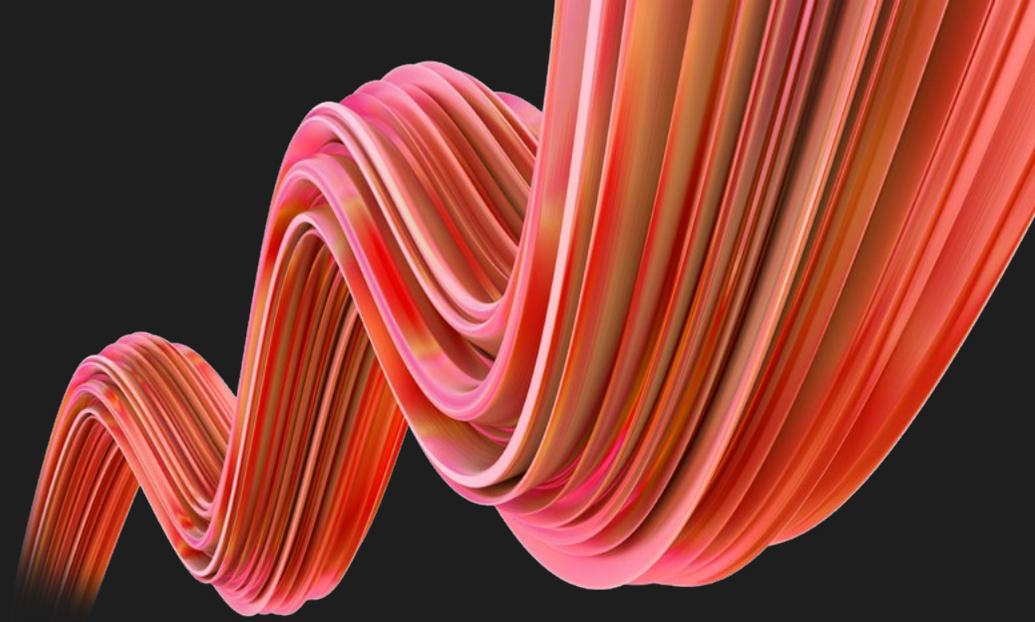# FUTURITY

A definitive guide to creating technology white papers

Copywriting best practice from 20 years' experience

12 rules for white paper success

White papers are a content marketing essential. They've been around for a long time but are still a highly valuable tool for convincing prospective customers to buy from you.

White papers are useful because they establish authority and thought leadership in your marketing communications. More in-depth than an article, less product-focused than a brochure, white papers let you provide expert advice on how your products and solutions can solve your customers' business issues.

But remember that your audience is likely bombarded with information and data every minute of the day. If you want your audience to engage with you, your white paper needs to be educational and engaging. A well-planned and expertly written white paper will help you demonstrate you understand the complexities of the business landscape, and that you have genuine insights and recommendations that benefit your reader.

In this ebook, we'll detail:

- How to pitch your message to these various readers

- How to convey complex technical messaging in a clear and comprehensible manner

- How to get all this information across in a punchy, engaging way

We've distilled over 20 years of tech industry writing experience and marketing expertise into these 12 Rules for White Paper Success. Read on to find out how to use white papers to position your company as the expert and trusted advisor your customers want to work with.

79% of B2B buyers said white papers are the content they are most likely to share[1]

75% would share information about themselves and their company in exchange for a white paper[2]

