BEFORE YOU EVEN START

So you're ready to start a whitepaper!

First, make sure everyone working on it — the copywriters, the designers, the content marketers, and more — have a clear understanding of what they want the whitepaper to accomplish. This will ensure everyone is working toward the same goal, saving everyone lots of time.

In two sentences, can you explain the purpose of the whitepaper and the goal it is trying to achieve? You should know the answers to these questions to help inform the purpose.

- How is the whitepaper fulfilling the objectives of your content strategy? How are you targeting an audience's needs?
    - Who is the intended audience? Be specific. Like real specific. (i.e., "Digital marketers" isn't going to cut it. Think strategic stakeholders, technical stakeholders, user stakeholders, targeted industry, targeted marketer size, SMB vs. Enterprise, etc.)
    - Is this whitepaper trying to push a specific narrative that changes a reader's perspective on a particular topic?
    - Are you simply trying to clue readers in on a complicated topic?
    - Are you addressing solutions to the pain points of a particular persona — essentially a how-to guide?
    - Are you meeting the needs of your audience at a specific point in the buying cycle?
    - Are you just trying to position your brand as a thought leader in the sector?
- Besides lead generation, are there any other direct metrics that will constitute success for this whitepaper? Be as specific as possible, so you'll have a definitive starting point to use when measuring campaign success.

Whitepaper PURPOSE: [Enter here]

DON’T SKIP THE OUTLINE!

An outline will save time and ensure the best possible content. It will expose gaps and unnecessary content, making it MUCH easier to change direction early on. The last thing you want is to start from the beginning after the whitepaper has already been written. Here are some guidelines to follow:

- **Map out sections and subsections.** Don’t expect audiences to read more than just your section headers and subheaders. Thus, make sure these are as relevant, enticing, and targeted as possible. If skimming the outline provides a compelling narrative and insightful action items, you’re off to a great start. Make sure each section of the whitepaper is mapped out in an order that showcases how you'll be using the whitepaper to progress, and eventually prove, your argument.
- **Collaborate with the team and plan on many revisions.** Make sure to include feedback from a regional approver, a PMM/marketing expert as needed, and the marketing director to make sure your whitepaper plan is on target.
- **But it’s just a blueprint.** Follow the outline — but maintain some flexibility to change it during the writing process. Sometimes it takes writing the whitepaper to understand what’s working and what isn’t.

OUTLINE (Don’t forget to include full section headers and subheaders, feel free to have more than 3 headers and 6 subheaders if the piece demands it.)

I. Background/Problem: Header (30 characters or fewer for all)
    A. Subhead (60 characters or fewer for all)
    B. Subhead
II. Solution: [Header]
    A. Subhead
    B. Subhead
III. Conclusion: [Header]
    A. Subhead
    B. Subhead

SEVEN WHITEPAPER GUIDELINES

1. **Use a linear, logical approach.** This means it must *attract* the right audience, *engage* your reader, *inform* your reader, and *convince* your reader.
2. **The *title* is key to success.** (See next page)
3. **Remember the 3-30-3 Rule.** You must earn a prospect's interest within the *first three seconds*. If you do, then you get *30 more seconds* to convince them the whitepaper is worth their time. If you convince them, then you have *three minutes* to make your main point.
4. **Write in the language of your reader.** This can only happen if you truly know who your audience is. (e.g., strategic stakeholders, technical stakeholders, user stakeholders)
5. **Be knowledgeable and principled.** Mention ALL solutions, not just yours.
6. **Graphics are content.** Don't make them look like a sales brochure. Make them useful and informative.
7. **Keep branding subtle.** Put your logo on the front cover. Include your boilerplate at the end, and provide relevant details about your product in the conclusion. Leave it at that. When it comes to whitepaper branding, less is more.

WHITEPAPER TITLE

The title is the most important part of the entire whitepaper. It can make the difference between being ignored and a download. Here are some tips for writing a killer title:

Answer the following questions to start:

- Who is your target audience?
- What are the greatest pain points, needs, and/or interests that this whitepaper addresses for them?
- What are you providing in this whitepaper that your audience cannot get elsewhere?

Grab attention with a bold title. Ensure your title represents what is truly in the whitepaper. And remember, focusing on your audiences' needs versus your own will keep us on a track to success. Unless intended for a highly technical audience, avoid jargon, and stick to clear and easy to understand language. (e.g., ~~incrementality~~)

Keep your title short, simple and to the point. Less is more. Keep your titles under 55 characters. Take the time to create a short, more powerful title. Having trouble shortening the title? Break it into sections with a colon, or insert a subtitle that can be more descriptive. Avoid the urge to be clever — titles that are easy to scan are the most downloaded.

Offer specific advice on actions to take. If you can add "-ing" to the title, you're probably offering a solution to people (e.g., eliminating, improving, building, delivering, saving). It should help people do their job better.

Consider search engine optimization (SEO). Tap into tools such as Google Keyword Planner, SEMrush, and Buzzsumo to see which words and phrases align the most with your topic.

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[Page #] CHECKLIST
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[Page #] GLOSSARY
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- Subhead

Executive Summary/Abstract

by [senior leadership]

The executive summary is another opportunity to grab readers' attention and convince them your whitepaper is worth their time. Spend time developing a concise and hard-hitting abstract.

