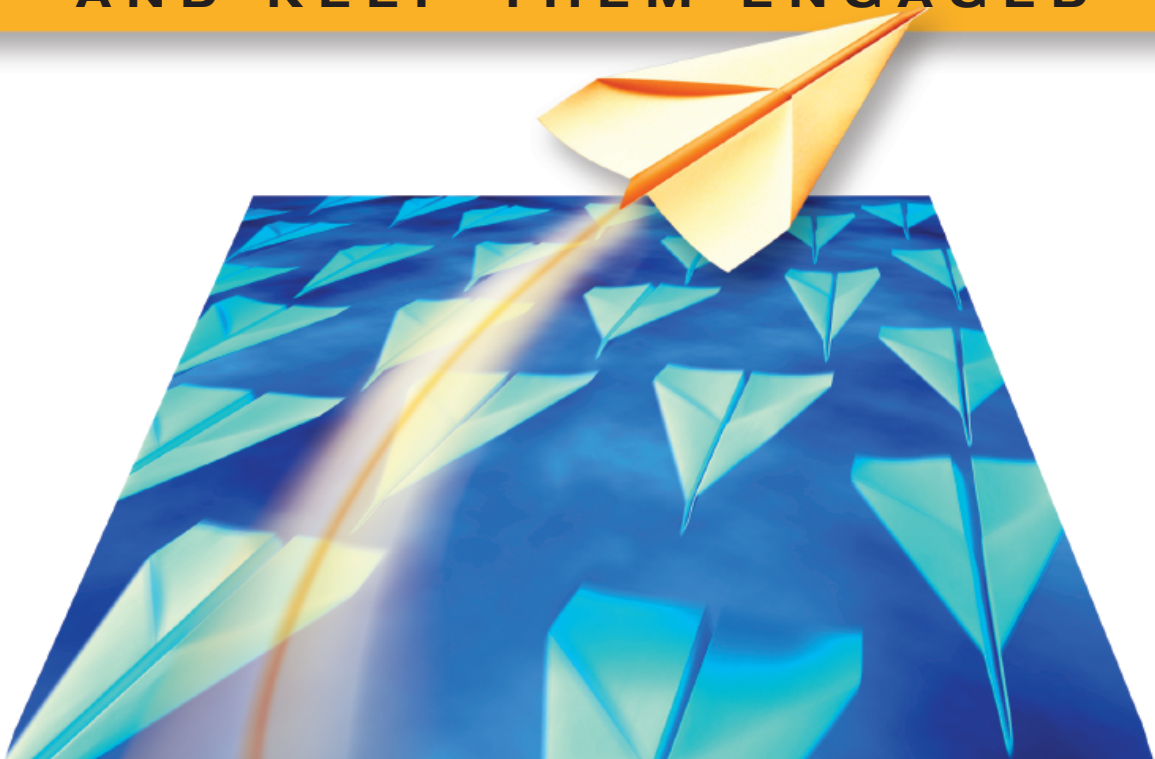


Michael A. Stelzner

# WRITING WHITE PAPERS

HOW TO CAPTURE READERS  
AND KEEP THEM ENGAGED



SAMPLE CHAPTER

“Michael Stelzner IS white papers. And this excellent how-to guide not only tells you everything you need to know to penetrate this lucrative writing niche AND produce a top-quality product, but does it with a fun, engaging voice.”

*Peter Bowerman, Author, The Well-Fed Writer series, and  
The Well-Fed Self-Publisher, WellFedWriter.com*

“What a fantastic resource! This is the definitive guide to intelligent lead generation using white papers.”

*Andrew Goodman, Author, Winning Results  
with Google AdWords*

“Michael Stelzner is widely recognized as a top white paper writer and a guru in marketing with white papers. By reading his excellent book on the subject, you can master in a few evenings the white paper marketing principles it has taken Michael years to develop and perfect.”