43% of B2B marketers say white papers produced the best results of B2B content assets used in the last 12 months[3]
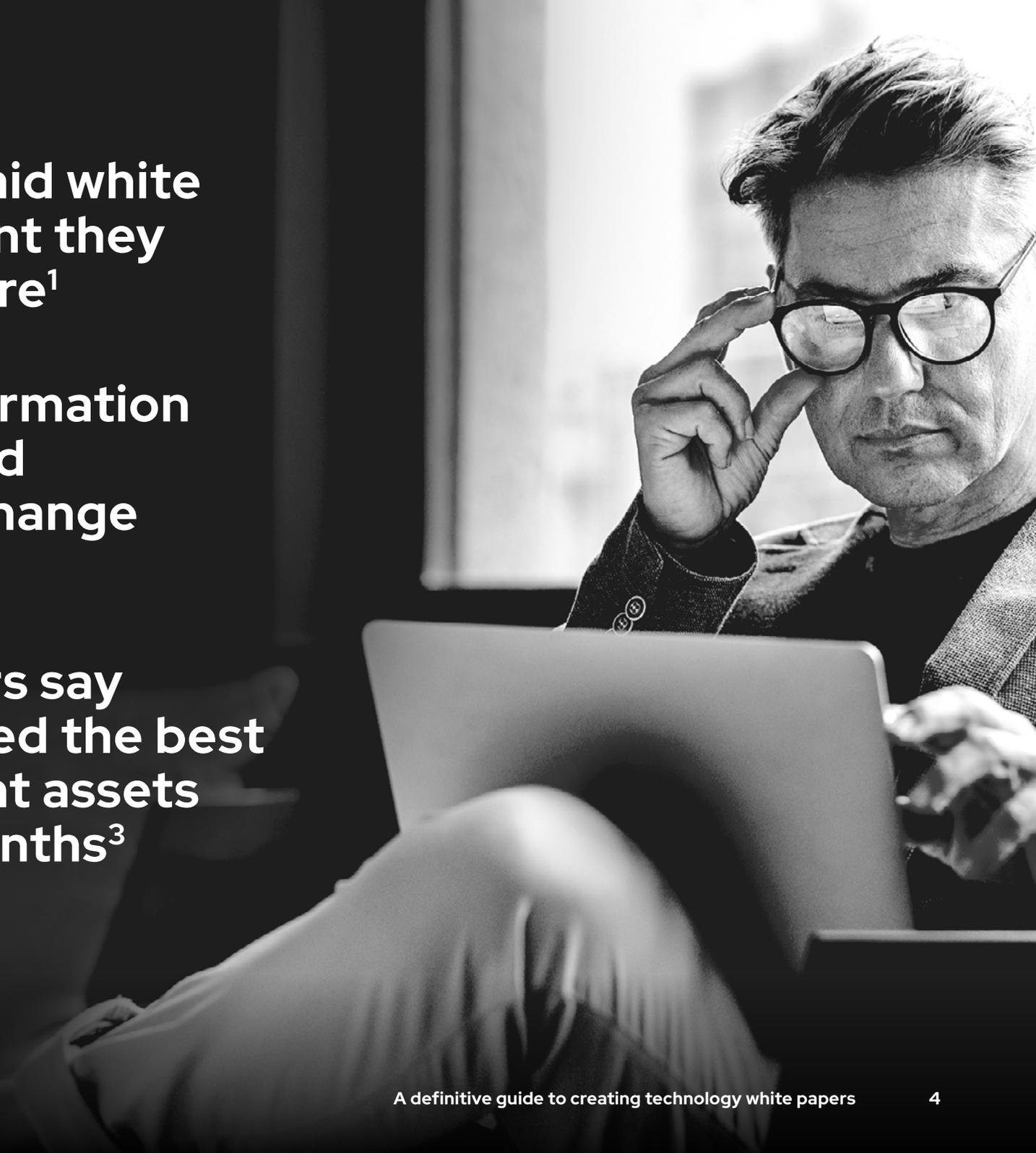
01

Setting realistic objectives for your white paper

You must set clear marketing objectives for your white paper – and stick to them. These are fundamental to the success of your paper and will help you keep it on track.

Start with your audience: you'll target various levels of reader with differing job roles, and who will have different degrees of influence on purchasing decisions. CFOs and CEOs might prefer visual white papers for a more at-a-glance overall picture, whereas a more techie reader will probably want to see more detail. Also, factor in whom your reader works for - enterprise buyers, the channel, independent consultants, or vertical industries – and why they'd be interested in how a generic solution like SD-WAN is relevant to their business.

Ask yourself what you want to achieve with your paper, then tailor it to your audience and ensure you communicate useful information to them. That means understanding your audience's challenges and demands and setting your paper out to solve one or more of their problems.

