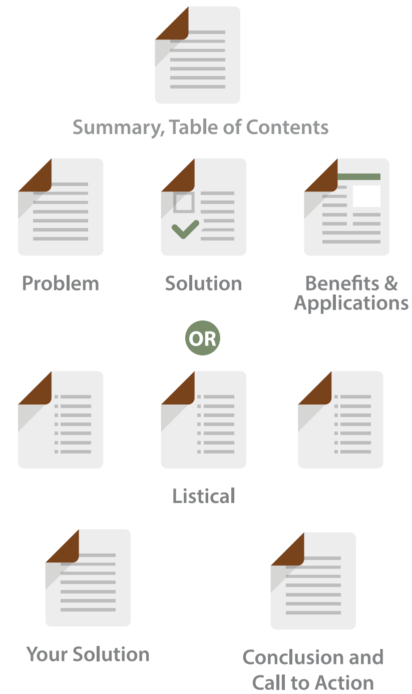
If the goal is to provide a summary of a topic in a document shorter than 6 pages, calling it a "business brief" or "solution brief" more realistically sets reader expectations.

2. CAREFULLY ORGANIZE THE CONTENT

White papers can effectively organize and present information in various ways. For example, the "listicle" format (used in this white paper) provides a numbered or bullet-pointed list of recommended practices, considerations, results, etc. Agnipravo Sengupta explains "why listicles are the new face of content marketing" by pointing out that "our brains love lists," "readers know what they're getting into," and listicles offer "great traffic, low bounce rate" [5].

SUGGESTIONS:
WHITE PAPER ORGANIZATION



A second effective white paper structure uses the storytelling flow of problem-solution-benefit popularized in case studies (success stories):

- First set the context by describing the relevant business or technical challenges.
- Next, describe various best practices for addressing the challenges – usually grouped into 3-4 categories for ease of presentation.
- Then factually describe the solution that the author recommends (see tip #3 for more).

In either case, as shown in the figure at right, beginning the white paper with an intriguing 1-2 paragraph summary of the motivation for the paper and topic covered invites the audience to read the body of the paper. A table of contents provides the reader a roadmap for the information that follows, which serves to highlight and reinforce the key areas covered in the paper. A conclusion helps wrap up the paper in a positive way. Ending the paper with a call to action and contact information helps to achieve the subtle marketing purpose of the paper. Including references at the end provides useful information for readers who want to learn more about the topic.

3. DESCRIBE COMPANY SOLUTIONS ONLY AT THE END

White papers are most useful in the early or intermediate stages of a sales cycle, when prospects seek to gather objective information and evaluate options.[1] These prospects are unlikely to be attracted to a sales pitch. In light of this, a best practice is to defer information on the company solution to the end of the paper, which increases the objective tone of the piece. To describe the company solution, adopting a factual rather than marketing tone also supports this quality of objectivity. Later in the sales process, use marketing collateral to provide the marketing pitch.

In her Smart Marketing Blog on 5 Steps to Writing Effective White Papers, Hollie Nishikawa echoes this recommendation: "It can be tempting to quickly dive in and explain how your company or product can address the topic. Resist this urge and wait until the end of your white paper to mention your products or services...This way, you will have successfully established your expertise on the subject of the white paper, and have developed the need for your product or service before you introduce it" [6].

[1] However, in White Papers for Dummies, Gordon Graham points out that a white paper can also be useful at the bottom of the sales funnel in the form of a backgrounder that "provides the technical details and payback numbers an evaluator needs to make a recommendation to the B2B buying committee" [7].

4. ADDRESS BUSINESS AND TECHNICAL AUDIENCES IN SEPARATE PAPERS

Some white papers are written to address both business and technical audiences. For example, Ryan Malone of SmartBug Media indicates that such a paper offers "something for everyone," but admits it is "not as targeted as a business or technology paper" [8]. Business and technical audiences struggle with significantly different challenges and seek different information about solutions. Their perspectives, as well as the language they use, are often widely divergent. Hence, attempting to address both of these audiences in a single paper (sometimes called a "hybrid" white paper) is almost always significantly less effective than developing a separate paper for each type of audience. Most readers respond more positively when the paper is tailored to their particular background, objectives, and concerns.

