



# **From Avoiding the Pitfalls to Achieving White Paper Success**

**A Guide for B2B Small Business  
and Marketing Entrepreneurs**



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# Executive Summary

## The Pitfalls

White papers are a time-tested tool for business-to-business (B2B) marketing.

Yet, as with any business project, too many of these projects fail. They just do—for a variety of reasons.

Research by experienced white paper and project management experts suggests that we can trace the failure of white paper projects to combinations of pitfalls:

- limited or ineffective teams, skills and resources employed in white paper planning, production and promotion, or
- the absence or breakdown of a straightforward and effective process.

Also, for too many marketers, especially those in small businesses, white papers are a luxury you can't afford!

Still, you know something about the importance of white papers as a B2B marketing tool. You understand they are a proven tool for complex and high-dollar B2B sales. You may even have seen a competitor produce a white paper.

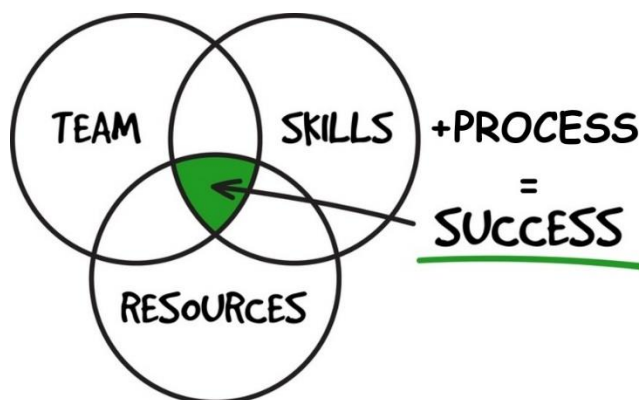
But you don't have the experience of creating a successful white paper, or maybe any white paper at all, for that matter! Where do you turn?

## A Formula for Success

You can avoid many of these failures by following this formula for success:

$$(\text{TEAM} + \text{SKILLS} + \text{RESOURCES}) + \text{PROCESS} = \text{SUCCESS}$$

So, what would an ideal white paper publishing process look like?



You are looking for a process built on a foundation of success, created and honed by experienced, successful white paper practitioners.

This process should encompass all three phases of planning, producing and promoting a white paper.

It should supplement your team, skills, and resources with a skilled team of white paper experts, providing a wealth of integrated, ready-to-use planning, production and promotion resources.

Now is the time to discover a clear-cut, robust, success-generating white paper process.

But how will you know when you find what you need? How can your small business achieve the benefits of a compelling white paper? Keep reading...

# Why White Papers Fail

White papers are a time-tested tool for business-to-business (B2B) marketing.

A white paper helps a businessperson understand an issue, solve a problem, or make a decision. These concerns are not like buying a coffee machine for the office. This situation is like purchasing enterprise software where your clients may bet on the company's future and spend millions of dollars or more. That's where white papers make their impact.

Compared to other marketing collateral, white papers are generally large, complex, and demanding projects requiring much effort and expertise.

## What? White papers fail!

As with any project in business or life, too many white papers fail. They just do--for many reasons.

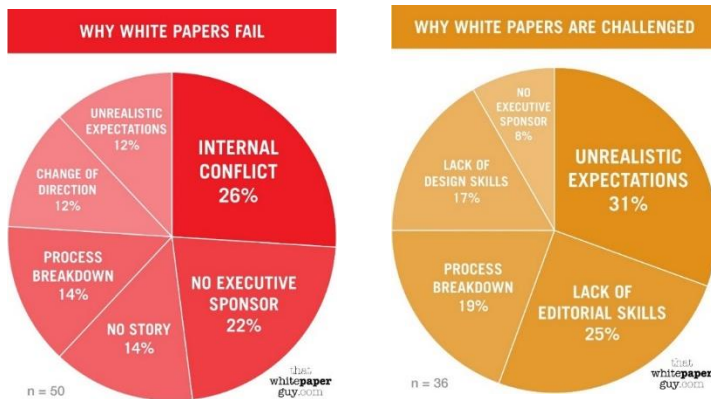


Gordon Graham, well-known in the field as "That White Paper Guy," has written over 300 white papers in his illustrious career. He recently studied all his white papers to explore why some fail while others succeed. The results uncovered some crucial lessons about the white paper process.

