



DavidChappell
& Associates

CREATING EFFECTIVE TECHNOLOGY WHITE PAPERS

A GUIDE FOR MARKETING PROFESSIONALS

COPYRIGHT © 2020 DAVID CHAPPELL

CONTENTS

| | |
|---|-----------|
| The Value of Technology White Papers | 1 |
| Understanding the Process | 2 |
| Step 1: Define the Goals..... | 2 |
| Step 2: Choose a Writer | 5 |
| Step 3: Interview SMEs..... | 7 |
| Step 4: Write the Outline | 8 |
| Step 5: Review the Outline..... | 8 |
| Step 6: Write the Paper..... | 8 |
| Step 7: Review the paper | 11 |
| Step 8: Use the Paper..... | 12 |
| Summing Up..... | 13 |

THE VALUE OF TECHNOLOGY WHITE PAPERS

Selling technology is complicated. People don't buy things whose benefits they don't understand, which means your customers must grasp both what you're offering and how it can help them. The best way to get these things across is often by creating an effective technology white paper.

The key word in that last sentence is "effective". Many technology marketing professionals have wasted a substantial chunk of their budget on low-quality papers. Doing this can be worse than creating nothing at all, since a low-quality paper makes you look like a low-quality company. The truth is that an effective white paper has three core characteristics:

- ***It's clear.*** The writing is simple, the diagrams and other visuals illuminate the topic, and the story makes sense.
- ***It's credible.*** The paper honestly educates the reader; it doesn't feel like a sales pitch.
- ***It's compelling.*** The paper effectively communicates customer value in terms the target audience cares about.

Used well, an effective white paper can boost your sales revenue by much more than the paper cost to create. Yet creating an effective white paper is a learned skill. If you're like most technology marketing professionals, you need to develop this skill—it's part of being good at your job. The goal of this guide is to help you do this. Reading it will give you a straightforward, repeatable process for creating high-quality technology white papers, along with a better understanding of how to handle some of the challenges that arise.

Who I Am and Why I Wrote This

I'm David Chappell, Principal of [Chappell & Associates](#). Over the last twenty years, I've written close to a hundred technology white papers on a range of technical and business topics. My clients have included Microsoft, Dell EMC, Esri, Blue Prism, and others, with papers published under both the client's name and my own. If you'd like to see some of my work, go [here](#).

For all those papers, I worked with product marketing people. But much of the time, my clients didn't have a lot of experience creating white papers; the process was unfamiliar to them. The goal of this paper is to help product marketers feel more comfortable creating technology white papers and, more important, to help them create better, more effective papers.

Comments and questions are welcome. Feel free to contact me:
david@davidchappell.com.

UNDERSTANDING THE PROCESS

Whatever your paper’s topic, people in three different roles are required to create it. Those roles are:

- **Sponsor:** As a technical marketing professional, this is probably you. You’re providing the idea, the funding, and the overall direction for the project.
- **Writer:** This is the person who actually creates the white paper.
- **Subject Matter Experts (SMEs):** These are the people who deeply understand the topics the white paper will cover.

In general, you should identify people in all these roles before you kick off a new white paper project.

The process of creating a paper has several steps—don’t expect to skip any of them. Figure 1 shows these steps and who’s involved in each one.

| | Define the Goals | Choose a Writer | Interview SMEs | Write the Outline | Review the Outline | Write the Paper | Review the Paper | Use the Paper |
|--------------------------------------|------------------|-----------------|----------------|-------------------|--------------------|-----------------|------------------|---------------|
| <i>Sponsor</i> | ● | ● | | | ● | | ● | ● |
| <i>Writer</i> | | | ● | ● | ● | ● | ● | |
| <i>Subject Matter Experts (SMEs)</i> | | | ● | | ● | | ● | |

Figure 1: The process of creating a white paper has several steps that involve people in three different roles.

To get the most value for the time and money you’re spending, you need to do every step well. The rest of this guide walks through each one, describing what’s required to succeed.