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5. ADOPT AN APPROPRIATE TONE AND POINT OF VIEW

Because white papers are primarily used in B2B marketing, white paper readers expect to gain information in a business context. While the corporate culture or "style" of these readers' employers varies, experience has shown that most readers respond well to a professional tone. One way to set this tone is the choice of point of view. Although the pronouns I, we, and our (first person) or you and your (second person) seem friendly, they may alienate the reader. Use of first person may seem too opinionated, and use of second person may seem too casual.

Alternatively, the third person point of view (not the reader or the author) sets a professional, informational tone that is recommended for most white papers. For example, this paper refers to third parties such as Eccolo Media, decision makers, and audiences. Jonathan Kantor of the Appum Group (The White Paper Company) agrees. "During my years working in the corporate sector, it was frowned upon to publish white papers in anything other than third person," he explains. "…Third person builds greater credibility with the reader by presenting information in a hands off, 'storytelling' fashion" [9]. The figure on page 6 shows this best practice, as well as a few others described in this paper.

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Another preferred choice is to use the imperative verb form (or mood of the verb), in which the reader is told what to do – usually as a recommendation. Examples of this approach in this white paper are in the subheadings (e.g., "Adopt an Appropriate Tone…").

Another way to establish an appropriate tone is through word choice [10]. For example, verbs such as make, do, come, put, let, give, go, and take set a casual tone, but convey little useful information. More descriptive verbs used in this paper such as survey, rank, assemble, challenge, and alienate provide useful information and set a more professional tone. Following are other ways to set such a tone:

- Use descriptive adjectives (e.g., leading, professional, preferred, and sufficient) instead of vague adjectives (e.g., big, good, and great) to provide more useful information.
- Employ active voice rather than passive voice (where practical) because stating who is performing the action improves clarity and provides more information. Scanning for the word "by" in a draft white paper identifies some passive constructions.
- Avoid hyperbole (e.g., best, stunning, tremendous, incredible) to enhance credibility.
- Avoid contractions (e.g., can't, aren't, won't, isn't) due to their overly casual nature.
- Avoid the word "must"; instead of telling the reader what to do, describe the ramifications of actions so they can make their own decisions.
- Avoid vague words such as very, thing, someone, something, anywhere, anything, somewhere, sometime, etc.

KEY ELEMENTS OF EFFECTIVE WHITE PAPERS

3rd person is recommended.

Text boxes are recommended to highlight key points.

Useful graphics complement the text and cater to visual thinkers. But keep the design simple.

3rd party info adds objectivity.

6. AVOID FEAR, UNCERTAINTY, AND DOUBT

For thousands of years, fear has highly motivated humans. However, instilling fear, uncertainty, and doubt (FUD) in readers' minds may not be the optimal strategy for white papers. Most business and technical decision makers do not operate based on these emotions. Instead, they typically evaluate options to implement sound decisions, especially in situations with significant financial implications. Predictions of doom and gloom may seem trite to sophisticated audiences. White paper readers usually prefer factual statements concerning the possible repercussions of various courses of action to aid them in their evaluations and decisions.

However, not all white paper experts agree on this point. In White Papers for Dummies, Gordon Graham provides another take on FUD: "You can use a white paper to throw mud at …competitors…By appealing to a buyer's *fear* of failure or embarrassment, *uncertainty* about a lesser-known vendor or product, or *doubt* about the claims made by competitors, this kind of white paper can effectively block an opponent" [7].

7. INCORPORATE THIRD-PARTY INFORMATION

By synthesizing information from various sources, a white paper can be a powerful resource for readers, saving them time and effort. Weaving information from third parties (i.e., parties other than the author and reader) into the paper, properly referenced of course, enhances objectivity. Unbiased third party sources include:

- Industry associations
- Regulatory bodies
- Government agencies
- Standards bodies
- Research institutes
- Think tanks
- Foundations
- Other non-profit agencies

Jim Lodico of JAL Communications emphasizes the importance of including third-party information: "Third party sources add credibility and objectivity to your white paper. They act as an endorsement of the information in your white paper. When a white paper only includes in-house information, savvy readers may start to question the validity of the report and start to look at it more as a sales brochure than an educational resource" [11].

While this content can be used to support the author's message, presenting alternative views and approaches also enhances objectivity. The figure below shows various ways to develop an objective white paper, including incorporation of third-party information.

8. USE GRAPHICS, TEXT BOXES, AND A SIMPLE DESIGN TO ENHANCE VISUAL APPEAL

A simple yet interesting look and feel for the white paper is consistent with its informational, rather than promotional, purpose. The figure below shows three options for cover pages, ranging from use of a large illustration to simple text on a white background. Use of graphics and infographics to complement the text serves readers who are attracted to, and better absorb, information in visual form.