Graham discovered that most projects were successfully published and reached their intended audiences. That is the good news.

The bad news is that 17% of white papers failed. The sponsor never published them!

Not only that, an added 12% were "challenged." His clients published these white papers with substantive defects!



As you can see from these pie-charts, both failures and challenges point to

- Some dysfunction or limitation of the white paper team (such as the lack of adequate sponsorship or internal conflict),
- The lack of executive, management, editorial or design skills, or
- A process breakdown (including unrealistic expectations, change of direction, or the absence of a compelling story)

If the "ThatWhite Paper Guy" has experienced these pitfalls, they would appear to be real threats! But don't just take his word for it. Experts in project management have a lot to say

about project failure and (spoiler alert!) success.

## **Project Management (PM) Helps Us Understand Why White Papers Fail**

**Planning, producing and promoting a white paper is, at its heart, a project. Thus, we can glean some insights from Project Management to understand white paper failures and challenges.**

**In 2019, The International Association of Project Managers (IAPM) reviewed Alexander Galdy's seminal article, "14 Errors in Project Management."<sup>1</sup> Galdy, a German thought leader in project management, summarized critical areas of project failure.**

- **Galdy sets the stage by claiming that "only a third of all projects are successfully completed in IT."**
- **One of the most basic mistakes in project management, Galdy claims, is not having the right team with the right skills. "If you don't have the right specialists for your project or don't make them available, you don't have the necessary know-how at hand and would most likely fail."**
- **Galdy later discusses a "devastating" mistake of project management, which he calls "a lack of methodology." Here, he argues that the absence of a straightforward and effective process can doom an otherwise promising project, even if you have the right team, skills and resources!**
- **In addition to team, skills and process issues, Galdy also points to problems with the "scope" of projects. Simply put, you need enough resources to succeed with a project.**

**In "10 Common Project Management Mistakes and How to Avoid Them," the experts at nutcache, a collaborative project management software company, focus on the same potential sources of project failure That White Paper Guy and IAPM have discovered.<sup>2</sup>**

- **dysfunctions or limitations of the white paper team**
  - **assigning the wrong person to manage the project**
  - **doing everything yourself**
- **absence of the appropriate skills and resources**
- **process breakdowns**
  - **failure to communicate properly**
  - **poor project initiation**
  - **lack of a clear objective**
  - **wrong estimation of time and budget**
  - **failure to manage project scope**
  - **micromanaging projects**
  - **not following a process<sup>3</sup>**

## **The Bottom Line**

Research by experienced white paper and project management experts suggests that we can trace the failure of white paper projects to combinations of

- limited or ineffective teams, skills and resources employed in white paper planning, production and promotion, or
- the absence or breakdown of a straightforward and effective process.

## **I Am the Marketing Department – Surely, white papers are a luxury I can't afford?**

The potential failure of white paper (and other) projects multiplies for small businesses (organizations with 99 employees or fewer) and other content marketers who have:

- limited experience, or little or no success, with white papers,
- limited personnel to maintain a team with the critical mass of bodies and skills, or
- limited financial resources to support white paper production and promotion.

In fact, reporting research by the Small Business Administration (SBA), Investopedia has identified blowing through marketing budgets as one of the main reasons small businesses fail.<sup>4</sup>

Under these circumstances, white papers appear to be a luxury you simply can't afford!

Yet, in the same article, the authors warn that "having realistic projections in terms of target audience reach and sales conversion ratios is critical to marketing campaign success. Businesses that do not understand these aspects of sound marketing strategies are more likely to fail than companies that take the time to create and implement cost-effective, successful campaigns."

In the B2B space, using white papers for lead generation may be critical to your small business's survival (and eventually the "thrival"). Is there a solution to this small-business resource dilemma? A formula for success is right around the corner. But first, here's a list of what you ought not to do.

## **The Usual Short Cuts That Too Often Lead to Dead Ends**

There are many traditional approaches content marketers use to try to complete a white paper:

- Jump in and start writing without any plan: You can imagine the howls from project managers. You are asking for trouble from the start.
- Search the web for tips and advice: Google "how to write a white paper." Among the 2.16 Billion hits, you might find some helpful info. But wouldn't it be better if you already knew a trustworthy source for advice and tools?
- Buy a book about writing white papers or send yourself or another staff person for training in white paper writing. You might learn something, but what about trying something that puts a practical solution in your hands?
- Hire a low-cost writer from an online marketplace who will promise a "white paper" for \$149, But don't expect to get anything more than a short blog post at best.
- Ask in-house personnel to write: But you know that most engineers or product managers often hate writing, which distracts them from their real jobs and costs weeks of their salary. Asking interns to write is even less realistic!
- Contact an experienced white paper writer: This might still be a good plan once you learn more about the process. But can you afford the risk of spending a large portion of your marketing budget on a single piece of marketing content?

