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.

How is voice different from tone?

- **Voice** reflects our personality. It’s *what* we say.
- **Tone** is the way we speak. It’s *how* we say things.

Our voice stays consistent across all of our content. Tone expresses the mood or feeling—which *should* change based on your audience and the situation.

OUR VOICE, TONE, & AUDIENCE

When writing for Salesforce, our voice is always:
- **Honest**: Trust is our #1 value, and we’re truthful in our writing.
- **Clear**: Our writing is concise and easy to understand.
- **Fun**: We’re dedicated to conversational, upbeat language.
- **Inspiring**: We help people live their best lives, and our writing harnesses that genuine emotion.
Take a look at our Corporate Voice and Tone to learn more about our company values.

Adapting your tone
Again, while our voice (our personality) doesn't change, we adjust our tone based on the audience. For example...

- Admins like encouragement and the occasional "You did it! Good job."
- Developers, not so much. They'd prefer we just get to the point, and they like it when we're honest about "gotchas."
- New end users can be intimidated by all that's in Salesforce. They need approachable, step-by-step introductions to terms and concepts.
- Salespeople don't have time for lots of text. They need to get in, find what they need—and get right back to closing those deals!

See our voice & tone examples to see where these different tones are appropriate.

WRITING GUIDELINES

Part of what makes Salesforce documentation special is the way we talk to the reader. It doesn't sound like enterprise software documentation. It sounds more like a conversation with your buddy. With that in mind, here are some tips for writing “the Salesforce Way.”

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 OK.
- Write from the users' perspective to help them accomplish tasks.
- Avoid developer-focused terminology, unless you're writing for a developer.

Be direct.
- Use plain English. Avoid buzzwords, jargon, and words you wouldn't say in person.
- Use active voice, and avoid complex verb structures.
- Refer to user-interface elements by their literal names, not variations thereof (e.g., “click Submit” vs. “then save it”).

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.**

**Be clever. But don’t try too hard to be funny.**
• Have fun—it’s part of our brand! But use humor judiciously, and know your limits. (Not everyone’s
a natural comedian.)
• Focus on clear, concise content over clever language. Make sure content is understandable
independent of any witticisms.
• If you do use jokes, keep them “family-friendly” and inclusive. (For instance, don’t make jokes
about dads unless you make jokes about moms, too.)

**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.

**Watch out for cultural references.**
• Be careful with allusions or culturally-specific language that may be lost on a diverse audience.
• If you use any idioms in the UI, clarify them in a code comment for the localization team.

**Use please sparingly.**
• Use *please* only when asking the user to do something inconvenient or 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 messages, or instructional text.
  **Avoid:** *Your changes were saved!*

**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 figured out what they need 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.

  **Exception:** In walkthroughs, and in error message where a user has clearly missed a button or control, directional instructions can be helpful for many users.

**OTHER RESOURCES**

**Trailhead:** Writing Style badge (get it!)

**UX:** Lightning Design System
VOICE & TONE EXAMPLES

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

EXAMPLE 1: Salesforce1 App (Phone)

Navigation menu callout (top left)

Search callout (top right)

ABOUT THIS EXAMPLE

Audience: First-time Salesforce1 Mobile app users

Goal & tone: The goal is to let users know what the navigation menu 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)**

![Walkthrough Screenshots]

**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 (Communities)**

**Gain Control of Each Page Layout with Theme Layout Types**

Looking for more granular control over the layout of each page in your community? With theme layouts and theme layout types, that’s exactly what you get! Previously, a theme layout applied to all the pages in your community. But with theme layout types, you can apply theme layouts to individual pages and easily switch layouts from one central location. And for developers, we’ve introduced the ability to add properties to custom theme layouts, which are configurable in the Theme area. This feature is available in communities using the Customer Service (Napili) template.

**ABOUT THIS EXAMPLE**

**Audience:** Admins

**Goal & tone:** The goal of this section is to let admins know that they have more flexibility and control over their community page layouts. It’s focused on what admins can do now. The tone is energetic, positive, and user-centric: “Looking for more granular control...?” “that’s exactly what you get!”

The section goes on to describe the various layouts (text omitted), concluding with some concrete examples to help admins get their heads around it: “Let’s say you create three pages for your upcoming Spring campaign....”

**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 Salesforce 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

<table>
<thead>
<tr>
<th>Post</th>
<th>Poll</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share an update, @mention someone, add a file...</td>
<td>Share</td>
</tr>
</tbody>
</table>

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 Salesforce 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.

```
1 EmailManager em = new EmailManager();
2 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:** Admins

**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: Admins

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 isn’t in the new UI), and offers a solution. The banner also displays the icons for the UI elements (Setup, Quick Find) it refers to.

EXAMPLE 12: Help Doc (Evaluate and Roll Out Lightning Experience for Your Org)

ABOUT THIS EXAMPLE

Audience: Admins and end users

Goal & tone: This topic helps admins and end users find features they use in the new Lightning Experience user interface.
Using casual and empathetic language, the introduction mentions the challenges that arise when using a new user interface: "Diving into a redesigned app can be disorienting..." The language then assures admins that we’re here to help make the transition as painless as possible.

**EXAMPLE 13: Profile Pic Callout Text**

**ABOUT THIS EXAMPLE**

**Audience:** End users

**Goal & tone:** The callout text gently notifies users that their profile picture may appear pixelated, and suggests a simple solution using lighthearted language.
EXAMPLE 14: Empty-State Text

Note: see more empty-state examples in Confluence.

No audiences yet!
We couldn't help but notice you don't have any audiences set up. Why not create one now, so you can get the right stuff seen by the right people?

New Audience
Not Now

ABOUT THIS EXAMPLE

Audience: Admins and end users

Goal & tone: This text indicates that audiences haven't been set up in a community org, and encourages community managers to create one.

Using a playful and supportive tone, the copy gently encourages the community admin to engage with the feature, and describes the value of the feature without going into too much detail: "Why not create one now, so you can get the right stuff seen by the right people?" The copy is paired with a picture that plays on the idea of an empty audience and adds a humorous slant to the message.