Once you've established your audience and their pain points, you can start thinking about what you want your paper to achieve. For example, this might be actionable advice that your reader can take after reading the paper. This should include a call to action to read more content assets you've developed.

Identify the target audience and goal of the paper

Agree on the content and approach

Consider actionable advice for your readers

02

Mapping your paper to the buying journey

The primary purpose of marketing content is to facilitate sales, meaning your content assets should be mapped to the buyer journey. This is traditionally seen as a sales funnel, which leads the buyer from research and nurtures them through to the point of buying your product or service.

At the top of the funnel is awareness, which is where you highlight a business challenge and the prospect of a solution. In the middle of the funnel is a consideration phase where buyers assess whether you're a credible provider of these solutions. And at the bottom of the funnel is the decision, where they've established your credibility, engaged with your account teams, and want a final bit of proof that you're the best fit for them.

In general, white papers are top-of-funnel content. They're there to educate your readers on how a certain type of solution can meet a business challenge, for example. Of course, not all readers of awareness assets are potential customers: they might also be competitors, journalists, prospective employees or students. White papers can also work in the consideration phase as buying guides, where you can outline different technology options of a solution, for example.

If your paper is part of an ongoing campaign, how does it fit in with your other collaterals? Your white paper should work in combination with other assets like case studies and brochures. And what is your desired outcome: awareness-raising, link to another piece of content, or email capture?

Decide what stage of the buyer journey your white paper targets

White papers are most commonly awareness-focused content

It should complement assets across the buyer journey

03

White papers for ABM: a different buyer journey

Account-based marketing (ABM) requires a slightly different approach to the traditional sales funnel, mainly because you're starting off with a small number of targeted readers.

ABM doesn't use the traditional sales funnel approach because only specifically identified companies go into an ABM funnel. White paper content is still valuable, but instead of focusing on attracting and qualifying leads, marketing needs align closely with sales to identify specific content to nurture these targets until they convert into paying customers.

This means white papers you use for ABM can be hyper-targeted for a specific readership. For example, an ABM campaign targeting financial services companies shouldn't just address the business challenges specific to that industry. It should directly address the challenges faced by your targeted financial service companies. You can identify these through desk research, interviews with account managers, and other routes. The end goal is a white paper customized for each target, even if the core content remains generally the same.

In ABM, work with sales to develop white papers to nurture content throughout the sales cycle

Consider developing hyper-targeted white papers for specific customers

04

Getting your tone of voice right

Tone of voice is a key aspect of your brand and informs how you interact with customers. So it needs to be consistent across all the assets that you produce, including your white papers.

If you don't have any documented tone of voice and brand guidelines, then it's worth putting these in place before you start writing a white paper. Tone of voice reflects how you communicate as an organization and needs to be consistent across all the content assets you develop. Do you want it to be contemporary or traditional? Fun and informative? Or practical and educational?

Your tone of voice should include guidelines on vocabulary, grammar and writing practices. The latter should cover length of sentences, what form or address you use with the reader and content structure. And you will need to decide on a style guide that covers questions such as capitalization, preferred words and punctuation.

While the idea is to keep your tone of voice consistent across all content formats, there should be scope to vary it across different types. For example, blogs might be direct address – as it's the writer speaking directly to you, whereas you might want to adopt a more formal tone in a white paper.

In all cases, however, it vital to focus on clarity and ensure that your content is concise. No one wants to read jargon or waffle.

Ensure that you have a tone of voice in place

Decide on any variations required for between content types

Provide a style guide for writers

05

Finalise your messaging before starting

You want your white paper to communicate your marketing messages in an informative and authoritative document. So, you need to ensure they're in place for the topic before starting.

White papers help you shape the story around a technology or business challenge to promote your company's strategy and solutions. So it's important you settle on your marketing messages before starting any white paper project. This is particularly important if many different stakeholders are involved in the white paper process – you need to be sure they're all aligned with your messaging in advance.

