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How to Use White Papers, Case Studies and Articles to Sell High Tech

By Alec Alpert

OVERVIEW

In today's fast-paced and highly competitive global economy, generating quality leads is an ever-increasing challenge for marketing professionals.

Overwhelmed by the daily onslaught of advertisements and marketing from all directions, prospects are increasingly selective and skeptical. It is no longer easy to entice them away from their busy schedules to meet with you.

At the same time, as budgets shrink, marketing and sales teams are expected to do more with less. Generating leads today thus requires a well-crafted, well-researched and proven lead generation strategy that drives more sales.

This being the case, does your marketing portfolio include *all* of the powerful tools that boost lead-generation?

If you have been relying mostly on sales guides, product brochures, data sheets, newsletters, print ads and press releases, then consider adding **white papers, case studies and articles** to your marketing strategy. This white paper explains why you should, using medical technology as an example of high-tech.

A White Paper - Your Powerful Marketer

Recent marketing research by MarketingSherpa, Zigzag and KnowledgeStorm, reveal that **white papers** are among the **most powerful sales and marketing tools** for driving complex technology sales. This is because white papers educate, explain and inform on the merits of products rather than pitch.

White papers quickly establish the **credibility of a company** and the **position of a thought leader**. Potential and existing customers use them as a valuable resource for making informed purchasing decisions.

After reading a high-quality white paper, busy decision-makers don't wait long to contact a manufacturer.

In fact, a recent report by KnowledgeStorm on white papers reveals the following:

White papers are one of the most powerful tools in the sales and marketing toolkit. Properly conceived and executed, white papers work. In one recent IT buying study by Forbes.com, 72% of respondents contacted a vendor or reseller after reading a white paper. In the same study, 57% of respondents said that reading a white paper influenced a product buying decision. White papers make companies credible. They help position companies as thought leaders, and they aid the selling process by informing and educating the prospect base...

Producing a high-quality white paper is a challenging task that involves a well-coordinated effort by many people such as marketing managers, project managers, engineers, scientists, copywriters, copy editors and illustrators. Typically, it takes 4 to 6 weeks to produce a high-quality 10-page white paper.

Once a white paper is produced, the next step is to reach with it as wide a target audience as possible. Here are 10 effective strategies of doing this:

1. Post it on a company's website for the whole world to see.
2. Publish it in trade magazines and scientific journals, on-line and off-line.
3. Directly mail it to prospects.
4. Publish it in newsletters.
5. Hand it out at trade shows.
6. Use it as a base for speaking engagements.
7. Use it to educate company personnel.
8. Leave it behind at sales meetings.
9. Re-write portions or an entire white paper into multiple articles and publish them separately.
10. Design an Internet-based marketing campaign around it.

Once these strategies are utilized, you will surely see an increase in response from your prospects. You will be busy answering e-mails and voice mails, and scheduling demonstrations.

But there is more...

As stated earlier, a white paper is not the only powerful tool that brings new customers. To boost your lead-generation even more, there are also **case studies**.

Why Case Studies?

Like white papers, case studies are **sought after by prospects**. Case studies are simply success stories from happy customers about how a product solves problems. With real-life data, case studies present the 'before' and 'after' state of affairs, so the contrast demonstrates the advantages of using a product. A case study is a very convincing document that immediately establishes credibility with the reader.

Case studies can be distributed in the same way as white papers, as described above.

Articles: Everybody Loves Them ... so do Your Prospects

And then there are **articles** - the **third powerful marketing tool** that should be in the strategy of all successful marketing campaigns. Articles have been the workhorse of promotion and communication for centuries, long before white papers and case studies

were invented. Articles are flexible and versatile tools and are relatively easy to write. And like white papers and case studies, articles educate and persuade, though in a different format.

Who is Qualified to Write Them All?

As can be seen, the powerful advantages of having white papers, case studies and articles in your marketing campaign are obvious. However, there is a caveat - to be effective, they must be **well-written by a professional writer**. In my opinion, having project managers, engineers or scientists writing marketing copy is a mistake. No doubt, technical professionals have vast, intimate knowledge of the product and can write excellent technical and scientific papers, but that does not mean they can write good marketing copy that sells effectively.

On the other hand, not all professional writers are qualified either to write about highly complex medical technology. A professional writer for medical technology must have excellent copywriting skills, a thorough knowledge of engineering, marketing expertise, regulatory knowledge, and understand well the needs and challenges of healthcare professionals.

With this in mind, here is what it takes to write high quality **white papers, case studies and articles for medical devices**.

