THE SALESFORCE DOC TEAM

VOICE & TONE Guidelines

INTRODUCTION

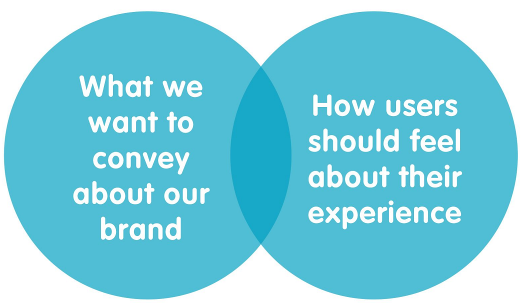
Why do we need voice and tone guidelines?

To connect with our customers, we need to talk in a way that resonates with them. The right voice makes people feel at home through content that speaks their language. It also communicates what our products and our brand are all about.

Consistency is the key to building and maintaining a strong, trusted brand, which is why adhering to our voice, tone, and style guidelines is so important.

What is voice, exactly?

Voice expresses our personality and is a synthesis of two things.



How is voice different from tone?

Our voice is the core of our personality, and it should stay consistent across all of our content. Tone expresses the mood or feeling of the voice, which can change based on the situation. In other words, it's not what you say, but how you say it.

OUR PERSONALITY

At Salesforce, we're:

- Trustworthy, *but not boring or uninspired*
- Innovative, *but not reckless or unreliable*
- Provocative, *but not disrespectful or outlandish*
- Energetic, *but not pretentious or artificial*
- Philanthropic, *but not passive or naive*

Take a look at our [Corporate Voice and Tone] to learn more about our personality.

Adapting your tone

While our voice remains consistent throughout our content because our personality doesn't change, tone *should* change. Tone is all about context. Think about how you interact with people as you go about your day. Although your individual thoughts and feelings stay the same, you adjust your tone when speaking to someone based on the person and environment; you wouldn't talk to a coworker, your best friend, a stranger, and a police officer in exactly the same way.

Your writing should also change depending on the context. Who is your audience? What situation are they in? Where are they interacting with this content?

Some content types (like onboarding copy) are well-suited to a lighthearted tone of voice, and others (like error messages or text in developer apps) should be more direct.

GUIDING QUESTIONS

To determine the appropriate tone of voice, ask yourself these questions.

1. Audience
   - Who is the intended audience?
   - What are the goals and motivations of the readers?
   - What knowledge or experience does the reader bring to the content?
   - How familiar is the reader with our product?
2. Situation
   - Where is the reader consuming the content, and how is it delivered?
   - What situation is the reader in?
   - How does the reader likely feel right now? How can you maintain or improve the reader's state of mind?
   - How will this content affect the reader?

WRITING GUIDELINES

Be concise.

- Use as few words as possible. Avoid unnecessary and redundant information.
- Focus on user goals; make sure that you create content for an actual use case.
- Avoid large blocks of text. Avoid long, complex sentences.

Be conversational.

- Use natural, conversational language with a friendly, upbeat tone.
- Contractions are okay.
- Write from the users' perspective to help them accomplish tasks.
- Avoid developer-focused terminology, unless you're writing for a dev.

Be direct.

- Use plain English. Avoid buzzwords, jargon, and words you wouldn't say in person.
- If you use any idioms in the UI, clarify them in a code comment for the localization team.
- Use active voice, and avoid complex verb structures.
- Refer to user interface elements by name.

Use *please* sparingly.

- Use *please* only when asking the user to do something inconvenient o when the system is to blame.
  Example: *The export process may take a while. Please wait until the process completes.*

Avoid *sorry*.

- Use *sorry* only in error messages that result in serious problems for the user (for example, data loss, the user can't continue to use Salesforce, or the user must contact Support).
  Avoid: *Sorry, but you must supply a search string of at least two characters.*
  Better: *Sorry, but you must exit and log in again.*
- Before you use *sorry* in UI text, ask yourself if we could change the design to avoid the situation.

Use exclamation points sparingly.

