Content Guide
Recommendation
Voice & Tone

Prepared for Jacobs March 31, 2022

Executive Summary and
Content Guide Recommendation

March 31, 2022

To Madhuri Andrews, Chief Digital & Information Officer
From Kelli Vazquez

Voice and tone need to vary for the intended audience and even for the platform, whether it's desktop or a mobile app. Conversational, casual tones and plain language are becoming more acceptable, especially with the heavy use of apps with mobile devices.

This report includes an analysis and comparison of two international companies' tone and voice style guides. Intuit and Salesforce are large corporations with distinctive voices. Their core values and vision are similar to Jacobs.

Both companies provide compelling and useful information and examples, but I found Intuit's content guidelines were sometimes vague and there were few writing samples. Salesforce offers a diverse wealth of examples and screenshots, with notes on which audience the sample is directed and the goal and tone used.

I recommend the Salesforce voice and tone content guide for its usability and easy-to-follow examples.

Company Snapshots

A brief overview of the companies included in this report, including products, customer relationships, vision and core values and a comparison of products, customer goals, and core values and how they compare with Jacobs.

	Jacobs	Intuit	Salesforce
	Engineering, technical, professional, construction services; scientific and specialty consulting	Products include tax, finance, and wealth building software	Cloud-based customer relationship management software
	Helps create a wide range of engineering solutions for government and private sector	Customers vary between individuals using products annually to businesses using them daily	Software is used by companies across sales, marketing, service, IT, and commerce teams
	Works to solve important real-world problems and create new standards for future needs	Wants to prevent uncertainty in customers, promotes confidence in product	Interested in building trust, promoting unity, building stronger relationships
	Core values: integrity, innovation, accept new challenges, focus on inclusion	Core values: integrity, courage to be bold, fearless thinking and actions	Core values: trusted advisors, customer success, product development, equality, and sustainability

Intuit vs. Salesforce
Tone & Voice Content Guidelines

01. Amount of Material

Intuit's voice and tone guide is separated into four sections, one per software platform. Each area uses a different but distinct voice and tone. Intuit leans toward inspiration, Mint aims to energize their customers, QuickBooks seeks warmth and confidence, while TurboTax's tone and voice gives a sense of dependability and simplicity. The Salesforce voice and tone guide has thirteen guidelines.

02. Instructions for Content Creators

Intuit's voice and tone guide does not tell content creators what to do or what to avoid. They outline their personality, voice principles, and offer tips on how to talk to customers. The Mint guide offers do/don't examples. QuickBooks offered a handful of samples and a links to Figma voice examples that require a company login to access. The TurboTax voice and tone guide did not offer examples and the single link to a One Intuit voice guidelines page was broken.

Salesforce offers suggestions, examples, and exceptions so content "doesn't sound like enterprise software documentation" but more like a "conversation with your buddy."

03. Plain Language

Intuit's use of language borders on overly simplistic, but their clients run the education gamut and when dealing with finances, people become nervous and tense, so keeping the language as plain as possible serves their customers' needs and helps prevent frustration. The lexical variations in the Mint voice and tone guide is geared toward a younger audience. TurboTax conveys a sense of strength and confidence. QuickBooks keeps it warm and genuine.

Salesforce varies their use of language based on the audience. For example, when directing content at busy sales reps, they use a direct, clear tone that keeps chatter to a minimum. The language they use for material directed toward developers takes on a friendly tone and uses everyday, casual language (i.e. "admin" instead of "administrator"). Mobile app sentence structure is minimal, "Here's your stuff!" For other user groups, the tone is reassuring and empathetic.

Intuit vs. Salesforce
Real Guideline Examples

Intuit 01. Close the Loop

When we show customers their info or data, we always tie it back to what they should consider doing next and explain why.

This example comes from the Mint tone and voice section and is especially helpful for civil engineering clients who want to know the potential benefits of a project.

Intuit 02. Genuine

Our customers know they can trust us because our words fit our actions. We share what we know, and we're up front about what we don't. We're transparent and reassuring in complex situations.

