E 303: TECHNICAL WRITING
School of Literature and Languages
Louisiana Tech University

White Paper Instructions Memo

To: Mr. Merchant's English 303 students
From: Mr. David M. Merchant, English Instructor
Subject: White paper instructions
Date: April 17, 2020

The purpose of this memo is to give instructions for the white paper assignment.

Summary

You will take the topic from your proposal and write a white paper where you will present your findings and support for your recommendation. While I will be a gatekeeper audience (grading the paper), you will also have real-world audiences—audiences that your argument is directed to. You are welcomed to submit your white paper to your real-world audience after the course is finished at the end of the quarter (again, you are not required to do so; you are only required to submit your white paper to me).

It is human nature for most to pick the path of least resistance (such as writing as few pages as possible). While I hesitate to give arbitrary page lengths (a paper needs what a paper needs and no more and no less), **if your white paper is only six pages or fewer**, it has a great chance of **failing**. I expect white papers to be around 15 to 25 pages (this includes a cover page, table of contents, and references) depending upon the needs of the topic (some topics need more visuals, some papers have surveys or interview transcripts to place in the abstracts, etc.) Most of the topics should not present a problem for writing a long enough white paper as long as you do due diligence in your research and writing.

The lecture "What is a White Paper?" just defines what a white paper is (it is an extended definition of a white paper). The white paper assignment officially assigns the white paper and discusses content. *Merchant's Style Guide* (davidmmerchant.com/style-guide/) gives formatting details: see section 4 for title formatting guidelines and Section 8 for report (formatting) guidelines.

These following guidelines will help you understand how you can effectively organize the content of your white paper. Your decisions will dictate how clearly your information is presented.

You will find that Chapter 13 in your textbook, *Merchant's English Usage Guide for Technical Writing* (davidmmerchant.com/merchants-english-usage-guide-for-technical-writers/), and writing help resources on Moodle will be helpful to successfully complete this assignment. Consult the course schedule for this assignment's due date. Note—*you cannot pass this class if you do not submit the report,* regardless of your current standing in the class.

If later you decide to submit your paper to your real-world audience, change my name to your real-world audience name and delete the cover page. But first, look at the grade comments and improve your paper as needed before you send it to them.

White Paper Length

While I hesitate to give arbitrary page lengths (a paper needs what a paper needs and no more), **if your white paper is only six pages or fewer** (including a table of contents and references), your white paper has a 99.9% chance of failing; if your white paper is 40 pages long, it is probably too wordy or strays off topic at times or otherwise loses its focus. Most white papers for this class are between 15 and 22 pages depending upon the topic's needs: some topics need more visuals than other topics, some papers have surveys or interview transcripts to place in the abstracts, etc.

White Paper Components and Formatting Overview

All white papers written for this class will have the following components:

Table 1. White Paper Components

Section	White Paper Components
Front Matter	1. Cover Page 2. Title Page 3. Table of Contents 4. List of Illustrations 5. Glossary/List of Symbols (if more than one page, place in the back matter) 6. Abstract 7. Acknowledgments
Body	See the discussion in the White Paper Body Components section below.
Back Matter	1. Glossary/List of Symbols (if just one page, place in the front matter) 2. Reference 3. Appendices

Formatting

You must use *Merchant's Style Guide* (davidmmerchant.com/style-guide/) for formatting the white paper, including formatting decisions for typefaces, capitalization of titles, heading levels, lists, and illustrations. For guidelines specific to reports (including white papers), see Section 8 in *Merchant's Style Guide*; Section 8 covers **formatting** decisions for cover pages, title pages, table of contents, and other document components specific to white papers.

Section Breaks

As discussed in the *Style Guide*, **you must use section breaks** to meet the pagination style requirements. Not doing so is cheating—not using section breaks can cost *a letter grade* off the assignment grade (more if not using section breaks causes other errors). Repeat: you **MUST** use section breaks; plus, you must submit your document only as a **Word** document.

The front matter has a pagination style that differs from the body pagination style (including, in the body, each level-1 section has different information in the page header). This is done with section breaks. You can find help on creating section breaks at the Microsoft Word Help Online resources at davidmmerchant.com/writing-help/.

