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Teaching White Papers Through Client Projects

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Abstract

White papers are increasingly prevalent in business and professional settings. Although textbook resources for white paper assignments are limited, a white paper assignment completed for a community client can provide a learning experience that students enjoy and that strengthens ties between the university and the community. This article describes a way to approach the white paper assignment in a communications-focused course and identifies resources to support white paper assignments.

Keywords: white papers, classroom practices, client projects, pedagogy, document design

Introduction

White papers are increasingly prevalent in business and professional settings. A Web search for white papers in a technical field, such as -telecommunications or civil engineering, will generate thousands or even millions of results. White papers help companies tell readers about their technologies and their approaches to doing business. While large companies have resources to spend on writing and distributing white papers, smaller start-up companies often lack the expertise and the time to write them. Because white papers are used frequently by people in a wide range of business and industry, developing white papers should be included in business communication coursework. Although textbook support for white paper assignments is limited (McPherson, 2010; Willerton, 2006), a white paper assignment completed for a community client can provide a valuable learning experience that benefits students and strengthens ties between the university and the community. This article describes a way to approach the white paper assignment in a communications-focused course and identifies resources to support white paper assignments.

How White Papers Got Their Name

Most sources that discuss the history of the white paper concur that the document originated in England, and that it was originally intended to convey information on governmental policy. In his dictionary of politics, William Safire (1993) says that in England, a “blue book” is “an extended explanation of government policy bound in blue covers” while a “white paper” is a report too short to be hardbound (p. 874). In recent political usage, a white paper often contains background information and, perhaps, an official statement with the government’s rationale. Safire contrasts white papers, which are sometimes classified (and thus restricted from public view), with unclassified position papers (p. 875). In certain situations in which vendors seek to provide research and development (R&D) for the United States Department of Defense, vendors must submit preliminary technical proposals called white papers (Van Nostrand, 1994). For a more extensive look at the history of white papers, see Thompson (2008).

While documents called white papers continue to be used in government, different forms of white papers have become prevalent in high-tech industries in recent years. The most detailed account I have seen of the white paper’s transition to a technical marketing document was posted on the website for Jonathan Kantor’s consultancy, the Appum Group. Kantor’s consultancy website (Appum Group, n.d.) stated that white papers were first adopted in technology circles by scientists working for the U.S. government on the Manhattan Project to create atomic weapons. Enrico Fermi and J. Robert Oppenheimer are among those on the project who wrote papers on nuclear fission and the scientific processes relating to the development of atomic bombs (Appum Group, n.d.). Kantor elaborated (personal communication, September 15, 2004) -that many of these white papers were written for military personnel who were not trained as nuclear physicists; thus, they are an early example of white papers being used to present technical material to a non-technical audience. Because these white papers contained information with implications for national security, in the U.S. “the term white paper became associated as a document of high importance, usually classified in nature, and often containing detailed technical information” (Appum Group, n.d., para. 6).

In the 1990s, white papers became increasingly prevalent in information technology sectors. According to technical marketing writer Gordon Graham (personal communication, January 28, 2005), at that time companies needed a lot of information to ramp up and deal with big technical challenges like enterprise resource planning (ERP) systems, Year 2000 (Y2K) programming problems, and developments in Internet technology. There were a lot of new, poorly understood technologies out there, but information was hard to find. Thus, people needed white papers to understand technologies and recent trends. Graham explained, “If you have a technological breakthrough that people haven’t used before, and if that is part of your product’s selling point, then white papers are beneficial”.

White Papers in Use

White papers are used in many different industries and settings, and they are used for a variety of purposes. Cynthia McPherson’s recent dissertation (2010) shows that documents called white papers are used in a wide range of fields, for a range of purposes, for a multitude of audiences, and in a range of styles. The definition of “white paper” depends very much on the rhetorical situation for which it is written.

That said, I think the white paper as a marketing document is a form to which many people can relate, and it is the form that will likely resonate with potential clients in the business community. Recent books by Stelzner (2006), King (2006), and Bly (2006) identify white papers as an effective means of marketing for technology companies. Articles in the technical communication literature (Willerton, 2007; Willerton, 2008) provide insight into how white papers are written and read by people in high-tech industries.

About White Papers Written for Marketing Purposes

Marketing expert Janice King’s (2006) list provides a helpful summary of common applications; this is a summary, but her book provides extended descriptions of each type:

- **Technology Briefing.** Explains the underlying technology incorporated into a product.
- **Business Case.** Describes the factors that justify a product purchase from managerial, financial, and operational perspectives.
- **Competitive Analysis.** Discusses the strengths and weaknesses of alternatives in comparison to your product or technology.
- **Industry Trend Overview.** Analyzes current market, operational, or technological trends.
- **Application Digest.** Describes potential applications for a product or technology in a typical customer environment or for different customer types.
- **Planning Guide.** Presents guidelines for implementing a new technology or preparing for future industry changes.
- **Strategy Review.** Describes strategies planned by your company or that are recommended to customers for implementing a product or technology.
- **Issues or Standards Analysis.** Describes the nature of an industry issue or proposed standard, and offers the company’s viewpoint or recommendations for a customer’s response.
- **Survey, test, or research report.** After purchase of reprint rights, a report produced by a market research firm, industry analyst, or testing lab can be presented as a white paper. (pp. 289–90)