STEP 1: DEFINE THE GOALS

With every white paper, the place to start is by defining your goals. A useful way to think about this is to answer a series of questions, the first of which is ***What do you want the paper to achieve?***

Technology white papers can be grouped into a few categories based on their main goals. These goals include:

- **Thought leadership.** You want to establish your organization as a thought leader in an emerging area.

- **New product introduction.** Especially for complex offerings, this kind of overview white paper can be essential.
- **Competitive positioning.** Competitive papers that feel like a biased sales pitch are generally a waste of money, but an honest description of your advantages can have real value.
- **Technology guidance.** This content could eventually become part of a product's documentation, but you might fund the initial creation to fill an immediate market need.

The notion of a white paper was once defined narrowly: It was only the first of the four possibilities just described, a thought leadership piece. This kind of paper is still useful, but white papers are used today for all four of these purposes (and more). It's now more accurate to think of a white paper as anything longer than a few pages that's paid for by a marketing organization.

Whenever you can, it's also good to identify specific goals for your paper. You might want to improve measurable favorability metrics, for example, or modify the reader's perception in some way, such as leaving them with the understanding that your offering is easy to use or enterprise ready or more secure than the competition. It's also possible that the paper needs to fit into a broader marketing initiative that includes other components.

Whatever style of white paper you create, make sure that the same document couldn't have been published by your competitors. Your paper should have unique content that's competitively valuable to you. Especially with thought leadership papers, it's easy to create something so generic that most of it could have come from another vendor. Don't do this; always make sure your take on a topic shapes the reader's understanding in a way that uniquely matches your offerings.

Once you've figured out your goals, the next question to answer is **Who is your target audience?** What kind of reader do you need to reach to achieve your goals? What do they care about? The more you understand your target audience, the better your white paper can be. You might even define specific personas you're targeting, complete with descriptions of their roles and responsibilities.

Typical audiences for technology white papers include these:

- **Technology leaders**, such as IT managers. This group is usually a key decision maker for technology sales, so they're the most common audience for technology white papers.
- **Business leaders**, such as COOs, CFOs, and their direct reports.
- **Technology users**, such as software developers, network administrators, or end users.

It's natural to want your paper to target more than one of these audiences. After all, you'd like the investment you're making to be as useful as possible. Sadly, this isn't usually possible. Each audience wants different things from your paper, and each has a different background. For example, you might hope to write a single paper for both IT leaders and business leaders. Yet IT

leaders typically have some technical knowledge, and they're likely to care about things like how your offering fits with their existing technologies. Business leaders, however, care solely about business benefits; they're drawn to case studies and real-world evidence. Don't expect them to read anything that contains technical jargon. These are fundamental differences, so while there might be some overlap in content, you should expect to create different papers for these two audiences.

The reality is clear: different types of white papers target different audiences with different content. Figure 2 summarizes the situation.

| Goal | Audience | Content |
|---------------------------------|--|---|
| <i>Thought leadership</i> | <ul style="list-style-type: none"> - Business leaders - Technology leaders | <ul style="list-style-type: none"> - Explains a set of problems, then shows how a new technology solves those problems - Demonstrates authority while shaping the reader's understanding of the area in a way that aligns with your offerings |
| <i>New product introduction</i> | <ul style="list-style-type: none"> - Business leaders - Technology leaders - Technology users | <ul style="list-style-type: none"> - Describes the new offering, illustrating what it is and how it can benefit the reader - Takes a big-picture view: more detailed than marketing material, less detailed than product documentation |
| <i>Competitive positioning</i> | <ul style="list-style-type: none"> - Technology leaders - Technology users | <ul style="list-style-type: none"> - Accurate and (mostly) fair description of the advantages your offering has over what other vendors sell - Moves customers toward choosing your offering rather than a competing solution |
| <i>Technology guidance</i> | <ul style="list-style-type: none"> - Technology users | <ul style="list-style-type: none"> - Explains which of your offerings to use in specific situations, gives best practices for using one of your products, etc. - Helps customers use your products and services more effectively |

Figure 2: The goal of your white paper determines its target audience and content.

