



Chartered Institute
of Ergonomics
& Human Factors

A GUIDE TO WRITING WHITE PAPERS

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#ciehf

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What is a white paper?

White papers were originally produced by government departments as position papers, industry reports or policy documents. In that capacity, they were developed as overviews of problems; potential means for solving them; and helping to guide policy change where required.

Companies and organisations have adopted white papers as a way to produce their own perspective on an issue and support various aspects of decision-making.

Many businesses use white papers as a marketing tool to promote their specific solution, product or viewpoint. In some cases, white papers do little more than sell expertise and persuade customers, clients and collaborators about a particular organisation's capabilities.

In the past, white papers could be lengthy publications. However, white papers have migrated from largely technical to primarily executive readerships. With this shift, the format of white papers has also changed so that they are shorter and more focused.

It is important to clarify that a white paper is not intended to be a lengthy monologue on a subject, overly detailed guidance document or market report. The focus should be on producing a concise and evidence-based document for its intended audience.

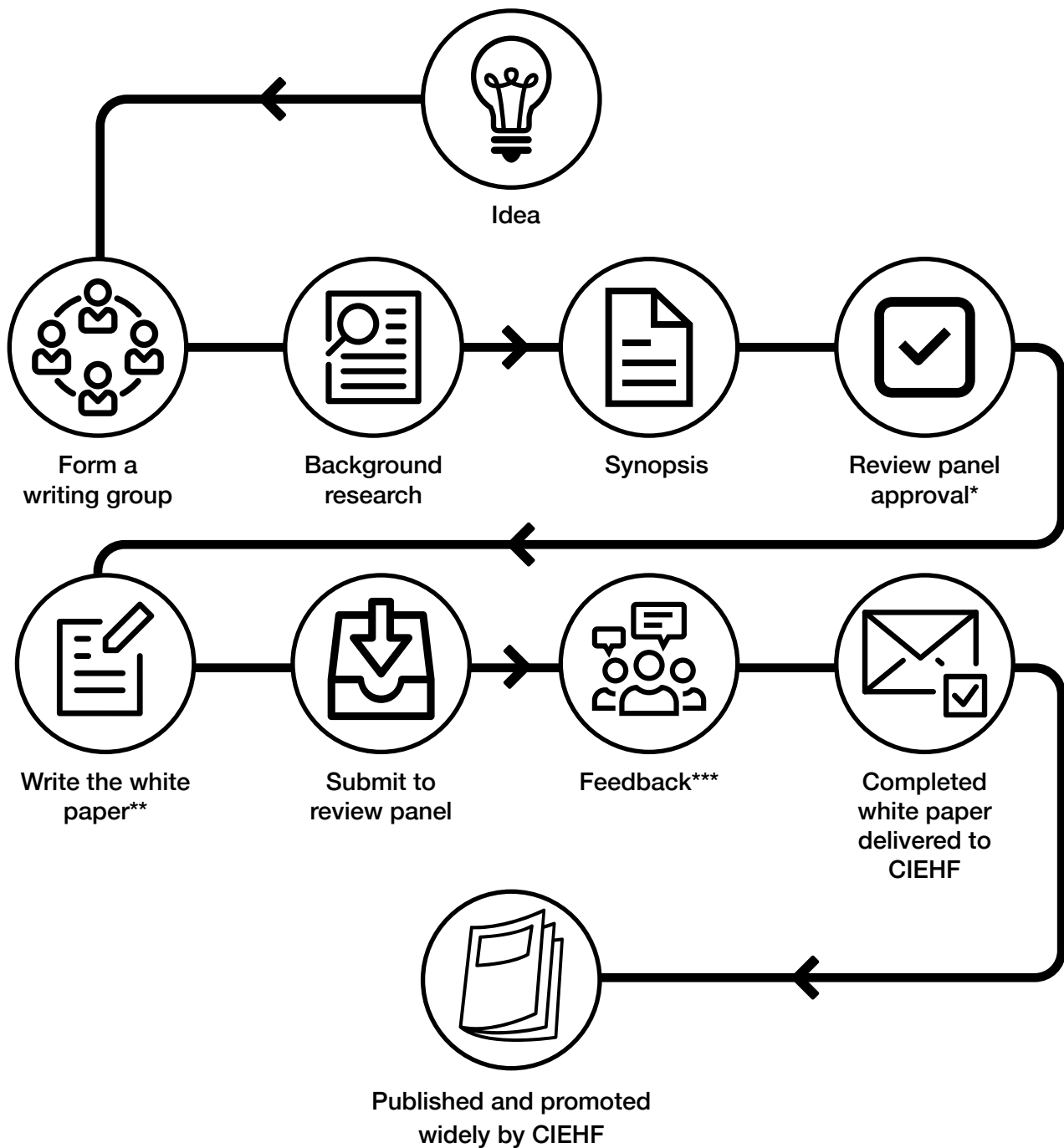
The CIEHF are producing white papers on a range of topics to demonstrate our position as the voice of our discipline and profession. Within the CIEHF, our white papers are a means of informing an audience, who may not have specialist knowledge of our discipline, about the role that HF/E can play in developing new approaches, helping to understand complex issues, and enhancing the social and economic impact of taking a user-centred approach to problem-solving. In this way, our white papers are about informing and influencing good practise, where HF/E can play an important role.

