

WADE & PARTNERS

# THE WHITE PAPER WHITE PAPER

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WHAT IS A MARKETING WHITE PAPER?  
HOW TO WRITE THEM.  
HOW TO USE THEM.

BY  
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(WITH SOME HELP FROM ALBERT EINSTEIN)

## WHAT IS A WHITE PAPER?

A white paper is a document that's intended to instruct or inform. Originally, the term referred to official government documents. There is something about the term "white paper" that implies official, informative and unbiased. Governments like to imply those things.

A white paper isn't quite the same thing as a memo. A memorandum (from the same root word as "memory") is a reminder or sometimes an announcement. A white paper is more of an educational or informative piece.

Today, white papers are quite commonly used as marketing tools. They're really sales tools trying to look they are official, informative and unbiased. The ploy isn't hard to understand. Let's say you're thumbing through a magazine and you come across an 8-page advertising insert titled "Allstate's Guide to Saving Money on Car Insurance." It's filled with dramatic full-color photos and slick graphics. Would you take the time to read it? Some people might, if they're really bored. But most people would take a pass. Let's face it, you already know what the answer is going to be: Buy Allstate Car Insurance. What would you expect Allstate to say? Do you think for one moment that they're going to be unbiased and objective?

On the other hand, if you saw a white paper with the title, "Understanding The Price/Value Relationship In Auto Insurance" and you were concerned about the cost of your auto insurance, you might just read it, especially if it wasn't too "slick" looking.

*If a white paper is going to be credible, it should not look like it came from the advertising department, even if it did. The importance of that fact can't be too strongly emphasized.*

If you're writing a white paper, and you're in the marketing department, then you have a bias. At times, you may even be able to reveal your bias ... as long as it doesn't sound like you're trying to sell something.

Clearly, *this* white paper has a bias.

A white paper can advocate a position. But it shouldn't try to sell a product. Suppose that you work for Toyota and you're trying to sell hybrid cars. You can write a white paper that advocates hybrid cars. You can document the savings involved, the social responsibility, the impact on the environment. What you can't do is advocate the Prius over other hybrids. Do that and you've crossed the line. Do that and you've written a sales brochure, a very bad sales brochure at that, one that lacks sizzle and eye-popping graphics.

## WHAT SHOULD A WHITE PAPER LOOK LIKE?

This is embarrassing. It's so obvious it shouldn't need to be said. But there really are people out there who haven't figured out what color a white paper should be. If I didn't have a bright "red" white paper sitting on my desk right now, I wouldn't believe it either.

Really!

It's hard to fathom why anybody would do this. Perhaps they were hoping that black type on a red background would be as hard to photocopy as it is to read. Or, more likely, they did it just because they could. Either way, it's wrong.

The latest versions of word processing software make it easy to change the background color of a page. But the resulting "white paper" is likely to be hard to read, will rapidly deplete the toner or ink in the reader's printer, and generally lacks the dignity expected from a white paper.

So very briefly, here are some of the physical properties that every good white paper should have.

- **White Paper.** It will probably be distributed and read electronically, but even so, keep the background color white.
- **Wide Margins.** There are two reasons for wide edge margins. The first is because it gives your reader ample space to make marginal notes. That kind of reader involvement is good for you. The second reason is because it keeps the lines of type shorter. It's easier for the eye to track short lines of type.
- **Choice of Font.** There are endless debates about which fonts are easier to read. Millions of dollars have been spent on research studies and new font development, and debates still rage over which font is easiest to read. Probably the best advise, within the scope of this white paper, is to avoid "funky" fonts. If you want to stand out, do it with your choice of words, not your choice of fonts.
- **Fewer Fonts.** As a general rule, use one or two fonts in your white paper, no more. If you use two different fonts, it should be because your headlines are in one font and your body text is in another font. Surely, you know better than to ever use two different fonts in the same paragraph.