*Robert W. Bly, Author, The White Paper  
Marketing Handbook (Thomson)*

“This book will pay for itself faster than almost any other investment I can imagine. No doubt all of your writing, not just your white papers, will improve as a result. Michael’s riff about being generic is a must-read.”

*Seth Godin, Author, Small Is the New Big*

“Michael Stelzner is the ‘King of White Papers.’ This is a book I recommend to all of my readers and clients!”

*Lori Richardson, Sales Coach, Trainer, and Author, ScoreMoreSales.com*

“As a freelance copywriter, this book is worth its weight in gold. In my opinion, it is the definitive guide to the best practices of white paper research, planning, writing and editing. I’m not sure how I ever did without it.”

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*Peter Spande, Director, TechRepublic.com and ITPapers.com*

“Is it a good book? It’s an excellent book. Whether you are employed or a freelancer, Stelzner’s book tells you everything you need to know about writing white papers. Better still, it shows you how to write really, really good white papers.”

*Nick Usborne, Author, Net Words: Creating High-Impact Online Copy,  
FreelanceWritingSuccess.com*

“Both experienced professionals as well as business and technical students will benefit from Mike’s pragmatic and direct style that guides the reader through the history and use of white papers, down to the nuts and bolts of putting one together and molding it to the intended audience.”

*Jim Happel, System Engineering Faculty, Whiting School of Engineering,  
The Johns Hopkins University*

“Michael Stelzner’s new book provides a road map that every white paper producer should follow.”

*Barry Harrigan, Founder, Ziff Davis Web Buyer’s Guide  
& White Paper Library*

“Michael Stelzner’s book gives readers a double dose of helpful information: research to show how important white papers can be, and advice based on his extensive experience. Students will benefit from Stelzner’s step-by-step approach.”

*Russell Willerton, Ph.D., Technical Communication  
Program, Boise State University*

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*James H. Collier, Assistant Professor,  
Department of English, Virginia Tech*

“This book is sure to become the standard reference in its field.”

*Gordon Graham, Copywriting Expert, ThatWhitePaperGuy.com*

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## \* Chapter 1 \*

# A Primer on White Papers

**W**hite papers help people make decisions. They sit at the forefront of an educational marketing revolution. Powerful enough to lure readers and able to persuade with unyielding strength, the well-written white paper is a super weapon in the marketing professional's arsenal.

Wearing many hats, the white paper can talk business or converse technically, and it can inform or influence. Best of all—it is highly sought after.

The white paper's underlying strength rests on this premise: **If you give readers something of value, they will give you their loyalty, and ultimately their business.**

White papers present monumental opportunities for writers, marketing professionals and businesses. Crafting the white paper can be a rewarding and often profitable experience. A single well-written white paper can propel a business to the thought leadership position and lead to enormous business opportunities. When you author a successful white paper, its positive results are credited to your efforts.

The use of white papers is exploding. In 2001, a Google™ search on the phrase *white papers* returned a

## 2 Chapter 1 \* A Primer on White Papers

mere 1 million responses.<sup>1</sup> By 2006, that number was a whopping 329 million! Along with the upward trend, the term *white paper* has become a fuzzy label, wrongly applied to many documents. The goal of this chapter is to clearly define *white paper*, explain why white papers are important and examine how they are used.

### WHAT IS A WHITE PAPER?

Defining a white paper is one of those challenges people have been wrestling with for some time. If you look up the term in a dictionary, you will find an outdated response describing a government report. Let's shed a little light on the term *white paper* by considering what some respected experts have to say.

Gordon Graham, an experienced white paper writer, describes white papers as persuasive essays and observes that their style rests "somewhere between a lively magazine article and a dry-as-dust academic paper." He adds that white papers are fact-driven and contain useful information, expert opinions and ironclad logic.

White papers are tools used to create a positive image of a company in the eyes of its readership, explains Dr. Russell Willerton, a professor from Boise State University who specializes in white papers.

