UX Content Guidelines, condensed

🪨 a snack-sized version for design partners, researchers, PMs, engineers, support folks, product marketers, and other friends of UX content

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Welcome!

You've landed yourself in the UX Content team's crash course on product writing at CallRail.

This document is intended to serve as a reference point for anyone at CallRail to get a quick understanding of:

1. 📚 Content design as a discipline
2. 🥧 A one-page bite of the content design system, if you only have a minute
3. 🔑 The key elements of our content guidelines
4. 🗃️ Our most important content rules at CallRail

First, let's set the stage with some definitions…

What is content design?

(aka UX content strategy or UX writing)

Content design is a multifaceted discipline that can wear many different cuts of trousers depending on a given team's company structure and industry vertical, but, much like trousers, content design always serves the same essential function.

The formal definition of content design's job at CallRail is

🗺️ "*Guiding users through evidence-based emotional design that provides simplified education and context.*" 🗺️

How does content design achieve this goal?

Through the practice of:

> 1. *using market research, data analysis, and (maybe especially) user experience research to identify the language we use to tell story of our customers;*
> 2. *partnering with Product Managers, UX Researchers, and UX Designers to tell the story of our product, using our toolkit of words and content strategy; and*
> 3. *leveraging data analysis and UX research to iterate and improve on the way we use language and content strategy to tell that story.*

In a sentence,

> 🥜 *Content design is storytelling with language across the nexus of customer and product.* 🥜

Content guidelines one-pager

Next, if you've only got a minute, here's a bite of the content design system, with an overview of the must-know guidance. Read past this section to dive a little deeper.

Brand voice

How our product "speaks" to our customers
- **Confident**
- **Approachable**
- **Direct**
- **Trustworthy**

Content principles

The strategy we follow to create outstanding content

- **Clear**
  - Will every customer be able to understand every piece of content?
- **Concise**
  - How can we tell customers what they need to know in as few words as possible?
- **Consistent**
  - Will customers have the same experience of language in every part of the app?
- **Caring**
  - Will every customer feel looked-after by the language in our app?

Rules for language

A few ➡️ **absolute must-dos** ⬅️ when writing for or about products at CallRail

- **Use <u>sentence case</u> for everything** *(Capitalize only the first word of a line, plus proper nouns)*
  - **Why?** Scannability, accessibility, and industry standards. Our most important integration partners all use sentence case, as do most modern tech companies.
- **Avoid platform-dependent interaction verbs** *(Just say no to "tap," "click," or "swipe")*
  - **Why?** Customers may use CallRail on various platforms (desktop, table, mobile), and platform-dependent language does not map to this range of usage
- **Banish sensory verbs** *(Tell "see," "look," "view," etc., to go pack their bags)*

- **Why?** Customers may use different senses to navigate CallRail. Ex: "See what's new" excludes customers who are using screen readers. Try alternatives like "Discover what's new."
- **Follow diversity, equity, and inclusion best practices** *(E.g. avoid color-value terms where "white=good" and "black=bad" like "white glove," "white label," and "blacklist")*
  - **Why?** We're committed to fostering Good Air in every facet of CallRail. Sometimes this means changing habits, which isn't always easy, but it makes us stronger as a whole.
- **Be as precise, concise, and contextual as possible in components** *(Make tasks quick and easy)*
  - **Headers**: No more than <u>two</u> lines. One is better.
  - **Body copy**: Try for no more than <u>three</u> lines. Fewer is better.
  - **CTAs:** Make them verb-first, contextual, and ideally three words or fewer.

CallRail content guidelines, abridged

One of the key tools content designers rely on when helping to bring products to life is <u>our in-product content guidelines</u>. Following these guidelines empowers us to create effective, reproducible, and on-brand content across the spectrum of our product offering.

> ℹ️ The most important elements of these guidelines are our **brand voice** and **content principles**.

Brand voice

Brand voice is the way in which we "talk" to our customers, in everything from social media posts to checkout flows. Our <u>Brand team's content style guide</u> defines CallRail's voice as

💪 Confident

- We own our knowledge and know we have the solutions to empower customer success.

DO:	DON'T:
For even more powerful insights, try Conversation Intelligence today.	Looking for a tool that we hope works? Consider learning about salad spinners.

🐶 Approachable

- We speak to our customers as an expert peer, in a warm, accessible, "human" way.

DO:	DON'T:
Please enter a valid email address to continue.	You input an invalid email address. Fix it if you want to proceed.