- Use exclamation points to be encouraging or generate excitement.
  Example: *Almost there! [To show progress during a process.]*
- Don't use exclamation points in error messages, confirmation message or instructional text. **Avoid:** *Your changes were saved!*

Be positive.

- Whenever possible, phrase sentences positively, not negatively.
  Negative: *The mini view doesn't appear if the record in the detail view doesn't have any records associated with it.*
  Positive: *The mini view appears when the record in the detail view has associated records.*
- When describing feature improvements, focus on new benefits to users, rather than on the design problems they addressed.
  Example: *We've made important improvements to the side panel that increase your users' productivity.*

Give information "just-in-time."

- Introduce required conceptual information only when the user is performing the related task.
- Explain business rules or constraints only when the user encounters their constraining effects.

Design text for easy scanning.

- Users often scan rather than read, so put the important points first. Put actions before explanations.
- Use *short* bulleted lists.
- Assume that after users have decided what to do, they immediately stop reading and do it.
- Use *See Also* links at the end of topics to refer users to additional, related information.

Provide clear instructions for users to correct errors.

- For error messages, give the user clear instructions on how to correct the error.
  Example: *This Self-Service username already exists. Choose a unique Self-Service username.*
- Avoid phrasing that blames the user or implies user error. Passive voice can be appropriate in messages to achieve this purpose.

Avoid referring to the location of items on a page.

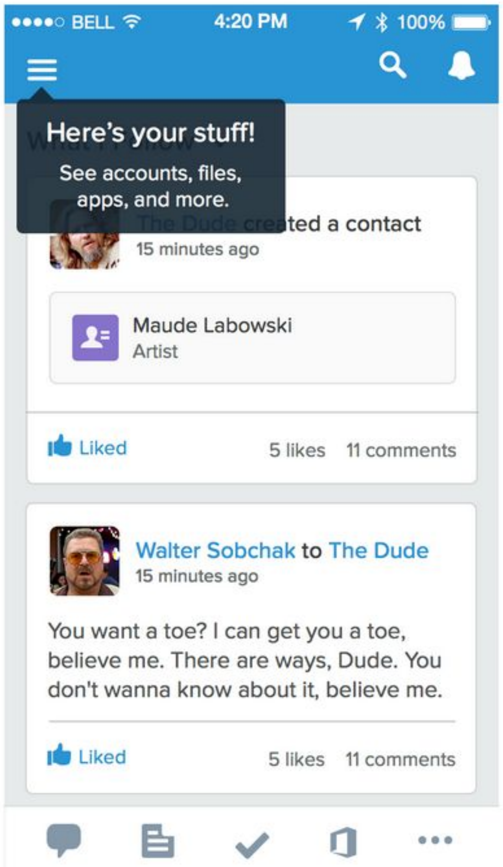
- Don't use *below*, *following*, *above*, or other directional words to refer to the location of elements on a page.

VOICE & TONE EXAMPLES

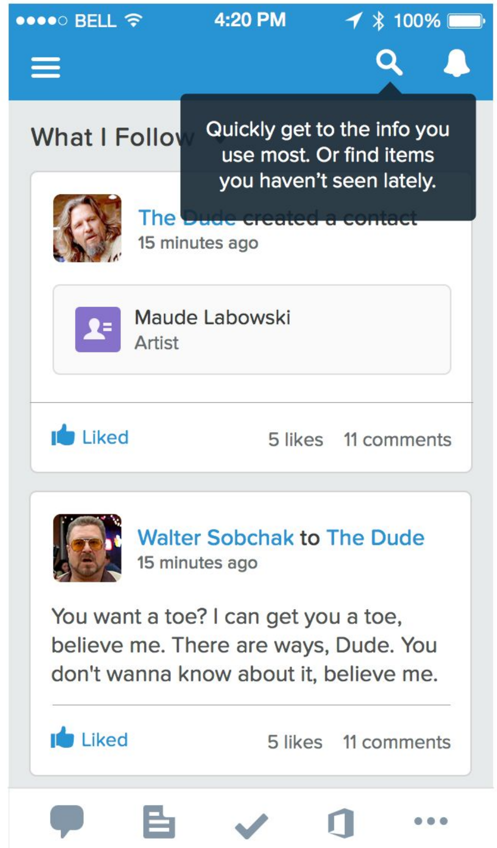
These examples will help you apply the voice and tone guidelines for different audiences and scenarios.