Spend some time creating a message house before you start the white paper writing process proper. It will give your copywriter the tools they need to convey your message accurately and compellingly in the paper. Without one, your white paper will take longer to produce as different stakeholders get involved and often disagree with one another's positions in the reviewing and editing process. This can lead to unplanned rewrites that reflect new positions and just delays your project.

Set out clearly what it is you want your white paper to say

Work with your all stakeholders to create a message house

Get sign-off on the messaging from all stakeholders before starting

06

Write a detailed brief

White papers are hefty documents that are written over a fairly long period of time – a detailed brief ensures the final document will meet your requirements.

White papers are long reads and can be complex to write, with many different concepts and messages to include. Writing a brief ensures your key messages, structure, and concepts are documented in advance. It helps you check that the delivered draft is what you'd initially agreed and saves you time and money.

The brief should include your desired paper length, target audience, guidelines on tone of voice, level of technical detail, key messages to highlight, and the overall objective of the paper. It should also include references to relevant third-party research you might already have, along with any internal messaging, presentations, and existing content that would be useful in the writing process. This brief should be agreed with your content agency and/or copywriter in advance of the project.

A detailed brief will ensure you get the paper you want

Include target length, audience, tone of voice, objective and messaging

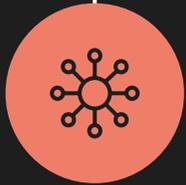**Provide relevant internal and external content for reference**

Build a project timeline which takes all dependencies into account

Includes agreed milestones for each project phase

Align project plan with other marketing campaign activities

07

Stay on target with a project timeline

Because white papers typically involve many different stakeholders, agreeing on a project timeline ensures your paper stays on track for delivery.

White papers generally take six to eight weeks from kick-off to final PDF delivery, and involve many stakeholders in the interview, writing, design, and review processes. The final delivery date will also need to fit in with your overall campaign planning. Sometimes it is better to work backwards from that date – and include some contingency.

You'll need to get your stakeholders to commit to interview slots. These are often subject to change as they're busy people with customer responsibilities and other work projects. They'll also need to be involved in the review process along with any other senior staff responsible for final sign-off.

Sticking as closely as you can to the milestones in your project timeline will ensure your paper is delivered on time. It also gives stakeholders an indication of when they'll need to review documents or speak to writers so they can plan for it in advance. Check out our timeline graphic **here**.

08

Capture information with interviews

Expert interviews are another key aspect of a successful white paper. Both writer and interviewee need to prepare ahead of talking to each other to make the most of the time allotted.

White papers are a way to capture your organization's expertise and harness it for marketing purposes. So, choosing the right interviewees is fundamental to the success of your paper. In our experience, some of the best white papers interviewees are pre-sales consultants with experience in addressing customer challenges. But they can also come from across the organization. It depends on the topic.

Our advice is to brief both your spokespeople and your writer about the interview process. The writer will need to research the topic and prepare a list of questions for the discussion. It's worth making sure these are validated and shared with the interviewee in advance. This helps them be prepared and makes the interview flow better.

Typically, interviews are best done on the phone to accommodate international interviewees. They'll usually take an hour, and keeping them as a single spokesperson at a time is best. Always try to record the call as well. The total number of interviews will depend on the topic, but three is usually enough. Too many adds complexity and potential disagreement, increasing the time needed for the interviews and extending the review process.
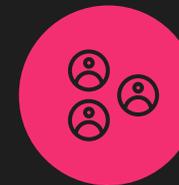
Choose up to three experts for interviews

Brief interviewees and provide questions to them in advance

Interviews best done over video call or phone for an hour with individual interviewees

Outline should include the main content points and structure of the white paper

Identifies any content gaps for further interviews

Allows any changes to the structure and content to be made before the writing process starts

09

The importance of an effective outline

An outline summarizes the structure and key elements of your paper. It captures the information the interviewees provided and lists the paper's key points and structure. The outline is an important step that allows your writer to structure the content from the interviews into a coherent paper. The outline can be bullet points and lists of content, but it gives you an idea of what content goes into which section. It is not an early draft, more a list of section headings and subheadings.