IMPORTANT! Write the abstract AFTER completing the whitepaper.

GET TO THE POINT RIGHT AWAY. Your readers are busy.

Include the most attention-getting findings, insights, and recommendations. Ensure that the abstract provides the following information:

First paragraph

- The first paragraph needs to grab attention and make a strong first impression. Consider a controversial or bold statement. (e.g., "There's a good chance you're wasting money on useless attribution models.")
- **What audience pain or need is trying to be solved?** Set it up in the first paragraph.

Second paragraph

- Introduce the author in the second paragraph and why they are the most qualified to write this piece, whether through author credentials, a survey run, data pulled, etc. (e.g., "As AdRoll's head of marketing, I have a rare perspective when it comes to attribution.")
- Why should anyone read this whitepaper? **Why is it different than anything else written?** Give your audience a reason to take time out of their busy schedule to read your whitepaper.

Next paragraphs

- Briefly introduce any methodology you used in your analysis.
- What are the most compelling and/or surprising statistics?

Finish by teasing the whitepaper's conclusions and recommendations. Explain why an audience should accept your proposed solution and reject other possible conflicting ones.

Keep it short, simple, and to the point. Try to hit 250 to 350 words. Put the entire abstract on one page. (You can use the page as a separate PDF for your sales team to send to prospects and add a call-to-action linking to the full whitepaper.)

DESIGN ELEMENTS

PULL QUOTE: [Paste most compelling sentence here.]

Problem Statement

Personalize the problem for your audience. This is where knowing your specific audience is key. Clearly highlight the specific, major problems that your audience deals with. You should be able to phrase this in a few words. (e.g., “low return on investment”, “unmanageable tech stack”, “too many attribution models”)

Try to answer all these questions. You may need multiple sections to fully flesh out the entire problem.

- What is currently happening in the market today? Give details about how you concluded this is a problem.
- How did this become a problem? Give a historical overview.
- What are companies and/or individuals struggling with most, and why?
- What are the specific problems, needs and/or pain points?
- What data help to support answers to the above questions? Show examples of the financial, time, emotional, and business growth effects of the problem.
- What frameworks and/or models can be used to enhance readers’ understanding of this information?

Use solid data. To make the argument credible to readers, back up all claims with reputable evidence. Findings should be able to be reproduced through the analysis conducted. It can also be good to have real-world examples sprinkled throughout or in a customer section at the end.

End by addressing the benefits of solving these problems. What are the potential benefits of addressing these problems, needs and/or pain points? Answering this question will help readers understand why your solution is of value; and, more importantly, entice them to continue reading.

DESIGN ELEMENTS

PULL QUOTE: [Paste most compelling sentence here.]

CHART/INFOGRAPHIC/TABLE: List any charts, infographics, tables, or other design elements you want to help illustrate the problem.

GLOSSARY TERMS: Highlight any industry jargon and provide a definition in a Google doc comment. You will compile them into a glossary at the end of the document.

Solution

Introduce the solution(s) for each problem(s), including a clear definition and even a framework or model. Briefly reference the pain points discussed previously.

Provide a thorough, step-by-step plan of action, which clearly explains how to implement the solution(s). Divide content into digestible parts, such as bulleted lists, to draw distinct boundaries between different parts of the solution.

Use sub-headers to make it easy for readers to follow your thought process.

Be very clear regarding the benefits of each of the solutions, including how it specifically impacts your audience. Target your solutions to different segments of your audience to improve your content's relevancy.

Provide specific, real-world examples to support your solution(s). Try to provide examples targeted for different buyer personas. These examples provide opportunities to connect with different segments of your audience.

- Link to other relevant content throughout the whitepaper, add UTMs wherever appropriate.

Create a figure and/or table as a stand-alone sheet to help readers visualize your solution(s). This sheet can also serve as a one-sheeter asset for your sales enablement efforts.

Consider providing a concession statement paragraph that acknowledges contrary viewpoints on the solution(s) to lend credibility and foster trust.

End by referencing the negative feeling that these pain points bring, how the solution(s) fixed this, and the main benefit(s) of solving these problem(s).

DESIGN ELEMENTS

PULL QUOTE: [Paste most compelling sentence here.]

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Conclusion

You started by telling readers what you were going to tell them. Then you told them. You'll conclude by telling them what you just told them — hammering home the main message a third time. Summarize these sections:

- Review the problem.
- Recap the solution.
- Re-emphasize the benefits of the solution and how it solves the problem.

Finish with a strong statement. This might include a vision of future solutions, how your readers can develop new solutions on their own, or where they can go for additional information and resources.

- If you choose to slip in a plug for your product or company, keep it relevant and subtle. Remember, you're focusing on solving someone else's problem, as opposed to promoting a product or service for personal gain.
- Consider curating expert content: Back up your message by including content from subject matter experts by getting quotes directly from them or curating their content. Be sure to follow ethical best practices for curating content, such as linking back to the original source, only taking a small portion of curated content, and adding your own annotation.
- Always add a link to another relevant piece of content, be sure to include UTMs.

DESIGN ELEMENTS

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Glossary

Provide a glossary of definitions at the end of the doc. The thought is that these are thought leader pieces — essentially mini-textbooks. It would be best if you continued to work on educating your audience.