Chapter 10

Formatting the White Paper

“It’s all right to have butterflies in your stomach. Just get them to fly in formation.”
—Dr. Rob Gilbert

The visual appearance of a white paper is just as important as the actual words you write. To pull readers into a white paper, it should be visually appealing.

If you look at enough white papers, you will begin to see they share common formatting. Usually, white papers use generous white space—the area around the text—and include light graphical treatments.

White papers should avoid the overuse of graphical elements. If they approach the higher-end look and feel of a brochure, white papers will lose their perception as educational pieces and instead be viewed as marketing or sales documents by your readers. This is an important point: You want the white paper to look attractive, but if it is too attractive, it will not be read.

This chapter will quickly touch on the key formatting elements of a white paper.
COVER PAGES

The traditional white paper includes a cover page. The core elements of a cover page include the white paper title, subtitle and date. Some white paper cover pages also include an author name, brief table of contents, an abstract and a copyright statement. Graphical treatments may also be added to a cover page to make it more attractive to the reader (see Figure 1).

Cover pages are becoming less common for white papers, especially shorter ones. The cover page can sometimes prevent a reader from diving into the white paper. If the layout or the few words on the cover page do not grab readers, they may never turn the page and begin reading your work.

![Sample cover page](image)

**Figure 1:** Sample cover page
The alternative to a cover page is to simply include your title and subtitle at the top of the first page of your document. Follow immediately with the opening paragraphs of your white paper. This is advantageous because readers will start reading the white paper in seconds and hopefully be lured deeper into your document.

ILLUSTRATIONS, CHARTS AND PHOTOS

Because white papers are very heavy on text, it makes good sense to try to break things up by adding some graphical elements. The most logical places to include graphics include the market drivers section and the places where you discuss your solution. In the market drivers portion of your white paper, you might include charts that show marketplace growth or diagrams that help convey market shifts. In the specific solution section of your white paper, screen shots and photographs of your product are very common.

Photographs can be used sparingly to enhance the story of your white paper. The history section of your white paper is an excellent place to include a photograph. Stock photography can be used to convey a key point. For example, if one of your problems is overworked call center staff, you could quickly locate royalty-free images of people on the phone at a call center. See Appendix III for a list of stock photography sources.

Process diagrams are very useful when discussing solutions (see Figure 2). At its most basic level, a simple diagram can be produced in PowerPoint or Visio and imported into Word or your desktop publishing application. Adobe Illustrator or Photoshop could be used to develop more advanced process diagrams. Ideally, a diagram should be developed by in-house designers or outsourced to professional illustrators.
Figure 2: This process diagram was designed to demonstrate international push-to-talk technology.¹

Another graphical element is the table. A simple table can break up the text in a white paper and help the reader quickly digest information. Tables are well-suited for benefits or "what to look for" lists.

SUBHEADS AND EXTRACTS

As a general rule of thumb with white papers, try to break large sections of content into smaller, easy-to-digest pieces. If you find a section is exceeding four paragraphs, it might make sense to break things down. The easiest way to accomplish this is with subheads. Because many readers are generally skimming white papers, subheads can help them quickly move through the white paper or keep them reading because they see the next section is only a few paragraphs away.

¹ Designed by Court Patton. See his other great work at http://www.pattonbros.com.
For example, if your white paper explores three key problems and the result is ten paragraphs of text, try breaking the content into subsections. Consider leading with a short introductory paragraph and then creating descriptive subheads for each problem.

Text extracts are another way to help readers travel through your white paper. By including a short descriptive sentence in the left margin or embedded in the text, it helps readers understand the section they are about to read or summarizes topics for readers skimming the document. When writing an extract, try to create an original sentence that paraphrases a section of your white paper, rather than copying words directly from your writing.

**USING WHITE SPACE**

White space is the area on the page where there is no text. With white papers, white space should be used generously. Many projects use a wide left margin of 2.5 inches, a 1.25-inch right margin and a 1-inch top and bottom margin. Text extracts are placed in the wide left margin, and the remaining white space enables readers to take notes when they print the white paper.

Adding bulleted lists also helps increase the use of white space. Some writers like to add an extra return after each bulleted item to create more space in a document.

Line spacing is another way to add more white space. Most white papers use single line spacing; however, 1.5 line spacing can help add more room to a white paper that needs a bit more length.

**FOOTERS AND HEADERS**

Most white papers include footers and headers. The first page header is usually distinct, and in some cases may include a document number and publication date.
Information residing in the footer and header depends on the needs of the company sponsoring the white paper. Typically, the header will include a company logo, the title of the white paper and the words “White Paper.” If you have a long title, it is appropriate to abbreviate it in the header on subsequent pages beyond the first page.

The footer usually includes a page number, a copyright statement and a website address. Some white papers also add telephone numbers and document numbers.

COLUMNS

Most white papers are single-column documents. However, for a more formal, newspaper-type look, consider a two-column layout. Most word-processing software can easily accommodate two-column layouts, but the use of a wide left margin in a two-column design can be challenging based on the software’s limitations. In addition, graphics often must be placed at the top or bottom of a two-column layout because of the text wrapping limitations.

DISTRIBUTION: PDF VERSUS PRINT

Once you have completed your white paper, you need decide if you want to print it professionally, distribute it exclusively as an electronic document or do both.

In the past, white papers were offset printed and distributed, similar to brochures. The document would be formatted, laid out in a professional desktop publishing application and sent to a printer. However, white papers often tend to be “living” documents, meaning they are regularly modified and updated as a market or product changes, making the offset printing process overly expensive.
Many businesses simply output white papers on laser printers and staple them together; a very acceptable practice for physical distribution with other product collateral. However, the most common way of distributing white papers is simply as an electronic Adobe PDF document. Because most white papers are sent via e-mail or downloaded from the web, PDF files make perfect sense. In addition, PDF files retain formatting, are easily searchable and can be quickly printed, making them more valuable to the reader.

This chapter provided a brief overview of some white paper formatting tips. Once the paper is complete, you should come up with a marketing plan. The next chapter will introduce some of the many marketing methods available for white papers.