According to veteran white paper writer Jonathan Kantor, white papers reveal product or service features and translate them into business advantages.

Extending these thoughts, here are a few concise definitions:

**High-level white paper definition:** A white paper is a persuasive document that usually describes problems and how to solve them. The white paper is a crossbreed of a magazine article and a brochure. It takes the objective and educational approach of an article and weaves in persuasive corporate messages typically found in brochures.

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<sup>1</sup> Graham, G. (2001). The art of the white paper, [http://www.gordonandgordon.com/STC\\_Chicago.html](http://www.gordonandgordon.com/STC_Chicago.html).

**Detailed white paper definition:** A white paper is a technical or business benefits document that introduces a challenge faced by its readers and makes a strong case why a particular approach to solving the problem is preferred. A white paper usually proposes a solution to a problem, but can also introduce a new concept or describe how to perform technical tasks. Most white papers range from 6 to 12 pages in length; however, some can exceed 50 pages. White papers are comprised of mostly text and usually very few graphics. However, diagrams, charts and illustrations are commonly included in most white papers.

White papers “represent an intersection of technical documentation (i.e., providing technical information about a product or service) with marketing communication (developing information to inform potential customers, improve sales and garner attention in the marketplace),” explains Willerton.<sup>2</sup>

#### **White Paper History**

The term *white paper* is an offshoot of the term *white book*, which is an official publication of a national government. A famous historic white paper is the *British White Paper of 1922* (also known as the *Churchill White Paper*), which addressed political conflict in Palestine.<sup>3</sup> Although white papers have their roots in governmental policy, they have become a common tool used to introduce technology innovations and products. A typical search on the phrase *white paper* will return millions of results, with many focused on technology-related issues.

<sup>2</sup> Willerton, D. R. (May 2005). Ethos and exigence: White papers in high-tech industries [Dissertation].

<sup>3</sup> See [http://www.palestinefacts.org/pf\\_mandate\\_whitepaper\\_1922.php](http://www.palestinefacts.org/pf_mandate_whitepaper_1922.php).

#### 4 Chapter 1 \* A Primer on White Papers

White papers usually provide valuable information to their intended audience, yet readers of white papers generally understand that the sponsoring company is marketing to them. The marketing aspect of a white paper is typically a very soft sell. Overt marketing messages are usually left for other documents. Often, solutions are introduced only after a significant case has been established, demonstrating a clear need.

There are four primary types of white papers:

White Paper Type	Definition
<b>Technical</b>	Technical white papers tend to be targeted at engineers. They often describe processes and procedures with precise detail. These types of white papers are usually introduced during the sales process to describe how things work. In the past, technical white papers were the most common type of white paper. However, most modern white papers are typically focused on business-related topics.
<b>Business Benefits</b>	Business benefits white papers are usually targeted at decision-makers in management positions. These types of white papers often describe the business advantages of implementing solutions and are typically used to generate leads. In recent years, the business application of white papers has grown significantly.
<b>Hybrid Technical/ Business Benefits</b>	Hybrid white papers are usually targeted at both influencers and decision makers. They usually lead with business benefits and include technical descriptions of processes. Hybrid papers are often used as lead generation documents and during the sales process.
<b>Government</b>	Government white papers usually discuss the implication of policy decisions. They are frequently focused at a very narrow audience.

## WHY WHITE PAPERS MATTER

White papers help people make decisions. Those decisions range from closing a deal to picking up the phone and initiating contact. White papers are also commonly used to help justify a purchase decision.

The decision to produce a white paper usually stems from the need to sell products and services. Interestingly, the same can be said of brochures, PowerPoint presentations and case studies. What differentiates white papers is their attractiveness to specific types of audiences, including engineers, business executives and other key decision-makers.

Often a white paper will work its way across the desks of an organization in a way that no other document could ever hope to achieve. White papers are able to fly under the radar and penetrate most organizations' anti-marketing defenses because they are sought after and brought into the organization by decision-makers. If they are well-written, white papers will not only reach their target, they will influence them.