EXAMPLE 1: Salesforce1 App (Phone)

Hamburger bubble (top left)



Search bubble (top right)

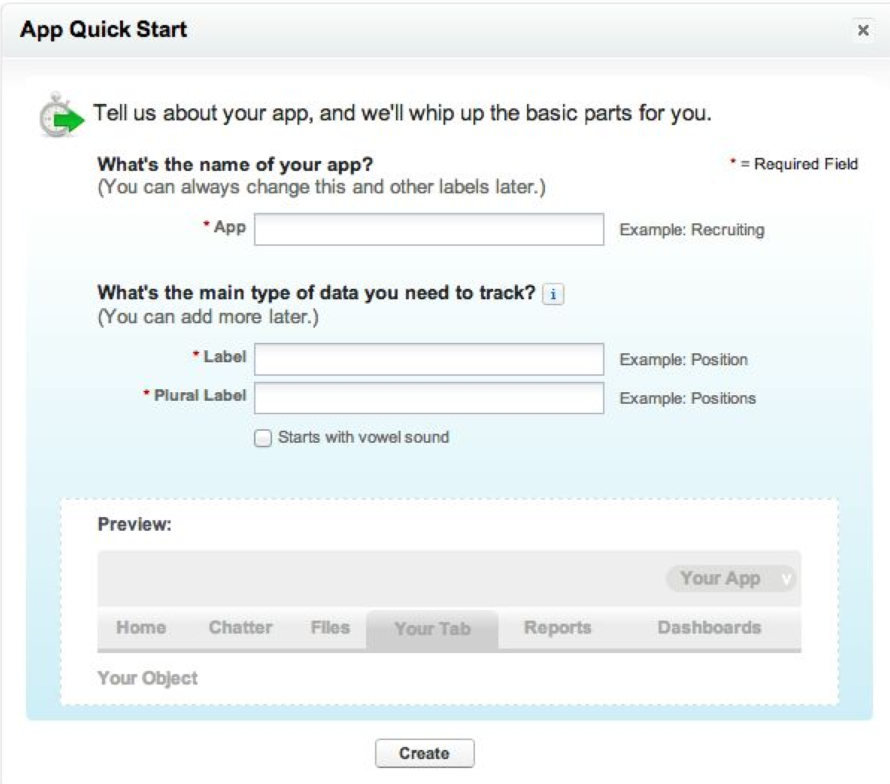


ABOUT THIS EXAMPLE

Audience: First-time Saleforce1 Mobile app users

Goal & tone: The goal is to let users know what the "hamburger" and search icons do, and generate enthusiasm for using the app. Since it's a mobile app, the text is minimal, and the tone is friendly and conversational: "Here's your stuff!"

EXAMPLE 2: App Quick Start



ABOUT THIS EXAMPLE

Audience: New Salesforce admins

Goal & tone: The goal is to help new admins get started quickly. We want their first experiences with Salesforce administration to be successful and productive.

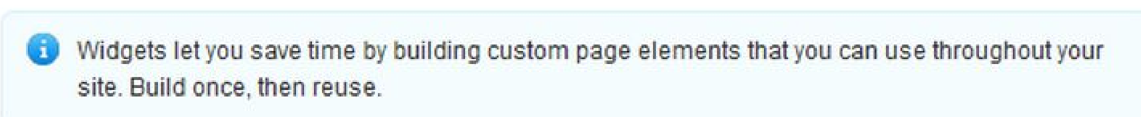
> *"Tell us about your app, and we'll whip up the basic parts for you."*

The tone is conversational and human ("us" and "we'll"). We want them to know we're here to help: just give us some info, and—voila!—we'll give you an app.