Front Matter Details

Keep in mind that while you will repeat some information in the report, do not just merely copy and paste: each section has a distinct purpose and may have different primary and secondary audiences. Thus, you may need to rephrase, rewrite, and sometimes expand on what you have written before to address the needs of each section and its audiences. And as discussed above, use *section breaks* to help you meet the numbering style requirements. **Remember, check *Merchant's Style Guide* for how to format each document component of a white paper.**

Cover and Title Pages

The first page of the front matter is the cover page. A cover page protects the document, presents the organization's branding, and for confidential or secret reports, shields the nature of the report from accidental viewing by unauthorized readers. Formatting guidelines, including an example, are found in *Merchant's Style Guide*.

The title page gives the title of the report, who it is for, who wrote it, and when it was written. Title pages can aid in building ethos and gaining the interest of the audience. Choose a title that conveys the specific purpose of your report. See the discussion on Audience, Purpose, and Context above (page 1) to help you decide who to put as your audience(s) on the title page. Formatting guidelines, including an example, are found in *Merchant's Style Guide*.

Table of Contents

Having a correct and properly formatted table of contents is necessary for accessibility. It also aids your documents' professional appearance. Microsoft Word has tools for creating a table of contents. Information can be found in your textbook (page 354) and through Word help resources found at davidmmerchant.com/writing-help/.

List of Illustrations

A list of illustrations helps readers to quickly locate important illustrations. They have two subsections: the first for listing figures with the second for listing tables. As this is a table of contents of illustrations, page numbers for each illustration **must** be included (and must be accurate). **If you only have figures**, then rename this section List of Figures (you will not need any subsections). **If you only have tables**, rename this section List of Tables (you also will not need any subsections).

Glossary (Includes Symbols)

A glossary is required. Place in the front matter if the glossary is only one page long, otherwise, place in the back matter. Include words, symbols, and abbreviations that your audience needs to understand to be persuaded by your paper. Analyze your primary audience—what words, symbols, and abbreviations will they be familiar with, and which will they not be?

To aid multicultural and non-subject matter expert readers, define abbreviations, acronyms, and symbols used in your document, including those commonly used (as found in an American English standard dictionary) with some exceptions:

- Do not include an abbreviation, acronym, initialism, or symbol used only once in a report; however, they still must be spelled out or defined when they are used.
- Do not include common name prefixes or titles (such as Dr., Mr., Ms., or Mrs.), or common name suffixes (such as Jr. or Ph.D.).
- Do not include contractions (which should only be in your document because a quote contains them or you are discussing contractions),
- Do not include MLA, URL, or common Latin abbreviations (such as e.g., i.e., etc., a.m., and p.m.)*.*
- Do not include standard mathematical operators (√ or ÷, for example) in the list of symbols. However, ***do include special operators and functions.***
- Do not include trademarked terms in the list of symbols.
- Some acronyms are now accepted as words in their own right; these acronyms do not need to be included (inclusion is optional). For example, the noun "scuba" started as an acronym (self-contained underwater breathing apparatus) but is now used as a word.

I used to require that you boldfaced terms, symbols, and abbreviations included in your glossary when they first appear in your paper or report; however, I am not requiring that any more. Your examples may be following this older requirement, but you can ignore it.

Check *Merchant's Style Guide* for a full discussion on how to properly format and organize the glossary section. The *Style Guide* has an example of how to format the glossary as does your textbook (page 358); the *Style Guide* and your textbook follow the same formatting for glossaries except for the level-1 heading—your textbook is inconsistent with formats for level headings. Format level-1 headings only according to the *Style Guide*.

Abstract

As your audiences for the abstract are subject-matter-experts familiar with the subject, technical language is allowed here. The abstract should be a descriptive or topical abstract; thus, do not explain the criteria used, but do give a brief description of the problem or opportunity, the major findings, and your solution or recommendation(s).

Word count for the abstract (includes keywords) should be between 100 and 300 words. Format the body of the abstract as one paragraph. Include a Keywords list (in a horizontal listing) terms that you expect a subject-matter-expert researcher to *likely use* when searching for your report electronically. Again, use the *Style Guide* for all the formatting requirements.