White papers can be very persuasive marketing tools. When a good white paper lands in front of the right person, it is a highly effective lead generation and sales instrument. Research indicates that IT executives examine an average of 30 white papers each year, that nearly 90 percent of executives find white papers helpful or extremely helpful and more than half claim white papers influence their buying decisions.<sup>4</sup>

The overwhelming majority of technology marketing professionals—85 percent—acknowledge that white papers are important tools for generating leads.<sup>5</sup> Nearly two-thirds of IT marketers rate white papers as one of the

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<sup>4</sup> Bitpipe. (February 2004). Bitpipe network user study: Readership usage of white papers in the IT buying process, <http://www.bitpipe.com>.

<sup>5</sup> TechTarget, Bitpipe and Sam Whitmore Media Survey. (December 2004). 2005 IT marketing trends study results, <http://www.techtarget.com>.

## 6 Chapter 1 \* A Primer on White Papers

most effective forms of lead generation.<sup>6</sup> For example, IT professionals respond to an online advertisement's white paper offering more than anything else.<sup>7</sup>

Among the significant breadth of content available to IT professionals, vendor white papers are more frequently read than reviews, analyst reports, product literature, websites, articles or case studies.<sup>8</sup> Furthermore, 86 percent of IT marketers indicate that white papers are effective for generating leads and rank them as more valuable than webinars, free trials, seminars and newsletters.<sup>9</sup>

The gestation period from receipt of a white paper to sale can range from the same day to many months. When asking clients how they found out about my business, the response has often been, "I registered for your white paper a few months back." In some cases, it was more than a year between when a client registered for a white paper and called to inquire about our services. Thus, white papers can have a very long shelf life and if well-written can become viral marketing documents.

In addition, white papers provide a great opportunity to introduce a new concept or show industry thought leadership. Often, professional organizations will highlight a good white paper and suggest it to their members.

### WHY YOU SHOULD CARE ABOUT WHITE PAPERS

Writing an effective and persuasive white paper for your company or client can be extremely rewarding. Often,

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<sup>6</sup> MarketingSherpa. (2004). IT marketing metrics guide: 2004 data for software, hardware & services marketers, <http://www.e-consultancy.com/knowledge/whitepapers/90014/it-marketing-metrics-guide-2004-data-for-software-hardware-amp-services-marketers-executive-summary.html>.

<sup>7</sup> MarketingSherpa and CMP Media. (2005). 2005 Attitudes and online IT advertising survey, <http://www.marketingsherpa.com>.

<sup>8</sup> CMO Council and KnowledgeStorm. (September 2005). Define what's valued online, <http://www.knowledgestorm.com>.

<sup>9</sup> MarketingSherpa. (2005). IT marketing benchmark guide 2005-2006, <http://www.marketingsherpa.com>.

the document becomes a foundational piece that can be leveraged for many other projects, including presentations, contributed articles and website content.

Because of the amazing marketing ability of a well-written white paper, your efforts can result in significant praise and long-term gain for the business. In addition, the educational value of a white paper can be used not only to inform potential customers, but also may be leveraged to train new employees.

For freelance writers, white papers represent one of the most profitable forms of writing. Word for word, there is no other type of writing that pays as well as white papers. Some of the most experienced white paper writers charge up to \$1000 per page.<sup>10</sup>

White papers can also bring significant recognition to the writer. Many writers place their names on the byline of a white paper. If the white paper is well-received in your industry or goes viral, your name will be associated with the excellent ideas presented in your paper.

### **Why Do Businesses Produce White Papers?**

Graham notes that businesses use white papers “to move prospects into the sales funnel and coax them down through it.” He notes that this is possible because white papers provide useful information, answer repetitive questions better than a salesperson and help a company gain credibility. Kantor backs this up by adding that “business decision-makers look to white papers to aid them in the decision-making process.”