Working out what you want your paper to achieve and choosing a target audience are the two most important decisions you'll make in creating a white paper. There are several other questions you should also think about, however, including these:

- **How will you use the paper?** Before you start a white paper project, have a clear plan for how it will be used. What does success look like, and how will you measure it? For example, you might use the paper to get leads, offering the paper as gated content that requires readers to give their contact information before accessing it. In this case, success is probably measured by the number of quality leads the paper creates. A white paper can also be used as a leave-behind for your sales force after an initial discussion with potential customers or as a trade show handout. It's also common to publish the paper on the web, then promote it through email and social media. Whatever approach is best, make sure you think about how you'll use your new white paper up front.

- **What should the schedule be?** Most of the time, you'll want the paper to be available as soon as possible. Still, be as realistic as you can; rushing the process when you don't need to can compromise quality. (You might even lose the ability to work with the best writer because your schedule isn't flexible enough.) And if you're trying to synchronize the paper's initial availability with something else, such as the release of a new offering or an important conference, allow plenty of time for whatever delays you might encounter, especially if you work in a large organization. Remember too that the biggest unknown in your schedule will almost certainly be the time required for SMEs to review the paper. They're usually busy people with many demands on their time, so your completion date will depend on how quickly they get comments back to you.
- **Under whose name will the paper be published?** There are two main choices: the paper can be released solely under the name of your organization or it can be published under the writer's name with a note that it's sponsored by your organization. (It's also possible to publish the paper solely under the writer's name without indicating your sponsorship, but readers are likely to view this as unethical.) If you're trying to establish your firm's thought leadership, publishing under your own name is probably better. If you're creating a competitive piece, however, the paper might be more credible if it's under the writer's name.
- **How long should your paper be?** The answer is simple: It should be as short as possible but as long as it needs to be to tell your story. To qualify as a white paper rather than, say, a technology brief, the document you're creating will likely have at least five pages of content, probably more. (Since the writer is likely to charge more as a paper's length increases, the size of your budget is also a factor in choosing the length.) You might think nobody will read more than a few pages, but realize that your target audience is often reading your paper to help them make a decision about spending a significant amount of money. The trajectory of your reader's career can be affected by this decision, which means they're willing to invest time and effort in making a good choice. Create the right paper—clear, concise, and compelling—and your target audience will read it.

STEP 2: CHOOSE A WRITER

Once you've nailed down your goals, you're ready to start creating your new white paper. To do this, you must choose a writer. At a high level, you want someone who can write a paper that's at least as good as—and ideally better than—those produced by your competitors. The things you want in a writer include these:

- **The ability to tell complex stories in a straightforward way.** Technology white papers are rarely about simple subjects, so turning complexity into clarity is a primary goal. Part of this is the ability to work out what the story should be; a good writer won't expect to be spoon fed a detailed narrative.

- ***The ability to learn quickly, along with enough background to understand the content of your white paper.*** Hiring someone who's a good writer but knows nothing about technology probably won't work. No writer can clearly explain something they don't understand, so if the writer lacks the background to understand your topic, don't expect a good paper.
- ***A willingness to push back (gently) on your marketing statements.*** Are the benefits you claim for your offering real? Is everything you want to say true? A strong writer will help you sharpen your messages to create a more credible paper.
- ***A track record of effective writing.*** Any writer you choose should be able to provide examples of earlier technology white papers they've written. Having written books is also a good sign, since it suggests the writer has been schooled by a publisher's copy editors in the mechanics of grammar and punctuation.

Don't look for a writer with deep expertise in the specific topic of your paper. Prior knowledge not only isn't required, it's typically not even desirable. People who know a topic deeply, such as the SMEs you're working with, commonly can't put themselves in the mind of someone new to that topic, such as your paper's reader. An outsider with enough background to learn the topic quickly is more likely to create a high-quality paper. Besides, since white papers are often on wholly new topics, such as your firm's latest innovative offering, deep knowledge of the topic might not even exist outside the product group.