Abstracts, executive summaries, and introductions each serve different audiences and have somewhat different purposes. Depending upon the audience and the purpose of the white paper, some white papers do not have an abstract, while others do not have an executive summary. (For this class, you will include both so that you can learn the difference between them).

A common mistake by student writers is to treat abstracts, summaries, and introductions as similar writings. This is a major error. Page 352 in your textbook has an example of an abstract. Page 357 has an executive summary example. However, the best examples are on pages **363** and **365** in your textbook—they are **excellent examples** of an abstract and an executive summary, respectively, written on the same topic (thus good for comparison). It will probably be easier to write the abstract and the executive summaries last.

Acknowledgments

The author(s) of a report must acknowledge every person or agency, not on the authoring team that contributed to the project the report covers, including those that contributed economic, material, and workforce resources. To leave this section out when others have contributed to the report is considered at best bad form, and at worst plagiarism. However, acknowledgments normally do not include editors, proofreaders, or fact-checkers. For this class, most of you will not need an acknowledgment section—if that is the case, you can leave it out. Just remember that in the "real world" you will normally need to have one.

Body Details

For the body of the white paper, you have some flexibility as different topics will need somewhat different treatments. One of these flexibilities involves the wording of section titles. Remember, check *Merchant's Style Guide* for how to format each document component of a white paper.

Paper Title and Section Title Wording

White papers have more flexibility for writing level-heading titles than technical reports. For example, instead of "Problem Statement," use something like "Technology's Impact on Productivity." Use clear, specific, and informative headings—headings that represent what is in that section and which respond to your audiences' needs. Do not use jargon or buzzwords unless your primary audience is a highly technical audience. Keep titles parallel in construction (see section 4 in the *Style Guide*). Finally, for your main title you may want to consider search engine optimization: keywords your primary audience will most likely use to find your document; also, keep in mind that many search engines will display only 50 to 60 characters of your title.

Make sure you format section titles (level headings) correctly, as discussed in the *Style Guide.* Incorrectly formatted level headings can cause confusion in navigating the document or understanding its hierarchy and greatly degrade the professional appearance of the document (and, thus, your ethos as a writer).

Organization Schemes

White papers have more flexibility for organizing the body than technical reports. Some common organization schemes for white papers are shown in Table 2 below (not an exhaustive list by any means). You can add components from one example with another if that suits your topic better. For example, in the organizational scheme in example 2, you could add Future Direction/Long-Term Focus from the organizational scheme in example 1, if it fits the discussion of your topic.

Detailed discussion on the main body features common to all white papers (and, thus, required), follow Table 2.

Table 2. White Paper Body Organization Examples

Example	Components (numbered—with Arabic numerals—items are level-1 sections)
1	1. Executive Summary 2. Introduction *(brief introduction of the issue, the context of the report)* 3. Background/Causes of the Problem/Defining the Problem *(why the problem exists; may have subsections for each major cause; may discuss why the standard way of doing things causes/has problems)* 4. Effects of the Problem [if this section is less than one page, can combine with #3 above as a subsection of #3] *(why we should care about the problem)* 5. Innovation (Solution/Technology or New Opportunity/Policy/Strategy) *(how it solves the problem or takes advantage of the opportunity; can organize this as three subsections: introduction, advantages, and disadvantages; criteria analysis would likely be in this section)* 6. Concerns/Considerations/Obstacles/Oppositions *(any disadvantages; how to overcome or lessen the disadvantages, if possible; feasibility study would likely be in this section, though feasibility study could be in the preceding section instead)* 7. [if applicable] Transitioning to the Innovation 8. [if applicable] Future Direction/Long-Term Focus *(overall future direction of the problem or solution)* 9. "Altar Call"/Call to Action/Recommendation *(essentially a final sales pitch for an innovative solution or an innovative opportunity; however, remember that white papers are not sales pitches in the traditional sense: a reader should feel informed, not sold)*

2	1. Executive Summary
	2. Introduction/Background
	(brief introduction of the issue including relevant background; why the need for the innovation exists; this is for papers that are not making a recommendation for an innovation, but, instead, making a recommendation for a specific application of the innovation or specific approach for taking advantage of an opportunity)
	3. Applications of the Innovation/Approaches to the New Opportunity
	   A. First Application/Approach/Strategy
	   (how the application of the innovation or approach solves the problem or takes advantage of the opportunity; can organize this as three subsections: introduction, advantages, and disadvantages)
	   B. Next Application/Approach/Strategy…
	4. Which Application/Approach is the Best?
	(Criteria Analysis and Feasibility Study/Test)

