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## Overview: White Papers in Perspective

The term white paper is often used, but rarely understood. Here we will put the white paper in a modern business perspective and answer some of the most common questions about white papers.

### Why Write White Papers?

The White Paper is, indisputably, the best way to deliver your technical message to the marketplace. No ad, brochure, data sheet or other marketing document delivers the essence of technical products and services like a properly crafted white paper. Moreover, a white paper is so versatile that it can be distributed in paper or electronic form, in person or virtually, via an email campaign, as part of a collateral or launch package, in a press or investor kit, stand-alone or all of the above. There are several reasons why an organization might want to generate one or more white papers. Let's take a look at each.

#### Help a Customer or Prospect Make a Buying Decision

The primary motivation behind most white papers is the desire to help an existing customer or prospect make a buying decision. Not surprisingly, most decision-makers place a lot of emphasis on white papers as a part of the purchasing process. They read and reread them, both those from vendors and those from consultants, analysts and other independent sources.

#### Show Market Leadership

Another important motivation is to show market leadership – to establish your company as a thought leader with well-written and credible white papers. Such an effort can be undertaken on a modest budget, by small, emerging companies yet have a ripple effect throughout an industry. A more comprehensive white paper campaign – a library of papers on a wide range of important topics – may be undertaken by larger, more established companies. But either way, the effect is to establish a strong defensible position as a knowledgeable, authoritative source. The Chinese military strategist Sun Tzu reminds us "to rely not on the likelihood of the enemy's not coming, but on our own readiness to receive him; ... on the fact we've made our own position unassailable."

#### Establish Market Positioning / Consensus

The worlds of datacom, telecom, and information security are driven by industry standards, which are often the result of years of meetings, arguments, testing, and compromise by many parties, including competitors. While these rivals must cooperate to reach consensus, they still can set themselves apart from the competition and exhibit market leadership.. Creating a white paper helps a company bring out issues and clearly delineate how its use of an industry standard is superior.

## **Drive Brand Clarity and Stock Value**

A technology company's brand value and (if it is publicly held) its stock price depend to a great extent on the judgment of industry analysts. Their views influence both prospective customers and security analysts, as well as the topics covered by trade press articles. A properly executed white paper can, for example, explain the advantages of a particular technical direction for a company and become part of a campaign to clarify issues and reassure skeptics about the value of a company's products or approach to solving a customer problem.

## **Support Sales / Marketing Program**

Each kind of sales and marketing document has a particular purpose and context. Bare bones data sheets, glossy brochures, focused case studies and knock-your-socks-off PowerPoint pitches all have their uses. But none of these is the right place for detailed technical explanations and arguments that explain the basis for the features and benefits of a particular product or service. That is the job of a white paper, a static, written source of information that can be studied, considered and revisited. It forms a critical piece of a package aimed at customers and prospects, especially for big, complex budget items.

## **Open New Markets**

Very often a white paper is part of repositioning a product or service for a new market. In fact, the Internet is the best tool ever invented for cost-effectively testing a new market, and the white paper is often the tool of choice for the first forays into that prospective new market.

## **Why NOT to Write White Papers?**

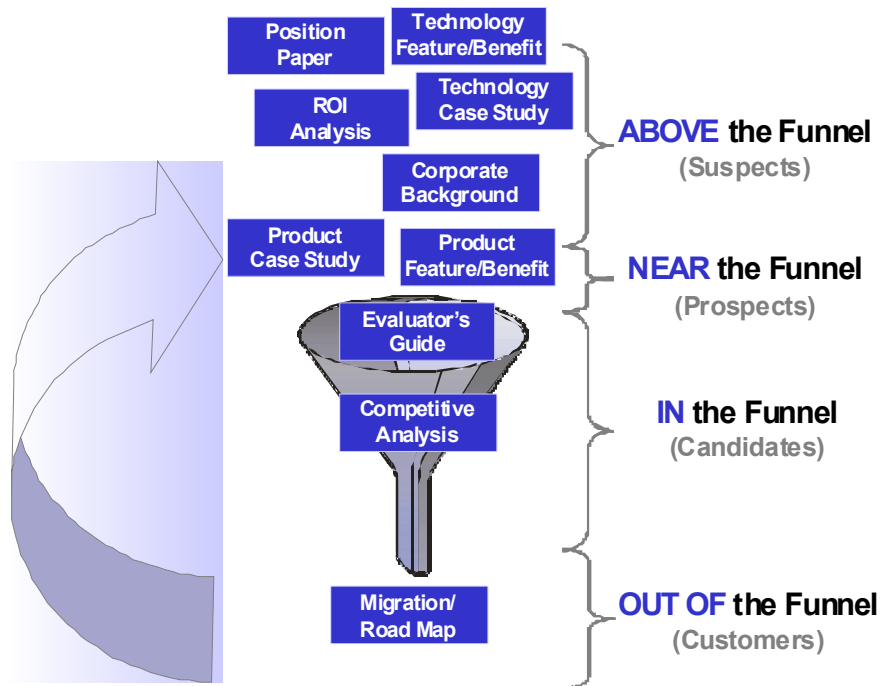
With all the good reasons to write and distribute white papers, there are also some bad reasons. Under no circumstances should white papers be undertaken without a plan, or simply to demonstrate busy-ness. White papers also carry risks: they can disclose information best kept secret. Such disclosures can prompt lawsuits or other reactions from competitors that could adversely affect the market's perception of your company.

## **How can White Papers Support the Sales Process?**

In addition to many, possibly overlapping, reasons to write and distribute white papers the focus of the white paper will change depending upon its timing in the sales process, often called the sales "funnel."

The diagram below shows common topics of white papers at different times during the sales cycle. The types of white papers that are of greater interest to the market in general are the position paper, Return on Investment (ROI) analysis, technology case study, corporate background and technology feature/benefit white papers. As the general suspects become prospects, there is a greater interest in more detailed information, shifting, for instance from technology feature/benefit to product feature/benefit and going on to include product case studies, evaluator's guides to assist in the product selection, evaluation or configuration process. Once the relationship is closer, and more trusting, white papers on topics of competitive analysis and migration/road map documents take

center stage. The farther down the diagram, which is to say the farther along in the sales process, the more likely it is that white papers will be covered under some sort of Non Disclosure Agreement (NDA) or other privacy arrangement. An NDA allows the white paper to be a vehicle for the sharing



of more sensitive information.

A key characteristic of the sales cycle, and indeed why it is called a "cycle", is that once new client business is closed the client is recycled and once again becomes a prospect, possibly for a new product or service, or possibly for an upgrade, expansion or update. The cost of sales to a current customer is a fraction of the cost of attracting, selling and closing a new customer. Selling to existing accounts is an

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area where white papers can be used tactically, and very cost-effectively, but this area is often overlooked because the marketing departments most often responsible for white papers are generally more focused on generating new customers than simply new business.

## When Should I "Buy" versus "Build" a White Paper?

Let's say that after the proper analysis and planning, you decide to move ahead with your own white paper project. Now comes the "buy" versus "build" decision. Having written hundreds of white papers and other documents, this author can say that there is nobody more knowledgeable about the proposed topic for your white paper than the subject matter experts in your own company. The process itself will force you to think through issues and clarify points, ask and answer questions, and become more clear in your own thinking. If you hire an outside "expert" there will invariably be things that get "lost in the translation" and the final product may not be as information-rich or powerful as it could have been.

But, "I can't write," you may be saying. Although you may not be a professional writer, and you have all your other duties to take care of, you can still create a sound, credible white paper. The key is to know and follow a proven process, and that is precisely what this document provides. After reading this white paper on white papers, you may still decide to hire a pro, but many companies will find that they are quite capable of producing top-quality, high impact white papers for the US Market.

A budget conscious middle ground is to engage a professional to be the coach and mentor during a white paper project or two. The idea is that during the process there will be a knowledge transfer that will empower your team and make them more self-sufficient for future projects, which may be done more cost effectively in-house.

## **How Can I Positively Differentiate My White Paper?**

This is one of the most important questions one must ask during the early stages of a white paper project, and it is answered quite easily in the academic sense. The answer is that the white paper must provide a complete, comprehensive and information-rich answer to as narrow a question as the budget will allow. For instance, if a company is trying to introduce a new voice over IP product and has a very small budget, they may think they are forced to try to cover a broad set of topics in very few pages. They may come up with a title like "Everything About Voice Over IP" and, working on the general industry guideline of \$1,500 to \$2,000 per page for the white paper content, shoot for 7 to 8 pages to stay within their tight budget. Not only does the title promise what it cannot deliver, the coverage of the different aspects of voice over IP would be wafer-thin. Instead, they should focus narrowly on their area of strength and deliver an information-rich coverage of that area. A title such as "Beat High Voice Toll Charges with Enterprise VoIP" would work better, provide better differentiation and would more narrowly focus the reader on the area where the product or service of the company has the most relevance and appeal. Another advantage is that proper differentiation of the white paper through proper title and subtitle, a well-considered abstract and an effective design will also pre-qualify the reader as a prospect for the product or service. If readers choose the fictional white paper just mentioned, they are obviously looking for a cost-saving solution for an enterprise.

One final point about differentiation: once the guidelines have been set, anything created during the writing portion must support the title and abstract. Editing is a seemingly brutal process, but often what is cut from one white paper can be the base, or even a large part, of an additional white paper. Once there is a body of material on a topic, re-purposing and re-targeting that material can be done easily and cost-effectively.

Having answered some of the initial questions about white papers, we will now take a look at the two types of white papers, the anatomy of a white paper and the creation process.

## The Two Types of White Papers

The term "white paper" derives from the proverbial "clean sheet of paper," on which was written an unbiased and independent set of observations. In its earliest form the white paper was part of an academic exercise of information sharing. In today's marketplace, the white paper has to state and support a position in order to have value. Businesses have no time for purely academic considerations; today's white paper is a decision-support document.

White papers appear to come in two different flavors: positioning/information-sharing and influencing/selling. Both types, however, are essentially persuasive. Some are just more subtle in their methods. But if the influencing/selling value of a white paper cannot be determined, it has no real value to the organization providing it.

For instance, a white paper from a pharmaceutical company written for doctors may very well be trying to influence the doctors to purchase the company's newest wonder drug. There is nothing wrong, or harmful about such an objective, if the white paper presents a persuasive argument for the drug supported by sound clinical tests, US Food and Drug Administration (FDA) approval and solid anecdotal evidence accompanied by case studies and all pertinent facts on side effects. Such a white paper helps the doctor to make an important decision. Or consider an independent consulting firm that writes a white paper to persuade businesses to buy more recycled products. The firm wants to showcase its research capabilities and demonstrate a quality work product. In both cases the white papers are designed to persuade, not just inform. The key is that unlike an ad, direct mail piece, or brochure, a white paper should sell primarily through telling.

### What Are Your Motivations?

As we move into the "how to" part of *this* white paper, it is important for readers to understand their own motivations. We will now discuss the two types of white papers in more depth.

### Positioning / Information Sharing White Papers

In the world of business, white papers always have an underlying persuasive objective of positioning the organization or individual creating the white paper. This is not to say that the reader cannot get unbiased and useful information from white papers or that they should always be on guard for the subliminal message, but the motivation of the author should be clearly understood. For example, I wrote a series of, independent white papers on network and corporate security and distributed thousands of copies of them at no charge. According to emails from many readers, they benefited by saving thousands of dollars in consulting fees and improved their security programs. My motivation? To enhance my credibility and create a potential market for my upcoming security book.



In many cases the influence value of independent, unbiased white papers is simply to underscore the presence of an organization in their marketplace, to overshadow the competition, and to create a sense of thought leadership. This is still an influencing effect, albeit a subtle one, but the value to the organization providing the white papers is still clear.

## **Influencing / Selling White Papers**

The white paper that is explicitly designed as an influencing/selling document is actually easier to write. Sometimes you can allay a reader's fear of being influenced, by stating early in the document that this white paper will "clearly show the benefits of xyz product or service". With that honest declaration up front, the path is clear to put forward evidence, deliver persuasive arguments and support them with facts, examples, reports, statistics, independent evaluations – all the evidence you can marshal.

Stating the purpose of the white paper, often in an abstract on the front page or very early in the document, can make all the difference in successfully delivering the message. And, very often, the reader is actually looking for the official position of a vendor in terms of features, benefits, Return on Investment (ROI) Total Cost of Ownership (TCO) or other key factors.

At the same time, there is an important caveat to this notion of explicitly selling through white papers, and it can be expressed as a case of less being more. In other words, a hard sell in a white paper will often backfire, because the reader will decide he or she has to erect filters to screen out the marketing hype. This extra work does not endear you to the reader. On the other hand, a straightforward, customer-centered discussion that provides real value in its information and shows the superiority of your company's approach, without resorting to mere sales copy, will raise your credibility with the reader and make closing a sale more likely. With this idea in mind, some authorities recommend confining explicit selling points to a conclusion or appendix to the white paper. More on this later.

## **Pros and Cons**

This contrast of informative versus persuasive white papers is to some extent an artificial construct; it is better seen as a continuum, with all corporate sponsors somewhere on the persuasive side. To help you decide on the right approach, think about your audience. It is sometimes assumed that a technical audience is influenced by statistics, facts and figures and responds better to a low-key, "just the facts" presentation. Another common perception is that managers, company owners, board members and other higher-echelon people prefer more flash and zip. We often hear the expression "it's the sizzle that sells the steak" linked with this executive audience. In my experience over a quarter-century, neither idea is true, at least as it relates to written material intended to influence a buying decision. Instead, most intelligent people can be better influenced by persuasive, well-written text that neither baffles by its apparent complexity nor insults the reader's intelligence by its overly simplistic approach.

If your budget is small, then you must have fewer white papers and they must be of the more directly influencing variety to get the biggest impact for your budget dollar. If your budget is large you may consider some of both varieties, keeping the emphasis on maximizing your return by using both the informational and influencing outcomes to support your message and superiority. Due to the almost overwhelming occurrence of the influencing type of white paper, that will be the focus of the rest of *this* white paper, but as you will see, influencing prospects is best done with facts and other evidence. In other words, in the influencing white paper, you are selling by telling.