Should You Write the Paper Yourself?

Probably not, for a couple of reasons:

- If you have the budget to hire a writer, the highest value use of your time is almost certainly doing something else. The opportunity cost of writing your own paper is high.
- Writing good white papers is harder than you think, and it takes longer. I once had a client tell me that he could have whipped out the twenty-page paper I'd spent weeks on in a weekend. He assumed that since he knew the content already, he could easily put together a good paper. All of my experience tells me that he was wrong—writing effective technology white papers is a specialized skill.

if you don't believe me, give it a try: take a stab at writing a paper yourself. I'm betting you'll only do it once.

Some writers work on their own, while others are part of an agency that creates various kinds of content. Solo practitioners might be cheaper, since they have less overhead, and you can also know exactly who the writer will be. Agencies can be easier to find, since they often have salespeople who are looking for you, but you might get whatever writer they have available right now, regardless of their background. In either case, don't expect a qualified writer to be able to start tomorrow. Good people are always busy, so try to choose your writer a month or two before you want them to start the project.

STEP 3: INTERVIEW SMES

Now that you have a writer in place, you can move to the next step in the process: talking with SMEs. You're probably a SME yourself, since you've defined the paper's goals, so the writer will likely interview you first. But for most papers, the sponsor alone isn't the only person who needs to weigh in on content. Instead, you'll need to help the writer find the right SMEs to talk with.

But who are these people? As a rule of thumb, your writer should talk with everybody who will be an important reviewer of the paper. Maybe somebody with power in your organization feels strongly about making a certain point or structuring the story in a specific way. Getting this information up front is essential, because making substantial changes to a paper during the review cycle is difficult and time-consuming. The best way to avoid this is to make sure your writer talks to every powerful reviewer before they start writing. And involvement helps create commitment: if a SME can see their contribution in the paper, they're more likely to approve it during the review process.

It can also be useful to include SMEs drawn from your target audience. For example, if you're writing a paper for business leaders, talking to some of these people can be enormously helpful in understanding what they're looking for and how you can best frame your story. SMEs from your target audience are also helpful during the review process, when they can provide uniquely valuable feedback on your draft paper.

The writer should conduct the SME interviews, although you might choose to participate in them. (Perhaps you want to monitor and guide the writer or just learn more about the paper's topic.) Whether you're part of an interview or not, the writer needs to drive the conversation; they must ask questions that uncover what's needed to tell the right story.

You should expect your writer to follow a few basic guidelines during the SME interviews, including these:

- ***The writer must prepare for the interviews.*** They need to learn as much as possible about the topic, then formulate good questions in advance. A prepared writer is more likely to ask the right questions and understand the answers.

- **The writer shouldn't be afraid to look dumb.** Asking simple questions of smart SMEs, then making sure you understand the answer, can lead to tough situations. The writer needs to be persistent, even at the risk of having the SME think they're not very bright.
- **The writer should respect the SME's time.** SMEs are usually busy people—that's why they're SMEs—so the interviews should be as concise as possible. Still, the writer needs to keep asking until they're sure they understand the topic. Don't expect your writer to develop deep expertise, but if they don't understand something at the level your paper requires, they can't write about it clearly.

STEP 4: WRITE THE OUTLINE

The paper needs some structure before it's written, so your writer must start by making an outline. In fact, the writer should be thinking about how the outline will look throughout the process of interviewing SMEs. An effective white paper is more than a collection of facts; it also provides a framework for organizing and understanding those facts. The outline is the initial expression of this framework.

You should expect the outline to change some throughout the process. The writer will understand the topic more deeply as writing proceeds, so they might decide on a better way to organize the paper's content. Still, it's a good idea for the writer to check in with the sponsor and the SMEs before making significant alterations to the paper's structure.