- **Emphasize Correctly.** You should have the confidence that your words are strong enough to stand out without any help. It should be rare when you emphasize them visually by making them a different color or bold or italic. When you do emphasize text, do it sparingly, and never underline text. That's a hangover from the days of typewriters when bold type and italic type weren't available. Professional typesetters have never underlined text. Typewriters did. You don't use a typewriter. Don't make it look like you do.
- **Add A Little Variety.** Like it or not, we're not living in an age of readers. People don't like to read. Too much text scares them. So break it up. Use bullets and subheads and bold lead-ins and every trick you can think of to break up long blocks of text.

*Anything that you can do to break up long flowing text into smaller, more easily digestible parts will help to make your text more readable and less threatening to the video-game generation. But don't get carried away or your page will quickly degenerate from "friendly" to "cluttered."*

Footnotes and references are also a good thing to include in your whitepaper. They add an air of authority. If it's been a long time since you've written a term paper, you can find excellent sources online that will show you how to format your references.<sup>1</sup>

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<sup>1</sup> Harnack, Andrew and Kleppinger, Eugene (2003) *Online! A reference guide to using internet sources*. Retrieved June 30, 2008 from <http://www.bedfordstmartins.com/online/cite6.html#1>

## WHAT MAKES A MARKETING WHITE PAPER A MARKETING WHITE PAPER?

Obviously, a marketing white paper is designed to help market a product or service. But why use a white paper when advertisements and brochures work so well?

It's all about credibility.

All advertising media suffers from an inherent lack of credibility. The message is always the same. "Choose our product over their product." What else are you going to say? All of your claims are self serving. All of your statistics are suspect. You'll never see an ad that says, "This product really sucks" unless it's for a Hoover and even that's not very likely.

So when you have a product with a genuine advantage, how are you going to get the message out and have people *believe* you?

Enter the white paper.

It's a marketing white paper because it was initiated by the marketing department and is probably funded by the marketing budget. But it's a good idea to make it sound like it came from someone more objective, like the engineering department.

*You'll never see an ad that says, "This product really sucks" unless it's for a Hoover and even that's not very likely.*

When engineers speak (or write) people tend to believe them. We seem to think that they know what they're talking about. The exception, of course, is other engineers. They know better.

Even if somebody in the marketing department writes the white paper, it's not a bad idea to credit it to an engineer. The President uses ghost writers. You can too.

If your white paper is really good, really informative and useful, it may just get passed around. That, of course, is the point. You want it to get passed around. So don't do anything to discourage the process. Don't get too silly about trying to lock down the file to prevent people from making copies of it or extracting quotes from it.

## A WORD ABOUT STYLE

If you don't write for a living, you might want to pick up a good book on style. (If you do write for a living, you should already have several.) The two that we refer to most frequently are:

- **“The New York Times Manual of Style and Usage”.** They modestly subtitle this book: “The Official Style Guide Used by the Writers and Editors of the World's Most Authoritative Newspaper”. It's the New York Times. What do you expect?
- **“The Chicago Manual of Style”.** Published by the University of Chicago Press. We have a mysterious bias towards this one.

There are others. You can use the one you like. But you really should have a reference work to back up your decisions. Those books help you to know how to handle the words you choose with rules of usage, capitalization, punctuation, abbreviation, etc.

It's also a good idea to have a book on stylish writing. One of the all-time favorites for many writers is “The Elements of Style” by Strunk & White. It was originally written back in 1918 by Cornell University Professor William Strunk, Jr. and has been updated several times since. Whether it's this book or one of many others you can find at your local bookstore, a book on style is a worthwhile investment.

*I cried because I had no shoes, until I met a man who had no style.*

“But wait a minute,” you protest. “I'm an engineer. I got stuck with the assignment of writing this white paper. I'm not a writer. I don't have time for this.”

Alas, no matter what your job title may be, the ability to write clearly will take you a long way. A famous physicist once said that the most valuable class he ever took in school was English. “Sometime, you think you've got a brilliant idea. But if you can't communicate it to anybody, it's worthless.”