WRITING EFFECTIVE WHITE PAPERS FOR MEDICAL DEVICES

Special Challenges

Unlike other products, writing about a medical device presents special challenges to a copywriter. For example, writing methods that effectively sell DVD players are ineffective for selling MRI machines to hospitals. Why? Because a medical device directly interacts with human bodies, and therefore gives rise to the risk of injury.

Actually, the main concern of medical device manufacturers is to mitigate the risks to patients or users, while delivering the maximum benefits. All medical device manufacturers are required to comply with medical device regulations that ensure the safety and efficacy of their devices.

Hence, when writing for the medical technology industry, a writer enters a highly regulated world that he or she must know well, in order to produce not only a technically competent paper, but also a paper that fully complies with the complex medical device regulations, both US and international.

It helps to remember that, on the one hand, a white paper is an effective marketing tool, while on the other hand, it is also a legal document that makes claims about product performance and health benefits. As such, a white paper falls into the category of “promotional labeling and advertising for FDA-regulated products” within the Code of Federal Regulations.

In fact, before it goes live, a white paper must usually pass the scrutiny of the medical device manufacturer’s Legal Department and Regulatory Affairs Department, in addition to obtaining approval of the technical, scientific and marketing personnel on the project team. In other words, once a writer commits to writing a medical device white paper, he or she has also assumed responsibility for the regulatory and legal savvy of the paper – a very important aspect of medical technology writing.

With this in mind, a writer should be able to grasp the complex science and technology behind the device, and to translate them into persuasive prose without any hype. The paper has to engage the logical mind of scientific readers, not so much their emotions, which is the opposite of methods used to market consumer goods, where appealing to human emotions rules. That’s why, in the medical technology field, white papers tend to be written in a formal and objective academic style, based on substantial, reliable evidence that exists at the time of claims.

A lead generation white paper for a medical device is a hybrid between an educational essay and a sales brochure. It educates and gracefully sells at the same time. The writing process starts with determination of the topic. The topic is usually the medical device that has been approved by the FDA and released for commercial use. Or the topic can be the scientific principles and technology used (or to be used) in the device.

Target Audience

The next step is to identify the ideal target reader. This is crucial. The writer must clearly identify who the paper’s audience will be. A medical device paper is usually written for a diverse audience of professors, doctors, medical physicists, scientists, technologists, hospital administrators and regulatory agencies. Knowing the audience sets the paper’s level of sophistication, scope, tone, structure and vocabulary.

In the case of a medical device, a white paper usually talks to two predominant groups. One includes readers with a scientific mind who are mainly interested in the device’s features and an in-depth analysis of its technology, often at the atomic level. The other group comprises administrators looking to grasp a device’s business benefits and see how it can save labor, cut costs and improve regulatory compliance. Hence, a writer is challenged to strike a balance between discussing a device’s benefits and features. In fact, it is not unusual for a writer to be pulled in opposite directions by a device’s manufacturer; engineers and scientists who want a technical paper, but marketing managers who want a sales document. It is vital to get the balance right.

The Outline

So how can a writer successfully resolve this dilemma? A good starting point is to prepare an outline of the paper and discuss and approve it with the manufacturer. The writer, however, should advise these people that a lead-generating paper needs to focus on a device's benefits, rather than just its features, or how great the company is. The outline will establish the paper's direction, focus and final destination before the writing even begins.

Once the outline is approved, the next step is to interview subject matter experts who have an intimate knowledge of the topic. They are the design engineers, scientists and other professionals working for the medical device manufacturer. Nobody knows the device better than the people who designed and made it. For this reason, a writer must take these interviews seriously and allocate sufficient time for them. He has to polish his interviewing skills and prepare for the interviews well in advance.

Besides interviewing, a writer should also access the relevant product documentation. The law requires all medical device manufacturers to maintain a Design History File, which contains product development documents such as product specifications, drawings, validations, operator manuals, and so on. Many questions can also be answered by simply searching the Internet. And, of course, a library or bookstore could also provide valuable information.

The Title

What is a white paper's structure? It naturally begins with the title, which is a crucial part of the paper. This can make or break the paper, and must be relevant, compelling, and engaging, enticing the readers to read further. It should be simple and focus on the benefits that the device delivers.

Then comes the first page, which sets the stage. The remainder of the paper evolves from the first paragraphs. The paper can be only as good as its first page. Readers will continue reading only if the first page convinces them to do so.

The Body

The rest of the paper is divided into manageable sections. As with any writing, the process is repetitive: writing drafts, refining, editing, and re-editing many times until the paper is nearly perfect. The writer must stay focused on appealing to the target audience, and strike the right balance between the benefits and the features.

Sentences and paragraphs have to be concise, with wide margins around the page. Bullets and headlines should be used generously, instead of long passages of uninterrupted text.

