White Paper Outlines

“‘Begin at the beginning,’ the King said, gravely, ‘and go on till you come to the end; then stop.’”
—Lewis Carroll, Alice’s Adventures in Wonderland (1865).

The outline is both the beginning of your white paper journey and your map to the end. Follow the agreed upon path and your destination will be clear. Perhaps the most important part of the white paper process is developing a compelling outline and obtaining the appropriate approvals before setting pen to paper or fingers to keyboard.

Think of the outline as an architectural blueprint that guides the development of your paper. This chapter will focus on different approaches to white paper outlines, present possible content sections and provide practical examples.

READER-FOCUSED WHITE PAPERS

When writing the outline, you need to come to the table with a general white paper approach. There are two primary ways to write white papers: (1) by focusing on your self-interests or (2) by concentrating on the interests
of your readers. The self-interest approach focuses \textit{exclusively} on a product, service or solution by expounding on its benefits, features and implications. While effective in some circumstances, this approach is best used in something other than a white paper, such as a data sheet or product brief.

The self-serving approach is often focused on the mistaken belief that people like to read details about why your product is the best thing since the invention of the Internet. This method is an ineffective approach to writing that turns many readers off immediately.

If you want prospects and customers to actually read the paper, you should try to gain affinity with them right away. It should be noted that it is perfectly appropriate to touch on features and benefits if they are carefully crafted into the white paper.

The alternative approach, and the one I strongly recommend, is to focus on the needs of your readers. This can be effectively accomplished by leading with the problems your solution overcomes, rather than the actual solution itself. To many people, this seems counterintuitive, but it really is just the opposite. \textit{By focusing on the pain points experienced by the reader and talking about the problems caused by those pains, you are establishing credibility with the reader and simultaneously filtering out unqualified customers.}

Consider the two examples in the box on the next page. Example A mentions the problem, but it is tainted by self-serving references to the company and the product. Contrast that with Example B, which focuses exclusively on the problem and hints at the solution in a broad sense.

Readers will feel more inclined to read Example B because it seems more educational to them. They have the chance to learn about a new technology that could solve their problem. With Example A, they learn more about the company and the product and less about the solution. Readers of Example A may never get to the point where they understand what the solution is. By
describing problems, you are really developing an important affinity with readers.

**EXAMPLE A:**
*Title:* Groundbreaking TechWidget by XYZ Company Solves Time Management Dilemma!
*Opening Sentence:* XYZ Company has done it again! Another great TechWidget invention can help you overcome time management challenges.

**EXAMPLE B:**
*Title:* Solving the Time Management Dilemma with Technology
*Opening Sentence:* If you find it difficult to manage your time effectively, a new class of technology products may be the solution you are looking for.

You can take it a step further by looking at issues such as historical precedence, describing new classes of solutions that address the problems and even identifying what to look for in a solution, while never once mentioning your product name or company (at least not yet). This altruistic approach will score major points with the reader and greatly increase the likelihood he or she will actually read the entire paper.

**What Type of Writer Are You? Wisdom From the Lord of the Rings**
During your journey as a writer, projects may have provided you beautiful and safe Rivendell-type opportunities. If you are experienced, you have also stumbled into the dark, dangerous and unfamiliar

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Helm’s Deep. Perhaps your journey is just beginning or you are well on your way, but the destination is unclear. Are you an "Aragorn," "Legolas" or "Frodo" writer? Each has a unique style and advantages suited to specific types of writing. Much can be learned from J.R.R. Tolkien’s epic The Lord of the Rings characters.

**Aragorn:** Writing for kings: The leader of the Rangers and the future king of Gondor, Aragorn is a knowledgeable warrior, pathfinder and healer. Able to focus on big issues and leadership, an "Aragorn" writer looks at the big picture and focuses on challenges that are relevant to leaders. The "Aragorn" writer avoids features and technical discussions while focusing on problems, benefits and implications. If you are "Aragorn," you speak a language that is easy to understand and get to the heart of critical matters quickly.