Willerton takes a stronger position and claims that businesses need white papers to “survive in their respective markets.” He explains that white papers are written to establish trust in the eyes of potential customers.

White papers also provide businesses the opportunity to take the thought leadership position in an industry by

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<sup>10</sup> To learn what the current rates are for white paper writers, see <http://www.whitepapersource.com/report/>.

## 8 Chapter 1 \* A Primer on White Papers

educating the masses. Thought leadership is the process of establishing a leading idea that is ultimately embraced by an industry. Establishing thought leadership is an underlying goal of many white papers.

### HOW WHITE PAPERS ARE USED

White papers are generally produced for one of three reasons: to generate leads, to demonstrate thought leadership or to help close sales.

Purpose	Explanation
<b>Lead Generation</b>	Most organizations will leverage their corporate website, online advertising campaigns or white paper syndication networks to generate leads with white papers. Additionally, many direct mail and traditional advertisements use the white paper as a call to action.
<b>Thought Leadership</b>	Often, businesses will write white papers on concepts that are theoretical or discuss the future of an industry or technology. Thought leadership papers are typically written to demonstrate forward thinking, to help convince existing customers to stick with a company and to persuade the world to buy in to a future vision. These types of white papers convert nicely into trade publication articles.
<b>Close Sales</b>	White papers are often used in the later stages of a sales cycle; as a “leave behind” after a client meeting. While white papers can help close existing prospects, they are most effective for generating pre-sales leads because executives and decision-makers rely on white papers when researching solutions to problems. White papers used to close a sale tend to be more technical and are usually targeted at influencers. However, hybrid papers are also effective sales closers, as they tend to address a combination of business and technical benefits.

Demonstrating thought leadership and generating leads are the most popular uses of white papers. In the *2005 White Paper Writer Industry Survey*<sup>11</sup>, hundreds of writers indicated that they use white papers primarily to demonstrate thought leadership and secondly to generate sales leads, both of which can be accomplished in a single document.

White papers typically educate readers on a company's value proposition in a soft-sell manner. Because white papers are usually educational and not hard-sell pieces, they can quickly become viral documents that spread across an organization. A more technical white paper is often used to describe processes and help educate potential customers on how a solution operates.

#### **Sample Application**

If your company has just developed a new product that alters or enhances an existing solution in a significant way, a white paper would be appropriate. Consider a fictitious company that is about to release a voice-controlled system for managing e-mail. A white paper that explains the time necessary to type emails and how new voice solutions speed the process via dictation might be effective. The white paper could be used to either generate leads or as a sales closing tool that describes the process and how it works.

White papers can be sent as responses to advertisements or when a salesperson has engaged a prospect who is asking for more information. Kantor explains their many sales uses: "White papers are used as online collateral, as handouts to support live presentations, as e-mail

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<sup>11</sup> Stelzner, M. (November 2005). *WhitePaperSource*. 2005 White paper writer industry survey: Identifying trends and issues faced by white paper writers, <http://www.whitepapersource.com/report/>.

attachments in business correspondence, as incentive offers within advertisements and as a core ingredient within a direct mail campaign.” Willerton adds that white papers can help a company gain grass-roots support from “the techie in the back room.”

White papers are most popular in the technology marketplace. However, white papers are also used in the financial services, medical and governmental marketplaces, among others. White papers are particularly useful among business-to-business technology companies that offer complex and costly solutions.

The vast majority of white papers are distributed as electronic documents in the form of Adobe PDF files.<sup>12</sup> In the past, white papers were printed and mailed; however, the Internet has opened up new distribution models, dramatically reducing the need to print white papers.

White papers are often posted on corporate websites, distributed via e-mail and syndicated via a number of fee-based outlets, including Bitpipe, KnowledgeStorm and ITPapers (see Appendix III).

## WHO READS WHITE PAPERS?

In the past, white papers were primarily targeted at engineers and technical influencers. However, today’s typical white paper reader has shifted significantly. Modern white paper readers are decision-makers and tend to be businesspeople rather than engineers.