The paper needs to be laid out so that a reader can quickly grasp the gist of it just by scanning the sub-headings.

The end of a white paper is a call for action asking readers to contact the manufacturer for a meeting, demonstration, evaluation, analysis, discussion or some sort of next step(s).

A lead generation white paper is typically 5 to 12 pages long, and mostly comprises text with minimal graphics.

Now, let's look at writing a compelling case study.

WRITING COMPELLING CASE STUDIES FOR MEDICAL DEVICES

The Structure

Typically, a medical device case study is a 500 to 1,000-word article on how the device improves the diagnosis or treatment of patients. It can also be a success story of how the device increased productivity, revenues, saved money, improved regulatory compliance or reduced downtime. Essentially, a case study is the end user's testimonial on the benefits of the device.

The structure of a case study on patient diagnostics, for example, typically includes the following sections:

1. Title
2. Case history
3. Procedure description
4. Discussion
5. Conclusion

The title is the most important part of a case study. It must entice the reader to read further. To do this, it should focus on the benefits of the medical device that are relevant to the target audience. Let's say the case study is about an advanced, high-resolution, 3D color, cardiac CT (Computed Tomography) scanner used in a specific hospital. Let's call the scanner Gektar. And let's say the case study describes a 30-year-old female admitted to the emergency room with severe chest pain. The title could read: 'Improved Workflow, Speed and Reliability in Diagnosis of Severe Stenosis with High-Definition GEKTAR CT Scanner'. An effective title requires a good understanding of one's target audience and what matters most to them.

A Specific Patient's Case

The case history section describes the patient's symptoms and the diagnostic steps taken. The female patient in this study was in good condition, but slightly overweight. The physical examination and EKG revealed nothing unusual. Her blood cholesterol was mildly elevated, but she had no history of smoking, drug or alcohol abuse, and was happily married. She had never complained of chest pain before. She was then transferred to the GEKTAR CT scanner to perform non-invasive cardiac CT imaging.

The procedure section describes the procedure performed on the patient and the findings. Let's say her heart rate was 87 beats per minute. The scan parameters automatically adapted to this heart rate and the scan was successfully completed in ten seconds. The 3D evaluation software produced the high-resolution, 3D, color images – the key proprietary features of the GEKTAR CT scanner. Within minutes, the high-resolution images revealed severe, non-calcified stenosis in a segment of one of the heart's blood vessel. The patient was immediately transferred to the cardiac suite for treatment.

The case study includes images of the area affected by stenosis – what the doctors had actually seen on the CT scanner's monitor. The images would have clear and detailed notes of what they depict.

The discussion section emphasizes the unique benefits of the High Definition GEKTAR CT scanner that allowed the transformation of an uncertain and perhaps initially dubious case into a quick and correct diagnosis with decisive actions that probably saved the woman's life. Not only did the CT scanner produce high-resolution images within seconds, but it was also connected to the hospital's information network, where the interventional cardiologists could see and download the 3D color images in seconds, and study the details of the stenosis.

The Conclusion

The conclusion section further endorses the CT scanner by stating that the hospital has been using it for over a year on hundreds of patients in total, and that it has always produced high quality, 3D color images that dramatically improved the reliability of diagnosis, increased productivity, personnel satisfaction and saved lives. Actual quotations and recommendations from doctors could be inserted in this section, stating how incredibly powerful and helpful the GEKTAR CT scanner had been in defining artery diseases, rather than depending on less effective conventional methods.

GENERATING QUALITY LEADS WITH ARTICLES

A medical technology article usually describes how a product works and its practical benefits for the user. The length of an article is usually between 500 to 1,000 words. A typical architecture of an article is the **promise, proof** and **call for action**.

As we have already established for white papers and case studies, a compelling title is as important for articles. If the title does not entice, an article, most likely, will not be read.

The first paragraph leads straight to the point of an article, explaining the subject matter, why the reader should continue reading. It promises that the reader will gain valuable knowledge that may solve their pressing problems.

Next is the proof to substantiate the claims. This can be presented as data, charts, statistics, facts, examples, comparisons, and quotes and opinions from credible sources.

At the end, an article echoes the introduction and prompts the reader to take action, like calling a manufacturer for a demonstration, or to discuss further an article's subject matter.

There are many ways to promote your products with articles; through the Internet, trade publications, scientific journals, newsletters, etc.

MARKETING COLLATERAL HAS WORKED OUT ... NOW TO THE ACTUAL SELLING

Without a doubt, white papers, case studies, articles and other marketing efforts bring you qualified leads – seriously interested prospects that admitted the need for the product and have available budgets to buy it. Now, it is important to clearly understand how hospitals, clinics or laboratories acquire medical technology. Let's look at their typical buying processes.