> *"You can always change this and other labels later."*
> *"You can add more later."*

The text is reassuring: by telling users they can go back and make changes, we show that we understand their fears as new users, and let them know they're not doing anything they can't fix later.

EXAMPLE 3: Widgets Message Block



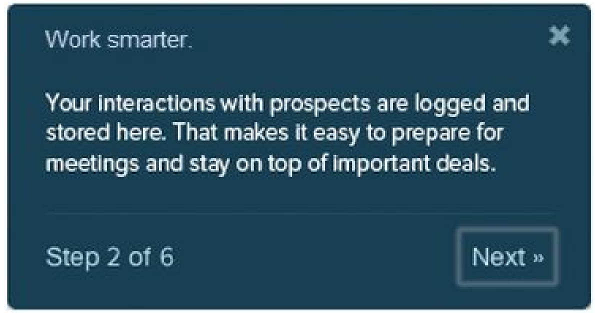
ABOUT THIS EXAMPLE

Audience: Admins

Goal & tone: The goal is to quickly communicate what widgets do and their benefit for admins. The tone is direct and conversational, but not overly chatty.

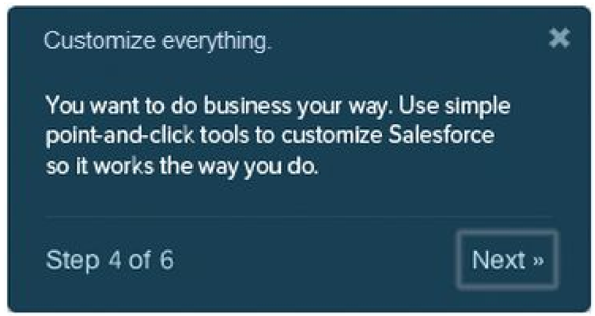
EXAMPLE 4: Walkthrough (CRM Free Trial, Initial Tour for Sales Reps)

Accounts, Contacts, and Leads Tabs

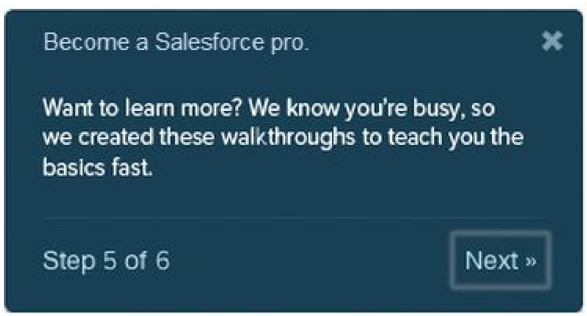


Opportunities Tab

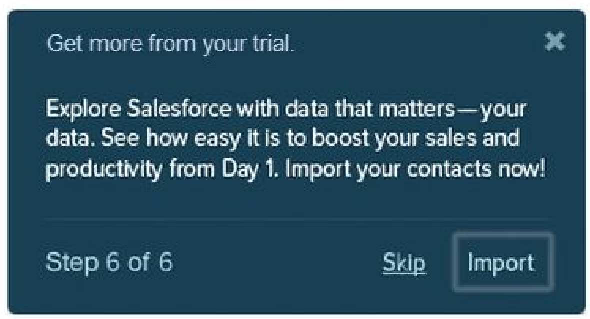
Reports and Dashboards Tabs



Setup Link



Walkthrough Side Panel



Import Contacts Widget

ABOUT THIS EXAMPLE

Audience: Sales reps evaluating Salesforce

Goal & tone: The goal of this walkthrough is to drive purchase and/or adoption of Salesforce. We want our customers to know that we *get* them: Sales reps are busy and driven, so the tone is direct and clear rather than chatty, and uses the same words they do. It also empathizes with their pain points: a messy desk and a busy schedule. It also acknowledges what's important to reps: identifying and closing deals, hitting quota.

Notice how we've used the same tone in both heading and text, and that we end with a call to action: "Import your contacts now!"

EXAMPLE 5: Release Notes (Salesforce for Outlook)

Salesforce for Outlook

You'll discover new Salesforce Side Panel features to help your users get more Salesforce work done directly from Microsoft® Outlook®. We've also improved setup so you can help new users hit the ground running quickly, and added helpful customizations in Outlook configurations to keep you in control.