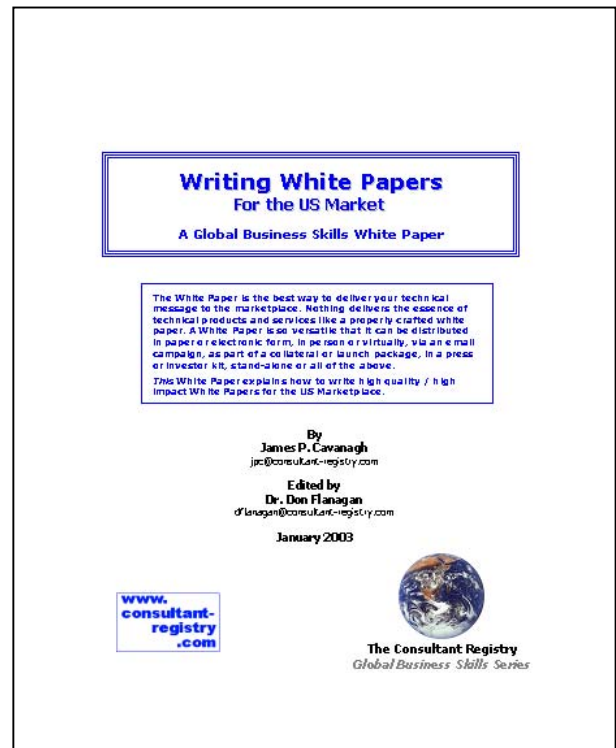
# Anatomy of the White Paper

The form and format of the modern white paper has been well established by convention. This does not mean that you must adhere strictly to convention, nor does it mean that there are not some decisions to make in creating your own white paper. What is important is to understand the established convention, and therefore your reader's expectation of what they will find in your white paper. In this section we will cover the basics and some variations on the theme, as well.

## Front Cover

Generally speaking, the front cover should contain the title and subtitle, if any, of the white paper. The title and subtitle should be very carefully planned; try out several variations. Very often it is a good idea to 'test market' the titles on colleagues, friends, spouses, or even the kids to see what types of reactions you get. Avoid questions like "I'm writing a white paper for work and my title is 'Efficacy of Agents for Clarity and Healthiness in the Recreational and Institutional Swimming Environment', waddya think?" Instead, try having a set of prepared questions that you ask each person. Also consider asking the same set of questions for several variations on the title. And, at the last, explain your intentions and objectives in more detail and ask your respondent to come up with a title or two. This aspect is so important that it is covered in more depth later in this document.

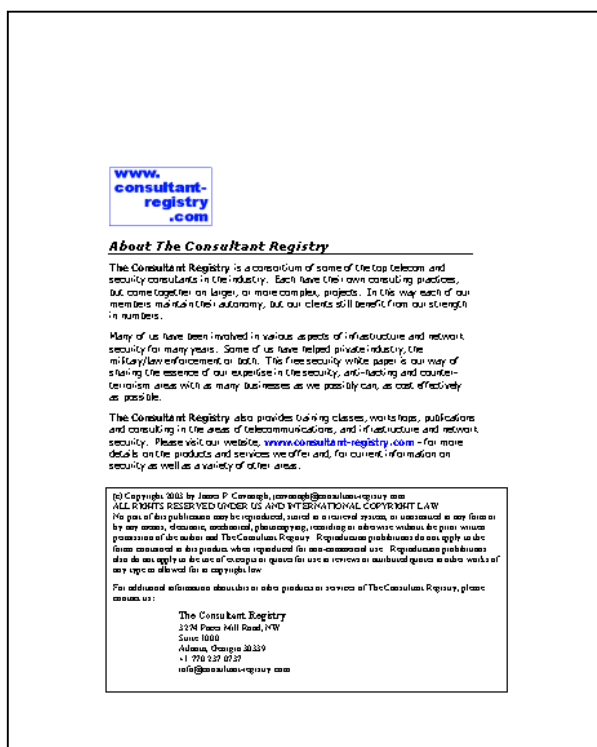
The front cover should also contain an abstract. Any academician will tell you that the abstract is a clear and concise summary of the content of the white paper for purposes of cataloging and proper filing. True enough, but it can do more for you. The abstract is the essence of the marketing message contained in the document, in effect, a statement of the problem being solved. The academics will tell you that the abstract also states the solution to the problem. The marketer, on the other hand, will tell you that the abstract promises a solution within, or gives a hint at what the solution is, such as "this white paper describes an innovative, and proven, accounting solution for multinational companies," without stating the solution. We also cover this in more depth later in this white paper.



The cover must also contain the name of the author, and often the editor, of the document if the white paper strategy involves using persons' names, or the name of the organization responsible for the white paper. Convention dictates that the title and organizational affiliation of the author and/or editor be stated. Modern convention also requires inclusion of email addresses, though this can certainly be to email boxes established for the purpose of collecting feedback on the paper.

Logos and other artwork are at the discretion of the organization.

Some white papers, especially shorter ones, do not have a separate front cover. Instead, all of the information normally contained on the cover is included in a header on the first page of the white paper. These shorter white papers often use a full-page width header and a two column format for the white paper content. This can actually be visually inviting and can appear less daunting than the longer, more formal white paper.



## Inside Front Cover

An inside front cover, technically speaking, is not really needed at all. The main purpose it serves is to identify the organization that created the white paper and give any copyright notices. This can, generally speaking, also be handled quite well in footers, or even in headers.

It is important to consider the final format in which the white paper will be delivered. If the white paper will be delivered only in an electronic format, an inside front cover may be more of a nuisance than a help.

Unless there are exhaustive legal notices, such as a comprehensive copyright notice, trademark list, etc., the "inside front cover" should be eliminated. If, on the other hand, the white paper will be printed, especially in a booklet form, the inside front cover is needed for purposes of spacing. Effectively it will be the inside, or back of, the cover, and is required for

proper page spacing. In the case of a printed, hard copy white paper, the inside front cover can be used very effectively for all of the legal and other required notices, in addition to describing the organization providing the white paper.

## **Executive Overview / Executive Summary**

The executive overview, or executive summary, provides a condensed version of the white paper and if there is any section of the white paper that should conform strictly to the conventions, it is the executive overview. The executive overview should be one to two pages in length, never more than four. It should begin with the "problem statement," describe the contents of the white paper and then describe the solution. Because it is a high-level summary, the executive overview should always describe what is in the white paper and never add anything that is not in the white paper. It is also mandatory to avoid the temptation to use the executive overview as a "teaser" and omit the solution, so as to require the reading of the entire document. You must have faith that the solution, as described in the overview, will cause the decision maker to read further, or at least, delegate the task of further evaluation to someone else.

## **Body**

Whether the Executive Overview is a condensed version of the body of the white paper, or the body an expanded Executive Overview, really depends on which part is done first. Many organizations prefer management to write a good, solid executive overview representing what they want to see and then direct a staff person or outside consultant to write the body to make this true. The more traditional approach is to write the body of the document and then condense it, highlighting key points and using bulleted lists, tables and graphs to illustrate what the body has to offer.

The body should contain information that supports the promises of the abstract. This is where the meat should be. Too often, however, white papers set up a problem and then gloss over the details of the solution, racing on to a conclusion that sells the benefits of the particular product or approach in question. Don't promise a steak and then feed your reader a watery gruel that leaves him or her hungry and dissatisfied.

If there is body content that is not promised in the abstract then one of two things must happen: the content must be stricken from the body, or the abstract must be changed. If the content of the body is changing the abstract too much, however, it is entirely possible that the abstract was not written well enough, or the project was not properly structured in the first place.

## **Summary / Conclusion / Call to Action**

The academics call the final part of the actual white paper content the "summary." A summary is, basically, a reworking of the executive summary. It is the last bookend, or more specifically, it is the third element of the classic "tell what you are going to tell them - tell them - tell them what you told them" model of training or information presentation. But if you follow the academic approach strictly, you lose a great opportunity. In the preferred model the executive summary is the "tell them the whole story, but briefly," the body is the story with all supporting evidence, information and details, and the last section is the conclusion in which you can directly promote the advantages of the solution described in the body. The summary also functions as a "Call to Action" That says, "You

liked the executive summary enough to read the details, *now do something!*" A good call to action outlines the steps that the reader should take in undertaking to implement a similar solution. The equivalent of this section in sales terms is called "asking for the order" and is something that surprisingly few sales people, and surprisingly fewer white papers, actually do.

## **Inside Back Cover**

If the design of the white paper calls for a front cover, then there must certainly be a matching back cover. There are several different options as to what can go inside the back cover.

### **Author / Editor / Subject Matter Expert Biographies**

One likely item for the inside back cover consists of the biographies of the author/authors and/or editor and/or subject matter expert. Because this is a critical element of the overall authority and credibility of the white paper, it should be created with care. A customized biography, as opposed to boilerplate, should be created listing credentials that bear on the subject of that white paper. Other elements include color photographs, either individual or of the team, brief bibliographies, or other descriptive text about the individuals who created the white paper.

### **Advertisement / Sales Message**

The inside back cover is also a reasonable place for an advertisement or sales message, but it is not as good a place for such material as the back cover because the back cover will be visible without having to open the document.

## **Back Cover**

If there is a back cover to the white paper it is the perfect place for a variety of different items, the two most common and useful being the advertisement / sales message and reviews / testimonials.

### **Advertisement / Sales Message**

The majority of white papers are selling documents and, as such, they can contain an explicit sales message or advertisement. If an ad or other explicit sales message of some sort is used, it should be separate from the body of the white paper and pertinent to the white paper's content. It might even be a sales message about the white paper itself. If traditional advertising is used, it should be consistent with the look, feel and message of the organization's advertising program.

### **Reviews / Testimonials**

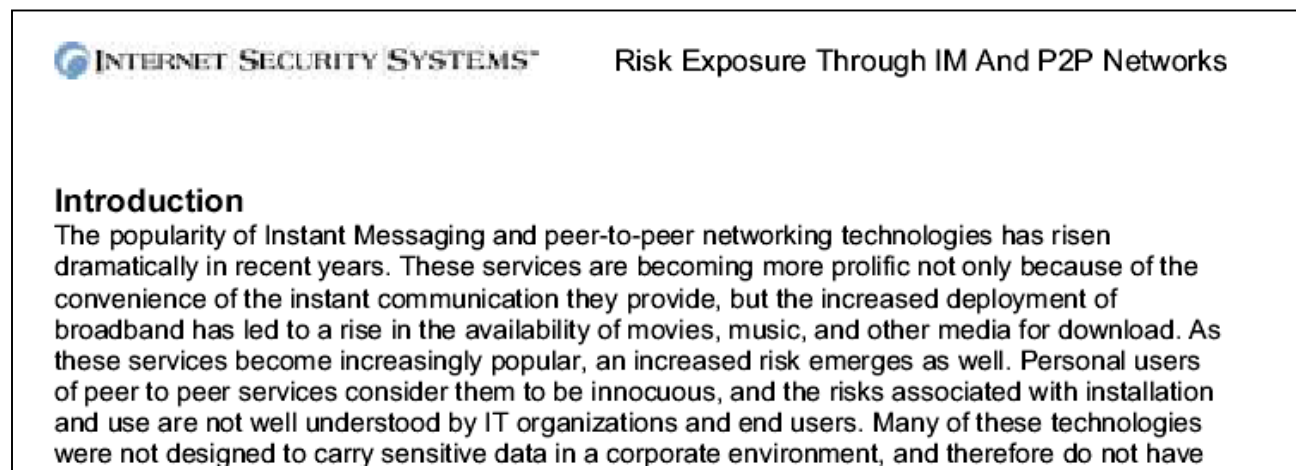
Like a book, the white paper must sell itself as a source of useful information and a document that is worth reading. In this regard a tool of book selling may be applied to the white paper: the back cover can contain reviews and testimonials of the white paper. This is especially true of white papers written by industry experts or ones that are clearly differentiable, and this is a place to spell out that differentiation and sell the white paper to the prospective reader.

## Additional Considerations

In addition to the foregoing items, there are numerous other considerations that need to be made prior to starting the white paper.

### Format

Among the most important additional considerations, and one that often receives scant attention, is the format of the white paper page. Book publishers have entire teams devoted to this aspect of a book, but it receives little attention when crafting most white papers. The page format, possibly more than anything else except the actual content, is responsible for how the readers feel about the material they are reading. Several examples will show the difference format can make.



The sample above is from Internet Security Systems' *Risk Exposure Through IM and P2P Networks* and received an honorable mention in the software white papers category of the Second Annual Bitpipe White Paper Awards held in 2002. This is an example of the classical technical style of white paper. There is a very sparse header followed by text. The font is what is known as a non-serif font, which means that it does not have the small embellishments like the font used in the New York Times newspaper, which is called Times or Times Roman. The margins are very small and the text is formatted using the less formal "ragged right", or non-justified format. Section headings are left justified, all of a single size, bolded and are not embellished with any underscore, italics or similar treatments.

What feeling does this white paper give you? Think about it for a moment or two. The feeling it gives me is one of professionalism and seriousness, leaning toward the engineering or technical. The close spacing of the lines and density of the font chosen exude seriousness. It suggests that the information itself is unembellished, unvarnished and is the "real deal." This Sergeant Friday, "just the facts" appearance brings real value to their marketing message as a market leader, and the ISS X-Force, authors of this document, surely are market leaders. This format, in my opinion, works very well for a technical audience.



## Optimizing Your Help Desk Processes



*Exceeding end users' expectations is an achievable goal when  
your help desk follows well-defined processes*

Your internal help desk is the face of IT to other employees within your company. End users judge the professionalism and overall value of your entire staff based on the response that they receive from the people in the help desk. Even in the best of times, working in the help desk is a difficult job. On days when user problems mount faster than

maximize the value of your help desk, you need to clearly understand the needs of your company and establish processes that leverage your knowledge.

**Goal: Deliver Outstanding Service to End Users; Streamline Your Help Desk Operations**

This sample is from another honorable mention in the Bitpipe White Paper awards. The dual-column format suggests that the white paper is aimed more at management than a technical audience. The use of a ragged right margin, that is to say not a straight/justified margin, makes the document less formal, though this example is more formal than the ISS white paper.