We want our customers to feel a sense of clarity. They're informed but not overwhelmed.
- We're sincere and candid.
- We're straightforward but not blunt.
- We say what we mean and don't sugarcoat.

This sample comes from the QuickBooks voice and tone section. A client wants a content guide that presents information clearly and realistically without burying the point. Be direct and knowledgeable.

Intuit 03. Reveal Tomorrow's Opportunities

Elevate the conversation when we talk about customer success. Make them aware of opportunities to achieve even greater prosperity, rooted in the financial freedom they already possess. It's all about shining a light on their future self.

This is an Intuit guideline example. Although this guideline is about finances, it stands on a foundation of opportunity and customer success.

Salesforce 01. 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.

This is a great tip. Most large companies deal with an international audience and being aware of colloquialisms or jargon is especially important. A content creator needs to be sensitive to these pitfalls.

Salesforce 02. 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.

This is guideline would be easy to implement. Many clients do not have time to read lengthy material. Make it easy for them to follow and quickly use.

Salesforce 03. 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.

This may be more difficult that it seems. Conversational language does not come easy for some content creators and r may have too casual a tone. Strike a balance for best results.

Content Goals

Intuit. Jacobs desires simplicity, puts people at the heart of their business and are committed to clients by bringing innovative solutions leading to profitable growth and shared success. Like Jacobs, the Intuit software group wants their customers to succeed. They must be able to explain complicated financial processes to their customers without making them feel inferior or frustrating them.

Salesforce. Sustainability is a big part of Jacobs's values. Salesforce has a similar philosophy. Jacobs also makes investments in its clients, people and communities, desiring to grow together. One of Salesforce's biggest desires is to bring companies together. Even though their products are disparate, the goals for these companies are very similar.

Comparative Analysis

How they are alike. Intuit and Salesforce are focused on customer empathy and the desire to earn and maintain trust. Both guides prefer the use of plain language in a conversational style that varies with the target audience.

How they differ. Intuit's guides are focused on walking customers through the financial process. They are heavy on customer empathy when dealing with tricky financial situations and concerned with customer emotions. It is principle-driven rather than by example and solution. Guidelines were sometimes vague and offered few writing samples. It appears to focus on ways for employees to help customers directly, such as by phone or chat. They only offered voice examples to their employees via a secure link.

Salesforce's guide was very informative and offered a lot of writing tips and examples. The guidelines were clear and easy to follow. The guide provided sample screenshots, which was a nice visual detail. Salesforce's voice examples are available to the public.

Intuit vs. Salesforce
Intuit Screenshots

✓

- You crushed it! Congrats on paying down your $6,420 credit card debt.

- Time to celebrate! You accomplished your goal!

Show how to make progress, then make it easy to do by chunking out the steps. Once they start building momentum, flex tone to help them enjoy the ride.

✗

Don't overwhelm with too much enthusiasm or generate noise with excessive messaging. We're on a long haul together, so sometimes less is more.

Write like you talk

Discussing money can feel taboo to some, so we're purposefully approachable. Keep things easy to understand, like you're helping a friend out.