The purpose of this guide

This guide is designed to help any of our members who may have an idea for a white paper. It sets out the key issues to consider before, during and after writing the white paper, along with tips to help plan and prepare effectively.

Overview of the process

Here is a simple depiction of the process for writing a white paper



***accept or reject.** If your idea is rejected then it may be suitable for a different type of publication we can help you with.

**** internal review and feedback along the way.**

*****accept, revise and accept** without further review, **revise and review**, or **reject**.

Things to consider in writing a white paper

2.1. Authorship

Whilst a lead or main author may have been agreed to write the paper, it is recommended that each white paper has a special interest group to help steer the research and content. This should include practitioners and academics, along with partners or bodies you may be collaborating with. There is no rule about how many or who should be identified as an author, but good practice is to include everyone who has taken an active role in contributing and preparing the paper.

2.2. Time management

White papers can take time to prepare (typically a year to produce). It is important that this is factored into the plan by building in time for edits and reviews. Will your focus still be relevant by the time the white paper is published?

2.3. Focus on the evidence

White papers should be research led, data driven and evidence based. Keep asking yourself 'where is the evidence' for anything you state.

2.4. Work out the white paper's aims and deadlines

Discuss your concept with the key stakeholders within the CIEHF (i.e. anyone on Exec or Council) and/or partners you are collaborating with. These people can help with the scope and focus of the white paper. It is good to establish a few goals for your content. These should include:

- ➡ The aim and objectives of the paper (i.e., one aim and three to four objectives)
- ➡ A deadline (this is to help you plan effectively)
- ➡ A decision about who will oversee the white paper production (including content writing, design and editorial).

Understanding this information will stand you in good stead when it comes to the following stages of white paper planning.

2.5. Think about your audience and what they want

Nothing is more important than knowing your audience. You can have the greatest topic in the world, but if it is not speaking to your audience then it will be ignored, and your effort and hard work will go to waste.

Are you solving a problem, setting out a new perspective or helping people understand best practice? These all need different approaches in how your white paper is produced. You need to understand and communicate what your white paper will provide that your audience did not know before.

Once you understand your audience, it's easier to predict what they are looking for and plan for what they will find useful. These questions might help you get started:

- ➡ What is the specific problem you aim to solve?
- ➡ What are the features of your white paper that can help achieve this?
- ➡ What learning or best practice are you trying to put across and how should it be used?

2.6. Do your background research

The more you plan and prepare, the easier it will be for you to write your white paper.

We are fortunate that we have many case studies on file and at least 500 chartered members who can be contacted to provide material or relevant research literature. We can also use our registered consultancies, regional networks, sector groups and special interest groups.

If required, we are also able to use our international networks across the IEA and FEES to contact researchers and practitioners worldwide.

It is important to remember that your white paper is not just describing what a product or service does. In many cases our white papers will be about influencing best practice within industry. It is important to be clear what industries or specific practices you are trying to influence and what they will gain from reading your white paper.

Your white paper also needs to communicate your ideas to an audience who may not have a deep knowledge of HF/E, and/or who may not understand the role of HF/E in underpinning our understanding of complex systems and user-centred approaches.

2.7. Write a synopsis for approval

A synopsis is a short overview of your white paper. We have developed a pro forma for you to complete that helps you think about the different aspects of your white paper. It is important to do this before writing your actual white paper as it helps you consider the scope and focus you will take. If your white paper is too broad (i.e., the scope is too wide) then it could end up being too long and difficult for people to read. If it is too narrow (i.e., the focus is too narrow) then you might limit the potential reach and impact of your work.