The use of a bigger header, also with the company logo, but now with a tagline as well as the choice of a Times Roman serif-style font makes this format more comfortable for a management audience – more like a newspaper or magazine format. Careful and consistent use of the company logo is an important part of the branding process and associates the logo with the good, rich, valuable content of the white paper. This company also used a banner heading that identifies this white paper as a part of a series of white papers, "A Triactive Best Practices Advisory". If this white paper were sufficiently long to warrant a cover page and inside cover page the inside cover page (or possibly, in this case, appendix or last page) could list all of the Triactive Best Practices Advisories. If this document were distributed electronically, for instance in and Adobe Acrobat PDF format, the names of the other advisories could contain hot links to the other advisories so that all advisories would become sales pieces for each other. If it were not possible to determine all of the advisories in advance, such that a complete list of all of them could be included, at least each of the white papers could contain a link to a web page that provided an index and links to all of the other white papers.

Also, note the use of non-serif headings mixed with a serif font for the body. What feeling does this white paper give you? What would be more suitable for the type of white paper you are contemplating? Would both the ISS format and this one work for different needs?

## Summary Description of CircuitPath Switching Technology

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*Digital communication network technology has evolved in two disparate directions over the past 50 years – one focused on supporting telephone communication and the other on data communication. Attempts to use only one of the approaches to support all communication have proved unsatisfactory. CircuitPath has devised a new paradigm that combines the benefits of both directions into a single approach that is simple, yet supports every kind of communication traffic in a single switched-network fabric.*

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### **The Multiplexing Problem**

A fundamental purpose of digital communication is to be able to combine different information flows such as conversations, data file transfers, and streaming audio and video into a single transmission link. The fundamental difference between the way that the telephone and data networks have evolved rests on the methodology by which combining information flows takes place. In other words, the difference is in the technology that allows different types of traffic to be *multiplexed* onto a transmission medium.

Whereas the original explicitly addressed data traffic model was to transfer message and data files from one computer to another, the current need has relegated that stereotype to near obsolescence. Today's traffic consists of information *flows* – web pages, streaming audio and video, telephone communication and even real-time voice and video conferencing. These traffic flows are far different from the original conception of "bursty" data traffic.

The reason for abandoning implicit addressing has been its focus on setting up *circuits* for voice (or other

The next sample is among the best formats for delivering serious technical information to either a management or technical audience. This is a white paper from CircuitPath Network Systems, Inc. describing their new SAIN Technology. Though they are a small start-up firm, their document has all of the seriousness and authority of a market leader, which is because market leaders with decades of experience actually formed the company. CircuitPath's author uses a single non-serif font family, called Arial. The addition of bold headers and subheaders and the use of a right-justified two-column format without much white space, speaks volumes about the content and invites anyone serious about understanding the topic to read the document. This white paper also includes a more in-depth synopsis of the document content, also known as an abstract, at the top of the page. The use of a well-written abstract will help readers decide quickly if this document is of interest to them. In this case there is also an implicit statement that they will be reading about the product of a single company, and not about an industry-wide standard or technology: "CircuitPath has designed a new paradigm." This also prepares readers for what lies ahead.

The format is quite suitable for busy technical managers, engineers and anyone else who needs a sound technical background in the topic. What feeling do you get about this document?

*“Wireless applications have the potential to substantially benefit marketing operations.”*

financial terms and organizational efficiency, effectiveness, and competitive advantage is compelling,” declares the report. Forrester Research estimates that more than 25 million Internet-ready handheld devices will be in the grasp of Americans by 2003.

WAP devices. The original form of SkillBay is a three-tier architecture consisting of the Internet Information Server, an application based on the Cold Fusion application server and the Oracle database.

Conversion of the application to the PDA platform was performed through the develop-

The sample above, from Syntel's White Paper "Full-Featured, Real-World Wireless Enterprise Applications Emerge" is another very effective format. This format is especially useful for delivering a non-threatening, easy-to-digest message to a management audience. It combines wide line spacing, very eye-pleasing serif fonts, highlighted messages and often side bars, or separate boxes, to make a message more visually appealing.

This can be a very effective white paper format, especially for a short 4 to 8 page white paper, but care must be exercised. The appearance and feel of this white paper format is often considered to be closer to that of a brochure than a serious white paper and may give the wrong impression to technical readers. There is nothing wrong, of course, with having two white papers on the same topic, one in this format and one in a different format, more suitable for a technical audience. The first white paper of the pair, a summary for a management audience, might be titled "Storage Area Networks: An Overview of Benefits and 'Bottom Line' Impact." The second white paper could be titled "Storage Area Networks: Selection and Implementation." The second white paper could, in fact, have all or most of the first white paper's content, and then some additional information about how to choose and deploy a storage area network. The first eight page white paper in the format above may be no more than a two to three pages white paper if presented in a denser, more technical format.

The last format we will consider is from this author's Security White Paper series. The sample below shows a more complex, more sophisticated format borrowed from the *Encyclopaedia Britannica*. The amount of additional editing and formatting is extensive, but the author feels that the final product is well worth the effort: it is easier to read and positively differentiates the white paper visually.

<b>Overview</b>	
<b>Vulnerability Audit: Assessing Your Organization's Security</b>	
<i>Security is a basic human need that predates civilization as we know it.</i>	Security is among the oldest human needs. While security has evolved through the ages the basics remain the same. The better an individual or organization understands their vulnerabilities and how to protect against exploitation of those vulnerabilities, the better the chance of survival.
<i>Early humans closed the vulnerability of individuals hunting by hunting in pairs or groups.</i>	In the earliest days humans realized, for instance, that hunting by themselves exposed them not only to the animals they hoped to kill and eat, but also to other, competing, humans vying for the same items for their family dinner. Security was enhanced by reducing the vulnerability of hunting alone by hunting in pairs and groups. Other aspects of the operation were also enhanced, but this is beyond the scope of this document.

This is actually a variation on the two-column theme creating a feeling of space, yet using a single non-serif font family preferred by the technical reader. The use of gray, Times Roman paragraph summaries on the left not only acts as an indexing tool to lead the read directly to, or back to, specific paragraphs of interest, they also act as a condensed version of the paper. A reader with more interest in the meaning, and less interest in the details, can read only the paragraph summaries and get the general content of the white paper. A reader with a deeper interest can read only the paragraphs, and not the summaries, and get the full content. Combined with bold, clear, meaningful headers and sub-headers this format is easy to read and gets very good reviews from both management and technical audiences.

### **Page Count**

While it is often best to see how many pages the white paper requires as it is written, there are often other things to consider, such as the format of the document. If the document will be printed and stapled in the upper left hand corner the page count can be anything it needs to be. On the other hand, if the white paper will be printed in a book format, then the number of pages must be evenly divisible by four, because each page will be printed on paper with contains four pages and is then folded. The number of pages per sheet is four because it will be folded after two pages are printed on each side. Page allowances will also have to be made for the table of contents and to be sure that each major section starts on an odd page number.

The very best way to discover the page count and learn the whys and wherefores of format is to create a mock-up. This is an important tool in the creation of a visually attractive white paper and is covered in more depth later.

### **Table of Contents**

Most white papers less than 20 pages, or so, which is to say many white papers, do not have a Table of Contents. A Table of Contents helps the reader refer quickly to the pages of greatest interest. Additionally, it supplements the abstract as a quick tool for the prospective reader to determine what sections are of greatest interest to them and if they need to read the white paper at all. While there are no strict guidelines, this author feels inclusion of a table of contents should not be seriously considered for white papers less than 15 pages long. Like the decision about a full cover page and inside cover, inclusion of a table of contents may make the white paper appear to be larger and more daunting than it actually is, though a well-done table of contents is invaluable for longer white papers.

It is a good idea, even if a table of contents is not envisioned from the beginning, to mark the table of content elements in the word processor so that a table of contents can easily be generated at a later time, should one become desirable. Very often a table of contents is valuable to see the progress and page counts in the document as it is developed, and does not have to appear in the final document.

### **Index**

Like a front and back cover, table of contents and other book-like elements, an index should only be considered for a longer white paper that will benefit from the ease of location an index brings. Generally speaking, an index should be considered more seriously for a work that is desired to appear scholarly or technical, and is less important, and often ill-advised, for white papers written for a management audience. Unlike a table of contents, marking of terms for inclusion in an index should be left until the very end so a careful consideration can be made of which terms are important enough to include in an index.

### **Glossary**

A glossary, or listing of terms and definitions, is an additional consideration. Generally speaking, the white paper should be written at a level that will be understood easily and clearly by the reader. This means that no terms or acronyms should be used in the body of the document that are not readily understandable or defined in context. Acronyms, at least the first time they are used, should also be spelled out fully. This practice may eliminate the need for a glossary.

A glossary is often helpful if a document will be read by an interested non-specialist or someone outside of the industry. Consider a company manufacturing a new broadband product. A white paper about its new product will be read by prospective buyers, but it might also be read by venture capitalists or bankers. A glossary helps these readers by providing definitions of terms at the end of the document. At the same time, the white paper can be written on a more technical level.

## **Appendices**

Appendices are a good way to concentrate helpful, supporting information at the end of the document, and often in a different format. Appendices can cover a variety of topics from additional reading, web sites of interest, product spec sheets, lists of supporting standards, sales offices, members of an association or worksheets, or additional charts and tables. Generally speaking, appendices are very useful, cost little to produce and can add a lot of value.



## The White Paper Process

The white paper process is a creative process, but the stages can be reduced to a simple process diagram. In fact, in a production environment each step of the white paper process can be assigned to different individual employees, departments, contractors or outside firms specializing in each of the steps.



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This diagram shows the steps in the white paper creation process. The first step is to define objectives. This is usually done by upper management and handed down to the white paper team, often the marketing or engineering departments. The next step is to determine strategy and tactics. That is to say, now that we have been given certain specific objectives, how will we accomplish those objectives? After an initial strategy and set of tactics are defined the framework into which the white paper must fit can be revisited and possibly revised. This is the process of clarifying the marketing campaign and message. If you cannot provide clear guidelines for the white paper creation coupled with a clear message that you would like the reader to come away with, you might want to consider not doing a white paper.

The next step is to understand the target audience. Once the target audience is understood you can now design the white paper, develop an outline and write the content. The process must be sufficiently fluid, and allow sufficient time, for the objectives, strategy and tactics and message to be revisited and revised based upon new information or insights gained at any step during the process. If, for instance, the original strategy was to develop a white paper for distribution to purchasing agents attending the CommUniverse trade show and it is learned during the audience-definition step that most of them would not be attending that trade show, the strategy must be changed.

After the edit / review cycle, or cycles, the white paper is ready for distribution. The specific distribution methods should be decided upon, and budgeted, during the strategy and tactics step.

Let's look at each of these steps in greater detail.



## Define Objectives

In his *Seven Habits of Highly Successful People*, Steven Covey states that the number two habit for success is to "begin with the end in mind". This is true of success in a white paper project. What would we like readers to say when they finish reading the white paper? As we develop the white paper, everything that we think contributes to this desired "take away" stays in the white paper; everything else comes out.

### Mission Statement

We might want to cast our specific objective as a "mission statement" for our writing project. This is an important part of the project, whether there is one author or a dozen. The mission statement should be played back to the decision-makers until they say "That's exactly right." Then it is time to begin. If the white paper team is large, the team leader will usually write the mission statement, because even though mission statement by committee is possible it is not advised. The team leader will also be sure to check with the ultimate decision-makers to be sure it matches what they want. In the process of white paper creation, it is also a good idea to insert the mission statement into the document header so that it appears automatically on every page created as a way of reminding everyone of the focus, though it should be removed from the final document.

Keep the mission statement to no more than three sentences, use simple, unambiguous language, and try to incite the team through the mission statement to do the best job possible. This starts things off right and "well begun is half done", according to an old saying.

How might a mission statement evolve? Start with the first simple statement that comes to mind, keep in mind the earlier discussion of motivations for writing a white paper, and revise until you are happy with it. If, for instance, a new router company were to enter the marketplace it would certainly wish to do a white paper to introduce their new router product. A first mission statement might be just that "To Introduce the Marketplace to Our Router." After some consideration, a second draft might be "To Differentiate Our Router in the Marketplace." Better, but not there yet. Third draft: "To Explain Why our Router is Better!" Getting there. Fourth draft: "To Establish LightSpeed™ Routing as THE Next Generation Standard in High Speed/High Capacity/Low Cost IP Routing." Perhaps it could do with a bit of refinement, but I would say that the fourth draft has all of the elements of a good mission statement. It is relatively short, very simple, unambiguous and clearly provides a positive spin. The author or team charged with this task would also feel as though they were accomplishing something important, even ground-breaking, and could get emotionally involved with the project.

### Three Specific Objectives

Now comes the job of extracting objectives from the mission statement. There do not need to be exactly three, but in general a single white paper should never really try to accomplish more than three things. If you do, focus is lost. One is really best, two is OK, and three will squeeze the most from the budget, but it is the outer limit of what should be attempted.

Let's reread our chosen mission statement: "To Establish LightSpeed™ Routing as THE Next Generation Standard in High Speed/High Capacity/Low Cost IP Routing." Objectives that seem to leap out might be:

1. Introduce LightSpeed™ Routing
2. Set the Criteria for The Next Generation Standard and How LightSpeed™ Routing Meets or Exceeds These Criteria.
3. Clearly Establish Benefits of LightSpeed Routing™: High Speed, High Capacity, Low Cost IP Routing

Depending upon the budget, these could all be accomplished in a single white paper, or they be better realized by a set of three white papers. If the decision is made for three white papers, they should all contain all three points, but each concentrate on a single point. For instance, in the case of three white papers, the first white paper might use the Executive Summary and Conclusion to state all three points with some examples, but the main body of the white paper would go into much more depth on LightSpeed™ Routing. There would be a discussion of what LightSpeed™ Routing is, how it compares with existing routing technology, how it is evolutionary or revolutionary, what has been learned from the research and field trials, how it is a disruptive technology or a logical migration from what we have today, etc.

### **Check the Success Criteria**

Before proceeding, the success criteria must be checked. It is time to ask, if we meet our three objectives, and if this accomplishes our mission, have we actually done what we set out initially to do? The only people who can really answer this question are the ultimate clients—the individuals who are spending the money on the white paper. After this interim milestone, it is time to either go back and revise the mission statement or to move on to strategy and tactics. Let's assume our mission statement and objectives pass muster, and move on to strategy and tactics.