**Legolas:** Writing with precision: Legolas, an elf, is fast, calculating and possesses incredible vision. He is always the first to draw an arrow in battle and knows how to thread his way through the most treacherous forests, noiseless and unseen. "Legolas is a scout, a hunter, a woodland elf, with deep personal connections to the natural world, but not to the policies, lore, history and problems of the lords and stewards of his race." The "Legolas" writer is one who demonstrates how things work in detail. If you are a "Legolas" writer, you are able to transcribe the most technical processes with a keen ability to convey the innermost workings of any topic.

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Frodo: Writing to bridge worlds: Frodo, a hobbit, was chosen to step outside the comfort of the Shire and into very foreign places that required an open, sharp mind. When encountering other races, Frodo tries to speak their languages and observe their customs. His uncle, Bilbo Baggins, reminded him, "You step into the Road, and if you don’t keep your feet, there is no knowing where you might be swept off to." The "Frodo" writer lives in both the world of Aragorn and the world of Legolas. Able to bridge technical concepts and higher-level benefits, the "Frodo" writer is able to address the how and the why. If you are a "Frodo" writer, not only do you speak and translate technical processes, you can understand and convey higher-level benefits.

OUTLINE INGREDIENTS

The goal of most white papers is to gracefully lead the reader toward the conclusion that your product or service will best meet his or her needs. To accomplish this, you must substantially make your case.

Adopting the problem-solution approach to writing white papers is a very successful model. Simply stated, by leading with some challenges faced by your readers and suggesting how to solve their problems, you can develop a compelling white paper that engages readers.

As a good salad has the proper mix of greens, vegetables, meat and spices, so must a good white paper contain a balance of different ingredients to appeal to the taste of your readers. Here are a few areas that may help you add substance to your outline:
The Greens: Core Elements of Most White Papers

A good white paper will include many of these five basic elements: (1) a challenge, problem or need, (2) a solution, (3) the benefits of the solution, (4) a list of considerations when examining a solution and (5) the specific advantages of your product or service. What follows is a brief explanation of each of these essential elements.

**Problem:** Often, white papers lead with challenges faced by the ideal reader. By discussing problems faced by your reader and the implications of not dealing with those challenges, you set up an opportunity to reaffirm the reader’s concerns and reveal new issues that may not have been considered. The goal of discussing challenges is to build affinity with your readers.

**Solution:** The next logical step after laying out a challenge is to introduce the solution. Solutions can be generic or specific. For example, push-to-talk technology may be a generic solution to improving field worker communication. The Nextel network may be a specific solution. If the paper is educational in nature, introduce the generic solution before the specific solution to remove the appearance of salesmanship.

**Benefits:** A good discussion around the benefits of a solution is always a useful addition to a white paper. The benefits should be directly related to the problems you put forth. For example, if your problem is that employees are spending too much time surfing the web and you have introduced a tracking solution that monitors employee surfing habits, a benefit might be, “Deters employees from viewing inappropriate web content.” Benefits should be mentioned in a solution-agnostic manner.

**The “What to Look for” Pitch:** An overview of important considerations when seeking a solution is an effective way to add substance to a white paper. This section of your paper can be “the buyer's guide” that helps your readers set up a standard by which all of your competitors will be judged. This is a great opportunity for you to
toot your own horn and get away with it. For example, you might state that it is important to work with a company that has an established client base and a global support team. You could explain these benefits and ultimately knock your smaller competitors out of the equation for the reader. This should all be done at a high level without getting into the specifics regarding your company or product. It is useful to note that you can focus on both corporate and solution-specific items on your list.

**Specific Advantages:** After a generic solution has been explained, it may make sense to clarify the specific advantages your product or service brings to the market. There is a slight distinction between benefits and specific advantages. Benefits should be generic to the solution and specific advantages should be highly related to your product or service. For example, if your paper is discussing the advantages of training employees to be accountable in the workplace, a benefit might include a statement such as, “Individuals display a willingness to answer for the results of their actions.” A specific advantage of your training program might be, “XYZ solution includes metrics for measuring employee acceptance of accountability.”

**The Flavor: Additional Outline Topics**

If you want to take your white paper beyond the basics, there are many additional sections that can be added to augment some of the core elements outlined above. The following list is not exhaustive and not all of these topics are appropriate for any single white paper.