🎯 Direct

- We understand the value of time, and we don't waste it. We tell customers what they need to know, when they need to know it.

DO:	DON'T:
Upload complete.	The image which you were uploading has finished transferring to our server.

For product content, we also add a fourth voice pillar,

🔒 **Trustworthy**

- We understand how important our customers' success is, and we do everything we can to earn and be worthy of the trust they put in CallRail by paying for our products. We achieve that trustworthiness by following our four content principles.

Content principles

Content principles encompass the strategies we follow to make sure our language creates the most effective customer experience possible. These principles are the "4 Cs"–**clear**, **concise**, **consistent**, and **caring**.

🧊 Clear

<u>The essential question</u>

Will every customer be able to understand every piece of content?

<u>How to make it happen</u>

- Use plain language and avoid jargon–keep language "human"
- Prioritize verbs
- Communicate no more than 3 (and preferably fewer) key points at once

DO:	DON'T:
Connection lost. Check your internet and try again.	CODE x4J: Permanent fatal exception occurred in request sector A75.1. Reconfirm connectivity.

🩳 Concise

<u>The essential question</u>

How can we tell our customers what they need to know in as few words as possible?

<u>How to make it happen</u>

- Simplify everything
- Trim words at every opportunity
- Make sure every word is serving a vital purpose

Be ruthless to your words to be caring to your customer. Respect their time by asking for only the essential amount of their attention

DO:	DON'T:
Name this number	What would you like to name this number?
Save this contact?	Would you like to save this contact?

> ℹ️ 🗣️ **But what about being conversational?**
>
> You might often hear that a more conversational text is, by necessity, a longer text: complete sentences, questions, full phrases that reach and engage the customer on that "human" level.
>
> This notion isn't quite the full picture.
>
> In practice, conversational text is *text that is appropriate for the conversation that is taking place <u>in that moment</u>*. In our products, conversations = interactions and tasks.
>
> When a customer is trying to accomplish a task quickly, longer texts don't pleasantly engage them in conversation–they get in their way.
>
> A customer's time and attention are precious and fleeting commodities, so, from marketing modules to checkout flows, the most effective product copy never contains fluff.

💡 This rule doesn't mean that we don't use personality in our writing, though–it just means that we do so *only at the right time*.

Check out this tone spectrum for some ideas about when to shift tone in product:

💼 Plain and direct -- - - - - - - - - 📚 Evocative and fun

Legal disclaimer	Checkout flow	Settings	Call flow builder	In-app marketing	Onboarding

💁 Consistent

<u>The essential question</u>

Will every customer have the same experience of language at every point in our app?

<u>How to make it happen</u>

- Follow established style guidelines
- Cross-reference existing patterns and nomenclature documentation
- Document new terms and usage for future reference
- Make sure language is consistent through a flow *and* through individual interactions

DO:	DON'T:
Save changes?	**Save changes?**

These changes will be applied to voicemail settings for all your numbers	These edits will be applied to voicemail settings for all your numbers
Cancel **Save**	Cancel **Update**

👥 Caring

<u>The essential question</u>

Will every customer feel welcomed and looked-after while using our product?

<u>How to make it happen</u>

- Make sure content is **clear**, **concise**, and **consistent**–doing so makes it **caring**
- Be mindful of Diversity, Equity, and Inclusion (DEI) and accessibility (a11y) best practices
  - Do not use words that attribute value to color, e.g. "white = good, black = bad." Examples include "blacklist," "white label," and "white glove."
- Suggested alternatives: "block," "bespoke," and "premium"
- Do not use words that prioritize the experience of one group over another. Examples include unintentionally ableist language like "See options" or "Tap to select"--customers may use different senses to navigate CallRail and can be excluded by these verbs.
  - Use non-sense-dependent language instead, like "Open options."

The rules and how-tos of content design at CallRail, tl;dr'd

Do you need to review or tweak some product copy, but don't have a content designer available? Follow these rules to make sure the copy meets CallRail's standards.

While the most in-depth information, including explanations for specific requirements, will always be found in the <u>content guidelines</u>, this section covers the key requirements that **must** be followed in **every** word of product copy to ensure consistency across our app.

> ⚠️ **But first, why do we have these rules?**
>
> Because consistency builds trust. Inconsistency erodes it. And erosion of trust is bad for business.

