

into the top of the funnel where leads are generated. If you try to use one for that purpose, you'll likely be disappointed.

If your company is an industry leader that doesn't have to work hard to attract prospects, the background can be an ideal white paper. Smaller vendors, be warned: If your firm has to work hard to attract recognition and if you're seeking to generate as many leads as possible, don't use a background to achieve those goals. You can get much better results from a problem/solution white paper (which I discuss in Chapter 8) or even a numbered list (which I cover in Chapter 7).



## Planning a Background

Publishing any white paper involves three major phases: planning, producing, and promoting. Parts III and IV of this book go into each of these phases in great detail, even breaking them down into a step-by-step plan. This section covers key areas in planning a background, namely the following:

- ✓ Gathering the essential information you need
- ✓ Allocating pages
- ✓ Choosing an appropriate title
- ✓ Setting the right tone

## Gathering essential information

This section is all about the background you need for your background. (I could get all postmodern about that, but I'll restrain myself.) In any case, you need to know five key things to help plan an effective background:

- ✓ Your intended reader(s)
- ✓ The purpose of the background
- ✓ The key features of the offering
- ✓ The key benefits of each feature
- ✓ The call to action at the end

The following sections discuss each of these items in turn. Until you uncover these items and make a plan for your background, don't even think about starting to write. You write during Phase 2 (see Chapter 13) when you actually produce your white paper.

### Your intended reader(s)

To help target your background to the right audience, identify your ideal reader as specifically as possible. You can use the following four categories to help specify your target readers:

- ✓ **Company:** Find some sense of the size, vertical market or sector, and location of the company where your intended reader works. For example, your reader may work at a Fortune 500 company in the Midwest that makes finished wood products, like doors and windows.
- ✓ **Demographics:** Dig up hard facts, such as the age, sex, education, and job title(s), of your target readers. For example, your readers could be C-level executives in their 50s, most often male with engineering degrees or MBAs. To find these kinds of facts, ask your sales, marketing, customer service, or technical support teams, or anyone else who has daily contact with your actual customers.
- ✓ **Psychographics:** Sketch in some of your target audience's attitudes, such as their experience, interest in your offering, and workaday stress. For example, your readers could be aware that their teams are drowning in paper but skeptical of hardware solutions and not keen to make any new capital expenditures. Because everyone is different, your guesses here may be all over the map. That's okay, because thinking about these things is better than remaining blissfully ignorant of them.
- ✓ **Technographics:** Imagine how your target readers will likely access the background — whether through a desktop, laptop, tablet, or mobile device. For example, you may assume that 80 percent of your target executives never leave their office until they're done working for the day and don't own an iPad or any other kind of tablet; in other words, the vast majority of your target readers will view your white paper on a desktop or as a printout. If you really have no idea, it's probably fair to say that some will use each class of device.

The main difference between a desktop, laptop, tablet, or mobile device is that each device has a smaller screen than the one before it, so someone reading your white paper on a desktop with a large screen has a much different page view than someone reading from his mobile phone.

Remind your white paper designer of these technographics during the design phase. Knowing how readers will likely view your white paper on-screen may well affect how the designer formats the pages, how many columns and graphics he uses, the colors he chooses, and so on.

If you have any secondary audiences — those who have the background passed along to them or are desirable but not essential readers — define them as well. For example, your secondary readers may be female department managers in their 30s and 40s whose teams are buried in paper files and forms. You may consider these readers secondary because they're not in a position to buy from your company, but they may be in an ideal position to recommend a purchase to help solve their department's problems.