King classifies the white paper as a sales document with a “soft-sell approach.” She writes that a white paper should emphasize the topic under discussion; that is, its primary purpose should be to convey information, and to do this with a strong ethos (p. 288). In high-tech industries, effective white papers focus on providing useful information that helps readers learn about a topic or make a complex decision; hard-sell approaches are less successful for white papers (see Stelzner, 2006; Willerton, 2008). While I suspect that some instructors may be uncomfortable assigning and grading a persuasive marketing assignment, they are more likely to be comfortable with a white paper that provides useful information and minimizes the hard sell associated with advertising.

Placing White Papers into a Business Communication Course

The degree to which a white paper assignment fits into a business communication course will depend on two factors: each institution’s overall goals for its business communication program, and the specific objectives for each course within a program. Many business communication programs focus on providing excellent survey courses or service

courses that give students a thorough introduction to common genres and techniques. Because survey courses already have many standard assignments, they might not be able to support a client-focused white paper. Indeed, a white paper assignment might run counter to established programmatic goals in such courses. A program that is able to provide a wider range of courses, such as a program offering a minor or a major in business communication, might find that a client-focused white paper can provide students a valuable learning experience while also strengthening ties between the institution and the surrounding business community.

Just as the uses of white papers vary, the opportunities for including them in the curriculum vary as well. Although marketing white papers don't have all the features of typical reports (McPherson, 2010; Willerton, 2006), they might be useful in a reports-focused class or an advanced class on workplace writing. A senior-level or graduate-level special topics course is another option; my recent experience involved assigning white papers in a graduate class called "Topics in Print Document Production." A capstone course could be an effective place for white papers as well.

Because many students will not have written white papers before, and because successful client-based projects require an extra degree of engagement from students, I recommend using a white paper assignment with students who have already demonstrated their writing ability and maturity. See Kastman Breuch's (2001) excellent article for an overview of several challenges students face when working with clients on projects. Although I suggest teaching white papers when students and clients can meet face-to-face, an instructor could use them in a distributed work environment. Paretti, McNair, and Holloway-Attaway (2007) describe lessons learned from an international collaboration between US engineering students and digital media students in Sweden, in which students produced white papers and websites. The authors suggest that although digital native students who have grown up with computers and mobile phones are comfortable with technology, students in a distributed environment need help learning how to interact effectively, to construct effective identities, and to identify shared goals with collaborators (pp. 347-39).

Recruiting Clients for White Papers

After deciding to have students write white papers for clients, an instructor will need to recruit clients. Instructors might need to try several tactics to identify and get connected with appropriate clients. For this assignment, I think an appropriate client is a company doing business in a high-tech industry; this opens the door fairly wide for opportunities while establishing some limits on whom to work with.

One way to recruit is to get referrals to likely candidates. It is possible that one's institution will have some connections to local companies. At my institution, we are connected to local companies through our Division of Research and Economic Development, through the Small Business Development Center we sponsor, and through a technical assistance program called TechHelp. I got contact information for several clients through our SBDC and TechHelp. Another way is through old-fashioned "cold calls." I had some success through cold-call e-mails to companies at local small-business incubators.

A third way to find clients is to let students suggest them. One student asked if she could work with a web design and marketing company in a distant state, and I agreed. Another way to get clients is to let the "grapevine" identify them. One of our clients, an online-only master's degree program offered in another college on our campus, contacted me after hearing about our project from the SBDC personnel. Finally, an instructor's own network of contacts and friends might identify potential clients.

The timing of the request for client involvement is important. Some clients might be ready to start immediately; others might have to think carefully before committing to the project. I would suggest looking for clients about a month before the scheduled date for students to start their projects. Additionally, I suggest contacting more potential clients than one has students (without committing to working together), in case a client or two decides against being involved.

To screen a list of potential clients, I recommend talking with each one to get a sense of what they want from a white paper. Ask what the potential topic would be, how many pages they expect in length, what kind of graphics they expect, what graphics they can provide, which people in the firm would contribute as subject matter experts, and similar questions. Make sure that each client is aware of your expected timeline for the project, and ask if the client anticipates any problems in meeting it.

For my class, I made preliminary pairings of students with clients, based on my knowledge of each student. I then allowed students to trade clients if they wanted. Only one student requested a switch, and all the other matches worked out well.

Structuring the Assignment

Many instructors who have assigned large projects will break them down into smaller pieces. I recommend a similar approach with a white paper assignment. In my recent class, we worked on white papers over seven weeks, and the project comprised 30 percent of the semester grade. I required two drafts before students submitted the final draft. These drafts made up only small percentage of the course grade, and I graded them quickly on the presence or absence of certain required elements. Stelzner's (2006) book has helpful chapters on developing white paper outlines and on writing the body of the white paper that will help students as they create drafts.