Before we dive into our latest features, it's a good time to consider migrating any remaining folks using Connect for Outlook to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft® Exchange Online, the Microsoft -hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all Microsoft® Outlook® contacts, events, and tasks
- Automatically scheduled sync cycles

Now let's take a look at our latest enhancements to Salesforce for Outlook and the side panel.

ABOUT THIS EXAMPLE

Audience: Salesforce administrators

Goal & tone: The goal of this section is to summarize the changes in Salesforce for Outlook, promote the Salesforce Side Panel, and encourage customers to migrate from an older product to a new one. The tone is energetic, positive, and user-centric: "help your users get more Salesforce work done…" "dive into our latest features…" "migrating remaining folks…"

The section goes on to list the new features (text omitted), introducing them in a conversational manner: "Now let's take a look at our latest enhancements…"

EXAMPLE 6: Quick Start Developer Text

Enough Talk; I'm Ready

If you'd rather read about the details later, there are Quick Start topics for each native development scenario.

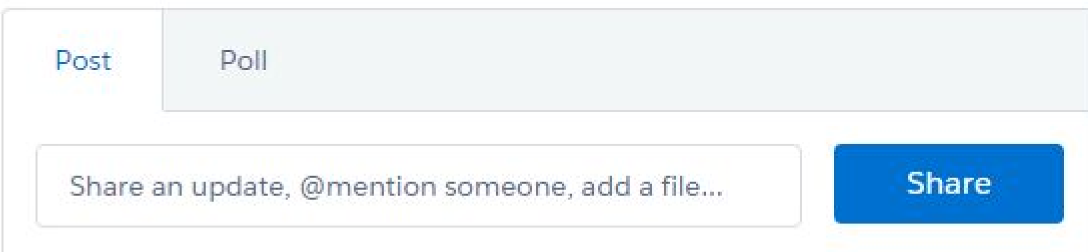
- iOS Native Quick Start
- Android Native Quick Start

ABOUT THIS EXAMPLE

Audience: Developers

Goal & tone: The goal of this developer guide is to encourage developers to create their own apps for the Salesforce1 mobile app. Here's a topic that sets the right tone. Brief, to the point, and acknowledges the fact that readers (developers) would rather *not* be reading.

EXAMPLE 7: Lightning Experience Chatter Publisher



ABOUT THIS EXAMPLE

Audience: Chatter users

Goal & tone: The goal of the ghost text is to tell users what kind of information they can enter in a Chatter post, and the ellipsis invites users to tell readers about their situation.

EXAMPLE 8: Salesforce Mobile SDK Guide

> ### Intended Audience
>
> This guide is primarily for developers who are already familiar with mobile technology, OAuth2, and REST APIs, and who probably have some Force.com experience. But if that doesn't exactly describe you, don't worry. We've tried to make this guide usable by a wider audience. For example, you might be a Salesforce admin who's developing a new mobile app to support your organization, or you might be a mobile developer who's entirely new to Force.com. If either of those descriptions fit you, then you should be able to follow along just fine.
>
> If you're an admin setting up users for mobile devices, you're probably looking for the Salesforce Mobile Implementation Guide.

ABOUT THIS EXAMPLE

Audience: Developers

Goal & tone: The goal of this developer guide is to encourage developers to create their own apps for the Salesforce1 mobile app. The tone is light, friendly, conversational. It starts a sentence with "But" instead of "However." It takes on an empathetic, reassuring tone with the phrases, "don't worry," and "you should be able to follow along just fine." It uses casual, everyday language, "admin," instead of "administrator."

EXAMPLE 9: Getting Started with Apex Trailhead Module

Call a Method to Send an Email

Let's invoke the public method. We'll use anonymous Apex execution to do so. Anonymous Apex allows you to run lines of code on the fly and is a handy way to invoke Apex, especially to test out functionality. Debug log results are generated, as with any other Apex execution.