Mechanics & diction (capitalization, commas, verb choice, etc)

Use sentence case

Every piece of content–every header, button, label, tooltip, CTA, etc.–must be written in **sentence case**. This means capitalizing **only** the first letter of a sentence or line of text, plus proper nouns (e.g. Lead Center)

> ℹ️ **Why?** Sentence case maximizes scannability and accessibility, and ensures consistency with industry standards, including those followed by our highest-value integrations (hint: it's a Mountain View company). Sentence case also helps us distinguish branded CallRail proper nouns from non-branded product literals, which is important for clarity.

DO:	DON'T:

Name this waffle iron	Name This Waffle Iron
Try Conversation Intelligence	Try conversation intelligence
Open unanswered calls report	Open Unanswered Calls Report

Use a serial comma

Some bands might not care, but we want that serial, aka Oxford, comma in our writing to guarantee maximum clarity.

DO:	DON'T:
I see my brother, a dog, and a rat.	I see my brother, a dog and a rat.

Avoid platform-dependent interaction verbs

Verbs like "click," "tap," or "swipe" are unwelcome for two reasons:

1. Our customers may use different platforms to engage with CallRail. "Click to connect" in the web app doesn't work so well for a mobile browser user.
2. Our customers may use different means to interact with our app beyond touch. Touch-dependent language excludes these customers and is bad UX.

DO:	DON'T:
Go to "Settings"	Tap "Settings"

Scrap any sensory verbs and clauses

Because customers may use different senses and tools to navigate CallRail, verbs that are sense-dependent must be avoided to meet our accessibility goals. This category includes "see," "view," "listen," "look," "click," "tap," "touch," "swipe," etc.

Prepositions and directional language must also be avoided. Words like "above," "below," and "on the left" aren't helpful to someone who isn't using sight to navigate CallRail.

Additionally, under certain conditions, responsive sizing can change the layout of a page so that something is no longer "on the left," etc.

Remember, even people who do not typically rely on a screen reader might occasionally use a voice dictation feature when they are forced to multi-task, and making our app fully accessible helps empower their workflow.

When it comes to accessibility, there is no such thing as an "edge case."

DO:	DON'T:
Select "Analytics" from the primary navigation	Select "Analytics" in the top menu
Open call details	See call details

Use numerals in headers, labels, and helper text, but write out the numbers 1 through 9 in body copy

Numerals are a great way to save space in constrained UI components like headers and labels, so we want to consistently use them there. In body copy, keep text just a bit more formal by writing out single digits. Brand's [content guidelines](#) agree.

DO:	DON'T:
Set up a call flow in 3 quick steps	**Set up a call flow in three quick steps**
You may have noticed one or two new options[...]	You may have noticed 1 or 2 new options[...]

Component guidelines, abridged

Headers

Keep headers as brief as possible–**no more** than <u>two</u> lines of text, and one line is preferable. Remember, we want to make sure our customers actually read our content, so respecting their time is essential.

Body copy

Like headers, also keep body copy as brief as possible–**no more** than <u>three</u> lines of text, and less is always preferable.

CTAs

Write great CTAs by following three rules:

1. **Lead with a verb**. A button is a call to *action*, so be sure to clearly identify that action
2. **Keep CTAs brief**. Aim for 3 words max. Use longer CTAs <u>only</u> when necessary for messaging, e.g. "Try free for 30 days"
3. **Make CTAs contextual**. Be sure that our customer knows what will happen when they select that button. CTAs like "Next" and "Go" don't give the user a roadmap.

Tooltips

Firstly, <u>**use tooltips sparingly!**</u>

They're not great for accessibility, and, ideally, our product should be clear enough to not require very many tooltips. When you do use tooltips, make sure they are very brief–one line **max**.

Tooltips aren't the best place for onboarding content and essential instructions. Their purpose is to offer a bit of clarity, e.g. explaining what an icon stands for. Don't hide must-know info!

Pop-ups (modals, overlays, interstitials, etc.)

In terms of content, follow the same rules for headers, body copy, and CTAs. As always, the more concise the words are, the better, and this rule can be especially true for pop-ups. Because they interrupt the customer's workflow and often hide part of the UI, it's important to make sure that the customer can get back to their task as quickly as possible.

And since pop-ups almost always interrupt, at least a little, it's always important to take extra time to make sure the pop-up is truly necessary. Could the same information be effectively integrated into the main product surface instead?

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Thanks for reading!

Questions? Comments? Tips on making more effective paper airplanes?

Please reach out to the UX Content team any time. We're always happy to talk about words. And probably cats, 90s jams, innovative potato recipes, and chickens.