Amen.

## CLARITY

When writing a white paper, or any paper, your primary goal should be clarity. You can't make it too simple.

There will be times when critics will tell you that you risk insulting your audience if your writing is too simple. In answer to that, consider what may have been one of the most significant white papers of all time. It was called, "Relativity: The Special and General Theory" and it was written by a kid named Albert Einstein.

In the introduction to his work, Einstein made the following statement, which seems almost shocking when you consider what he was writing about.

*The author has spared himself no pains in his endeavor to present the main ideas in the simplest and most intelligible form, and on the whole, in the sequence and connection in which they actually originated. – A. Einstein*

The man was presenting the theory of special relativity to the world, for pity's sake, and wanted to make it understandable to "those readers who, from a general scientific and philosophical point of view, are interested in the theory, but who are not conversant with the mathematical apparatus of theoretical physics."

Way to go, Einstein.

So did he succeed? When you're done with this white paper, take a minute to read the addendum at the end. It's chapter III from his book, called "Space and Time in Classical Mechanics." Decide for yourself if he succeeded.

It's clear that, while he was impressing the world with his brilliance, he made it look like he wasn't trying to. You may have a mental image of the man standing in front of a chalk board covered with indecipherable equations. But look at an example of an equation lifted straight from his book:

$$(\text{Force}) = (\text{inertial mass}) \times (\text{acceleration})$$

He didn't even use algebraic symbols.

In other places in the book, where he did use algebraic equations, he carefully defined each term, never assuming anything on the part of the reader. (See "Charts, Graphs and Formulas".)

## THE WRITING PROCESS

Now you're faced with the most frightening part of writing: the blank white page. In writing textbooks, the classic approach goes something like this:

- Thesis
- Outline
- Rough Draft
- Revise and Polish
- Revise and Polish Again

There's nothing wrong with that approach, although some writers are more free-form in their approach. For some, it's enough to have the thesis clear in your mind, whether it ever goes down on paper or not. Your outline should also be clear before you start, whether on paper or just in your mind.

Then start writing. Bang on those keys or start putting ink on paper. Every word doesn't have to be perfect. Every word won't make the final draft. But it's important to get your thoughts flowing. Try to fill up a page or two before you stop.

Then go back and read it, asking yourself a few questions.

What was your thesis again?

Who is your audience?

What are you trying to accomplish?

Where is this going?

Most of all, keep asking yourself the relevance questions. Why is this important? Who cares? What does this have to do with the thesis?

Don't be afraid to reexamine your thesis after you start. It may change on you as the words start to flow.

The most important step is not the first draft, it's the rewrite. Read what you've written. Rewrite it. Reread it. Rewrite it again. Don't stop until it's perfect, until you can't find a single word that should be cut or changed.

## CHARTS, GRAPHS AND FORMULAS

Yes, you should include them wherever possible.

One of the classic writing assignments is to have students write a paper describing how to tie a shoelace. Naturally they're allowed to use words only, no pictures. It's difficult. Some would say, "impossible".

Fortunately, you won't have to suffer this restriction. However, unless you're a graphic artist, you should leave the finished art to someone who is.

These days, it's easy to create professional looking pie charts and bar charts, but pass along the source files (spreadsheets) to the marketing department when you're done. Let them add the finishing touches.

*NOTE TO THE MARKETING DEPARTMENT: It's your job to take the charts, formulas and graphs from the engineering department and make them clear without making them look too polished. Remember, this is a white paper. Don't be tempted to sacrifice clarity for beauty.*

One of the biggest mistakes that's often made is to present a chart, graph or formula with an insufficient explanation. Remember, you're familiar with the information being presented. You look at where those two lines cross and the dramatic message is so clear to you. But don't be afraid to make it clear to others.

The same is true with formulas.