Example	Components (numbered—with Arabic numerals—items are level-1 sections)
	5. Results/Conclusion/Recommendation *(recommendation of one application/approach over others)*
3	1. Executive Summary 2. Introduction /Background (background or history of the problem, importance of addressing the problem) 3. Current/Standard Solutions or Approaches/Policies A. First Solution or Approach/Policy *(how it solves the problem or takes advantage of the opportunity; can organize this as three subsections: introduction, advantages, and disadvantages)* B. Next Solution or Approach/Policy 4. Alternative Solution/Innovation/Approach/Policy 5. Which Solution or Approach/Policy is the Best? [Or: How the Innovation Beats the Standard Way(s)] *(Criteria Analysis and Feasibility Study/Test to show how the innovation is the best)* 6. [if applicable] Transitioning to the Innovation *(Even though you showed that the innovation is feasible in the above section, if you think your reader will still need some persuasion because the innovation is radical or the transition, while feasible, is complicated or has never been done before, etc, you should discuss transitioning. Do not address the audience directly. Do not say things like "you need to do …" as you do not want to make your audience feel like you are just assuming they will automatically accept your recommendation. The Call to Action/ Recommendation section can refer to this section if needed.)* 7. "Altar Call"/Call to Action/Recommendation *(essentially a final sales pitch for an innovative solution or an innovative opportunity; however, remember that a reader should feel informed, **not** sold)*
4	1. Executive Summary 2. Introduction /Background *(background or history of the problem, importance of addressing the problem)* 3. Current Solutions/Approaches/Policy [standard way of doing things discussed generally/overview] 4. Alternative Solution(s)/Innovation(s)/Approach(es) [can be just one] *A.* First Solution/Innovation/Approach *(how it solves the problem or takes advantage of the opportunity; can organize this as three subsections: introduction, advantages, and disadvantages)* B. [If applicable] Next Solution/Innovation/Approach 5. Market Drivers *(trends, needs or demands by the public, what does a good solution need [essentially a **criteria analysis and feasibility study**], which of the solutions discussed wins and becomes the recommendation—this shows which solution*

Example	Components (numbered—with Arabic numerals—items are level-1 sections)

	or approach/policy is the best)
	6. Main Obstacles/Opposition to Your Recommendation
	   (with solutions to the obstacles)
	7. [if applicable] Additional Obstacles/Opposition
	   (with solutions to the obstacles)
	8. [if applicable] Transitioning to the Innovation
	9. "Altar Call"/Call to Action/Recommendation
	   *(essentially a final sales pitch for an innovative solution or an innovative opportunity; however, remember that white papers are not sales pitches in the traditional sense: a reader should feel informed, **not** sold)*

5.	1. Executive Summary
	2. Introduction
	   (introduce the problem or opportunity, define any terms you feel need to be defined; maybe include an anecdote or example to show why the reader should care about your topic)
	3. Previous Approaches
	   (describe what is currently being done to solve the problem or take advantage of the opportunity)
	4. New Findings
	   (describe and discuss the results of your research, this includes showing how your findings better address the problem or opportunity)
	5. "Altar Call"/Call to Action/Recommendation
	   *(essentially a final sales pitch for your recommendation based on your findings; however, remember that a reader should feel informed, **not** sold)*

Remember that since your primary audience is probably *not* a subject-matter-expert, you need to minimize the use of technical jargon.

Insert what you need from your extended definition wherever it logically fits: in the introduction (background of the problem, causal analysis), or in a discussion of a solution. Only include what you need, if anything. *If you need any extra extended definitions, add them*; remember: always need to keep in mind audience, purpose, and context.