STEP 5: REVIEW THE OUTLINE

Along with defining a paper's structure, creating an initial outline lets the writer get the planned structure approved. The sponsor—that's you—should definitely review the outline, as should the most important SMEs (who are also likely to be the most important reviewers). The writer should then make any necessary changes to the outline until its reviewers are happy with it.

Changing an outline is much easier than changing a fully written paper, which is why it's so important to have the outline approved up front. Spending more time here can save time later when the paper itself is being reviewed.

STEP 6: WRITE THE PAPER

As a marketing professional—the sponsor of the paper—your role during this step is minimal. It's up to the writer to take the direction you've given, together with the knowledge gained from the SME interviews, to create a strong draft of the paper. Yet it's important for you to understand what an effective white paper looks like. Here are some of the things you should expect:

- **The paper should be interesting.** This means using a not-too-formal writing style, along with a friendly but professional tone. The paper should talk to the reader as if they're an intelligent equal.

- **The paper should be easy to read.** People feel smart when they understand things quickly and easily; make sure the paper provides this. The reader should have a pleasant experience, leaving them with a positive feeling about your offering and your company.
- **The paper should be easy to skim.** Much as you'd like your readers to linger over every word, the truth is that many of them will skim the paper instead. You want to make sure that even a skimming reader gets the main points, so using bullets, putting key points in bold, and breaking up the flow with sidebars are all important.
- **The paper should be free from grammar and punctuation errors.** White papers with grammar and punctuation errors reflect badly on the firm that publishes them. If you're not confident that your writer can do this, consider finding a copy editor to review the final draft.

Different writers work in different ways. Figure 3 illustrates one approach to creating an effective technology white paper.

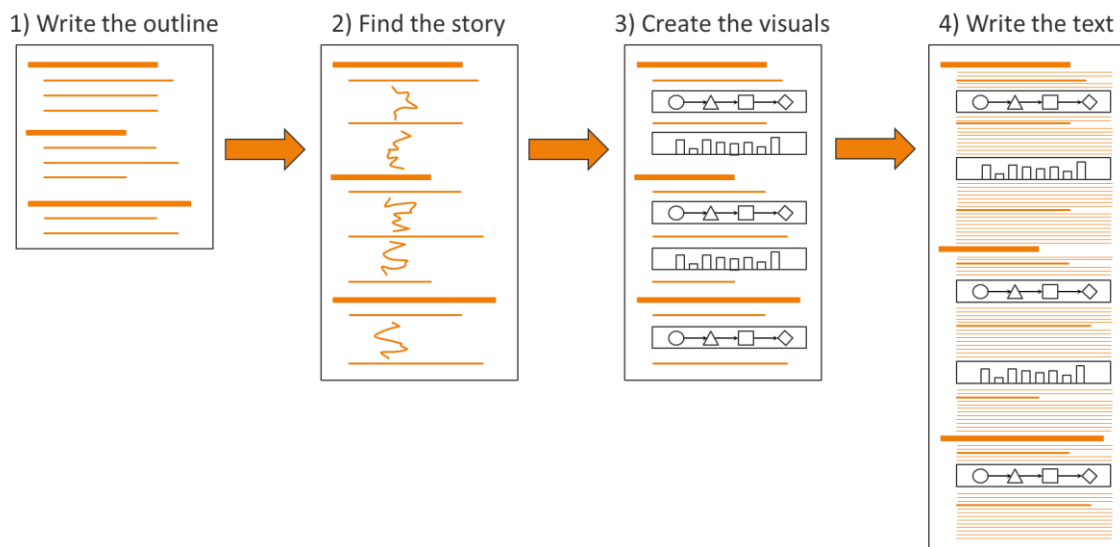


Figure 3: Once the outline has been approved, the writer can find the story, create the paper's visuals, then write its text.

As already described, a completed outline comes first (step 1). Next, the writer might find the paper's story (step 2). What will the narrative look like? How can the paper best convey the information it needs to get across? Once the writer has the general story, they can create the visuals that best support this story (step 3).