I required students to post to a discussion board in response to prompts about their experiences on the white paper project. Students gave final presentations that summarized what they did and what they learned in their white paper projects. The final draft of the white paper was 20 percent of the semester grade. Certainly, a significant project like this could make up a larger portion of a semester grade if that would benefit students and support course goals.

Identifying Pedagogical Resources

White papers are receiving more attention in professional communication textbooks than they used to, but textbooks provide only an overview. Markel (2010) and Johnson-Sheehan (2010), for example, each show some excerpted pages from sample white papers and provide some general guidelines on writing white papers. While Markel describes white papers as marketing documents, Johnson-Sheehan describes them as impartial briefing documents. As McPherson (2010) notes in her dissertation, textbooks vary in their descriptions of white papers.

I recommend Michael A. Stelzner's book (2006), *Writing White Papers*, for anyone teaching white papers as marketing documents. Stelzner has written white papers for many clients; he also hosts a newsletter, electronic forums, and online seminars about writing white papers. Stelzner provides practical advice for writing each section of a typical white paper, and he provides helpful outlines. The book includes two sample white papers as well. Students in my class enjoyed Stelzner's book and considered it quite helpful. The book does not go into great detail on design and layout of white papers; I suggest having students bring in sample white papers and then discussing their designs in class.

Another book on the market is Robert W. Bly's *The White Paper Marketing Handbook* (2006). Bly has made his career as a copywriter and as an author of books on writing. Bly's book is more about how to use white papers as marketing tools and less about how to write white papers. Bly's book would be useful for a class concerned with marketing strategies and campaigns. The advice Bly gives on writing white papers is similar in scope and content to that provided in King's (2006) book.

Things Students Learn

Students in my recent graduate class unanimously endorsed the white paper project. They clearly connected concepts we discussed in class to applications in their client projects. Students took away several lessons from the project.

First, students got experience in client relations. This includes managing schedules; making visits, phone calls, and e-mails; presenting themselves as professionals; gathering information and feedback from clients; responding to feedback from clients; and managing or preventing client attempts to increase the scope of a project. While many students had easy access to their clients, one student had a client who frequently traveled to trade shows and used an older version of publishing software than we had. Students took their client relationships seriously and worked hard (sometimes harder than I had expected) to be prepared and professional in interactions with their clients. While I required students to show me drafts that I knew would be unfinished and in-progress, some students reported that they hesitated to show clients anything that looked less than finished. Nevertheless, experienced writers learn to work in drafts, and they learn what is appropriate for each client with whom they work. At the end of our project, some students said that they would have benefitted from more in-class discussion on working successfully with clients; perhaps a weekly discussion would be good to incorporate into future iterations of this project.

Second, students got experience writing in a genre that they did not know well. A client-based white paper project has some general guidelines, but the final product must be created by the student in concert with the client. Professionals in many fields often find they must write or produce something they have not done before. Students benefited from the experience of creating a document largely “from scratch,” with the help of Stelzner’s (2006) book. I expect to see some of these white papers in our graduate students’ culminating portfolio projects.

Third, students got to use and expand their research skills in a field that was new to them. Many clients commented that they were impressed with the research that my students did to support their writing. Students went beyond using basic Web sources to finding credible, peer-reviewed sources of information. A fourth benefit, related to the third, was that students had the opportunity to learn, use, and apply the vocabulary from another field in their writing.

A fifth benefit that students received was networking. Each student added to his or her contacts in the community. As part of that, students got to see how each client approaches work and got to see what drives the client. The student who worked with a local inventor, who holds several patents, talked about the “gleam in his eye” as he explained his most recent product.

Finally, students learn that the white paper genre (if it may be reliably called a genre) is flexible and can be adapted to many situations. The white papers the students produced varied in length, in visual design, and in content, but each met the client’s ideas of what a “white paper” is.

Suggestions for Instructors

My first suggestion for instructors using a client-based white paper project is to ensure that the clients can commit to a project that 1) fits the due dates in the course and 2) reasonably resembles a typical white paper. Instructors might go as far as co-signing a letter of understanding with the client. I sent a letter with goals and due dates for the assignment to each client-student pair.

My second suggestion is to help students protect against scope creep, which refers to a significant change, often in subtle increments, in a client’s expectations for a project. While this is an aspect of client relations that students need to manage actively, some students felt compelled to acquiesce to the client’s demands. Instructors should consider in advance whether and how they might intervene. Consider requiring students to send e-mail when they and their clients agree on an outline. The instructor’s periodic communication with clients can help students as well.

My third suggestion is to help students establish a distinct conclusion to the project. Some clients may want students to make further changes or to work on other projects for them. One way to conclude the project is to send each client a letter thanking them for their involvement. An assessment of some sort (questionnaire, online survey) can help instructors improve the process for the future while also reminding clients that the project has finished.

Conclusion

The assignment to write a marketing white paper for a client provides students several opportunities to learn and grow. Such an assignment can also strengthen ties between the institution and the business community. Students will benefit from the experiences gained in a white paper project, and they will enhance their portfolios with the addition of a current, valuable document.

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