The simple formula for the volume of a sphere is:

$$V = \frac{4}{3}\pi r^2$$

You get it, right? But never be afraid to define your terms. You're not going to insult anybody if you add ...

V = Volume

$\pi$  = The value of "pi" (3.14)

r = Radius

Einstein did it. Nobody called him stupid.

## GETTING THE WORD OUT

Now that you've written your white paper, the question of distribution comes up. How are you going to get the word out?

Your marketing department should have no problem with this. The first thing they'll want to do is post the white paper on the company web site. You probably wrote it using a word processing program. They'll probably want to convert it to a format that can be read by anybody, whether they have the same word processing program or not.

That means converting it to an HTML page or possibly an Adobe Acrobat® file. Your goal is to get this paper in the hands of as many people as possible.

Send it as an email attachment to everyone you can think of, both inside and outside your company.

A press release is appropriate.

Send it to magazine editors.

If it's possible, try to adapt your white paper into a "slide" presentation and offer to take the show on the road. Trade associations are always hungry for presenters. Your customers may view it as good fill for their next sales meeting.

Be sure to include contact information somewhere in your white paper so that interested readers can call or write for more info.

And by all means, make it easy and unintimidating for people to spread the word. Add a statement something like this:

*Wade&Partners has no objection to the reproduction and re-use of the materials contained in this white paper, as long as Wade&Partners is acknowledged as the source.*

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ADDENDUM:  
SPACE AND TIME IN  
CLASSICAL MECHANICS

(CHAPTER III FROM THE BOOK "RELATIVITY: THE  
SPECIAL AND GENERAL THEORY")  
BY A. EINSTEIN

"The purpose of mechanics is to describe how bodies change their position in space with time." I should load my conscience with grave sins against the sacred spirit of lucidity were I to formulate the aims of mechanics in this way, without serious reflection and detailed explanations. Let us proceed to disclose these sins.

It is not clear what is to be understood here by "position" and "space." I stand at the window of a railway carriage which is travelling uniformly, and drop a stone on the embankment, without throwing it. Then, disregarding the influence of the air resistance, I see the stone descend in a straight line. A pedestrian who observes the misdeed from the footpath notices that the stone falls to earth in a parabolic curve. I now ask: Do the "positions" traversed by the stone lie "in reality" on a straight line or on a parabola? Moreover, what is meant here by motion "in space"? From the considerations of the previous section the answer is self-evident. In the first place, we entirely shun the vague word "space," of which, we must honestly acknowledge, we cannot form the slightest conception, and we replace it by "motion relative to a practically rigid body of reference." The positions relative to the body of reference (railway carriage or embankment) have already been defined in detail in the preceding section. If instead of "body of reference" we insert "system of co-ordinates," which is a useful idea for mathematical description, we are in a position to say: The stone traverses a straight line relative to a system of co-ordinates rigidly attached to the carriage, but relative to a system of co-ordinates rigidly attached to the ground (embankment) it describes a parabola. With the aid of this example it is clearly seen that there is no such thing as an independently existing trajectory (lit. "path-curve"<sup>2</sup>), but only a trajectory relative to a particular body of reference.

In order to have a *complete* description of the motion, we must specify how the body alters its position *with time; i.e.* for every point on the trajectory it must be stated at what time the body is situated there. These data must be supplemented by such a definition of time that, in virtue of this definition, these time-values can be regarded essentially as magnitudes (results of

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<sup>2</sup> That is, a curve along which the body moves.

measurements) capable of observation. If we take our stand on the ground of classical mechanics, we can satisfy this requirement for our illustration in the following manner. We imagine two clocks of identical construction; the man at the railway-carriage window is holding one of them, and the man on the footpath the other. Each of the observers determines the position on his own reference-body occupied by the stone at each tick of the clock he is holding in his hand. In this connection we have not taken account of the inaccuracy involved by the finiteness of the velocity of propagation of light. With this and with a second difficulty prevailing here we shall have to deal in detail later.