Executive Summary

A summary is not an abstract; it summarizes the entire paper and, thus, will explain the criteria used (where the abstract does not). Another difference is that the main audiences will be managers and general readers; and as they are *not* subject-matter-experts, you need to minimize the use of technical jargon. Include in the summary the background of the problem or opportunity, a brief description of the methods, the criteria used, and a broad discussion about the conclusions/recommendation(s) keeping in mind your audience (especially the managers who are interested in costs, savings, and feasibility). A good executive summary is a stand-alone document written so that a busy, non-subject matter executive can read only it and still know what the paper is about.

Word count should be between 250 and 400 words. Do not merely copy and paste from previous documents—keep your audience in mind as you write the executive summary.

As mentioned earlier, page 357 has an executive summary example. However, the best examples are on pages **363** and **365** in your textbook—they are **excellent examples** of an abstract and an executive summary, respectively, written on the same topic (thus good for comparison). Look over those annotated examples carefully to help you write your own correctly.

Introduction

Do not confuse an introduction with an abstract. An introduction sets the stage for your paper.

The Introduction begins with the context of the report: subject and purpose (see the top of page 494 in your textbook for an example); write that I asked for the research. If you submit your paper to a real-world audience, you can delete this context.

Include a discussion of the scope of the project if needed (the boundaries of your topic: what topics you are including, as well as those you are not). Again, solutions are often not universal: what works for one context will not work in another; thus, you need to tell your reader how you have narrowed your focus. For example, countries can sometimes have different regulations, economic situations, and cultural attitudes that make a solution workable in one country but not in another. Do not casually discard this discussion: if you need it, make sure it is included.

The introduction often continues with a background of the problem or opportunity. Use this part of the introduction to show the importance of your topic and the necessity to solve it or address it—why should your audience care? Give enough general background information to show you know what you are talking about. Discuss problems from your reader's perspective. Remember that since your primary audience is probably *not* an expert, you need to keep technical jargon to a minimum. Do not mention your solution or approach directly in the introduction yet.

However, sometimes the causal discussion is large or complex enough that it deserves its own subsection in the introduction section or even its own level-1 section(s), following the introduction. For example, a white paper on implementing a puppy room at Louisiana Tech had two level-1 sections after the introduction: the first discussed/defined what stress is ("Stress: It is a Bodily Function") and the second discussed/defined what depression is ("Depression: Like Stress, Only Worse." After that, the paper discussed the effects of stress, depression, and anxiety on students before finally discussing the solution, the puppy room.

Discussion Section: Discussing Solutions or Approaches

Choose an organizational scheme from Table 2 that best fits your topic. Each scheme has some discussion of its components; below is a general discussion that applies to any scheme.
After you have shown a case for a need for your solution or approach, transition to discussing the solutions. Rather than write the proposed solution as the only correct solution, research the benefits and possible challenges of both your solution and the alternative, feasible solutions (if applicable). You are essentially comparing and contrasting, which may need a table to help your reader understand how the solutions compare to your proposed solution or approach. Describe

how the solution(s) would be implemented. Provide information about the costs associated with the solution. Use this discussion to anticipate objections of your audience to your proposed solution and put those objections to rest: address any concerns your audience may have. Remember, you need to persuade your audience.

Sometimes you may need to give a historical overview where you discuss what has led to the problem, issue, or opportunity your solution solves or takes advantage of. If your solution or approach is unique or innovative, you may need to discuss this new class or category and then introduce your solution or approach.

In discussing solutions or approaches, you need to show how your proposed solution or approach solves the problem or best takes advantage of an opportunity. You will, thus, need to set up a criteria analysis for determining the best solution(s). When you discuss the application of your solution or approach, discuss the criteria you choose; in other words, discuss how you determined what would be the best solution or approach or why you choose those criteria. You will also need to show that the proposed solution is feasible (this is a persuasive document, after all). The technical report example in your textbook combines both the criteria analysis and feasibility into one task, which is also acceptable for a white paper.

The following is a list of the most common feasibility criteria (not an exhaustive list and not all may apply to your white paper):

- Availability of materials and technology.
- Capital/cost requirements.
- Environmental concerns.
- Implementation schedule.
- Local and international laws and regulations.
- Market opportunities and strategies.
- Production or distribution capabilities
- Professional staffing levels.
- Profit and loss forecasts.
- Public acceptance
- Real estate needs.
- Risk analyses.
- Transportation requirements.