The outline stage is a good time to identify any missing content and schedule further interviews if necessary. This could mean getting a new interviewee involved. Reviewing the outline also allows you to approve any changes from the original brief your interviewees may have requested. Making these changes at this point prevents longer delays further along the writing process.

10

Draft and review your content

You should allow up to three rounds of drafting and revision to sign off the text of your white paper before starting the design.

The drafting and reviewing process is iterative. After you've agreed on your outline, the writer will write up the first draft of your paper. This should follow the agreed structure, contain all the key points, and include an indication of page numbering and additional elements such as sidebars, pull quotes, and boxouts.

Versioning is always a potential issue in white papers that have many stakeholders. To prevent problems, the reviewing process should always be consolidated on the client side, ideally using the Word revision/tracking changes function to mark up the document directly. This way, you can make sure no revisions are overlooked and there's no duplication. Ideally, a single point of contact manages the review process and liaises with the writer. If different stakeholders mark up different documents, you can end up with contradictory comments, or reviewers referring to text that has been changed in another version. All of which just adds delays to the process.

Based on the comments and amends provided in the marked-up draft, the writer will produce a second draft that will go through the same review process. This process will continue until the project manager has signed off on the text draft, and it can be submitted to the design process.

DRAFT — Writer will produce the draft based on the agreed outline

Client provides consolidated comments within document using review functionality

FINAL — Final document will follow two or three drafts

V.XXX — Always be aware of versioning issues

11

Design the final paper

Design is a key part of white paper creation. A boring design can be a real turnoff for your reader and mean your paper is not read. Use good signposting throughout and break the text up with boxouts, sidebars, and other design elements. You'll also need to decide which format to use. For example, a landscape ebook style is best if the paper is primarily for online viewing.

Your paper design needs to follow your company brand guidelines on font use, imagery, and colours. Having clear guidelines on photographic use makes it possible to use stock photos while ensuring a consistent look and feel. If you don't already have brand guidelines for white papers, we can help you put them together.

Again, the review process is iterative. Our design team creates an initial PDF draft for review. The client team should circulate the PDF to gather consolidated comments, marked up directly on the PDF using the Acrobat commenting function. We expect to have two to three rounds of these changes before producing the final versions – either online only, or online and print formats.

Decide on final format: online only or print and online

Follow brand guidelines on fonts use, imagery and colours

Expect two or three cycles of reviewing before the final version

12

Distribute and promote your paper

When you've finished your white paper, the journey continues to distribution and promotion. This is how you ensure your target audience sees and reads your paper.

Distributing and promoting your white paper is typically done via email marketing using prospect and customer lists, and can also include activities like webinars or other events. The white paper can be used as a post-event takeaway for the latter. Most organizations will use lead scoring to validate these leads based on a buyer journey of downloads.

Attracting new readers means a distribution strategy that includes digital advertising. Your target audience will dictate which platform works best. For example, with Google AdWords you can target and refine specific searches so you capture readers actively looking to solve the business challenges you cover in your white paper.

Match your campaign distribution and lead scoring on the buyer journey

Use the white paper as takeaways for events and webinars

Supplement your campaign distribution with digital advertising

Why Futurity Media

We have 20 years of experience writing white papers and ebooks for leading technology companies. Our in-house team of B2B writers create compelling white papers that educate and persuade audiences, even for the most complex topics.

- Standalone white papers or part of multi-asset campaigns

- Hyper-targeted to support account-based marketing campaigns

- Wide range of technology knowledge, including cybersecurity, AI, cloud, 5G, IoT, digital workplace and SASE

- Vertical experience of technological transformation in multiple industries, including retail, manufacturing and natural resources

- Multidisciplinary team of designers and web developers to offer you a one-stop shop

Contact us to find out more about our white paper program at stewart@futuritymedia.com.

White paper clients have included

vodafone business   Telstra   orange Cyberdefense   splunk>   SITA   orange Business

Telstra Purple   OneWeb   NTT | Global Networks   JUNIPER NETWORKS   IoT.nxt   expereo faster to the future

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