It is also important for you to consider how your white paper will demonstrate the Institute's position as the voice of our discipline and profession. Our white papers are about informing and influencing good practice, where HF/E can play an important role. For your synopsis to be approved and your white paper to be published under the CIEHF banner, it is important that you clearly articulate how it will achieve these things.

The synopsis is useful for both you and the other stakeholders. It allows everyone to come together and agree on a broad thrust of the main issues you'll address, the language you'll use, and the solutions you'll offer. It helps you focus your thoughts and, when well-constructed, will make the white paper easier to produce.



2.8. Internal review of synopsis, approval and final review

These are crucial stages in producing your white paper.

Circulate your synopsis with colleagues, ask for their feedback and make sure you've got the tone right. And if there's significant feedback or edits to be made on the synopsis, it's a lot better to catch these early in the overall white paper writing process.

Usually, a white paper is the collaborative work of a number of people. The activity of writing the synopsis can help identify those who have the time to commit to the work and distributing tasks going forward.

All white papers need to be approved by Council so please factor this into your timescale. This is important as Council will be able to consider your synopsis in relation to other planned publications and activities.

Once approved by Council, your white paper will be assigned two general reviewers and a technical reviewer. You can propose someone who will agree to act as the technical reviewer for the final draft of your white paper (however, it cannot be one of your co-authors). These people will act as the formal review panel for your white paper, although you may invite feedback from others if you wish.

Upon submitting your completed white paper, the reviewers will assess how well it addresses the original criteria set out in the pro forma. They will be looking for evidence that it achieves its aim and objectives, provides evidence-based consideration of the problem, how the solution promotes HF/E to a wider audience and evidence of impact.

2.9. Structure of the synopsis and white paper

White papers come in many shapes and sizes, but the majority follow the same basic structure for their synopsis and for the full version:

INTRODUCTION → PROBLEM → SOLUTION → IMPACT STATEMENT → CONCLUSION → REFERENCES

- ➡ **Introduction** (scope and focus) – identifying the aim and objectives
- ➡ **Problem** (structure) – setting out one problem or perhaps subdivisions or a main issue – using evidence to provide legitimacy
- ➡ **Solution** (HF/E relevance) – how does HF/E help us understand things differently?
- ➡ **Impact statement** (wider reach) – is there any evidence that your solution has impact?
- ➡ **Conclusion** (call to action) – how can the reader take this forward?
- ➡ **References** – a list of all sources you have referred to in your white paper.

In general, the main emphasis of the white paper should be dedicated to the problem and solution (i.e., approx. two-thirds of the paper), with the introduction and conclusion (i.e., approx. one-third of the paper) helping to frame the paper and provide a clear way forward at the end.

There is no hard and fast rule about how long each of these sections should be but in general white papers are short digests rather than lengthy essays.

Again, by thinking of your audience, you will have already identified who your readers are likely to be. Will they typically have time to read a 50-page report or would a 10-page digest be a much better way of communicating the purpose of the white paper?

It is important to think about what your white paper will give to its audience. Are you providing a list of recommendations, a checklist for people to use, a new approach/tool/method? Might it be useful to provide an infographic summary or abstract of the work that can be posted on a wall (and which can be produced with help from CIEHF)? These are all valid ways of promoting your work and making it relevant to the audience.

2.10. Impact statement

An impact statement outlines the wider benefits from your work from an economic and societal perspective. This may occur through commercial activity, social enterprise, professional practice, clinical use, public health, public policy design, public service delivery, public policy and laws, public discourse, culture, the quality of the environment or quality of life.

Impact might be demonstrated at a local, regional, national or international level and can be incremental or immediate in terms of the changes it produces.

Above all, impact needs to be measurable. A clear and concise statement should provide evidence of impact rather than just a description of impact.

Impact might be demonstrated through publications (i.e., journals, professional membership or mainstream media), education, public engagement, translational research, commercial and social enterprise activity, engaging with public policy makers and public service delivery practitioners, influencing ministers, collaborating with academics and non-academics etc.



Writing your white paper

Writing your white paper is by no means the easy part of the process. But if you've taken the time to get the initial steps right, this will be a lot simpler.