## **Strategy & Tactics**

Chinese military strategist Sun Tzu once stated "Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat." We must craft both an overarching strategy and the tactics to be employed within that framework to best assure our desired outcome.

### **Strategy**

The white paper strategy is not the strategy of a war, but it is the strategy of a battle. It is not critical, therefore, for those working on the white paper to know all of the calculations and considerations, but it is important for the bigger plan to be considered. To contribute the most to the momentum of the organization, the white paper must play a specific role, and that role must be determined before work has begun on the document. The first consideration is how the white paper will be used, as a stand-alone document, or as a part of a campaign. The second strategic consideration will be the amount of confidential information the white paper will contain and the third strategic consideration will be the degree of competitive positioning.

### **Stand-alone Document or Part of a Campaign?**

If the document shall be a part of a campaign, the campaign should be designed before any of the white papers are developed. Very often a campaign can be developed as a series of white papers with increasing levels of detail answering questions which are likely to arise at different stages of a campaign to bring a company from the "suspect" phase to the "closed" phase. On the other hand, white papers can be built around a decision tree arrangement and used to answer specific questions that might arise. The former approach is simpler, but less flexible and may not meet all needs while the latter may come closer to meeting all needs, but can become very expensive.

A happy middle ground, if there is enough flexibility in the organization and it can react quickly, is to have those people closest to the sales situation provide written responses to each situation that arises and then formalize the responses into white papers that can be re-used later. In practice things might work like this: The new LightSpeed Router™ is introduced into the market with only a single white paper. The balance of the budget is reserved for reactive white paper creation.

Now the very first serious customer is moving closer to purchasing the first production version of the router and is greatly concerned about the security of the router. The sales team works very closely with marketing, engineering and white paper writers to craft a specific response for that single customer. After the order is placed, the material is generalized, cleaned up and made into a generic white paper. It is likely that if the first customer had security as a big issue, other prospective customers might as well. It is also possible, with permission, to incorporate information about the initial customer in a case study and/or testimonial.

A stand-alone document is just what it says: a single document intended to provide specific information or to fill a specific information need, independent of any other white papers. Stand-alone white papers are often created to meet a specific need, and that need is later found to be broader than originally anticipated. Stand-alone white papers also tend to be more focused, shorter and of a far narrower distribution than white papers that are elements of a larger marketing campaign.

Increasingly, companies are paying third-party consultant or analyst firms for reports or studies, produced in the form of white papers, which appear to be independent but which support a company's position. I will not make any value judgments, but I will say that it is, in my opinion, more correct when the white paper produced helps the entire industry and less correct when it is self-serving. As an example, suppose the makers of the LightSpeed Router™ commission a study and pay for an analyst group to publish a white paper entitled "Study Says: High Capacity Routing Is Future of the Internet." This is, in this author's opinion, better than the same process resulting in an "independent survey" concluding "Survey of top ISPs Says LightSpeed Routing™ is The Wave of the Future." You will have to ultimately be the judge, however.

### **Level of Confidentiality**

What level of confidentiality should be applied to the final white paper? A stand-alone white paper designed to answer a specific question with very limited distribution amongst partners or clients under Non-Disclosure Agreements (NDAs) could contain more confidential information than a general-distribution white paper available on the web site to every one who clicks in. You should assume that all white papers will fall into the hands of your competitors, so act accordingly.

### **Competitive Positioning and Response**

The strategy must always include considerations of the effects of the white paper on positioning in the marketplace relative to competitors and if the release of the white paper will cause a response from the competitor. Often in a relatively stable, mature market shared by two or three major competitors, white papers are more informational and less inflammatory. In markets with David and Goliath imbalances, however, the smaller company may want to provoke a response from the larger. These considerations must be part of the strategy and often include the legal department.

### **Distribution Strategy**

One of the strategic considerations prior to beginning the white paper development process must be a discussion of the who, what, why, when, how and how much of the white paper distribution. A white paper aimed at generating upgrade business within the existing customer base could be distributed as an email link or attachment very cost-effectively, and would probably not require a very sophisticated white paper format. In fact, a very simple Frequently Asked Questions (FAQ) format might do the job rather nicely, with embedded links back to the web site for additional details. If this is the case, the "who is sending" will be the organization authoring the white paper, the "who is receiving" is their customer base. The "what" will be a simple "Upgrade/Migration FAQ white paper." The "why" will be to drive upgrade business and prepare the customers for their budget cycles. The "when" is prior to the customer's budget cycle (maybe early to mid-summer). The "how" will be via a link from a brief email introduction and the "how much" might be to have an administrator do the emailing over the weekend from their PC and then take a day off during the week. The budget is small with a potentially large return, embedded links can be used so some of the budget might be spent on improving the web site content that will be linked to, the existing customer database can be used, and the target audience is generally friendly.

On the other hand, an architectural description or position paper intended to impact the industry will require much more emphasis on the image aspects of the paper. There is usually some means of measuring the success rate, such as number of clicks on the white paper title, number of views of the abstract and number of downloads of the white paper. It is also not uncommon to repeat an email campaign as many as three time or more, at least tripling the cost. In this case the "who is sending" might very well be an outside service bureau. In fact, in order to measure responses, they might not even send the white paper, just an invitation to download it and then monitor responses. The "who is receiving" will also have to be very carefully considered to match the white paper title

and content. The "who is receiving" might be anyone with the word "technical," "operations," "network management" or "network architecture" in their title who attended at least three of the last five CHIPUniverse trade shows, who are registered to attend the upcoming show and who claim to have purchase or influence over \$1 million or more per year in microchip QA systems. The "what" will be a very high impact, visually enticing white paper with rich content, lots of good interpretive graphics and examples and an invitation to come by the booth for a private demonstration at the upcoming CHIPUniverse show. The "when" might be once per week in the three weeks prior to the show. The how might be via the sending service bureau's list and the how much might be staggering. The how much might include \$20,000 for artwork and production services, \$1,500 to \$2,000 in money or staff time per page of finished white paper and \$1.50 per contact or more (times three) for the email campaign, and more if you'd like to print hard copies of the white paper for the trade show booth.

Consider this strategic aspect carefully. The mechanics of distribution are discussed in more depth later in this white paper.

### **Tactics**

Strategy and tactics are often interwoven, and the development of one causes changes in the other. The following are among the most important tactics.

### **Authorship**

Authorship is an important part of the success of a white paper. Authorship does not, however, mean ownership and often does not reflect the true writers of a material, simply the author of record. There are several aspects to consider.

**Ghost-Writing:** Many of the most influential white papers ever written were "ghost written". That is to say, that they were actually written by one individual or group and published under the name of someone else. This is a common practice, and not a bad or illegal one, because a white paper should come from an individual who is recognizable by name and/or title, and those individuals are often busy doing other things. As long as the writing was done as a "work for hire" with a clear understanding of the authorship prior to pricing and signing the contract, there is no problem. Many writers charge a higher price for a ghost written work, since their own reputations are not directly enhanced.

**Individual:** This is the most common category, though there could be a great many of these that are ghost written. In this case the white paper is claimed to be the work of a single person, usually also identified by their position and company. The individual authorship is most often used when the person and/or their title is important to the authority or credibility of the white paper. This is an important decision. One way to help make a decision on this point is to ask people from the target audience if the person adds credibility to the white paper and topic or not.

Another spin on the question would be "who would add impact and credibility?" and hire them to be an author, or at least an advisor, whose name can be put on the final product. Very often the high-impact individual author is an industry consultant, speaker or author, but you might be surprised at the impact of an author who works for a customer company, trade association or other organization related to the implementation and use of the product, service or technology described in the white paper.

**Team:** This type of authorship parallels the discussion for the individual, but considers the importance of the team in authority or credibility.

**No Author:** Another approach is to simply identify the company who created the white paper and leave any specifics as to authorship off of the white paper, or to bury them on some legend inside the document. This is especially true if no individual or identified team can add value to the document.

### **Outside Assistance**

How much of an inside project will this be and how much outside assistance will be required. Make an inventory of skills needed for each part of the white paper you have decided to build. Anything you can not do in house will require outside assistance.

## **Clarify Marketing Campaign/Message**

The next step is to revisit the marketing campaign and marketing message to be sure that the white paper project is still consistent with them. Do the white paper mission statement and objectives still reflect the results that need to be achieved? If so, move on to encapsulate them into other working elements of the white paper: the title, subtitle and abstract.

### **Title / Subtitle**

The title and subtitle must be clear, succinct, and easy to understand. They also must sell the content of the white paper and indicate why readers should invest their time. In other words, a promise should be made in the title and subtitle and kept in the body of the white paper. A title like "Understanding Quality of Service in The New Telephony Marketplace" beats "Voice Quality of Service: 28 Pages of Information," but "How to Profit from Quality of Service in Voice over IP" has a much bigger promise, and will probably get more readers. Consider the objectives the reader would like to achieve, and the market conditions. Do not over-promise and under-deliver. At the same time, a big-promise title like "Everything You Need to Know to Profit from VoIP" from a credible source could really be a huge hit, if the body of the white paper delivered on the promise.

Probably the best source of ideas for titles and subtitles is a repository of white papers on similar topics aimed at similar audiences. For instance, go to Bitpipe, ([www.bitpipe.com](http://www.bitpipe.com)) and look at topics and titles, and then try to make yours better. Try out several titles on colleagues, on customers, and then on people totally unrelated to the project. Choose the best one and don't be afraid to change the title during the development process; experiment with different versions and even see how certain title/subtitle combinations work together in the chosen fonts and color scheme.

## **From Mission Statement to Abstract**

With the title and subtitle tentatively chosen, let's turn the white paper's mission statement into an abstract. Think of the abstract as the brief description that will cause the prospective reader to become a reader or move on. The abstract should be more adjective-dense than the white paper itself, and, except within academia, it is understood that the abstract is not just a cataloging, but rather a selling tool – selling the white paper itself. As with title and subtitle, read through several samples in a searchable online catalog such as Bitpipe and see what appeals to you. What do you like? What don't you like? What would you keep? What would you do differently? Make your decisions and give it a try.

### **Feedback Loop**

As with every good project, there is always a feedback loop. In the case of the white paper project, the feedback loop usually takes the form of informal reviews or formal milestone reviews. At this point, having developed a title, subtitle and abstract, it is a good time for a review and to ask if what you have created is still consistent with the original mission statement and objective, or if anything needs to be adjusted.

The next step is to understand the target audience. Many people would suggest that we should have understood the target audience much earlier in the project cycle. This is actually not so. Up to this point we have focused on what the organization wants to have happen. We have chosen the white paper as a vehicle to deliver a message to the marketplace and have decided just exactly what we want the message to be. It is now time to try to determine how best to get the target audience to respond the way that you would like them to respond.

## **Understand The Target Audience**

The readership of the white paper will, invariably, be broad and will most likely include many different parties, most of whom are represented in the following list:

- Customer / Prospect Management / Decision Makers
- Customer / Prospect Technical Evaluators and Recommenders
- Employees / Sales Force
- Partners
- Press
- Investors / Stock Market / VCs
- Competition

The first job is to put the list in descending order from the most important audience to the least important and then understand their psychology and hot buttons. If certain terms or phrases come out of this process which should be included in the mission statement, objectives, title, subtitle or abstract, do not hesitate to cycle back and include them. Remember that the inclusion of words that will spark the interest or cause an emotional reaction on the part of the prospective reader are the words you are looking for to flavor the abstract. The proper use of words that hit reader hot buttons will make or break your white paper success.

Some companies skip this research into the target audience, relying instead on previously formed opinions. That is a big mistake. After the ordered list of the target audiences is determined, it is time to do the research in earnest. Get on the phone, call members of the target audience, read articles, ask sales people and anyone else with some insight. What is motivating the target audience and why do they think it is motivating them? How important is cost? How much value is assigned to strategic technologies, products or services? How scary or desirable are disruptive technologies? Is the target audience more likely to buy a product or service that will extend the useful life of what they already own? Is it time for a complete swap-out with new products? Is there a groundswell in the industry of which you should be aware? This is the type of research that can make or break a white paper.

Who is the target audience of this white paper you are reading right now? Our organization has written a lot of white papers over the years. Recently, we noticed a precipitous fall-off in the number of white papers we were actually doing and a rise in the number of clients either wanting to do shorter, more budget-conscious white papers, or haggling more over the price, or both. This caused us to dig deeper and determine that white papers are still considered to be among the best vehicles for delivering a technical message to the marketplace, but budgetary constraints were causing a decrease in the quantity, and quality, of white papers in the IT marketplace. White papers are to the purchasing process in IT as a full air tank is to the diver: they are critical for survival. So, what did we do? We realized that our mission statement said that white papers were a key area of focus and revenue, but did not say we had to write them all ourselves. So, we began the process of selling the expertise, doing coaching and facilitating the creation of white papers. Even though it is not what The Consultant Registry set out to do from the beginning, nor what we have done since our founding in 1994, it is consistent with our mission statement. Facilitation of IT white papers does fuel the information technology industry, the health and survival of which is important to all of us. Now let's move on to the design of the white paper for the target audience.

## **White Paper Design**

White paper design crosses over into the area of graphic arts and desktop publishing, though just about any engineer working for a large company can do the job with no problem. How? By using the company's web site as a guide. While many facets of the white paper may have to be modified the basic design elements, logos, fonts, color palettes and overall look and feel have already been selected, usually by professional artists. This should be the first place to look.

The next place to look is to professionally prepared documents that might accompany a corporate information package: company overviews, annual reports and similar documents. Most company's marketing and/or graphics departments have prepared style kits including the company logo in many sizes and shapes as well as company approved graphics and clip arts. If the company web site has a picture of a cell phone user reaching for the stars, why not put it on the front cover of the white paper and change the title slightly to "Reaching for New Cellular Applications"?



## **Look and Feel**

The "look and feel" should create a good, positive feeling on the part of the readers. The more technical the audience, the more important good graphics, diagrams, tables and other technical presentation aids. The more management oriented the audience, the more important feature/benefit tables, Return On Investment analyses, examples and case studies. Technical people prefer feeds and speeds, while managers prefer stories and case studies. But everyone needs to be persuaded: they need to be drawn to conclusions and to know, clearly, the opinion of the white paper author and how the author reached the conclusions that they did.