Jack Phelan of California Polytechnic State University describes the balancing act of graphics use in white papers: "White papers should avoid the overuse of graphical elements. If they approach the higher-end look and feel of a brochure, white papers will lose their perception as educational pieces and instead be viewed as marketing or sales documents by your readers. This is an important point: You want the white paper to look attractive, but if it is too attractive, it will not be read" [12].

Consistent use of color, fonts, and visual design in all illustrations and the overall document design (that is also consistent with the company website and collateral) demonstrates a cohesive corporate style. Text boxes can serve to complement subheadings to emphasize key points. Of course, adherence to corporate style guides helps ensure consistency across documents as well. Remember to include a reasonable amount of white space – it is called a "white paper" after all.

9. USE A PROCESS THAT MAXIMIZES THE CHANCE FOR SUCCESS

Establishing an agenda for a white paper kickoff call with the writer, marketing contact, and key subject matter expert ensures that all parties agree on the high points of the paper and the process for its development. These key points can include:

- Definition of target audience
- Desired length and objective
- Primary topic and key messages
- Challenges covered
- Supporting information available
- Schedule for completion
- Writer's work scope
- Key contact persons

Gordon Graham in White Papers for Dummies emphasizes the importance of the kickoff call: "A kickoff conference call is one of the magic bullets in a successful white paper project. This can save weeks of stress, communication breakdowns, wasted effort, scrap, and rework. Holding a kickoff conference call creates shared expectations among everyone on the project, promotes harmony on a team, and dramatically reduces one of the most common problems writers report: changes in direction partway through a white paper" [13].

Development of an outline and careful company review of the outline ensures that project participants are on the same page. This is the single most effective way to avoid delays and cost overruns on white paper projects.

10. CAREFULLY SELECT THE WHITE PAPER WRITER

Many companies outsource white paper writing because of the inherent difficulties in writing them in-house. Employees are often too close to their products and services to be able to write an objective white paper about them; they may bring preconceived notions and strong biases, and may lack perspective. Additionally, in-house personnel are often not skilled in the art of white paper writing, which results in ineffective papers. White paper development quality also usually suffers when in-house personnel try to find time in their busy schedules to develop the paper while continuing to perform their existing duties. A carefully selected outside writing firm can produce a high-quality white paper in a timely fashion without excessive use of in-house resources for interviews.

Freelance writers can produce high-quality work and may be fairly inexpensive, but they lack the strategic advantages of agencies. Agencies usually employ multiple writers, thereby mitigating risk, providing broader coverage, and offering faster response times when business conditions call for quick action. Compared to freelancers, agencies can generally provide an ongoing, more consistent resource at-the-ready – a partner that allows businesses to communicate to target audiences consistently and effectively, in a timely fashion. VendorSeek provides thoughts on this subject: "Of course pricing is an issue, but it should be deemphasized in comparison to the quality of the content, the availability of the writer, the time it takes to complete, etc. Agencies usually have several people on staff to complete jobs more readily and in a more efficient fashion. That is why the price may be larger than that of a freelancer who works alone" [14].

CONCLUSION

Writing a conclusion for a white paper is challenging. Repeating key points already included in the executive summary and body of the paper is repetitious. However, ending the paper without a conclusion of some sort may leave the reader feeling "up in the air." Some writers attempt to resolve this by stating conclusions that logically follow from what was covered in the paper. However, if these conclusions are important enough to wrap up the paper, should they also be included in the executive summary, and maybe even in the body of the paper as well? This again leads to repetition.

One alternative is to include recommendations that follow logically from the key points of the paper. Another option is to conclude with the benefits of adopting the best practices discussed in the paper, if these benefits have not already been covered. So, for example, this paper could point out that adopting these best practices can:

- Enhance thought leadership
- Improve lead generation
- Better inform a wide range of audiences (not just potential customers)
- Enhance content marketing
- Build bridges between internal departments through the process of developing the white paper

Readers are likely to respond well to wrapping up the paper on a positive note in this way.

ABOUT THE AUTHOR

Steve Hoffman, president and founder of Hoffman Marketing Communications, Inc., has written hundreds of white papers for leading business clients around the world for 30 years. For more information, visit www.hoffmanmarcom.com.

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