These visuals—diagrams, charts, photos, or something else—are a critical part of an effective white paper. Pretty much everybody is a visual learner, so figuring out how to express the paper's main points graphically is essential. And since many of your readers will only skim the paper, getting the key ideas across through easy-to-understand diagrams is important. In fact,

since they're so important, it's often useful for the writer to get the planned visuals reviewed before writing the text.

Once a solid draft of the paper's visuals is ready, the writer can write the text of the paper (step 4). Once again, there are several things you should expect from the writer. They include these:

- ***The paper should get to the point immediately.*** The first paragraph, even the first sentence, should pull the reader into the paper. Don't waste the reader's time with generalities or things they already know.
- ***The paper should state its conclusion up front.*** Not everyone will read the whole paper, but you want even people who start it to get the key idea. Make this clear right away, then motivate the reader to read the rest of the paper.
- ***The paper should explain things one step at time.*** Once we know a topic well, it's easy to leave things out when we're explaining it. But the reader doesn't know the topic well, which means the writer needs to walk through each part of the story in order, leaving nothing out.
- ***Most technology white papers should focus on what and why, not how.*** Except for technology guidance papers, the story should emphasize *what* some technology does and *why* the reader should care. If your paper leans too heavily toward *how* to use the technology, you might be writing documentation rather than a white paper.
- ***The paper should be honest.*** Maintaining your credibility is critical. It's fine to describe a problem in a way that best fits the solution your offering provides, and you shouldn't feel obligated to focus on areas where your offering is weak. Still, if the reader finds things in your paper that aren't true, they're not likely to believe anything else you're saying.
- ***The paper should include third-party validation whenever possible.*** This includes quantifiable evidence produced outside your organization, customer case studies, and more. Support from others, especially neutral parties, makes your paper more credible.
- ***Consider creating an executive summary.*** Especially if the paper is ten pages or more, a one- or two-page executive summary can quickly express its main arguments and conclusions. This summary serves two purposes: it provides a quick read for people who only want the main points, and it also lets you make an argument for why it's worth reading the entire paper.
- ***Most of the time, the paper should end with some kind of call to action.*** You might want the reader to contact one of your sales reps or access a free trial or get further information or do something else. Whatever it is, say this explicitly, then provide direct pointers to how the reader can take that action.

What should you expect the writer to deliver at the end of this stage? The answer is clear: something that the writer believes is ready for publication. They're almost certainly wrong about this, of course, because they've surely misunderstood some things or missed important

details. But expecting to fix a weak paper in the review process is asking for trouble. Barring unusual circumstances, a first draft shouldn't change more than five or ten percent during the review process.

STEP 7: REVIEW THE PAPER

Your goal in the review process is to make the paper as good as it can be and to fix any errors or other problems. By the time you start reviews, it's tempting to believe that your white paper is almost done. This might be true, but even in small organizations, the political dynamics of reviewing a white paper can be intense—the process can take a while. Issues to be aware of include these:

- ***Is there consensus in your group about how to tell this story?*** Does everyone agree, for example, on what parts are most important and which are secondary? Putting everything down in black and white makes this concrete. Disagreements that you didn't know existed can surface. (In fact, it's not unheard of for a firm to commission a white paper that's not really meant to be published; the true goal is to help warring groups reach agreement on a story.)
- ***Is there consensus with other groups in your organization about the story this white paper tells?*** Technology companies often wind up with overlaps between their offerings. If your draft white paper describes something that competes with other solutions, reviewers in that area might not like your paper. These conflicts might have gone unspoken until your new paper made them explicit.
- ***Is there another group in your organization that wants to tell a similar story?*** For example, a product group that wants a paper to describe its new offering might collide with a developer relations group that wants a description of the firm's broad approach in that area. Getting these related groups to review your paper can be helpful—they often have good suggestions—but it can also lead to conflict. It's tempting to send the writer's first draft to all your reviewers simultaneously. Don't succumb to this temptation. You're much better off starting with one or two reviewers, e.g., you and a trusted expert. This lets the writer fix any significant problems in the draft, giving you a stronger document for later reviews. This is important because it's essential that the reviewers—your SMEs—not lose faith in you or your writer. They have to believe that both of you know what you're doing. Sending out a draft with significant errors for broad review doesn't help with this, which is why you should always do a small number of reviews first.