As previously suggested, look at existing white papers: go "shopping". There are thousands of white papers available on line. What look and feel appeals to you? Which ones do you feel will appeal to your target audience?

## **Color Scheme**

The color scheme should typically follow the company colors, and this is best determined from existing brochures, business cards, letterhead and the web site. This is not the time to re-invent the color palette for the organization. Even if it is not your style or taste, go with it.

## **Logos**

Logos, those ubiquitous symbols of the corporation, are an important part of branding and should be used as liberally in the document as is tasteful. The front cover, legal legend, back cover, first page and elsewhere might be appropriate, especially if the logo can be worked into the design tastefully. But, don't overdo it: readers will brighten at their own logos, but may tire of yours. And, because the white paper is not a proposal, per se, you really can't work in a prospect's logo. So, after you have finished the document, do a logo review and ask some impartial reviewers if the logo is used appropriately.

## **Font(s) and Justification**

Does your organization have an official font? If so, you must use it. If not, go with non-serif font families, such as Arial, for the more technical white papers and serif font families, such as Times Roman or Palatino, for the less technical white papers, especially if the white papers will be printed. The Arial font family also works remarkably well for white papers that will be web-based, regardless if they are technical or not; it is very easy to read from the screen and looks nice in a variety of sizes, bold and italics. The other question is should the text be justified on the right? In other words, should the right side of the paragraph be straight? The answer, generally is no, unless desktop publishing software is used that is capable of doing a professional job of justification.

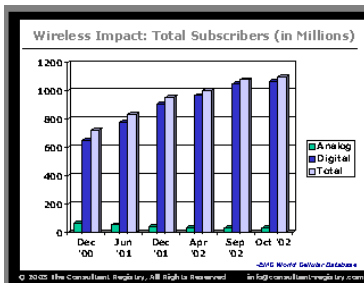
## **Artwork and Photography**

Artwork and photography can add to or take the focus away from the white paper content. There are a number of different ways to use artwork and photography in white papers. Generally the only place for clip art or stock photographs is on the cover, unless a more artistic, magazine-like design is desired.

Custom artwork and photographs taken specifically for the white paper can be very useful, however, and should be strongly considered if they provide visual support to the points being made. Black and white photos that illustrate a key point or show a key person discussed in the text, are often better than a color photo, depending upon the reproduction techniques used. It is often advisable to test-print both color and high-contrast black and white to see which is the most appealing. The paper choice is also very important for white papers that will be printed.

## Charts, Tables and Diagrams

Charts, tables and diagrams are sometimes confused. They are actually three different ways of visually representing data, and all can be used in most white papers to present information in an interesting and engaging manner. Not only do charts, tables or diagrams help readers understand



the content, but they can also help authors clarify their own thinking. The insights that the author of the white paper can gain as a result of creating a chart, table or diagram can be profound. Perhaps the best historical example is the discovery of "Moore's Law." As Gordon Moore of Intel was preparing a chart for a presentation in 1965, he made his famous observation that computer chips double in capacity, while halving in cost, approximately every 18 months—which has remained remarkably

accurate in the decades since. Creating the chart triggered the observation.

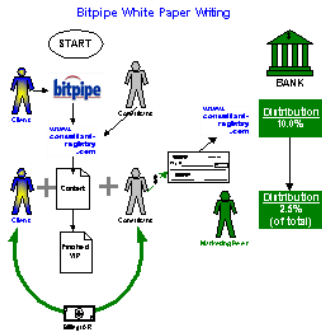
Make liberal use of charts, tables and diagrams that add value to the white paper, and embed attribution into the graphic itself. This is not only true when the attribution is to another organization, such as "© 2003 NetUniverse Corporation - Used with permission," but also for you or your organization. If the graphic adds value there is a very good chance that it will be used by others and this is usually a good thing. But, you want to be sure that your credit appears with the material.

What differentiates a chart, a table and a diagram and when should each be used? Charts generally represent numerical relationships, trends or statistics. A bar chart, for instance, representing cellular subscribers by technology, such as the chart to the left, can be very useful in showing trends visually and bringing out relationships in data. Other familiar types of charts are line charts, pie charts and horizontal bar charts. Charts are useful in representing financial information and trends over time. Charts are also useful in clarifying points and representing information in both management and technically oriented white papers.

Tunnel	Auth:	Char:	Volume
L2P	Authentication = PLS Encryption = Provided by Client and Gateway Client to Server via GRE	Encapsulation = IPsec	Client to Server via GRE Client to Server via GRE
L2TP	Authentication = PLS Encryption = Provided by Client and Gateway Client to Server via GRE	Encapsulation = IPsec	Client to Server via GRE Client to Server via GRE
L2TPv2	Authentication = PLS Encryption = Provided by Client and Gateway Client to Server via GRE	Encapsulation = IPsec	Client to Server via GRE Client to Server via GRE

Tables are also used to represent numerical information, and often text as well, but they are more a way to organize data rather than to show it visually. Information represented in tables is more compact and useful than if it is written out in full narrative text, although they are often accompanied by narrative text. The table at the left, for instance, is used to compare three different types of tunnels that might be chosen for different network security

scenarios. The table format is easier to use for a quick reference than similar information in the body of the white paper. An additional value of the table format is a side-by-side comparison of the three choices.



Diagrams can be used to show many things: a process, an organizational structure, a configuration, or a historical timeline or how money is distributed. The only limit is the imagination of the author or artist. Sometimes, too much imagination can lead to trouble. For instance, representing amounts of money by pictographs of coin bags of varying sizes can be misleading. Does a bag that is twice as high and twice as wide as another bag mean four times as much money, or only two times? In fact, the graphical representation of information can be complex; make sure your diagrams do not mislead.

The diagram is often a collaborative effort between an author or Subject Matter Expert (SME) and an artist. This is an area where the professional services of a graphic artist are justified. A professional artist can often suggest ways to graphically represent a concept, idea or process for a modest fee while many, many hours might be wasted by the author/SME trying to accomplish the same task. And, as with the other two types of graphics, the process of creating a diagram can also have the positive effect of clarifying the white paper material in the mind of the white paper author or team.

## Design Decisions

With these big items out of the way, let's take a look at the little items that must also be taken into consideration.

## Styles

Styles, or style sheets, are formatting elements that can be applied to a document at the click of a mouse. For instance, in this document there is a style called Body 1. By simply placing the cursor anywhere in a paragraph and clicking Body 1 in the upper left hand corner pull down menu in Microsoft Word, all of the text in the paragraph is formatted using the Tahoma font in an 11 point size with a particular line spacing and pre-saved margins. This use of a predetermined style saves time in editing, and assures consistency across multiple white papers. Changing the style changes all of the other tagged text automatically facilitating the use of material for multiple purposes.

If the white paper is to be a one-off project, then the use of style sheets or styles is a big waste of time. However, you can never assume that a white paper will never be repeated. The first thing to do relative to style sheets is to determine if a sample white paper already exists. If so, use it. If not, create your own and be sure it is used to assure the consistency of future endeavors. One of the worst things an organization can do is to realize that they do not have a white paper library, but rather, an unrelated bunch of white papers. It is OK, by the way, to have two different styles - one for management/financial white papers and a separate, different style for technical white papers.

## **Line / Paragraph Spacing**

Line spacing is also an important formatting consideration. While single spacing is common in technical papers and 1.5 line spacing, often called 'space and a half', is more common for less technical white papers, a broader line spacing generally makes a white paper easier to read and less fatiguing. For this reason, stick with at least 1.5 line spacing. You can also customize line spacing with fine gradations. For instance, this white paper uses 11 point Tahoma with 16pt spacing.

In addition, consider paragraph spacing, top and bottom spacing, and spacing of any headers or subheads for their impact on the appearance of the white paper. Most word processors allow a different amount of spacing to be allowed before and after a paragraph, and these settings can all be combined to create an attractive and self-formatting document.

## **Headers / Footers**

Headers and footers can contain useful information and can also be important style elements. The type of information that can be contained in headers and footer includes copyright notices, page numbers, revision numbers, dates, confidentiality legends, and the name and logo of the organization creating the white paper. It is also possible to vary the headers and footers. For example, you can omit headers on the first pages of sections, or have a different header on the first page of a white paper.

If a booklet format will be used, headers and footers can also vary for even or odd pages. It is customary for the page number to appear on the outside of the page, the farthest position from the gutter, or place in the middle where the pages are stapled or bound together. For publishing on a web site, there is no need for headers and/or footers every 11 inches, as this requires extra scrolling and is inconvenient.

## **Margins**

Margins should be narrower for more technical white papers and broader for less technical white papers. A broader margin may also be created in the gutter of the page for any white paper that will also be printed in hard copy.

## **Pagination**

Pagination is also important to think about. Generally speaking, only the body pages are numbered; front and back cover, appendices, table of contents and other similar pages are not. Page breaks should also be positioned so that they do not split key diagrams from their descriptive text, or split paragraphs in unattractive ways, stranding a single sentence, for instance, on the next page. And, because the white papers discussed in this document are aimed at the US Information Technology marketplace they should be in a consistent 8 1/2" x 11" North American page format.

## **Table of Contents**

As discussed briefly earlier, a table of contents should be considered only for a longer document, possibly one exceeding 15 pages. It is a strong addition to a longer document, and may well detract from a shorter document. The two other issues to consider in the table of contents after the decision to include one has been made are the style and depth of the table of contents.

Just because the headings and subheadings in a document run to five levels, it is not necessary to include all of the levels of subheadings in a table of contents. Very often two or three levels are sufficient to allow the readers to directly locate what they are looking for, or to allow the prospective readers to make a decision about whether they will read the document or not.

As for the style of the table of contents, most word processing and electronic publishing programs have built in styles ranging from traditional to fancy. In most cases one of the existing formats will suffice, or can be adapted for your white paper.

If the document will be published in an electronic edition, you should also consider creating hot links from the index items to the appropriate page to allow easy navigation and take advantage of the power of the web. Readers will greatly appreciate this additional consideration.

## **Index**

Consider including an index, like a table of contents, only for a longer document. If an index is included, take great care in the list of words to index. Include references to products, technology and people you would like the readers to be able to easily locate within the document. As with the table of contents, the index is often a tool used by prospective readers to select or not select to read the document, or to jump to specific sections.

## **Footnotes / Endnotes**

Footnotes and endnotes are most often used as a way of providing credit for quotations from other authors or sources. A footnote is marked with a superscript character, usually a number<sup>1</sup>, with notation at the bottom of the page. An endnote uses a similar superscript character, but the accompanying note appears at the end of the section or end of the work. In the case of a white paper, endnotes would appear at the end of the white paper, often in an appendix.

Footnotes and endnotes must be used very carefully in a white paper. The use of excessive credits indicates that the material in the white paper is not original to the author and therefore reduces the overall authority and originality of the material in the white paper. This is where a white paper and a report can be clearly distinguished. A white paper is intended to state a position, some original thoughts or ideas of the author or originating organization and is not intended to be a reworking of or report on prior works.

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<sup>1</sup> Like this, for example.

In a white paper it is usually better to avoid quoting other works. In cases where it is impossible to avoid, do so in context. As an example, if it is desirable to use a chart or graph from another work, use a copyright credit right on the graphic. If it is important to quote another source, give credit in context, rather than using a footnote or endnote. Such as "In his excellent book *IP Telephony Demystified*, Ken Camp points out that 'one of the most vital points in the evolution of H.248 or Megaco standards was the recognition that two distinctly different functions are performed in telephony applications.' Consistent with this key Megaco revelation our product, the VoIP100 combines both of those functions, the call control and media control functions, in a single chip set for maximum efficiency and lowest cost of the phone sets."

## Develop The Outline

The next step in the process is to develop the outline. The outline has two elements: the items in the outline, and their order. Both elements must be carefully weighed to create the final outline, which acts as the document "blueprint." In the same way that it is difficult and expensive to make changes to a building as it is being built, so it is disruptive to change the outline of a white paper after the writing process has commenced. So take sufficient care in the outline development process.

Let's consider a possible outline for the CopperSaver® 1MEG DSL Modem, a product designed to auto-speed detect and provide the highest possible throughput over twisted pair copper Telco lines. The target audience for the white paper is DSL marketing managers in telecommunications carriers.

### CopperSaver 1MEG DSL Modem Outline 1

- I. Introduction: What is DSL?
  - A. Digital Subscriber Line
  - B. Benefits of DSL
    - 1. Carrier Benefits
    - 2. Subscriber Benefits
  - C. 'Flavors' of DSL
    - 1. Asymmetric
    - 2. Symmetric
  - D. Historical Problems with DSL
    - 1. Wire Gauge
    - 2. Distance
    - 3. Installation
    - 4. Bridge Taps / Splitters / Punch Downs
    - 5. Loading Coils
    - 6. Cross-talk and interference in bundle
  - E. Historical Solutions
    - 1. Install New Pairs
    - 2. Limit Distances
    - 3. No Self-Installation
    - 4. No installs except on home run wire
    - 5. Eliminate Loading Coils
    - 6. Precertify bundle, limit DSL in bundle
- II. Introducing the CopperSaver 1MEG DSL Modem
  - A. Overcomes Historical Problems
    - 1. Autoconfiguring

- 2. Maximum speed up to 1MEG
- B. International Standards Compliance
  - 1. Certifications
  - 2. Homologations
  - 3. Testing
- C. Carrier Benefits and Return on Investment
- III. Conclusion

What is right, or wrong, with this outline? To begin with, it does not follow the form we discussed earlier. We must begin with an Executive Summary or Executive Overview. The next question is, should we begin with a tutorial on DSL if our audience is DSL Marketing Managers with large telcos? Probably not, but a third question that might clarify the issue is, how much emphasis did the author expect to place on the introduction? An outline is not actually a sample table of contents, though a sample table of contents can be very helpful by providing one more levels of information as well as target page numbers for the various sections. This may or may not be included in the outline, depending upon the importance of a certain page count, or emphasis on certain sections. If you don't wish to use actual page counts, another tool is to assign an emphasis, by percentage, to various sections to provide guidance to the author or author team. Let's add these changes to the next version of the outline and see how it evolves.

