Salesforce Voice and 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 basic personality and is a synthesis of two things:

What we want to convey about our brand

How users should feel about their experience
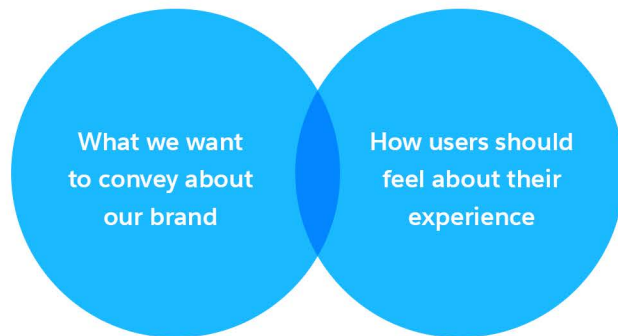
This guide defines our voice and personality, and it provides examples of exceptional content written in the Salesforce voice.

Our Personality

Who is Salesforce?

Salesforce has spent years building one of the most trusted and recognizable brands in the technology industry. But how do we translate that brand identity into a distinct voice? How do we apply that voice to our content so we can forge an emotional connection with our users?

We established core attributes that define our personality and reflect how our customers should feel about us, particularly when using our products.

At Salesforce, we're:

- **Trustworthy**, *but not boring or uninspired*
- **Friendly**, *but not passive or naive*
- **Engaging**, *but not disrespectful or outlandish*
- **Trailblazing**, *but not reckless or unreliable*
- **Empowering**, *but not overwhelming or complex*

Our Tone

How is tone different from voice?

Our voice is the core of our personality, and it should remain consistent across all of our content. Tone expresses the mood or feeling of the voice, which can change based on the situation. Here's another way to think about tone: It's not what you say, but how you say it.

How do I adapt my tone?

While our voice remains consistent, our 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. Some content types (like onboarding) can have a lighthearted tone of voice, and others (like error messages) should be more direct.

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

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?

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 and 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 recommended.
- Write from the users' perspective to help them accomplish tasks.
- Use plain English. A void buzzwords, jargon, and words you wouldn't say in person.

Be direct.

- Use active voice, and avoid complex verb structures.
- If you use any idioms in the UI, clarify them in a code comment for the localization team.
- Refer to user interface elements by name.

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, work stoppage, or requesting that the user 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 can 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.*

Writing Guidelines (cont)

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 links to refer users to additional, related information.

Provide clear instructions 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.
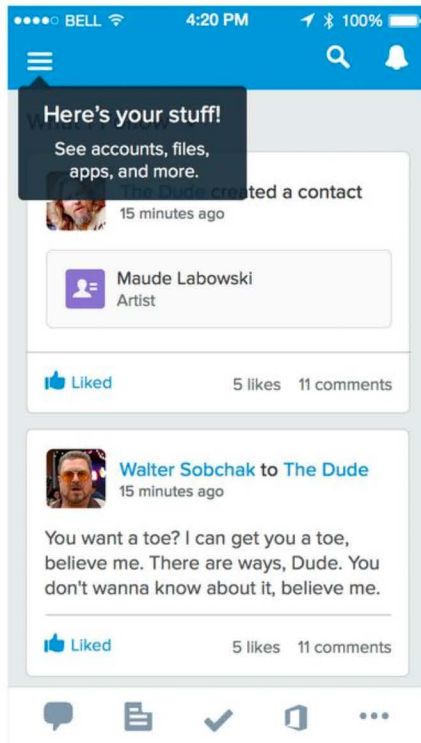
Avoid referring to the location of items.

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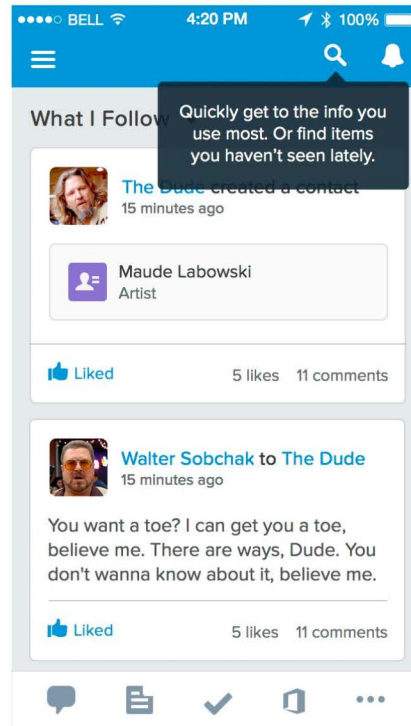
Voice and Tone Examples

These examples will help you apply the voice and tone guidelines to different audiences and situations.

Example 1: Salesforce1 Mobile App

Hamburger bubble (top left)

Search bubble (top right)

About This Example

AUDIENCE

First-time mobile users in the Salesforce1 app.