Modern hospitals depend heavily on medical technology to diagnose, treat and prevent diseases. A typical mid-sized hospital has hundreds of items of medical equipment, from simple stethoscopes and blood pressure monitors to highly sophisticated MRI machines and linear accelerators. Hospitals are complex organizations with entire departments dedicated to technology planning, assessment, acquisition, maintenance, and upgrade and replacement at the end of the product life cycle. They have elaborate systems, programs, policies, procedures and protocols in place for purchasing new medical equipment.

Buying Processes at Healthcare Facilities

To sell successfully to healthcare providers, marketing and sales professionals have to be well versed in the buying processes that healthcare providers use. Medical device

marketing is quite different from any other type of marketing. Typically, hospitals have a review process to qualitatively and quantitatively evaluate their medical technology needs. The review's scope depends on the cost of the technology, and may involve many departments. For expensive equipment, the review most likely will be elaborate. For less expensive and disposable items, the review may simply assess the department's current needs, and the proposed purchase's operational and financial impacts. In either case, a market survey and literature search take place to some extent, and this is supplemented with extensive data collection and analysis when needed. This is why **white papers** and **case studies** published by medical device manufacturers are very useful during the review process – the decision-makers look for every bit of information they can find. Hence, white papers and case studies can significantly influence the decision-making process.

A typical review process includes the following phases:

1. Strategic planning
2. Assessment
3. Acquisition
4. Utilization
5. Repair and maintenance
6. Replacement and disposal

The process starts with *strategic planning*. In this top-level phase, the relevant stakeholders (e.g., Directors, Professors, Managers, Doctors, Engineers, Purchasing, etc.) review key issues, success factors and resource allocation, and assign responsibilities for sustained improvement in technological performance. They identify the services their facility provides, and the technologies that would complement their existing services. The typical questions to answer are: Where are we? Where do we want to be? And, how are we going to get there?

Because medical technology greatly impacts the cost and structure of healthcare delivery, hospitals include *technology assessment* in their planning processes, which typically include *cost-benefit* and *cost-effectiveness* analyses.

Cost-Benefit Analysis

Cost-benefit analysis calculates the costs of applying the technology and compares these costs to the benefits resulting from its application. It provides criteria upon which to base decisions of whether to adopt or reject a proposed device. The device is adopted if its benefits exceed its costs. However, one limitation of this analysis is that it expresses all benefits, including therapeutic effects, in monetary terms. Hence, hospitals also conduct cost-effectiveness analyses to quantify therapeutic effects in terms of reduced patient hospital stays, and compare these to the costs of the technology's implementation. Although at first glance the chosen technology may seem to have a limited

impact on other facility operations, stakeholders also examine the likely effect of the new equipment on existing services.

Other aspects of cost-effectiveness analysis include assessment of *long-term replacement strategies* and *identification of emerging technologies*. Since medical devices have finite longevity, hospitals have replacement plans to minimize the effects of unforeseen capital replacement. By identifying emerging technologies that fit into the projected plans of the hospital's service area, the hospital tries to avoid investing in nearly obsolete technologies.

Justification of Purchase

Purchase of a new technology is justified only when an increase in the equipment's cost-effectiveness is clearly demonstrated. The typical questions asked during the analysis are:

- Will the new medical device increase the volume of the service?
- Will it raise the costs of the service?
- Will the device generate additional revenues and, if so, how much?
- What is the new device's expected lifespan?
- What is the device's reliability and the costs associated with its repair and maintenance?
- How reliable and reputable is the manufacturer?
- What impact will the new device have on routine operating costs?
- What will the disposal cost be?
- How easy is the device to operate?

Once the technology has been assessed and the decision to purchase has been made, the next phase in the process is *technology acquisition*, which typically includes the following steps:

- Preparation of general and functional specifications
- Clinical, technical and cost evaluations
- Review of proposals and evaluations, and making a final decision about a device manufacturer
- Contract negotiation for the device's acquisition
- Preparation and issuance of a purchase order
- Contract award

A contract award is the green light for the medical device company to deliver and install the product.



ABOUT THE AUTHOR

Alec Alpert is a writer specializing in marketing collateral and technical writing for high technology. His freelance writing career emerged from technical and business writing at high-tech international companies such as Siemens Medical Systems, Becton Dickinson Diagnostic Systems, Smiths Aerospace, and Terumo Medical.

In 30 years at these companies, he has written or contributed to the writing of white papers, user's manuals, service manuals, product inserts, quick reference guides, assembly procedures, test procedures, validation protocols and reports, data analysis reports, PowerPoint presentations, business correspondence, and other technical and business communication.

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