**Market Drivers:** A persuasive white paper might reveal a need by building a solid market driver or trends section. Market trends tend to be used early in the white paper to demonstrate the key market movements that justify examining a solution in detail. For example, a white paper on network security might examine the number of recent network attacks and cite specific
analyst research that predicts a future, increased need. Whenever possible, market trends should reference third-party research.

**Historical Overview:** A historical overview can be a powerful addition to your white paper. In the world of technology, it’s useful to discuss what has led to the modern-day dilemma addressed by your solution. Take, for example, the topic of multimodality. Briefly, this new technology allows mobile callers to talk on their cell phones and simultaneously interact with the onscreen display. A historical overview section could focus on how consumers have moved from touchtone dialing to text messaging to mobile applications and ultimately to converging next-generation solutions. The objective is to show how the needs of users have evolved and to set the stage for your new technology.

**How It Works:** If your paper is technical or on a process-related topic, a section describing how your product works may be in order. Diagrams can be used to augment your writing and can visually convey the steps or components involved with a solution. For example, if you are writing about how hosted e-mail services are ideal for eliminating spam, it may make sense to create a section that demonstrates how the model works.

**Examples:** It is always useful to explain situations where your solution would be particularly effective. You can be as specific or as generic as you like. Sometimes it is helpful to talk about specific industries where the solution works well. Other times it makes sense to talk about specific customers who have found success with the product.

**Tips:** If you are writing a white paper that is educational in nature, it may make sense to include a section on tips or pitfalls to avoid. Some examples might include ten tips when hiring a subcontractor or what to avoid when incorporating. These tips can be treated as sidebar material or integrated into the paper.

**Comparisons:** For some white papers, doing side-by-side comparisons of two options, or the pros and cons
of a product or service may be appropriate. This can be a useful tool to quickly identify the advantages of one product over another.

**Features**: Features belong mostly in documents other than white papers, such as brochures and datasheets. However, when implications are added to the list of features, they may be appropriate for some white papers. For example, if your product features easy-to-use wizards, an implication might be a boost in productivity by offloading technical experts. Features may also be discussed in a technical white paper. Features are best conveyed in a table or a bulleted list.

**A New Class of Products**: You may need to write about something that has never been addressed in the unique way you need to address it. In these circumstances, it may make sense to introduce your solution as part of a new class of products. This can be very powerful because you have an opportunity not only to name the class, but to define its key characteristics. For example, one of my clients developed automated software that responds to emails using artificial intelligence, which in turn offloads support staff. We coined the term *virtual support teams* and it stuck in the industry. When you create a new class of products, you can refer to the benefits of the class and even address specific minimum requirements for a product to be part of the class.

Be sure to examine Chapter 8 for an in-depth examination of many of the possibilities addressed above.

**OUTLINE TEMPLATES**

What follows are some proven white paper outlines that you can apply to almost any type of white paper. These outlines can serve as templates for writing your white paper and help guide you throughout the entire process, from interviews to writing.
Standard Business Benefits Paper

The following outline is appropriate for a 6- to 10-page white paper that is educational in nature and focused on business benefits.

**Introduction:** Introduce the high-level problem and the high-level solution in the first few paragraphs

**Market Drivers:** Discuss what is driving the market toward your solution

**Problems:** Identify the top 3 to 5 issues related to the high-level problem

**Generic Solution:** Introduce the solution in a generic way
- **Define:** Clearly define the solution
- **Benefits:** Explain how it overcomes the problems listed earlier
- **What to Look for:** List top 10 considerations when looking for a solution

**Specific Solution:** Discuss the specific advantages of your product, service or solution

**Call to Action:** Provide a logical next step and include company contact information

The standard business benefits white paper starts with a quick introduction of the problem and solution faced by your ideal reader. The market drivers discussion examines trends in the market that reveal a need. This section can be placed before or after the problems section depending on where it best fits. Sometimes market drivers are meant to pull a reader into the paper and other times they work well as a transition to the solution. The problems section should address the challenges faced by your ideal reader when he or she does not have a solution similar to yours in place.

When introducing the solution, it is best to use generic concepts. Rather than mentioning your product name, introduce the category it falls in. For example, rather than “Motorola’s Bluetooth Car Kit,” lead with something
like “wireless automotive solutions.” When defining a solution and discussing its benefits, remain category-focused rather than product-focused. Thus, examine the key components of your generic solution and how it helps overcome the identified problems.