✓

- Hi or Hey there
- Thanks
- You need to
- Heads up

✗

- Greetings or Dear
- Thank you or Salutations
- You're required to
- Warning

Emotional

- Header
- Email subject line
- Body content

Kind of emotional

- Subhead
- Email preheader
- Help content

Functional

- Tooltip
- CTA
- Toast message

Kind of functional

- Error message
- Bulleted/numbered list
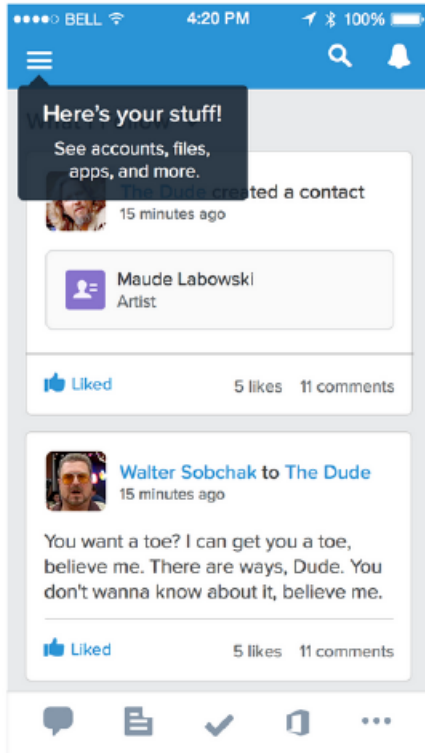- Inline message

Empathetic

We know you and understand your challenges. We are compassionate and can relate to you personally. We never talk down to you and genuinely care about improving your life. We'll always be by your side.
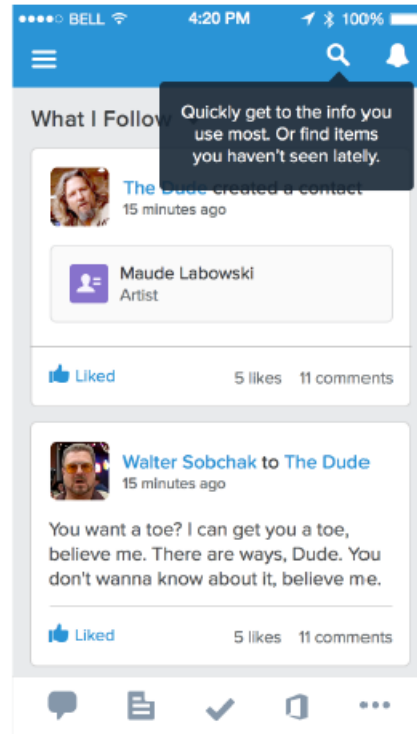
Intuit vs. Salesforce
Salesforce Screenshots

EXAMPLE 1: Salesforce1 App (Phone)

Navigation menu callout (top left)
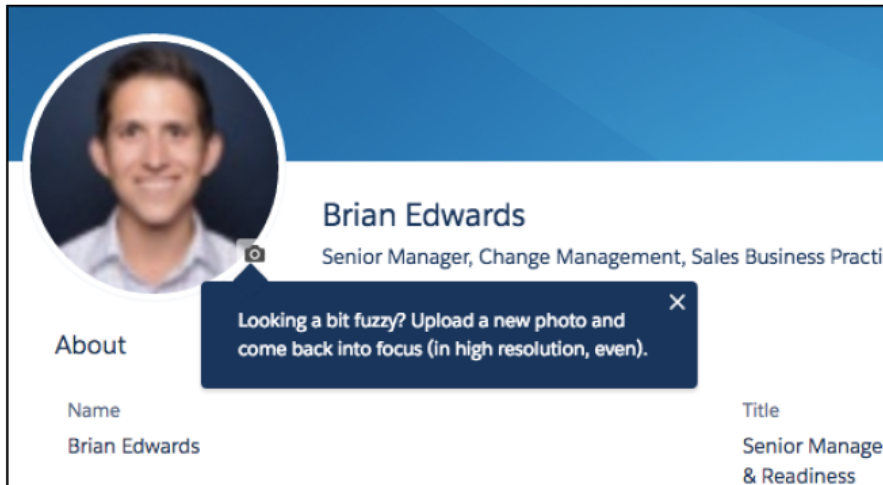
Search callout (top right)

ABOUT THIS EXAMPLE

Audience: First-time Saleforce1 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 13: Profile Pic Callout Text

Brian Edwards
Senior Manager, Change Management, Sales Business Practi‹

Looking a bit fuzzy? Upload a new photo and
come back into focus (in high resolution, even).

About

Name	Title
Brian Edwards	Senior Manage
	& Readiness

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 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 3: Widgets Message Block

> ⓘ Widgets let you save time by building custom page elements that you can use throughout your site. Build once, then reuse.

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.