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NEMALA

MicroCopy Studio

# Microcopy

## The Complete Guide

==== Kinneret Yifrah ====

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Your users will fall in love

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All the tools you need to write smart microcopy yourself ★ Answers to recurring questions ★ Dozens of screenshots from actual sites and apps

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Kinneret

# Microcopy

## The Complete Guide

Kinneret Yifrah

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\* Regarding copyrights of screenshots included in the guide, see the note on page 11.

**Comments are most welcome!** Drop me a line: [microcopy.guide@gmail.com](mailto:microcopy.guide@gmail.com)

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## INTRODUCTION

WHAT IS MICROCOPY  
AND WHAT'S IN  
THIS GUIDE

## How microscopy was born

In 2009, Joshua Porter wrote a blog post with the title "Writing Microcopy" (Bokardo blog). In the post he described a checkout form he created for an e-commerce project, where 5%-10% of the online transactions were failing because of billing address errors, hence causing financial damage. What did Porter do? He added one sentence next to the billing address field: "*Be sure to enter the billing address associated with your credit card*".

*"And just like that, the errors went away", he wrote. "It was clear the right copy meant I didn't have to worry about that problem anymore, thus saving support time and increasing revenue on the improved conversion."*

Porter shared with his readers an idea that he had been mulling over for a while – just adding a few words in the right place at the right time could completely change the user experience. Not only that, he created the name for this type of copy: microscopy.

At a lecture he presented at the UXLD conference, he recounted that this post, which took less than 20 minutes to write, became a phenomenal success, the type of success bloggers dream about, and that he received many replies from UX readers thanking him for giving a name to these small but powerful words.

Porter's post was the first step in defining a new area of knowledge, microscopy. This was a central element of the user experience that hadn't received enough attention or benefitted from having a methodology to implement it. Since then, the definition of microscopy has been developed and refined, setting it off from content and copy. Following is the definition that I like best, and that was used to write this guide:



### Microcopy: the definition

The words or phrases in the user interface that are **directly** related to the actions a user takes:

- The motivation **before** the action
- Instructions that **accompany** the action
- The feedback **after** the user has taken the action

## The role of microcopy in the user experience

For many years, the trend was to make the interface "clean", with as few words as possible. Many people claimed that words overload the interface and are perceived as threatening by users. Others minimized the importance of words and asserted that no-one read them anyway.

But the simple truth is that communication is based on words, and anyone who gives up on using them is removing a very basic component of the relationship between people. In other words, if you want to create an interface that sounds human and relates to the people using it, you need words. At the end of the day, people are going to use your interface, and there are some things that you can only convey to them by using words. This book contains a lot of them.

## What can microcopy add to your user interface?

### 1. Create a positive experience and engage the user

Microcopy reduces the alienation between man and machine, and changes the relationship from a robotic functional encounter to a human personal experience.

Accurate microcopy adds a rich palette of colors to the experience you are trying to create, and adds depth to your interface. Where needed, words will reach out to your users, and enable them to perform an action. Words engage users and can make them laugh or calm their fears.

Good microcopy changes the connection between the interface and its users into a mutual relationship that can be rich and even moving. Microcopy will create a dialog with your users that is full of character, such that it makes them want to work together with the application, and return another day. Microcopy can make your users fall in love.

## 2. Increase usability

**Microcopy greases the wheels of the interface and reduces friction with its users.**

Well written microcopy, appearing exactly where it is needed, will prevent problems in completing an action, and will save the user valuable time, frustration and a feeling of helplessness. A few small words that appear exactly where the user needs them will prevent a bad experience and unnecessary damage to their relationship with your brand.

## 3. Enhance branding and differentiation

**Microcopy written with a full understanding of your brand and target audience highlights the brand's character and differentiates it from other brands.**

Instead of a boring and predictable interface, one that your users encounter all over the internet, your interface will be unique and full of personality. It will support your vision and the values of your brand, sharpen the key messages to your target audience, and create an authentic and unified experience throughout the whole interaction with your audience.

The enormous potential of microcopy and the critical influence it has on the relationship between your brand and users, are becoming clearer to more and more user interface professionals. However, the subject is often overlooked during the design stages of the user experience. This is sometimes because of lack of time, lack of funds, or lack of awareness, and sometimes because the team just doesn't know where to begin.

**The aim of this book** is to give you the knowledge and tools to write microcopy; and no, you don't need to be a copywriter or content writer. All you need appears in this guide.

## Who should read this book?

- User experience professionals
- Website managers
- Digital marketing managers
- Chief digital officers (CDOs)
- Optimization experts
- Small business owners
- Product managers
- Bloggers
- Advertisers
- Website designers
- Sales personnel
- And anyone who is interested in great interfaces

## What's in this book?

The book **Microcopy: The Complete Guide** provides a methodology for writing microcopy for websites and apps after designing the voice and tone of the brand. It provides insights, guidelines and practical tools that I have gathered over many years of writing microcopy for websites, apps, and other digital products for corporations, startups, and small businesses.