Nonetheless, writing a white paper can be a tricky process, even if you have taken all the preparatory steps. So, here are a few tips to help:

3.1. One step at a time

There's nothing more daunting than sitting down to see a blank page and thinking, 'Where do I start?' When you're sitting down to write, don't think about the fact that you've got 3,000+ words ahead of you. Go through the content section by section, breaking it down into manageable chunks.

3.2. Perfection is the enemy of progress

When writing, it can be tempting to over-analyse every word and phrase, trying to find the best things to say at the right time. Noble as that objective may be, being too methodical can result in you tying yourself in knots in trying to find the right words, and inevitably making no progress whatsoever. Sometimes it's just better to 'block' things in and get the words on the page. Then you can give it a couple of days and take a fresh look.

3.3. Eliminate distractions

Writing is a particularly immersive experience; it's not the kind of task you can easily dip in and out of. If you're flittering constantly between writing, checking emails, talking with colleagues and other distracting tasks, you'll find little progress being made. It's vital to carve out a chunk of time when you can sit down and dedicate fully to the task at hand. Try turning notifications off on your computer.

3.4. Feedback, feedback, feedback

Once you're finished, or perhaps even during the process of writing your white paper, it's vital to get feedback from other people. Another set of eyes can help you understand things about your writing that you wouldn't have otherwise been able to see. Getting input from other people allows you to reshape your writing in a way that readers can understand.

Once you've planned your content thoroughly and got to grips with various writing tips, you'll be in a good position to produce a quality white paper that informs your readers and solves real problems. This, above everything else, is the key to promoting our discipline.

Tips for writing

Here are some tools that people use for researching content:

- ➔ **BuzzSumo** – a great tool for finding popular content
- ➔ **Google Trends** – discover what's popular
- ➔ **Microsoft by the numbers** – especially useful for Microsoft partners, back your research up with cold hard facts
- ➔ **Radicati** – loads of fascinating facts about the internet
- ➔ **Wikidata** – Wikipedia's central store of structured data
- ➔ Also remember government data sources and reports by major tech analysts
- ➔ Journals and conference proceedings
- ➔ Professional and technical publications.

Statistics

Statistics can be a powerful tool because they can help simplify complex issues. They also provide a degree of objectivity to your arguments, lending weight to the issues you're discussing. It's often helpful, when outlining a problem, to offer statistical proof of your argument. You should always ensure your statistics come from a respectable source such as industry analysts, research from independent organisations or government agencies.

Other forms of legitimacy

Quotes from recognised industry leaders or a foreword by a respected stakeholder or company will add weight to a white paper. It can help to highlight the problem you are solving and/or the importance of HF/E in offering a solution.

When making decisions, people are looking for advice from respected sources. If you can include any form of endorsement in your report, it will take on a whole new level of significance with your readers. That is one of the reasons why it is useful to find partners to collaborate with.



Case studies, 'breakout boxes' and infographics

In addition to statistics, building a narrative can be extremely engaging. People love a story. Stories can be used to demonstrate more complex ideas and values.

These narratives can be presented in a breakout box. This is a specific section that draws the reader to it and provides a break from the main text they are reading. It's a powerful way of keeping the reader engaged rather than presenting them with a 'wall of text'.

Within the CIEHF we have access to appropriate graphic design resources and links to media and PR agencies that can help us generate content alongside white papers. These might include articles in *The Ergonomist*, *Think* and even infographics and web-based content for promotion on professional and social media. The more creative you can be with promoting your white paper, the more reach and influence it is likely to have and we can help you do this!

Length of your white paper

While there is no specific rule on the length your white paper should be, you should be aiming to present your work as concisely as possible.

Some readers of white papers may only have a very short time to take in the information you are presenting. Your white paper therefore cannot be overly complex to read or too long.

Various guides exist for the length of white papers generally ranging from three to 15 pages. This may be hard to achieve but please bear in mind that papers that are too long are a common disappointment amongst readers.

Papers can vary in length but the longer your paper is, the more work will be required to write it (and the more effort it may take to read it!). It may be better to separate the work into a number of shorter white papers, with different authors providing specific inputs that can be promoted as a series to specific readerships.

There can be a tendency for authors of a white paper to present all they know about a problem in one white paper. Unless the topic is very narrow then the paper can easily run away from the authors and become too big to serve its purpose effectively.