If they are targeted appropriately, white papers can be valuable to literally anyone. For example, a very small business owner or an investor are worthwhile recipients of white papers—just be aware that they may be more accustomed to the term *guide* than *white paper* (a small label change like this can have a big impact on a marketing campaign).

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<sup>12</sup> See <http://www.adobe.com/products/acrobat/adobepdf.html> for information about Adobe PDF files.

## HOW HAVE WHITE PAPERS EVOLVED?

If natural selection applies to white papers, it seems that the technical white paper is becoming an endangered breed. In the 1970s, white papers were internal corporate documents that revealed strategy and tactical plans, which were referred to as *marketing requirement documents*.

By the 1980s, most white papers were very technical documents that explained processes in excruciating detail. However, businesses began to see the lead generation potential of white papers and held them out as lures to attract sales prospects.

By the mid 1990s, the marketing value of white papers began catching on in the technology world. Slowly, the predominant reader of a white paper began to shift from a technical user to a business decision-maker. Because business readers focus more on business challenges and less on the inner workings of solutions, white papers have also become significantly shorter.

Distribution is another more recent change. Today's white paper outlets, portals and electronic distribution channels were largely absent 10 years ago. In addition, many industries outside of the technology marketplace are starting to use white papers.

## THE EMERGENCE OF WHITE PAPERS AS MARKETING TOOLS

How have white papers emerged as marketing tools? Prior to the 1990s, datasheets, brochures and presentations were the predominant forms of marketing collateral. These marketing tools were often perceived to be biased materials that were discounted by many prospects who were early in the decision-making process.

How could marketing professionals get their complex messages in front of qualified customers? A marketing tool was needed that would be read by potential clients

and work as a sales agent before contact was ever initiated.

Many businesses were submitting contributed articles to trade publications. These articles stripped out much of the typical marketing spin and began educating readers on new technology. However, this type of marketing made businesses subject to the whim of publishers.

White papers became the solution. They were already accepted in the technology world as educational documents that described technical processes. They also had longer shelf lives than articles. In some cases, portions of the white paper could also be repurposed for contributed articles.

Analyst firms were some of the first to write business benefits white papers. For example, IDC and the Gartner Group were sources businesses could engage to have an authority write what was perceived to be an objective paper on the state of an industry. However, the high costs of having analysts produce white papers prompted many companies to begin writing their own.

Today, most organizations either use in-house or contract writers to author their white papers, rather than subject-matter experts. Regardless of who writes them, executives and decision-makers rely heavily on white papers when researching solutions to problems.

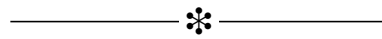
## **WHITE PAPER STANDARDS**

Despite the fact that millions of white papers have been written, there are few or no recognized industry standards for white paper writing. I have seen one-page advertisements and full-length books wrongly labeled as white papers. The phrase is so attractive to some industries that many businesses are slapping the label on just about anything in hopes of jumping on the white paper bandwagon.

To help establish standards, WhitePaperSource surveyed hundreds of white paper writers. Here are some

of the findings that resulted from their surveys and forum discussions. White papers should:

- Begin by addressing problems, challenges or needs, rather than the solution
- Range from 5 to 12 pages in length, on average
- Educate as a top priority
- Avoid direct selling
- Focus on benefits more than features
- Contain information useful to the reader
- Avoid the use of humor



Now that you understand what a white paper is, its value and how it is used, it is important to spend some time examining how to create a well-written white paper. Even though white papers are everywhere, most are never read cover-to-cover. To ensure your paper is embraced by readers, it is critical to start with a thorough needs assessment. The next chapter will reveal what you need to know to properly frame a white paper project.

## SPECIAL OFFER!

As our way of saying “thanks” for reading this sample chapter of Michael’s new book, we would like to provide the following offer to you:

- **Five dollars off!**
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