CopperSaver 1MEG DSL Modem  
Outline 2

- I. Executive Overview ..... 1
- II. Introduction: What is DSL? ..... 3
  - A. Digital Subscriber Line
  - B. Benefits of DSL
    - 1. Carrier Benefits
    - 2. Subscriber Benefits
  - C. 'Flavors' of DSL
    - 1. Asymmetric
    - 2. Symmetric
  - D. Historical Problems with DSL
    - 1. Wire Gauge
    - 2. Distance
    - 3. Installation
    - 4. Bridge Taps / Splitters / Punch Downs
    - 5. Loading Coils
    - 6. Cross-talk and interference in bundle
  - E. Historical Solutions
    - 1. Install New Pairs
    - 2. Limit Distances
    - 3. No Self-Installation
    - 4. No installs except on home run wire
    - 5. Eliminate Loading Coils
    - 6. Precertify bundle, limit DSL in bundle
- III. Introducing the CopperSaver 1MEG DSL Modem ..... 5
  - A. Overcomes Historical Problems
    - 1. Autoconfiguring
    - 2. Maximum speed up to 1MEG
  - B. International Standards Compliance
    - 1. Certifications

- 2. Homologations
- 3. Testing
- C. Carrier Benefits and Return on Investment

III. Conclusion ..... 15

In this outline we have added an executive overview and we are now aware that the introduction and background is intended to be only two pages, pages three and four. This quick introduction might be useful to re-introduce the issues to the audience. We will keep it.

What else might be done with our outline? We might want to add outline annotations, or notes from various contributors that will be useful in assuring that the outline evolves into the document we want. Let's see what an annotated outline looks like.

CopperSaver 1MEG DSL Modem  
Annotated Outline

- I. Executive Overview ..... 1  
THREE MAIN POINTS: Overcomes historical DSL Problems, International Standards compliance and designed for carrier deployment.
- II. Introduction: What is DSL? ..... 3  
Short and sweet: use bullets and brief sentences. Keep it interesting and brief. Keep to two pages - NO MORE.
  - A. Digital Subscriber Line
  - B. Benefits of DSL
    - 1. Carrier Benefits
    - 2. Subscriber Benefits
  - C. 'Flavors' of DSL
    - 1. Asymmetric
    - 2. Symmetric
  - D. Historical Problems with DSL
    - 1. Wire Gauge
    - 2. Distance
    - 3. Installation
    - 4. Bridge Taps / Splitters / Punch Downs
    - 5. Loading Coils
    - 6. Cross-talk and interference in bundle
  - E. Historical Solutions
    - 1. Install New Pairs
    - 2. Limit Distances
    - 3. No Self-Installation
    - 4. No installs except on home run wire
    - 5. Eliminate Loading Coils
    - 6. Precertify bundle, limit DSL in bundle
- II. Introducing the CopperSaver 1MEG DSL Modem ..... 5
  - A. Overcomes Historical Problems
    - 1. Autoconfiguring  
Autoconfig works when install is by end-user and speeds install even if done with carrier 'truck roll.' Use table from provisioning study based on US\$ rates: show Internet link to International provisioning web page.
    - 2. Maximum speed up to 1MEG  
Base this discussion on study of end-user uptake rates and demand versus ability/desire to pay stats.
  - B. International Standards Compliance
    - 1. Certifications



2. Homologations  
3. Testing  
C. Carrier Benefits and Return on Investment  
Use the MarketKnowledge RoI Calculator as a basis. Don't forget to stress that our system was designed to maximize carrier nextgen RoI.

III. Conclusion ..... 15

While most annotated outlines are far more detailed, and in fact might run to several pages, the example above provides a general look at the process.

In addition to being annotated, outlines are often numbered or otherwise noted as to their level and relationship. This is a relatively useful tracking mechanism while developing the white paper, and allows identification of specific sections of the white paper among the team. The section, subsection and subsequent numbering is very rarely retained in the final white paper, however, unlike documents like Requests for Proposals (RFPs) and contracts..

The level of detail of the outline should be as deep, and the annotations as specific, as are required to communicate from the white paper client to the white paper author or author team. Some teams that work together a lot and are familiar with general requirements and guidelines may be able to do a very good job with less detailed outlines, while teams that work together less frequently need more detail. Do not think that strict, or detailed outlines "limit the creative process." The time for creativity is prior to and during outline creation. Once the blueprint is finished, the creative process must operate within well-defined limits. The blueprint called the outline should, in fact, facilitate a disciplined writing process resulting in a high-quality white paper which is on time, on budget and on page count.

## White Paper Writing for the US IT Market

The next step is to begin writing the *first draft* of the white paper itself. I stress first draft because it is the very rare white paper that requires no revisions or rewrites. It is a strong testimonial to the proper planning if a white paper only requires one or two revisions. Special advanced consideration and decisions about several different aspects of the writing process are also important to reduce the amount of rewriting and hit the target as squarely in the middle as is possible on the first draft.

### Tone and Language

The aspect of the white paper known as tone is tied very closely to the exact language that will be used in creating the proper feeling in the readers of the white paper. Many experts suggest writing in a tone and using language appropriate for the intended readers, especially if the intended readers are technical. This author contends, on the other hand, that the actual readership may be broader than expected so keep the tone and level of the language relatively simple and direct. For less technical readers, the document will still have value. Even highly technical readers will find such a document easier to understand and less tedious. In either case there are benefits to keeping it simple.

Therefore, choose simple over complex words wherever possible. The phrase "it was a simple case at attempted obfuscation of the worst possible kind" could easily be replaced with "they tried to make it as confusing as possible." Similarly, keep industry jargon and acronyms to a minimum, and spell out acronyms the first time they are used, as in "... in which case the Network Security Response Team (NSRT) should be immediately notified." Use your judgment about acronyms that have become universal, such as TCP/IP.

### **Use of Humor**

There is no room in a white paper for humor. That is not to say there is no room for useful analogies and anecdotes. Analogies and anecdotes, if properly used, can dramatically increase the impact of the white paper. More technical readers prefer tighter, more information-dense material, while business managers tend to learn more from stories and anecdotes. Neither audience, however, will generally tolerate anything in a white paper from a stand-up comedy routine.

### **Spelling / Spell Checking**

Proper spell checking is mandatory, and your automated spellchecker is not sufficient. Two problems that occur time and again are improperly spelled words that get into your spelling dictionary and words that are spelled properly, but are not correct for their context. To solve the first problem, rely on good proof reading; if possible, have someone proofread the document who is not familiar with the subject. The less technical proofreaders tend to find grammatical problems more readily because they are not familiar with the content and are likely to read more slowly and more carefully.

Another spelling trick is to delete your custom dictionary at the beginning of every white paper project. It is possible in a past spell check that you identified an improperly spelled word as being a properly spelled word and saved it in your personal spell checking dictionary. That improper spelling will pass through the filter as a properly spelled word.

### **The Writing Process**

Picture yourself as Charles Dickens or Leo Tolstoy if that will help you in your pursuit of the proper turn of phrase, but such a level of art with the written word is not needed for a great white paper. In fact, the pursuit of art is not really desirable in a white paper as a proper white paper needs to be more streamlined than *David Copperfield* or *War and Peace*. In fact, phrases such as "writer's discipline" and "word economy" are far more appropriate. A white paper should be "sparse" rather than "rich," should "clearly describe" instead of "create an image" and should be as unambiguous and to the point as possible.

To a large extent, drafting the white paper can follow the process laid out in most US elementary, junior high and high schools. The process goes like this: create the outline. From each detail level of the outline create a main, or topic, sentence and from that sentence build a paragraph that supports the topic sentence. If the sentences in the paragraph support the topic sentence, and the order and relationship of the topic sentences is clear, the result will be a good white paper.

## **Generating Ideas**

At this point in the process, focus on generating ideas to express the specific topics that have been chosen. Think about survey data, good analogies, examples, and anecdotes, as well as charts and graphs that can illustrate your points. How would you best understand the concept? What explanation would inform the more knowledgeable reader without leaving the less technical reader behind? How have other writers accomplished this? Is an original invention needed, or is a quotation appropriate? Is there an established convention?

## **Source of Content**

In virtually all cases the source of the white paper content is expected to be the author of the white paper. This does not mean that other sources cannot be used, but they should be used sparingly; too many references may detract from the authority of the author and/or the originality of the work, neither of which is good.

## **Attribution / Plagiarism**

Whenever material is used from another source, or even previously published material from the author(s) of the white paper it should be attributed as discussed in the prior section on footnoting and references.

## **Focus / Productivity**

Probably the most difficult aspect of white paper writing is focusing on the task or writing, and doing so productively. Many white paper authors produce only one to three finished white paper pages per day. Good planning and an excellent outline will shorten the writing process, but drafting and revising will still take time. Use of dictation and voice recognition may speed the page-creation process, but editing and rewriting time may be increased to a point where the number of pages per day remains about the same.

This is not to say that a white paper writing project should require solid eight-hour days; a concentrated four-hour effort will yield far better results than an interrupt-filled ten-hour day. The authors should determine the best way, within their own schedule, to get an uninterrupted block of time when they will be most productive. For many people showing themselves "unavailable" during the morning, or writing prior to the start of the regular work day is useful. Other writers are more productive in the evening after a meal and some exercise. The main point is to find out the best circumstances for you and then to schedule time, have discipline and get on with it.

## **The Four Powers of White Paper Writing**

The power of most white papers comes from one or a combination of four elements: authority, enthusiasm, strength of message, and indisputable proof.

## **Authority**

As an authority on a specific topic, the white paper author is providing insights and wisdom gained from long study. The authority of the individual comes from widely recognized achievements, and the white paper provides unique and special insights beyond the grasp of the readers without the guidance of the author. In white papers that get their power from the authority of the authors, carefully worded biographies (minus hyperbole) are critical. Together with a strong abstract that states clearly why the paper is important, the bio should make it clear why the author is an expert in the field. The release of a white paper on a specific topic is often an event suitable for press releases and media interviews. Some events are highly newsworthy—a new patent, for instance.

## **Enthusiasm**

While a white paper is not powerful due to enthusiasm alone, the dimension of enthusiasm is an important one. Very often an enthusiastic start, such as in the executive summary or executive overview can set the stage for a straightforward presentation followed by a strong call to action in the summary or conclusion.

Enthusiasm can be injected into a white paper by a number of methods. One simple method is to choose one and only one problem to solve in the white paper, clearly state the benefits of the solution and then to work through to the solution in a serial fashion with a grand solution of the problem that is recapped in the conclusion section.

## **Strength of Message**

The third power of the white paper is derived from the strength of the message. The strength of the message comes from the power and the focus of the message. Strength is achieved by eliminating any words from the white paper that soften the message or take away from the specific focus. For example, the following phrase might appear in the first draft of a white paper on the topic of Voice over IP (VoIP) and its replacement of traditional telephony. "The strength of Voice over IP lies in the wide variety of multimedia services that it will probably eventually provide as it moves more into the mainstream of usage and slowly begins to overtake traditional digital telephony as today's digital telephony replaced the earlier analog telephony, a method of transmission based on waves rather than on digital ones and zeros." This is not a strong message for many reasons. For one, this is a very long sentence and introduces several bits of information that detract from, rather than support, the intended theme of the white paper. The second reason is the use of softening words such as "probably" and "eventually." The following sentence would be more suitable to the purpose. "The strength of Voice over IP (VoIP) lies in the wide variety of multimedia services that it provides, a key strength that the market is realizing as VoIP moves into the mainstream and overtakes traditional telephony as the basis of the Public Switched Telephone Network (PSTN) globally". Two more edits will make the message even stronger and more emotionally charged. "As Voice over IP (VoIP) overtakes traditional telephony as the basis of the global Public Switched Telephone Network (PSTN), the market is realizing that the variety of multimedia services that VoIP provides is a key strength."

## **Indisputable Proof**

The third power of the white paper comes from indisputable proof. In a case where a white paper is based upon some fact or proof that is obvious, it is best presented unadorned. Trying to present the indisputable proof in any but the most straightforward manner will render it less powerful. Indisputable-proof white papers are often best combined with authority to answer the "says who?" questions that will arise. It is also very often a good idea to make indisputable-proof white papers short and to the point, with other supporting white papers taking up related case studies and applications. It is often a good idea to make indisputable-proof white papers as broad in scope as possible, even encompassing a class or product to include competitors' products. This can work very well in establishing the industry leadership and vision of the organization publishing the white paper and establishing first rights to the concept. Customers may ask your competitors to comment on your white paper, and in the ideal situation your competitors quote from or distribute your white paper.

For example, say you are a manufacturer of disk storage systems. Your research concludes that a new, patent-pending technology will make your disks seek 212% faster. The new technology can be applied to your disks, as well as to the disks of your competitors, but your team developed the technology and you will hold the patents. The white paper should probably describe the technology in as much detail as your attorneys allow, without giving up the unique intellectual property in the patents, and indicate that the technology is broad in its application to all types and styles of disks except, for instance, removable disks. The emphasis should be on the innovation broadly, showing by example your leadership, capability and creativity. With this brief, eight- to ten-page white paper as a base, it is now possible to write additional white papers, referencing the first one, that describe how it will be applied within your product lines, your licensing strategy for other manufacturers, or why you won't license it, etc. The impact and wide distribution your original white paper will receive will be well worth a less aggressive, more academic description of the new technology.

## **Edit / Review Cycle(s)**

With the writing of the first draft completed, it is time to consider the edit and review cycles. Editing and review is a repetitive, cyclic process intended to converge on a final white paper product that is true to the original mission statement and objectives set at the beginning of the project.

### **Editorial/Content Review**

The editorial and content review includes a review of the facts, style, grammar, spelling and all other aspects of the written white paper itself. The editorial and content review itself may include several iterations before going on to the next review steps. If there are no substantial changes in the next review steps, the editorial review will not be revisited. If there are substantial changes, however, the editorial review will have to be repeated before final release of the document. One of the fundamental errors in the white paper review cycle is to omit a final editorial and content review before release.

## Legal Review

While often neglected, especially by technical marketing organizations, the legal review is an important one. The following items, at the very least, should be reviewed by the legal department or outside legal counsel.

