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that should be posted to the web site, sent to clients and included in new business proposals. The three kinds are:

- Client Case Histories
- The “Ten Steps To...” Papers
- The “Thoughtful Analysis” Papers

I did not create these categories, nor did I cause them to be important. Back in the early Eighties, a wise old Greek-American named Mike Vasilakes did that. He had already been a trade magazine editor, industrial publicist and corporate communications expert for a century or more when he took me under his wing and taught me the trade, but I have used what he taught me every day for more than three decades since. Think of him as Yoda to my Luke Skywalker.

And since the people who do marketing for accounting firms and their vendors are roughly as young and inexperienced today as I was then, I thought it might be worth laying out some of the base rules that make some white papers great and others mere fluff pieces.

First, the mechanics. A white paper is never called “white” in this politically correct world, lest we offend someone of color. In the old days “green papers” were drafts, “white papers” were the final copies. I am not sure which “green” people we might offend, but today these are “drafts” and “position papers.” So we will henceforth call them position papers. They are published in 8 ½ x 11-inch format, and include at least one graphic illustration or photo.

Position papers are no more than 2,000 words, which works out to about four printed pages. A few less is acceptable, but the paper should be no more than four pages. This, in my day, was called “bathroom reading,” because if the subject was really interesting the intended reader would take it into the bathroom with them to

read. No, really. Some papers are only 1,000 words, printed front and back on a single

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Every business has problems that need to be solved, so matter how successful they are. So if you talk about their problems, also play up their successes. In this way, they don't feel as though they are the goat in a pasture full of bulls.

Your firm, regardless of what you do, gets “three righteous mentions.” First, the paper should carry the by-line of one of your partners as the author. To enhance that partner and the firm. Second, it should mention the firm's product – the one that solved the problem, the one that best fits the needs of most clients, or the one that illustrates a trend. Finally, you can quote one other person – a client who uses the service, for example, or an expert from within the firm. This “three mentions” rule does not count the firm name and contact information at the bottom of the last page.

With that as prelude, let's talk about the three types of position papers:

- **Case Histories.** These are a presentation of how your firm solved a problem for a client, and you should have at least two for each of the firm's major product lines. These are very formulaic – they open with a presentation of the problem; discuss the client and how great they are; discuss why the client picked your firm to help solve the problem; present how you solved it; and discussed the benefits to your client made possible by the solution. This should be single page, front and back.
- **“Ten Steps To...”** These are basic how-to pieces, and you should have at least one for each product line. They can focus on five steps, seven, ten or 12, but no more. Remember, those trips to the bathroom are short. They outline a problem and the steps needed to solve the problem. Like how to manage succession management. Or basic general ledger and accounting. Or how to prepare for an audit. Their purpose is to inform, education, and demonstrate to the client that your firm has a depth of experience and ability.

- **“Thoughtful Analysis” Papers.** These can be the most difficult to write, and

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and up from a free-lance writer to \$5,000 and up through a competent ad or PR agency.

Accounting firms, tax preparation firms, wealth management firms and other professional services suffer from a perception that they should not advertise directly. Actually, when I first started working with accounting firms this was more of a directive than perception. And while the rules have loosened a bit, marketing the firm is one facet of practice management that can still be tricky.

The creation and effective use of position papers is one way to enhance the firm in a positive, educational and professional way. They are perfect for clients' new business presentations, accounting shows and other marketing presentations, as well as posting to the corporate web site.

And don't forget to circulate them within the firm. It is amazing how members of even a small firm may not know the areas of expertise the firm has, the credentials of its partners, or its abilities to solve problems for clients. White papers are an effective communication tool, both within the firm and without.

That's what Mike Vasilakes taught me, and it is still valid three decades later.

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