Other Section Options
Depending upon which organization scheme you choose, after discussing solutions you can have a section discussing

- the overall future direction of the problem/opportunity and the solution/approach (Direction/Long-Term Focus);
- trends or the needs or demands by the public for a solution (Market Drivers); or

- any obstacles or opposition to the solution or approach (Main Obstacles/Opposition, Additional Obstacles/Opposition)—include how to solve or mitigate the obstacles or oppositions.

Conclusion/Call to Action

The conclusion in the white paper concludes the paper and makes a "sales pitch" for the recommended solution to your primary audience. However, try to avoid addressing the audience directly. Help your audience to understand what should now happen, what they should now do or support or look more into. Your audience should feel informed so that they can make a decision and not sold. Absolutely do not make your audience feel like you are assuming that they have decided already to accept your recommendation.

Recall that a white paper has more freedom for level-1 heading texts. However, as always, use clear, specific, and informative headings. Instead of "Conclusion" or "Recommendation," for example, use something like "Using Technology X to Improve Productivity" (without the quotation marks, of course).

Back Matter Details

Pagination is the same for back matter as for the body of the report; the back matter, while not part of the discussion in the body, supports the discussion through a glossary (if long, otherwise, it will be in the front matter), references, and any needed appendices. Remember, check *Merchant's Style Guide* for how to format each document component of a white paper.

Glossary (Includes Symbols)

A glossary is required. Place in the back matter if more than one page, otherwise, place in the front matter. See page 6 for more information.

References Section

You can acquire these sources from the Internet, books, journals, magazines, databases, e-books, or e-journals. Referenced information used in your document is best summarized or paraphrased. Keep quoting to a minimum. Whether quoted or paraphrased, all use of references should be cited to avoid plagiarism. Make sure your reference page(s) includes all references used (quoted from or not) for all sections of your document.

Appendices

Appendices are optional in that if you do not need to place anything in an appendix, then you do not need an appendix section. They include relevant information that would be out of place in the main body of the document. Readers may want to access the information in the appendices to verify your results or to learn more. As appendices contain supplemental information, the white paper should be able to stand alone without them; that is, all essential information needed for your reader to understand your discussion, your conclusions, must be in the body of the paper; the appendices are only for supplemental information. Information in an appendix *must* be referenced to, if not discussed, in the body of your paper at least once. Appendices include the following kinds of supplemental information.

- Code details
- Company information (for a product or technology; not necessary for a well-known company, but for startups or less-known companies, a mission statement/about us statement may be good to include in an appendix)
- Detailed tech specs
- Extra details on the research methods
- Information that is too detailed or too lengthy, interrupting the narrative flow of your paper or otherwise distracting the reader from the main content
- Information not essential to support your position but still important as is supports your analysis or validates your conclusions
- Information that pursues a related point
- Interview transcripts (each person interview is a separate appendix)
- Questionnaires and surveys' detailed results
- Questionnaires and surveys instruments
- Raw data
- Schematics
- Specifications (for example, proposed product's specifications)

Each appendix should be its own document. No more than one document can be in an appendix. (For example, if Appendix E is a copy of a questionnaire, then Appendix F is the results of that questionnaire.) The *Merchant's Style Guide* gives more information on formatting appendices.

Tips

Remember audience, purpose, and context: this is a persuasive document and your audiences are not subject-matter experts (they may even be resistant to your solution or idea). Follow Markel's Eight Measures of Excellence (discussed in his textbook): accessibility, accuracy, clarity, comprehensiveness, conciseness, correctness, honesty, and professional appearance.

Visuals and Examples

Using visuals, from tables to charts to images, helps your document be persuasive by making the document both more appealing visually and more comprehensible. Visuals can help engage a reader and are usually more quickly understood than text and are thus useful to support, summarize, or illustrate a concept discussed in the text. Include charts and tables to show or summarize statistics, trends, or other data. Examples, including case studies, can also help illustrate your argument.

Closing

I look forward to reading your white papers. If you have questions, please contact me via email or the course Moodle page (forum or messaging service). Do not forget to do your assigned readings. Again, *Merchant's Style Guide* and *Merchant's English Usage Guide for Technical Writers* are located at davidmmerchant.com/.

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