- Hire a full-time writer with experience in white papers: Oh yeah, there is still that budget issue! Wouldn't it be better to use these resources to improve or expand other crucial skill sets for the business?

## Three Keys to White Paper Success: Process, Process, and Process

Yes, many white papers fail. Failure is often a fact of life, even for white paper projects that are very well-intentioned about essential topics.

But you can avoid these failures!

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What is essential to project success? Process, process, process!

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### It's Ultimately About the Process!

Stuart Burroughs is a long-time project manager for IBM's Life Cycle Management Team and an IAPM-certified project manager. In a recent interview, he confirmed the project failure observations we outlined earlier.<sup>5</sup>

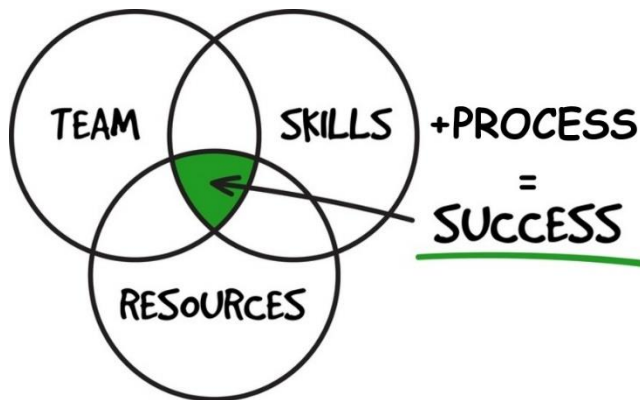
He pointed to one overriding factor when asked about the best ways to avoid project management failure. If you start with a reasonable goal, have the right team, and the necessary skills and resources, the best path to success is using a time-tested, clear-cut process.

His laser-like focus on the essential nature of the process conjured up the old mantra: "What are the three most important factors in real estate? Location, location, and location." Burroughs and many other successful project managers would answer, "What is essential for project success?" Process, process, and process!

### The Formula for Success:

**(TEAM + SKILLS + RESOURCES) + PROCESS = SUCCESS**

You are looking for a process built on a foundation of success, created and honed by experienced, successful white paper practitioners.



This process should encompass all three phases of planning, producing and promoting a white paper.

It should provide a way to evaluate whether you have gathered and utilized all the critical success factors, including the right team, the right resources and the right skills.

It should also supplement your team, skills, and resources with a skilled team of white paper experts, providing a wealth of integrated, ready-to-use planning, production and promotion resources.

With the help of an effective process, you expand and enhance your team, skills and resources and are ready to take on larger, more complex and more demanding projects like white papers.

## What about White Papers for Small Business?

You know something about the importance of white papers as a B2B marketing tool, or you wouldn't still be reading. You know they are a proven tool for complex and high-dollar B2B sales. You may even have seen a competitor produce a white paper.

But you don't have the experience of producing a successful white paper.

So, where do you turn, especially when you know that you probably don't have the critical mass of personnel to build a team to plan, produce, and promote a white paper on your own? The same is probably true for your in-house skillset, not to mention your incessant lack of resources.

If you are the lone marketer of a small business, you need a process that supplements your skills and resources and creates a virtual team of experienced, successful white paper specialists.

## Is the Same True for Other Marketing Entrepreneurs?

What about marketing managers in larger businesses and freelance marketers who are today's marketing entrepreneurs? Many of you are eager to blaze new trails for your companies or clients, introducing innovative products and services in the B2B marketplace.

White papers might be an ideal avenue for lead generation. But like your small business counterparts, you may have limited experience or limited success in white papers.

So, where do you turn?

## What to Look for in an Ideal Publishing Process

So, now it is time to discover a clear-cut, robust, success-generating process. But how will you know when you find what you need?