It doesn't matter if your website or app is already up and running, or if you are planning or upgrading it, this book will take you step by step through the entire process of creating microcopy.

The first part of the book covers discovering the **voice and tone** of the brand, and what you need to decide **before** you actually go ahead and write the microcopy.

The second part covers the power of microcopy to create **engagement** with your users and to provide a **positive and rich experience**.

The third part of the book concentrates on the impact of microcopy on **usability** and deals with **microcopy for complex systems**.

The 18 chapters of this book are written as practical guides with a method that you can immediately implement on your website or app. Each chapter starts with an understanding of the basic ideas and provides the steps required to implement them on all the elements of a website or app, from the invitation to sign up for a newsletter, through error messages and button text, and finishing with those short phrases before the fields of a form, within the fields and next to them. All the guidelines and tools are presented with the logic behind them, and the goal they are trying to achieve; and of course there are dozens of examples to learn from.

## We are almost at the start line

This book will change your digital experience, both as a user and as a person providing the experience. The verbal connection between the interface and its users – the piece that completes the puzzle of the user experience – will forever capture your eyes and heart, and will be important and meaningful to you. And that's a good thing. We spend a large part of our lives interacting with digital interfaces, and it is only fitting that these valuable hours are spent in a pleasant way.

Good luck on the journey and enjoy the read,

Kinneret



### Note about the copyright of examples used in the book

This book contains a lot of screenshots from within websites and apps. Naturally, the screenshots include elements covered by copyright, such as fonts, design and copy. Therefore, based on written legal advice, I have dealt with them with extreme caution. For instance, for each example I present only the minimum necessary to deliver the message. Wherever a screenshot was not essential, I have not provided it. Whenever websites or apps have provided the names of the designers, I have quoted this information. Despite this, if the book contains examples that their creators are not interested in having published here, please contact me at [microcopy.guide@gmail.com](mailto:microcopy.guide@gmail.com) and I will remove them in the next edition.

PART 1

# PART 1: THE VOICE AND TONE

# Things you need to know before writing your first word

Copy and microcopy writers for websites and apps know well those first few moments before writing a title, call to action, or any other sentence that demands we step into the shoes of our users and speculate: What will drive them? What exactly describes the value we are providing? And how can we prove to them that the best solution is our product or service? Then come the next set of questions: How do we phrase it? Should we use humor? What about slang or maybe wit? Should we be brief? Do we need to write formally? Do we stir someone's emotions or rather try to calm them?

These considerations are very important and indeed necessary to ensure that every word we write is effective and does a good job. The thing is that instead of **speculating** each time afresh, we should **know**. The central messages you'll impart to your users to propel them to act and to connect to the brand, and also the voice and tone of what you write, should be defined beforehand. Luckily there is a method to achieve this.

After reading the first three chapters of this book, and if, as a result, you make important decisions and abide by them, you won't need to speculate what will influence your users and the best way to phrase it. The answers will be clear and available whenever you need them.

## Chapters in part 1:

1. Voice and tone design
2. Conversational writing
3. Microcopy that motivates action

## CHAPTER 1

# VOICE AND TONE DESIGN

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### IN THIS CHAPTER

- How language influences users
- What is voice and tone design and when to do it
- The complete step-by-step guide to designing voice and tone

## What do you mean when you say innovation?

A large communications company, one of my earliest customers, stated that the main way they differentiate themselves from other companies in this very competitive field is with the digital innovation of their products, self-service options, and how they provide a relevant and customized experience for their customers. Their approach is to think young, up-to-date, and one step ahead of everyone else.

This message is emphasized at all board meetings, and they have documented it in the brand and UX concept guides. They are focused on being leaders in their field and to bring to market new innovative products. Like many other companies, they have invested a great deal in branding so that it broadcasts this important differentiation. They have designed a logo that matches their values, and they have created a high-end website and several apps. They paid a lot of attention to their choice of colors, fonts, and the many other elements that make up the user interface. They provide a user experience that makes their customers feel that the competitors are trailing far behind.

They turned to me because they realized that their voice and tone, the words that appear on the various digital interfaces, hadn't been updated for the last 15 years. It had been left behind and they didn't know how to update it so that it fitted their innovative approach.

To get an idea of their current voice and tone and the microcopy used, I browsed the site and used some of the apps. As I do with all my customers, I registered on the site, completed self-service processes, recovered my password, made contact using their form, found their 404 page, and deliberately filled in each form with errors.