GOAL

The goal is to let new users know what the hamburger and search icons do. We want to guide new users who might feel lost or confused, as well as provide upbeat encouragement. However, users are busy and have important tasks to accomplish, so we need to help and empower them without being too disruptive.

APPROACH

This example takes into account the user's context and their top needs as a mobile newbie. There's not much screen real estate, so the text is short and concise. And the onboarding assistance is limited to the main question they're likely to have as a new mobile user: "How do I find my data?"

"Here's your stuff!": The tone is friendly and helpful. Using the word "stuff" is more conversational and casual than using a word like "objects" or "records."

"Quickly get to the info you use most. Or find items you haven't seen lately.": This direct, matter-of-fact assistance gives the user just enough information to get oriented, and then we get out of their way so they can keep working.

Example 2: CRM Free Trial Walkthrough for Sales Reps

Accounts, Contacts, and Leads Tabs

Know your customers.

View a complete profile for the people and companies you do business with—all in one place. No more outdated spreadsheets and messy notes.

Step 1 of 6 — Next »

Opportunities Tab

Work smarter.

Your interactions with prospects are logged and stored here. That makes it easy to prepare for meetings and stay on top of important deals.

Step 2 of 6 — Next »

Reports and Dashboards Tabs

Focus on the right things.

Use reports and dashboards to identify deals that are likely to close, then make them a priority. Improve your win rates, and hit your quota.

Step 3 of 6 — Next »

Setup Link

Customize everything.

You want to do business your way. Use simple point-and-click tools to customize Salesforce so it works the way you do.

Step 4 of 6 — Next »

Walkthrough Side Panel

Become a Salesforce pro.

Want to learn more? We know you're busy, so we created these walkthroughs to teach you the basics fast.

Step 5 of 6 — Next »

Import Contacts Widget

Get more from your trial.

Explore Salesforce with data that matters—your data. See how easy it is to boost your sales and productivity from Day 1. Import your contacts now!

Step 6 of 6 — Skip — Import

About This Example

AUDIENCE

Sales reps using the CRM Free Trial for the first time. These prospects are evaluating whether to purchase Salesforce.

GOAL

The goal is to encourage exploration and boost conversion rates. We also want to persuade users to import their data, which increases the likelihood of purchase.

APPROACH

This walkthrough is the sales rep's first impression of Salesforce, so we focus on how the product benefits them.

The tone is straightforward, direct, and no-nonsense—like a sales rep delivering a convincing pitch. We use casual, jargon-free language to prevent users from feeling overwhelmed. Short, pithy headlines and persuasive speech grab their attention and encourage them to keep reading.

We build rapport with the sales reps by demonstrating empathy. We acknowledge they're busy and that learning software is time consuming. We also use language that resonates with them: *"stay on top of important deals," "identify deals that are likely to close," "improve your win rates," "hit your quota,"* and *"outdated spreadsheets and messy notes."*

The walkthrough concludes with a call to action: *"Import your contacts now!"* But we make sure to point out the benefit of heeding our call: they'll get more out of their free trial.

Example 3: App Quick Start

App Quick Start

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

What's the name of your app?
(You can always change this and other labels later.)

* = Required Field

* App [   ]   Example: Recruiting

What's the main type of data you need to track? ⓘ
(You can add more later.)

* Label [   ]   Example: Position
* Plural Label [   ]   Example: Positions
☐ Starts with vowel sound

Preview:

Your App ⌄

Home   Chatter   Files   Your Tab   Reports   Dashboards

Your Object

[Create]

About This Example

AUDIENCE

New Salesforce admins who are creating an app.

GOAL

The goal is to help new admins quickly achieve success by building their first app.

APPROACH

The first sentence sets up a relationship with the user: "*Tell us about your app, and we'll whip us the basic parts for you.*" It conveys to the reader that we're accomplishing something together. The pronouns "*us*" and "*we*" make our product sound more human, like the user is interacting with a person, which strengthens the emotional connection.

The expression "*whip up*" is colloquial and friendly. It has more personality and punch than a synonym like "create," with the added bonus of connotating speed. Also, the expression conjures an image of hospitality and generosity, as if we're preparing a meal for a guest.

"*What's the name of your app?*": This prompt for user input is presented as a question in natural language, which reinforces the conversational nature of the interaction.

"*You can always change this and other labels later.*": This reassurance inspires trust by clearly setting expectations. We're reading the user's mind and answering a question before it's asked.

Example 4: Widgets Message Block

> ℹ 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

Salesforce admins who are new to using widgets for page design.

GOAL

The goal is to help admins understand the purpose and benefit of the widgets feature.

APPROACH

"Widgets let you save time…": Leading with the feature's benefit grabs the user's attention and helps the user focus on the results, not the process. It also demonstrates respect and generosity; we're communicating to users that we want to make their lives easier.