> There are other ways to invoke Apex, for example, through triggers. You'll learn more about triggers in another module.

1. In the Developer Console, click **Debug** | **Open Execute Anonymous Window**.
2. In the window that opens, enter the following. Replace `'Your email address'` with your email address.

```
EmailManager em = new EmailManager();
em.sendMail('Your email address', 'Trailhead Tutorial', '123 body');
```

3. Click **Execute**.

   Now that this method has executed, you should have received an email in your inbox. Check your email!

ABOUT THIS EXAMPLE

Audience: Developers

Goal & tone: The goal of this Trailhead module is to introduce developers to Apex. The conversational and relaxed tone makes readers feel comfortable trying out a new programming language. For example, it reassures readers that we're in this together by starting the module with "Let's." The phrase "on the fly" and the adjective "handy" reinforce the friendly tone—it's like the programmer sitting next to you is helping you out.

Also, the module is short, which supports the Trailhead goal of helping customers learn quickly and efficiently. The amount of text and information is minimal and focused on only the task at hand. A note lets readers know that there are other ways to do this same task, but doesn't confuse them by going into that right now.

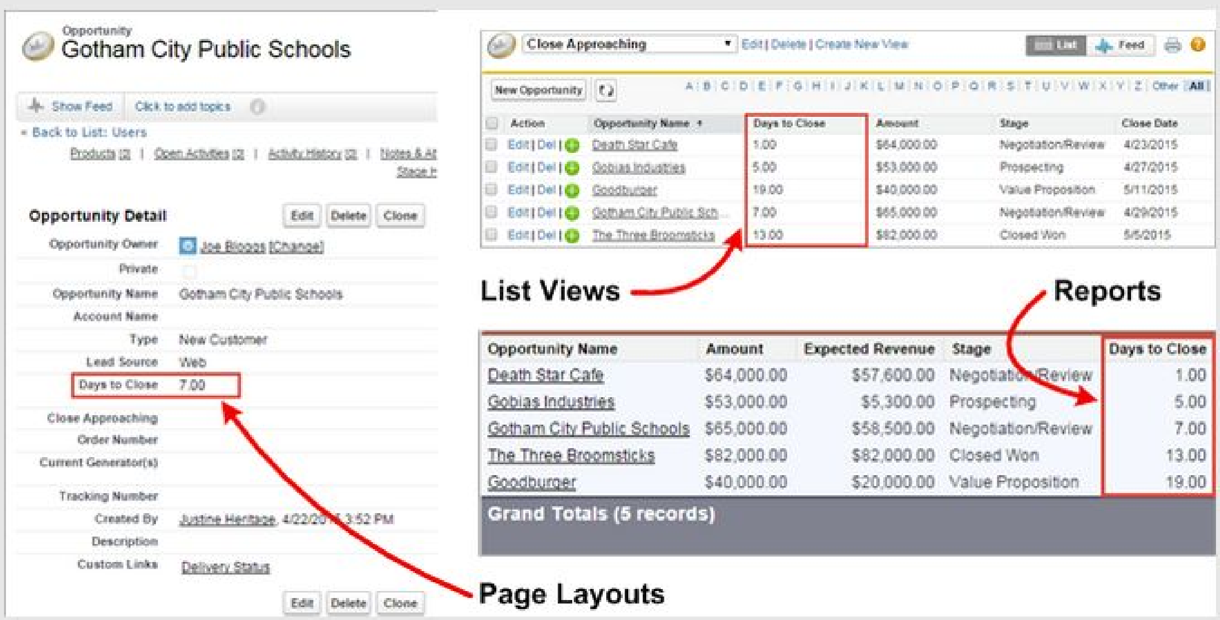
EXAMPLE 10: Using Formula Fields Trailhead Unit

Introduction to Formula Fields

You've got a lot of data in your organization. Your users need to access and understand this data at-a-glance without doing a bunch of calculations in their heads. Enter formula fields, the powerful tool that gives you control of how your data is displayed.