You should expect several things from your writer during the review process:

- ***The writer should be open to changes in the story you're telling.*** No matter how many interviews they've done, the writer is likely to have misunderstood (or completely missed) some aspects of the story you want the paper to tell. Whatever the changes are, the writer needs to fix them, regardless of how much work it is

- ***The writer should be open to technical corrections.*** While the writer by now understands the topic to some degree, they're likely to get at least some details wrong. Publishing a white paper with technical errors is bad, so the writer needs to fix these with no complaint.
- ***The writer is likely to push back on some suggested changes.*** The writer is the guardian of clarity. For example, your reviewers might be used to hearing this story told in a specific way, such as the way they tell it themselves, and they might resist an alternative approach. But while the story they tell might be great for people like them, it can still be entirely wrong for your paper's target audience. It's the writer's job to argue on the reader's behalf, that is, in favor of telling a clear story for people new to this topic.

The review process can be challenging, and it will probably take longer than you expect. Go in with your eyes wide open, and be prepared to defend your vision for the paper. Most often, you'll complete reviews with a paper that's better than the one you started with.

Handling Conflicts During Reviews

What happens when a reviewer disagrees with some aspect of the story your paper tells? The answer often depends on how much power you bring to the review process. If you're a new product manager without much of a reputation in your company, you might find yourself on the losing end of these debates. In this case, expect to change your paper to reflect the agenda of whoever has the most political power. (There's always somebody else who's happy to use your marketing budget to tell their story.) In the worst case, your paper might even be killed.

In my experience, though, these bleak outcomes are rare. Doing your homework up front, including having the writer interview everybody who might be a hostile reviewer before writing the paper, helps enormously in avoiding these challenges. With a clear understanding of the audience and the paper's goals, you can usually rally people around your point of view.

STEP 8: USE THE PAPER

The best white paper in the world has no value if its target audience doesn't read it. Once it's ready, make the paper available as quickly as possible. You should also look for quantitative ways to measure the impact of your paper. Can you count the number of downloads, for example, or measure how many high-quality leads were derived from those downloads? Hard numbers help you justify the money you spent as well as get support for future papers you'd like to create.

Other things to consider in using the paper include these:

- **Titles are important.** This is especially true if you're planning to use the paper as gated content to get leads. An appealing but accurate title that attracts reader interest will get lots more clicks than something bland and boring. It's useful to pick a working title at the start of the project, but don't be afraid to wait until you're done to finalize it.
- **Plan for revisions to keep the paper current and fresh.** You've spent a chunk of your budget on this paper, and you'd like to get as much value from it as possible. One way to do this is to periodically refresh the paper's content, keeping it aligned with your current offerings. Good papers can live for a while, so they're worth investing in.
- **Look for other ways to use the paper's content.** For example, an effective white paper should be a solid foundation for a great presentation. Think about whether you can repurpose the paper's content into a deck for your sales force.

SUMMING UP

A white paper can bring substantial value to your company, increasing sales revenue by much more than the paper's cost. But this is only true for high-quality papers that tell the right story in the right way to the right audience. Keep in mind that an effective white paper has three fundamental characteristics:

- **It's clear:** The paper is easy for the target audience to read and understand.
- **It's credible:** The reader believes what you're saying.
- **It's compelling:** The paper makes a convincing argument in terms the target audience cares about.

Creating a great technology white paper isn't that much harder than creating one that's just so-so. By following the process described in this guide, you can increase your paper's impact and get the best return on your investment.