Here is what to look for in an ideal publishing process. It will be:

- A low-cost guide to creating your white paper inhouse, specially designed for small businesses and market entrepreneurs
- Practical tips and advice drawn from decades of specializing in white papers



- Advice gleaned from ~~used on doing~~ hundreds of white papers for clients in all different industries
- Time-proven solutions to the most common pitfalls for white paper writers
- A definitive, easy-to-use, and low-cost map to guide a marketing person through the three main steps in publishing a compelling white paper: planning, producing and promoting
- Tools specifically designed for white paper success, including articles, checklists, podcasts, templates, tip sheets, worksheets and videos
- An easy and fun to use, game-like app to help you navigate through all the steps and measure your path to success

Tools and resources created and honed by white paper experts will virtually expand and enhance your team and your operational skillset, especially for small businesses.

With this kind of advice, these tools, and the path around the pitfalls they provide, you will be on your way to achieving white paper success.

## Conclusions

White Papers are a time-tested tool for business-to-business (B2B) marketing. But far too often, they fail!

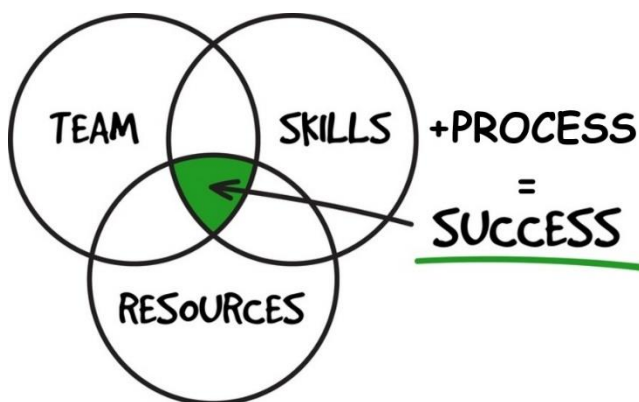
## Avoiding the Pitfalls

Research by experienced white paper and project management experts suggests that we can trace the failure of white paper projects to combinations of

- limited or ineffective teams, skills and resources employed in white paper planning, production and promotion, or
- the absence or breakdown of a straightforward and effective process.

## Achieving Success

To experience the sweet taste of success, you seek a process built on a foundation of success, created and honed by experienced white paper practitioners.



This process encompasses all three phases of planning, producing and promoting a white paper.

It provides a way to evaluate whether you have gathered and utilized all the critical success factors, including the right team, resources, and skills.

It supplements your team, skills, and resources with a skilled team of white paper experts, providing a wealth of integrated, ready-to-use planning, production and promotion resources.

# Especially for Small Businesses and Other Entrepreneurial Marketers

Are you the lone marketer of a small business or another member of the rising class of marketing entrepreneurs? Then you need to know that white papers are no longer a luxury you can't afford! All you need is a time-tested and practical process that supplements your skills and resources and creates a virtual white paper team.

## Are You Ready for White Paper Success?

There is a practical path to white paper success, with an experienced guide to lead you. Simply go to <https://www.rewilliswrites.com/white-papers> and fill in the contact form at the bottom of the webpage.

## Endnotes

<sup>1</sup> “14 errors in project management by Alexander Galdy.” A review of Alexander Galdy, “14 Fehler beim Projectmanagement” in *Manager Magazine*, 2008. Retrieved 3 September 2020 from <https://www.iapm.net/en/news-events/iapm-blog/!/show/432/14-errors-in-project-management-by-alexander-galdy/>.

<sup>2</sup> “10 Common Project Management Mistakes and How to Avoid Them.” Retrieved 5 September 2020 from <https://www.nutcache.com/blog/10-common-project-management-mistakes-avoid/>.

<sup>3</sup> Please note that the ten mistakes are listed in a different order than in the article to fit the categories of team, skills, resources, and process that we are exploring. A careful observer will also note that there appear to be eleven mistakes. In the original list, “Lack of resources and skills” is a single “mistake.”

<sup>4</sup> “The 4 Most Common Reasons a Small Business Fails: Running a Small Business is Not for the Faint of Heart.” Investopedia, 8 June 2020. Retrieved 10 October 2020 from <https://www.investopedia.com/articles/personal-finance/120815/4-most-common-reasons-small-business-fails.asp#:~:text=The%20most%20common%20reasons%20small,model%2C%20and%20unsuccessful%20marketing%20initiatives.>

<sup>5</sup> Stuart Burroughs. Telephone interview. 25 September 2020.