Let's say you wanted to take two numeric fields on a record and divide them to create a percentage. Or perhaps you want to turn a field into a clickable hyperlink for easy access to important information from a record's page layout. Maybe you want to take two dates and calculate the number of days between them. All these things and more are possible using formula fields.

Let's look at a specific example. What if you wanted to calculate how many days are left until an opportunity's close date. You can create a simple formula field that automatically calculates that value. By adding the value to the Opportunity page layout, your users can quickly access this key information. You can also add this field to reports and list views for instant access.



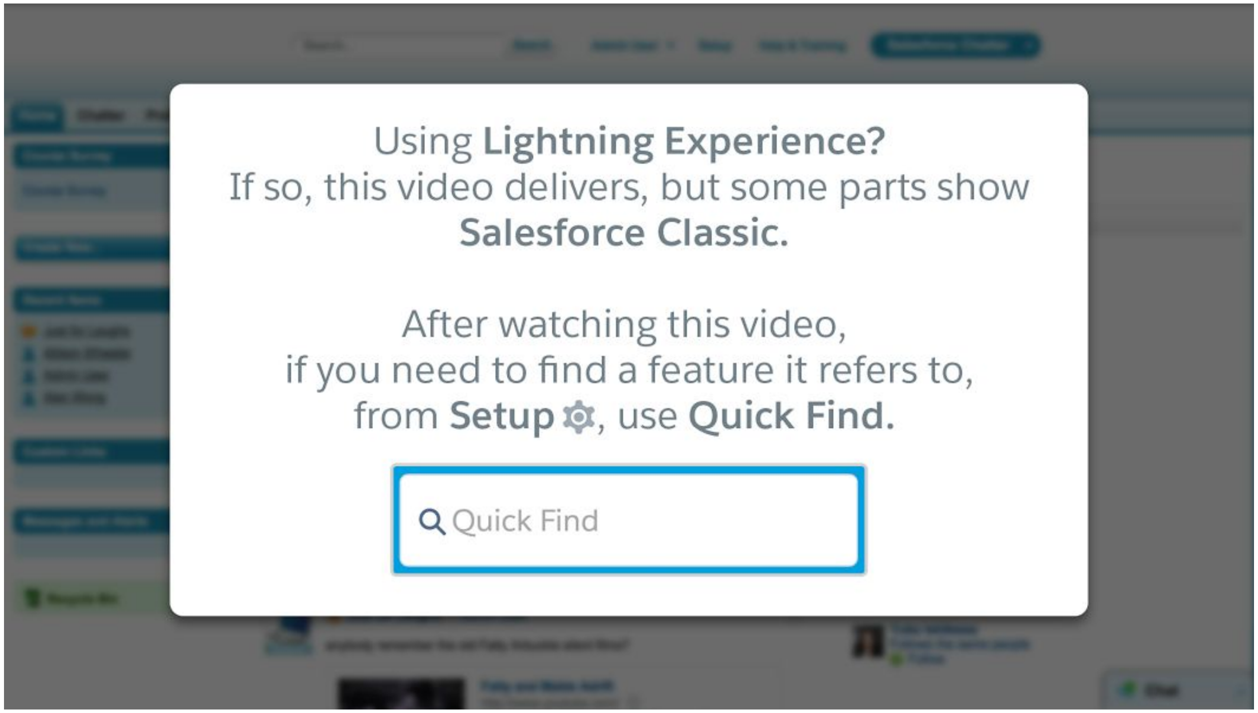
ABOUT THIS EXAMPLE

Audience: Administrators

Goal & tone: This section within the Formulas & Validations module introduces admins to formula fields using simple, conversational language. The description also aptly uses several real-world business examples.

Trailhead units engage users by combining our voice and tone with simple visuals, inline videos, interactive challenges, and links to additional resources.

EXAMPLE 11: Admin Video Setup Banner



ABOUT THIS EXAMPLE

Audience: Administrators

Goal & tone: This video banner alerts admins using Lightning Experience that parts of the video show the old UI.

The banner anticipates a potential pain point (finding a feature that in the new UI), and offers a solution. The banner also displays the icons for the UI elements (Setup, Quick Find) it refers to.