- Claims - Are all claims in the white paper supported or supportable? Are any claims made that are not consistent with other advertising, contracts, or product literature?
- Competitive Statements - Are all statements made about competitors and/or their products supported with or supportable by facts?
- Non Disclosure Agreement (NDA) Compliance - Is any information released in the white paper the property of any third party covered under an NDA, or the property of the white paper company and covered under an NDA? If yes, should this information be removed, or is it otherwise acceptable to disclose the information?
- Copyright / Trademarks - Are all copyrights and trademarks, of all companies including competitors, properly referenced and acknowledged? Are all requisite permissions for use referenced and any copyright fees paid? Have proper registrations and filings been made for any trademarks, registered trade marks, patents, copyrights or other legal protection listed in the white paper?

After the legal review comes the security review.

## Security Review

The security review assures that confidential information is not compromised through the release of the white paper. Many look at the security review as possible censorship, but the wise manager knows that the security review is a further check to assure that release of the white paper does not provide unnecessary information to competitors or market analysts.

## Consistency with Level of Confidentiality

The part of the security review is to assure that the white paper is consistent with the level of confidentiality assigned to the white paper. It is possible, of course, to have white papers that contain confidential information and are marked appropriately and provided only under a Non-Disclosure Agreement (NDA). The general rule of thumb, however, with any written document is that it should be written and distributed with the idea that it will be read by competitors and others and should contain nothing of a confidential or proprietary nature. In general, if something is not suitable for printing in the general press, it should not be included in a white paper.

## Information Leakage

All white papers should be tested for their information leakage potential. There are several aspects of a white paper that an organization should check prior to release of a white paper, as they will certainly be checked by others after its release if the topic or some other aspect of the white paper is of the least competitive interest.

- Metadata - Metadata is information intentionally, or unintentionally, stored in a document and thought to be hidden or not even realized by the author and/or distributor of the white paper. The metadata problem is generally solved by converting a document to an Adobe Acrobat PDF file prior to distribution. Many an organization has been embarrassed by releasing a Microsoft Word document with one author's name on it only to find that the metadata inside

the document shows other authorship. In many cases chunks of text thought to be deleted, and often disagreeing with the official position stated in the white paper, can turn up as metadata, stored in the document.

- Open Source / Information Aggregation - Information analysts should review the white paper to be sure that it cannot be combined with seemingly innocuous other information about the company to allow open source intelligence to be gathered. Many times white papers on their own do not leak information, but when combined with other openly available bits of information, they can paint a remarkably clear and comprehensive picture of a company's plans, strengths and vulnerabilities.
- Social Engineering - Social engineering is, fundamentally, lying or conning people to get information. White papers should be reviewed carefully from this standpoint to assure that they do not provide terms, code words or other insider information that can be used by social engineers, also known as spies, to infiltrate or otherwise get information from an organization.

After the editorial/content, legal and security reviews it is time to distribute the white paper. As with all prior steps white paper distribution has its own level of planning and steps to be taken to assure success, as we will see in the following section.

## **White Paper Distribution**

It is now time to distribute the white paper. We will consider the two most common electronic formats as well as several different channels for distribution.

### **Distribution Format**

White papers can be produced as paper documents, electronic documents, web pages, in magazine formats or a variety of other formats. The most common format is to produce the white paper such that it will appear in its final format, usually on a standard sized 8.5 x 11 inch page and to publish it via Adobe Acrobat. In this format it can be read from a web site, sent as an email attachment or link, and included in other electronic documents. It can also be printed so that it can be distributed at a trade show, press or analyst briefing, as an insert or as a part of other printed marketing collateral.

### **MSWord**

Microsoft Word is a very good format for white paper development as it contains several very useful features such as formatting, styles, spell checking, version control, change tracking and more. There is a substantial difference, however, between the development platform and the delivery platform. Once a white paper is developed it is desirable to "freeze it" so that it is not easy for others to make changes to it after it is released. For that reason the Adobe Acrobat Portable Document Format (PDF) is a far more desirable electronic format for white paper distribution.

## **Adobe Acrobat PDF**

The Acrobat PDF format from Adobe is the preferred distribution format for white papers. The main reason is that the document is displayed on the screen EXACTLY as published, even if the target machine has different fonts and other display attributes. This is an important advantage over pure MS Word documents and an extremely important advantage over HTML web pages that can vary even more from their original when displayed. Additional benefits of the Adobe Acrobat format is that while the program that writes Adobe Acrobat costs the original publisher money, the reader that displays the document is distributed free of charge, allowing the reader to display the original document in its original format.

## **Limited Distribution**

In general, everything that appears in a white paper should be considered to be public domain. However, many organizations wish to share confidential information and choose the white paper format as the preferred vehicle. In this case, there are some distribution tools that can be used to assist the process.

## **Confidentiality / Integrity**

When confidentiality of a document must be assured, it is often simple enough to be certain that all receiving parties have signed a non-disclosure agreement and to mark the documents accordingly, preferably on each and every page in the header or footer of the page, possibly in red. To assure the integrity of the original document, and to that no changes have been made or can be made, it is also possible to systematically scramble the document, a process known as encryption. It is also possible to digitally sign the document so that any attempts to modify the document from its original form will be clearly noticeable. This technology is known as the digital signature and it is also closely akin to the encryption process.

## **Document Tracking / Management / Watermarking / Steganography**

If additional tracking is desirable, each document that is released can be digitally watermarked prior to distribution using a process known as steganography, or information hiding. Watermarking can contain any information, such as date, time and recipient, to allow later tracking should a document be recovered. Watermarking software is virtually undetectable, especially when the watermarking information is also encrypted, and the software to do it is relatively inexpensive.

## **Broad Distribution**

In most cases, however, white papers are distributed without security features to a broad audience, in the hope that it will have maximum positive impact and bring the greatest benefit to the organization distributing it. There are several distribution options, the most popular of which are briefly described here.



### **eMail /Mail Campaign**

White papers are ideal for distribution via electronic mail (email) or paper mail (pmail) campaigns. The exact method of distribution will vary based upon the campaign, but the distribution lists will generally be individuals who have already expressed interest in the products or services of the company or who are part of an "opt in" list in which they have voluntarily participated. Possible distribution lists also include the industry press, existing clients and stockholders.

Distribution by email or pmail can often be expensive, and often the target of the mail may not want the content. So it is usually best to send an invitation to receive the white paper rather than the white paper itself. For email, a link to retrieve the white paper is sufficient, often with an additional registration or sign-on. For pmail, a return card or telephone number to call usually works quite well, but can also add a layer of inconvenience to the process as well as additional costs.

### **Press / Media**

The trade press is another good channel, especially if the white paper addresses questions of topical interest or is written by a recognized authority. There are several organizations that manage distribution of press releases. Alternatively, your own marketing department or PR agency can handle it. White papers distributed through this channel are usually accompanied by a press release summarizing the main points of the white paper and providing a background on the organization releasing the white paper.

### **Sales / Marketing Campaign**

White papers can also be released to your own or partner sales force. Include background information on the white paper, indicating the best use of the white paper in terms of type of customer or prospect and the timing in the sales cycle. It is also a good practice to solicit feedback from the sales force on their opinions of the white paper and its acceptance. It is even a better practice to include some representatives of the sales and marketing departments on the white paper development team. If possible, ask field sales personnel to write some parts of the white paper to assure that the proper message is being conveyed at the correct level of technical detail.

### **Trade Shows**

Trade shows are excellent venues for white paper distribution. While it is nice to distribute paper copies of white papers, it is costly, and often the information is lost among all the other literature collected by the trade show attendees. A better practice is to keep a few hard copies for solid prospects to be distributed at the discretion of the show floor sales staff and to swipe the badges of other attendees and mail, or email, the white paper as a follow-up item. This often has a lot more impact and the white paper receives much more attention than if it were part of a bag full of material collected at the trade show. In this way you also capture lead information.

## Launch Kits

There is not a new product launch kit that could not benefit from a well-written, comprehensive white paper. Very often, in fact, a white paper or two are the heart of a launch kit. The only difference between stand-alone white papers and those used in launch kits is that an effort should be made to coordinate the look and feel of the complete launch kit, including white papers and other collateral, to be sure that it appears as one harmonious whole.

## Investor Packages

Like product launch kits, the investor package can include a white paper or two. Investors today are doing more technical due diligence, and a sound technical white paper on the internals, uniqueness and benefits of a product or service can help their decision.

## Bitpipe Syndication

Several services available will distribute white papers or provide some or all of the underlying services for email or pmail campaigns. The most cost-effective and high-impact distribution of Information Technology (IT) white papers is through Bitpipe syndication. Bitpipe, Inc. ([www.bitpipe.com](http://www.bitpipe.com)) is the leading syndicator of in-depth information technology (IT) content including white papers, webcasts, case studies and product literature. Bitpipe distributes content from over 3,500 leading IT vendors and over 60 top analyst firms including The Consultant Registry, Gartner, IDC, Aberdeen Group, Meta Group, and Yankee Group via the Bitpipe Network to a global audience in excess of 21 million potential readers. The Bitpipe Network reaches this qualified audience of technology buyers through agreements with *InformationWeek*, *eWeek*, *CIO Insight*, *Network Computing*, *PC Magazine*, *Forbes.com* and over 70 other leading IT and business-related web sites. Go to [www.bitpipe.com/partners](http://www.bitpipe.com/partners) for a complete list of Bitpipe Network sites. Bitpipe Inc. was founded in 1998 by people with significant experience in information business, web site development, and building web-based marketing databases. Led by CEO Jay Habegger, the team designed Bitpipe's content and distribution services to be highly flexible and customizable.



## Additional Tools of the Trade

Some additional tools of the white paper trade are research tools, mock-ups, dictation and voice recognition speech-to-text systems. We will examine each briefly here.

### Research Tools

Research is an important part of the white paper creation process. In order to create a white paper that not only stands alone, but also contributes to the overall fabric of industry knowledge it is important to do research. First, research provides useful supporting information—quotes, charts and tables that can be used to enhance a white paper at little cost. Second, research provides insights into the current status and trends of the industry and competitive positioning. Third, research shows what has already been written on a topic, thereby allowing the white paper author to take a new tack on a subject, or to avoid subjects that have already been extensively covered.

The most useful research tool available today is the Google® search engine. Google® allows for a virtually instantaneous search of several billion web pages and other important web resources, such as news groups and some discussion forums. It is simple to use, can be used to search within search results for a fine-tuned result, and is the broadest, deepest search tool available to ordinary web users.

### Mock-Ups

The mock-up is a tool that has been used by this author for almost three decades for everything from school reports to Request For Proposal (RFP) responses, product and services proposals, white papers, sales guides, product manuals and a variety of other documents. The concept is very simple, and the benefits are substantial.

The Concept: Create a document that has all of the needed parts of the document you are creating. Print them, by hand if you like on pieces of paper which act as physical place holders and then replace the place holders with the real document elements as they become available. If, for instance, we are creating a mock-up for a white paper, we would take several pieces of white 8 1/2 x 11 inch pieces of paper. On the first paper we would simply write "outside cover," on the next we would write "inside cover," on the next "table of contents - front," on the next "table of contents - back," on the next "executive summary, page 1," then on the next "executive summary - page 2" and so on. We would then arrange them sequentially from front to back, probably turning the pages so that they appear back to back as they will in the final two-sided printing. We can then binder clip the entire mock-up, or, better yet, slide them into clear plastic page protectors in a master binder. As items are finished, such as the cover art, they are printed out and inserted in place of their generic place-holders. The mock-up process can be more sophisticated, but there is really no reason for it to be; this simple approach has stood the test of time.

The Benefits: The mock-up acts as a visual status report at any moment in time; it can be updated dynamically if some element has been forgotten; and it acts as an instant check list to be sure all tasks have been assigned and completed. The mock-up is a simple yet highly effective tool, especially if there is more than one white paper project under way simultaneously.

## **Dictation**

Some people write better than they speak, but it is the usual case that subject matter experts speak better and more fluently than they write. For this reason, it is often highly desirable, and very productive to have the white paper author record their initial draft of the white paper, following the outline very closely, on a standard cassette recorder or micro dictation tape. The spoken word can then be transcribed by a professional, thus providing the first draft of the white paper text for further editing by the original subject matter expert or a professional writer under the expert's direction.

With very little coaching, any subject matter expert can be taught to produce a tape of sufficiently high quality as to allow excellent transcription. The subject matter expert should speak clearly, enunciating each word and clearly spelling any specialty terms or acronyms. Speaking slowly is preferable, but even more important than speed is consistency of pace. If a speaker speaks faster or slower, the speed of replay of the tape can be adjusted by the transcriptionist, but it is very difficult to adjust for an inconsistent speed of delivery.

## **Voice Recognition / Speech to Text**

Voice recognition and speech to text is very similar to dictation, except that dictation requires a person to listen to the tape recording and transcribe the text, most often to an editable electronic form such as a word processing document. With speech recognition that second person is taken out of the loop. The expert speaks directly to the computer, and the computer attempts to render the human speech as readable, editable electronic text. While this type of system was once the stuff of science fiction, the technology has become mainstream and is within the grasp of everyone who owns a computer and can purchase software for it.

The most important element of voice recognition is to train the software. Training involves reading a known story or two to the software to allow it to capture your specific nuances of certain syllables, words and phrases. While today's average voice recognition can have greater than a 70% recognition factor right out of the box, proper training can drive the recognition factor into the mid 90s, which can make voice recognition a very powerful tool for creating white papers.

Like dictation, careful consistent speech with an equal emphasis on each syllable and very clear pronunciation is extremely important for success. More so than with dictation it is necessary to make sentences simple and to end sentences clearly, pausing only between sentences. The software will often try to determine the proper spelling of words in the context of the sentence.

## **Managing the White Paper Process for Success**

Though it has its own special characteristics the white paper process can be managed just as any other project. And, like any other project the normal project management processes can be applied as well as the normal rewards and recognition for success. Do not forget that if the white paper is being created and distributed by the company's own staff, a great many budget dollars have been saved and an immeasurable contribution to the sales and marketing effort has been made. Be sure to reward it in some meaningful way.

### **Project Management Process**

Set reasonable goals not only for the completion of the entire white paper process, but for interim milestones as well. It is possible, with the help of this white paper, to identify all tasks, assign them to the appropriate individuals and put them in the correct order. The rest is simple project management.

### **Rewards and Recognition for Success**

Creation and distribution of a high impact white paper is by no means an art, but rather a science with clear steps and clear success criteria. For this reason, it is possible to assign rewards and recognition for goals being met and, especially for bringing the entire project to a timely and successful conclusion. Rewards can range from "Dinner for Two" coupons for the solo author of a short white paper to group dinners, gift certificates and cash bonuses for bigger projects. As usual, rewards should match contributions.