I concluded that the customer was, once again, right. The usability was nearly perfect, the design brilliant, and I managed to achieve everything I set out to do; but unfortunately their differentiation and sense of innovation were lacking continuity and quite confusing:

- They declare themselves as innovative, but write in worn out clichés ("Your inquiry is important to us" or "Your registration has been successfully completed").
- They should persuade the user that signing up is simple and easy, but they sound like an insurance company ("If it is your intent to register").
- They want us to believe that their products are cutting-edge and relevant, but they use words that nowadays can only be found in dictionaries ("Your search yielded the following results").
- They want to evoke a young and dynamic feel, but they write like a robot ("loading data, Please wait").
- They try - oh, how they try - to motivate users to action, but forget to speak to their users' strongest motivations.
- And most important, they strive to be different, but sound just like everybody else.

This is how I started one of the most fascinating voice and tone designs I have ever worked on. The change was so great that after a short while the competitors started a similar process, except the company I was working for could back up its assertions - it was again one step ahead of everyone else.

## Voice and tone in digital interfaces – the human connection

**The Man Who Lied to His Laptop** is the name of a book written by Professor Clifford Nass of Stanford University, together with Corina Yen. Professor Nass was one of the leading researchers in the field of interaction between humans and computers, and in this book he and Yen summarize 100 experiments where he researched this interaction.

He found that people treat their computers according to social norms we apply when communicating with other human beings. Research proves again and again that we respond to computers and digital interfaces as if they were human. We are polite to them and expect them to respond politely, such as praising us if we manage to complete a task. In fact, if the computer provides warm and positive feedback, shows emotion that we relate to as

authentic, or behaves in a similar fashion to us, we'll be more productive in the tasks it asks us to do, we'll agree to more of its requests, and will believe more of what it is telling us. And conversely, if the interface does not conform to our social conventions, and does not behave in the expected way, we are liable to get angry, disappointed, and even offended.

**What's happening here?** Before the digital age, the only entities that used language to communicate were humans. Thus, when someone addresses us using language, our brain immediately responds to the other party as a human.

Language is therefore the main factor that makes interfaces more human-like, it endears them to users and creates an emotional connection that motivates us to act. But for this to happen, the interface needs to conform to social conventions and feel natural and authentic.

## Users' trust hinges on your voice and tone

Professor Nass researched how humans relate to interfaces that present an inconsistent personality, especially where there are non-verbal elements (such as tone of voice) that are not consistent with the verbal elements (such as the content). He found that users related to the interface as if it were unauthentic and unworthy of their trust. The story that this personality presented did not manage to persuade the users or evoke any emotion. On the contrary, the interface sowed confusion and suspicion.

On the other hand, when the verbal and non-verbal elements were consistent and supported each other, the users felt that the personality was intelligent, fun and persuasive. They also understood the messages better, had an emotional reaction to them and were influenced by them. The more the users trusted the personality communicating with them, and believed that it was authentic, the more they were persuaded by its messages and agreed to act accordingly.

Nass explained that the reason we react in this way is because we try to create a coherent picture of the personality communicating with us. If we cannot create such a picture, we become suspicious and feel a sense of rejection.

That's what was happening in the example that opened this chapter: The interface reflected innovation in its non-verbal elements, but the language was outdated; the interface was dynamic but the language was heavy; the interface was simple and clear but the language was cumbersome; thus, users lost trust, understood less and were less persuaded by the messages.

## How voice and tone design solves the problem

Voice and tone design defines the language the brand will use when communicating with its users across all its interfaces. This voice and tone design keeps the language the brand uses in line with its core values and supports them, so as not to create dissonance and unreliability.

**Voice and tone design defines the language in two main ways:**

### 1. Content

**What will you talk about with your users?** What are the main messages? What will you highlight to get them to act? What should you say so that they feel good about themselves and your brand? Which ideas will elicit a positive emotional response? And finally, what can you say to create a desired relationship that benefits you both?

### 2. Character

**How will you talk with your users (and with customers in general)?** What is the right tone, degree of formality, degree of humor, the use (or non-use) of slang, pace of speech, and more?

**After you have defined your brand's voice and tone, and you actually use it in your written materials:**

- Every word you write will be deliberately chosen, focused and influential.
- Your target audience will easily understand the value of your offering and the need it fulfills for them.
- The call to action will be simple and more effective.
- The brand will elicit identification and will come across as credible and compelling.

## Example: How character sounds like

If we ask two people to state the same message in their own words, we'll receive two different versions. If we ask five people, we'll get five versions. We each have our own character, unique way of thinking, different experiences that shaped us, and distinctive goals in life. Therefore even if we talk the same language, what any one of us says will be in a slightly different tone.

For example: two different American e-commerce sites ask their users to provide their date of birth when signing up, and each provides the reason they need this information – because it's required by law.

Famous and serious **Nike** says this:

required to support the Children's Online Privacy Protection Act (COPPA).