"Build once, then reuse.": After reading this concise, persuasive sentence of only four words, the user has a basic grasp of how the feature works and why it's useful. We employ a forceful, direct statement to compel action, and we give them the tools they need to get the job done. It's empowering.

Example 5: Progress Bar in the Data Import Wizard
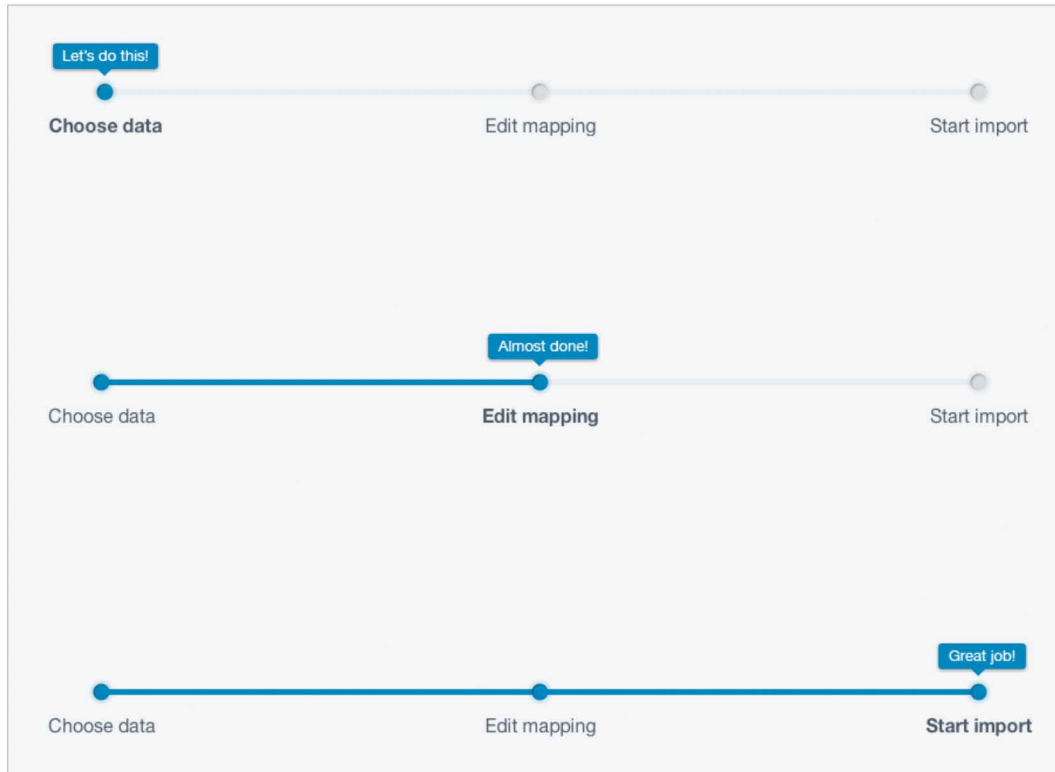
About This Example

AUDIENCE

Salesforce admins importing data, potentially for the first time.

GOAL

The goal is to break up the task of importing data into manageable, bite-size chunks to increase the user's confidence and make the process seem approachable.

APPROACH

"Let's do this!": This exclamation inspires users to action. Using the word *"let's"* fosters a collaborative spirit. By speaking in an enthusiastic and energetic voice, we radiate a contagious, can-do attitude. Importing data is a daunting task, and we're here to cheer on the user as they work towards their goal.

This phrase also adds a touch of surprise and delight to the interaction, making the experience more fun (or, at the very least, making it seem like less of a chore). It even helps evoke the user's curiosity: *'What message will appear if I complete this step?'*

"Almost done!": This phrase offers encouragement by intervening at a moment when the user's energy and optimism might be flagging. It reminds the user that their goal is within reach, and that we're still rooting for them.

"Great job!": This accolade gives the user a high five and acknowledges their hard work. The result? We deepen our connection with users by sharing in their relief and triumph.

Example 6: 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

Mobile developers who are learning how to use the Salesforce Mobile SDK.

GOAL

The goal is to explain the intended audience for the Salesforce Mobile SDK Guide and encourage developers to get started with the SDK.

APPROACH

The tone is friendly and conversational. We start a sentence with *"But"* instead of *"However."* We use casual, everyday language: *"admins"* instead of *"administrators."*

The text is reassuring and conveys empathy; we use phrases like *"don't worry"* and *"you should be able to follow along just fine."* We ease the fears of any admins or developers who aren't sure they know enough about coding to dive into Salesforce Mobile SDK.

We also anticipate a potential issue with the reader having the wrong expectation about the content. We thoughtfully inform admins who want to learn how to set up mobile users that they need a different resource in order to accomplish their goal. This helps us build trust with our users.