## A White Paper Critique - You Be The Judge

There is one last exercise to test your appreciation and understanding of the white paper. The links below lead to three actual white papers. Click on one, two, or all three, read the white paper and you be the judge. The following criteria are the judging guidelines from the Bitpipe Second Annual White Paper Awards held in 2002. Apply these guidelines in your judging of the sample white papers and then compare your evaluations to the following evaluations from this author.

### CRITERIA

Awards were presented in the four categories of Hardware, Software, IT Services and Networking/ Telecommunications. Winning papers and runners-up were selected based on the following criteria:

- **Editorial Quality** - the level of writing, structure of the writing, flow of the overall narrative and use of clear language to explain the topic or product
- **Format/Presentation** - the quality of layout of the paper including incorporation of any charts, diagrams or graphics
- **End User Utility** - the balance between clearly setting out the benefits of your product or explaining the issue, while not deafening the reader with overt marketing and sales speak. IT professionals consistently value those papers that clearly explain and state a case in a reasonably balanced way

### Sample White Paper 1

#### [Risk Exposure through Instant Messaging and Peer-to-Peer \(P2P\) Networks](#) by Internet Security Systems X-Force

**Abstract:** The popularity of Instant Messaging and peer-to-peer networking technologies has risen dramatically in recent years. These services are becoming more prolific not only because of the convenience of the instant communication they provide, but the increased deployment of broadband has led to a rise in the availability of movies, music, and other media for download. As these services become increasingly popular, an increased risk emerges as well.

Many of these technologies were not designed to carry sensitive data in a corporate environment, and therefore do not have encryption or other security features (which causes users to unknowingly expose information about themselves and/or their companies). The three major instant messaging vendors (AOL, Yahoo!, and Microsoft) have all had issues with privacy violations and well-publicized security holes. There have been numerous security risks inherent in peer-to-peer clients such as Morpheus, KaZaA, and the various Gnutella clients, which can also be harnessed to distribute worms and malicious code.

This document details the dangers of using these services. It also explores the potential of these clients for misuse and what steps can be taken to minimize their inherent risks.



**Editorial Quality:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**Format / Presentation:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**End User Utility:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

## Sample White Paper 2

### [End-to-End Security for Remote VPN Sessions](#)

by Check Point Software Technologies Ltd.

**Abstract:** Today, increasing numbers of remote workers are using VPN technology to access internal corporate network resources via Internet access technologies such as cable modems and DSL. However, the "always on" nature of these broadband Internet services can leave individual machines open to intrusion-ultimately putting both the client and the corporate network at risk. In order to prevent hackers from potentially hijacking a VPN session for use as an entryway to internal corporate resources, it is critical that enterprises deploy an end-to-end security solution for VPN clients.

**Editorial Quality:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**Format / Presentation:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**End User Utility:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

## Sample White Paper 3

### [Securing Data at Rest: Developing a Database Encryption Strategy](#)

by RSA Security

**Abstract:** Database attacks are on the rise even as the risks of data disclosure are increasing. Already the financial services and health care industries must deal with legislation and regulation on data privacy. Consumer concerns about data disclosure and misuse will inevitably expand the responsibility of your enterprise to secure customer information. Failure could expose you to legal liability, negative publicity, lost public trust, as well as cost you money and lost productivity.

In this environment, your security planning must include a strategy for protecting sensitive databases against attack or misuse by encrypting key data elements. Whether you decide to implement encryption inside or outside the database, RSA Security recommends:

- Encrypted information should be stored separately from encryption keys.
- Strong authentication should be used to identify users before they decrypt sensitive information.

- Access to keys should be monitored, audited and logged.
- Sensitive data should be encrypted end-to-end -- while in transit in the application and while in storage in enterprise databases.

**Editorial Quality:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**Format / Presentation:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

**End User Utility:** 1-10 (Best) \_\_\_\_

**Comments:** \_\_\_\_\_

## Author's Judging

### Sample White Paper 1

[Risk Exposure through Instant Messaging and Peer-to-Peer \(P2P\) Networks](#)

by Internet Security Systems X-Force

**Editorial Quality:** 1-10 (Best) 9

**Comments:** Overall the editorial quality is excellent. The introduction is clear and well written, the risk exposure and technical countermeasure information is presented in a consistent format for the top six peer-to-peer networking systems (AIM, .NET Messenger, YAHOO! Messenger, ICQ, KAZAA/FASTTRACK, and GNUTELLA) and clear solutions to the overall Peer-to-Peer (P2P) networking exposures are offered. The information presented is based on unique research done by the respected, industry-recognized thought leaders of the ISS X-Force and is, therefore, authoritative and is compellingly written, as well. The audience is clearly a technical one though an in-depth knowledge of security and software operation is not necessary and the white paper is readable by an entry level technician on one hand, or a technical manager on the other, and this is just the audience that ISS serves.

The "9" score is because knowledge of the acronyms covered in the white paper are not spelled out anywhere. This white paper would be greatly enhanced by spelling out the acronyms at their first use, as discussed elsewhere in this paper. Not knowing the meaning of the acronyms does not detract horribly from this paper, but it does create a mental speed bump on the part of the reader and leaves them wondering exactly what is meant. The meaning of acronyms and specialty terms is often an objective of the white paper reader that is not met by this particular white paper.

**Format / Presentation:** 1-10 (Best) 8

**Comments:** The format and presentation of this white paper is very good with a large, easy to read sans-serif font and a simple, appealing header and footer format subtly presenting ISS X-Force as the source of the white paper on each page. For each of the six P2P networking systems covered in the white paper there is a consistent template and depth of coverage including architecture, client details, security concerns, protocol, capabilities, security risks, and technical countermeasures. The graphics included help to illustrate the points made in the text, but unfortunately are very difficult to read and this reviewer found them frustrating rather than helpful though from a presentation

standpoint they do add visual appeal and break up the text. The inclusion of screen shots also underscores the fact that the white paper was prepared by real practitioners as opposed to theoreticians, which adds to the overall authority, as does the fact that the source is the ISS X-Force, as opposed to an individual by name. The use of the X-Force name also means that the white paper will have maximum benefit even with the inevitable turn over that occurs by named individuals.

**End User Utility:** 1-10 (Best) **10+**

**Comments:** This reviewer can only give a 10+ for end-user utility because it seems to be the highest possible score. White papers from the ISS X-Force are relied upon for the unselfish devotion to presenting the facts in a usable format with a very understated statement of capabilities left until the very end. When you are the industry-leading X-Force, you really don't need bright neon lights and a strong sales pitch. The message itself is useful and the obvious value of the team behind the message stands on its own.

### **Sample White Paper 2**

[End-to-End Security for Remote VPN Sessions](#)

**by CheckPoint Software Technologies Ltd.**

**Editorial Quality:** 1-10 (Best) **10**

**Comments:** CheckPoint Software Technologies has done a lot with four pages in this brief, well crafted white paper on one of the hottest topics in network security today. The excellent, no-fluff "just the facts" style will be well appreciated by the manager with very little time and important decisions to make. The absence of any sales pitch, but the implication of "we are the experts and we can help you" is clear and will also go a long way toward maintaining CheckPoint's reputation as a leader in the industry. It is noteworthy that this author, as a networking and security consultant, often points to CheckPoint as the industry vision leader and innovator in key areas such as firewall technology, stateful inspection and intrusion detection and prevention. My high praise is obviously well warranted when CheckPoint's ideas and leadership are expressed in such well done white papers. It is also worthy of comment that putting this much information in such a clear message is far more difficult, and requires far more discipline, in four concise pages that in ten pages where the author can ramble a bit and is not so constrained on space.

**Format / Presentation:** 1-10 (Best) **10**

**Comments:** The graphics are colorful and interesting, the integration of the CheckPoint logo is interesting and tastefully done, always keeping the source of this excellent information in plain view. Margins are generous and integrated with a border motif that gives a feeling of generous space and makes the reading easier and less daunting. The inclusion of a very high level table of contents and features on the first page also helps the potential reader make the crucial decision if they will read further. Even though this white paper packs a lot into four pages, the spacing, font and margins still have an open, uncrowded feeling.

The careful choice of a single, information rich and well-drawn graphic also greatly enhances this white paper. The graphic adds a lot of value and supports, as well as being supported by, the text. The only negative comment, and this is a very picky one not worth lowering the "10" score, is that with a only a single graphic this author would not have identified it as "Figure 1" as there is no "Figure 2." This is most likely due to adherence to some template or set of style rules, and is a very minor point on an otherwise excellent white paper.

**End User Utility:** 1-10 (Best) **8**

**Comments:** This white paper is clearly written as a part of a bigger set of white papers intended to support the industry leadership role of CheckPoint, and therefore kept very academic and high level. This reviewer found the information presented in this white paper so compelling, well done and information rich that solutions to the VPN problems stated within the white paper began to form in my mind and I wanted more information. This is where the white paper let me down. I can't use this white paper as a spring-board directly to additional useful CheckPoint information. Even though I would not tamper with a single word, heading, comma or period of the white paper I do feel that the white paper could be aided dramatically, as could CheckPoint's sales efforts, by one brief line after the summary paragraph: "For additional information on Checkpoint VPN security solutions please see [www.checkpoint.com/indepth/vpnsecurity](http://www.checkpoint.com/indepth/vpnsecurity)." This web page would include a more in depth white papers, case studies and links to sales literature. I would have given a "10" to have that link.

### **Sample White Paper 3**

#### **[Securing Data at Rest: Developing a Database Encryption Strategy](#)**

**by RSA Security**

**Editorial Quality:** 1-10 (Best) **10**

**Comments:** *Securing Data at Rest: Developing a Database Encryption Strategy* by RSA Security strikes a happy balance between being a white paper for the planner or manager and a technical resource and tutorial. The authority for the white paper is derived from the source: RSA Security, representing Rivest, Shamir and Adleman, three of the most respected names in cryptography and the company they formed to bridge the academic world of encryption with the practical world of business and ecommerce applications. The white paper itself is written for the planner or manager with some of the more salient technical points reserved for two excellent appendices: Applying encryption technology and authentication methods to control access to encryption keys.

All points are clearly supported with both technical reasons and business logic. The reader clearly understands, from the outset, that they must take some steps to protect data and the penalties and risks if they do not. While this may seem obvious, a compelling argument including risks and penalties is not often included in white papers, but it should be because it is the basis of many actions taken by businesses.

The text is stream-lined, well written and gets right to the point, all technical terms are defined in context and acronyms are clearly spelled out the first time they are used. Worth a clear 10.

**Format / Presentation:** 1-10 (Best) **10**

**Comments:** A very simple black, grey and red color palette is used which compliments and incorporates the red RSA logo and seems to add a sense of drama and urgency to the white paper, as the use of red usually does. The red motif is also well incorporated into graphics as well.

The titles and subtitles, appearing in both the body of the white paper as well as the brief summary table of contents are compelling and entice the reader to read more. While a section title such as "Introduction" is hardly an attention-grabber a subtitle such as "Hackers are not the only threat - or even the most dangerous" or "Legal liability for disclosure is increasing" definitely demand the potential reader's attention and pull them quickly into the white paper.

Two solutions to data encryption are offered and a very logical presentation, in graphical form supported by the text, of the advantages and disadvantages of each are presented clearly.

When the profile of RSA and how they can solve the readers' problem is presented at the end of the document it is introduced as a matter of course, supported by an excellent, all-encompassing graphic. The graphic includes products and services of immediate interest to the reader as well as the full spectrum of RSA products and services in the security space. The RSA Security Solutions section of the document, while brief, gives both the reader and RSA full value in terms of starting or continuing a relationship with RSA: very professionally done and quite understated.

**End User Utility:** 1-10 (Best) **10+**

**Comments:** The content of this white paper is very well organized, presented at a sufficient depth and well written. The pass along value of this white paper is also very high and this is an additional element of white papers that add to their value immensely. Its great to go out on the Bitpipe web site and find a paper that looks interesting, its another thing altogether to receive a copy or link from a colleague with a strong "read this" recommendation. I'd forward it to colleagues, clients, students and other interested parties, and have.

## **Conclusion:**

### **Write The Best White Papers and Dominate Your Market**

The white paper truly is the best way to deliver your technical message to the marketplace. Among the main reasons to write and distribute white papers are:

- Help a Customer or Prospect Make a Buying Decision
- Show Market Leadership
- Establish Market Positioning / Consensus
- Drive Brand Clarity and Stock Value
- Support Sales / Marketing Program
- Open New Markets

White papers can be designed to provide the critical input and influence needed at many different points throughout the customer relationship.

There is nobody more qualified to write your white paper than you or your subject matter experts. The process itself will force you to think through issues and clarify points, ask and answer questions and become more clear in your own thinking. If you hire an outside "expert," there will invariably be things that get "lost in the translation" and the final white paper product may not be as information rich or powerful as it could have been. On the other hand a white paper written by a recognized third-party expert will have an authority and credibility that is difficult to get on your own.

While there are barriers to the "creative process" of writing, such as distractions, writer's block and the like, the creation of a really sound, credible white paper can be somewhat mechanical, with an assured outcome. This white paper describes the tools, procedures and process. If the process of creating and distributing a white paper that makes a positive contribution to your sales and marketing efforts is beyond your abilities, go out and engage the best outside professional help you can find. But, on the other hand, you may decide that you are quite capable of developing the skills needed to write top quality, high impact white papers for the US Market. A budget-conscious middle ground is to engage a professional to be the coach and mentor during a white paper project or two with the idea that during the process there will be a knowledge transfer which will empower your team and make them more self-sufficient for future projects which may be done more cost effectively in-house.

Now is the time for action. Armed with the information from this white paper and the dozens of ideas that, no doubt, are swirling around in your head, and irregardless of whether you buy it or build it, go out and create white papers for the US IT market.



## Appendix A: References

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### Useful Books on Writing

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Lanham, Richard A. *Revising Business Prose*. 4<sup>th</sup> ed. New York: Allyn & Bacon, 1999.

Strunk, William and E.B. White. *The Elements of Style*. 4<sup>th</sup> ed. New York: Allyn & Bacon, 2000.