The “what to look for” list should focus on key considerations when seeking a solution. The specific solution should only touch on the high-level advantages of your solution, rather than hitting the reader over the head with excessive details that belong in a different document. The conclusion should include a clear call to action, such as a web address that readers can visit for additional information.

Longer Business Benefits or Hybrid Paper

The following outline is appropriate for a 9- to 15-page white paper that is educational in nature, focused on business benefits and that provides some technical details.

**Introduction:** Introduce the high-level problem and the high-level solution in the first few paragraphs

**Market Drivers:** Discuss what is driving the market toward your solution

**Problems:** Identify the top 3 to 5 issues related to the high-level problem

**Historical Approach:** Talk about how challenges have historically been addressed

**Generic Solution:** Introduce the solution in a generic way

- **Define:** Clearly define the solution
- **Benefits:** Explain how it overcomes the problems listed earlier
- **What to Look for:** List top 10 considerations when looking for a solution
- **How It Works:** Describe how the solution works or its process
- **Examples**: Provide some case studies or hypothetical examples

**Specific Solution**: Discuss the specific advantages of your product, service or solution

**Call to Action**: Provide a logical next step and include company contact information

Three key elements were added to this outline that take it beyond the standard business benefits white paper: the historical discussion, how it works and examples. Not only does this increase the length of the white paper, it provides a bit more technical depth than a standard business benefits white paper.

The historical approach is very helpful when your solution takes existing products to the next level of evolution. For example, if you are writing about laptop computer security, you might want to talk about how security has evolved from simple password protection to integrated thumbprint readers. When discussing how things work, it is often helpful to describe processes and enhance the section with diagrams.

When providing examples, consider sticking with hypothetical applications of your solution to avoid the need for legal approval from customers, which is typical when disclosing details about a specific company. For example, if Microsoft is your customer, you might say, “A leading software developer achieved significant benefits...”

**Technical Paper**

A technical white paper is usually focused on describing a process or procedure. The problem-solution approach can still work well for technical papers. Here is a sample outline that would be very effective for a technical white paper:

- **Introduction**: Introduce the technology
- **Market Drivers**: Discuss the challenges that are driving the need for your technology
Historical Approach: Talk about how technical challenges historically have been addressed
Specific Solution: Discuss the specifics of the process or technology
  • Define: Clearly define the technology
  • Benefits: Explain how it overcomes the problems listed earlier
  • How It Works: Describe how the solution works
  • Applications: Illustrate how the technology could be applied
  • Key Features: Discuss some of the major features
  • Comparisons With Alternatives: Discuss the competitive advantages to alternate technology
Conclusion/Call to Action: Summarize the paper topics and include company contact information

The above outline would be appropriate for a rather large technical white paper. For a smaller white paper, consider removing the historical approach, comparison with alternatives and applications. A technical white paper places the problems portion of the discussion in the market drivers section. There is also no need to generically introduce the solution in a technical white paper. This type of paper is usually used after a sales engagement has begun with a prospective client, meaning clients are in the analysis stage with your specific solution. The “How It Works” and “Features” sections of a technical white paper are typically a very large part of the paper.

GETTING APPROVALS

Once you have developed the outline, an important next step is to assure the appropriate people approve it before you begin interviewing or writing.

Often, the person who is your primary interface or project lead is not in a position to approve the direction of your paper. For freelance writers, the marketing commu-
ications manager is usually the internal champion for white paper projects. However, it is typically a product line manager or vice president of the company who has requested the white paper be created. It is critical that these key people have a chance to approve the target audience, objective and outline prior to your performing any additional work.

Getting critical buy-in early is important to reduce the likelihood of surprises later in the project. For example, if the CEO has approved the outline and later decides the approach should be changed once a draft has been written, remind your key contacts that the direction was blessed before you began writing. If you are an outside contractor, this is your opportunity to explain that a scope change will incur extra expenses.

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This chapter introduced the value of reader-focused white papers and the core elements of most white paper outlines. Once the outline has been developed and approved, the next step is to begin asking many questions. The next chapter will reveal the value of interviewing and introduce many tactics to improve the results of your discussions.