[www.nike.com](http://www.nike.com)

Whereas **J. Peterman**, that sells unique vintage products from all over the world, puts it this way:

Sorry, our lawyers made us ask.

[www.jpeterman.com](http://www.jpeterman.com)

Exactly the same message ("we are required by law") is written by two different brands, each with its own unique character, thus the voice and tone used differs. If J. Peterman had used Nike's voice and tone, they would have spoilt the warm and intimate atmosphere that they have created with every word and in every nook and cranny of their delightful site. Whereas if Nike used J. Peterman's voice and tone, they would harm the credibility they try to create as a company that takes itself very seriously.

Each of these brands has a different relationship with its users: J. Peterman tries (and succeeds) in creating a warm, very service-oriented relationship with its customers, the type you might have

between a seller and regular customer in the neighborhood second-hand shop. On the other hand, the relationship created on the Nike site can be seen as being between a corporation that plays in the big leagues and potential customers who dream of getting there too. The voice and tone of each brand supports these different relationships.

## **7 stages in the lifecycle of a brand when it is worthwhile to stop and create a voice and tone design**

As with all things connected to branding, voice and tone design follows the rule of **the sooner the better**. The earlier you define the voice and tone, the more consistent your texts will be, and the verbal elements of the interface won't look like patchwork. On the other hand, it is never too late: a change of voice and tone can result in an improvement to the bottom line, and that is always a good thing, isn't it. In conclusion, you can design the voice and tone at any stage of the brand's lifecycle.

**Following are the 7 critical stages where I recommend creating a voice and tone design, if you haven't yet created it:**

- Creating a new brand – as an integral part of the branding process, together with the visual branding, before the first word is even written. If you design the voice and tone right up front, you will benefit from a brand that communicates in a uniform way, and is persuasive from the word go. You'll also get used to communicating in the brand's voice and tone, and won't need to overcome bad habits further down the line.
- Release of a new or upgraded website or app – you are already investing in design and user experience, so make sure that your verbal element supports the new message and doesn't hinder it.
- Starting a process of sharpening your brand's differentiation, presenting to users the brand's benefits and messages that distinguish it from the competition.

- Setting up a new digital campaign.
- Creating or upgrading the organization's written communication infrastructure (email, chat, and social media).
- Before entering a new market with a new target audience.
- If you understand that the words and messages you currently use simply don't work.

## The guide: How to design a full and effective voice and tone

Voice and tone design is a short process where you fully and accurately define the personality of the brand and the messages that will influence its target audience. You can do this in-house or with the help of external content and branding experts. The whole process should take around one to two weeks.

The end product of this process is a written voice and tone design that enables you to write microcopy (you can also use it when writing copy, content, status updates in the social media, and anything else written on behalf of your brand).

For medium and large companies and for freelancers that write microcopy for these companies, the full process includes four stages, and at every stage you'll discover important insights. If you lack the time or budget, or if you own a small business or a blog, stages 2 and 3 are the ones you should definitely do. In the following pages you'll discover exactly how to accomplish each stage and where you get the required information.

**Stage 1:** Read design and branding documents written so far, and extract essential information about the brand.

**Stage 2:** Listen to what the target audience says and extract good quotes, authentic phrases, words that repeat themselves, and what users see as motivators and setbacks.

**Stage 3:** Hold a structured group interview with the organization's key personnel. In small businesses and blogs, this is probably you, and you can do this session with team members, a strategic consultant, or a close friend whose advice you appreciate. I recommend not doing it by yourself, because the objective point of view is no less than critical.

In this session, ask a series of questions about the brand and target audience. All the questions are provided further along in this chapter (see: The questions that will lead you to your voice and tone, on page 46). This interview usually lasts about 3 hours, and by the end of the meeting you should have a rich, detailed and interesting portrayal of the brand's personality.

It is highly recommended to make this a group interview of all the key figures, as opposed to conducting several one-on-one interviews, so that conflicting views are immediately resolved (and it's a much more efficient use of your time).

**Stage 4:** Produce the voice and tone design. This is basically a working document that brings together and organizes all the information you were exposed to in the previous steps, and is used to guide the actual writing.

**By the time you have completed the voice and tone design, it will include two sections:** the first section defines the personality of the brand, and the second defines the motivations and mental barriers of the target audience. Together (with all their subsections), both provide us as writers with much important information concerning the central messages (**what** the brand communicates), and the voice and tone (**how** the brand communicates).

**The following pages provide a practical handbook to designing your voice and tone.** The more questions you answer or information you gather, the more consistent, rich, precise and effective your voice and tone will be.

# The first part of voice and tone design: The brand

## 1. Define the vision and mission

**The change the brand wants to promote and the way this should be achieved**

Usually we don't explicitly tell our users the vision and mission, but everything we write should implicitly reflect and promote them. Thus, it is important that the vision and mission are clear and familiar to all the writers.

Defining the vision might sound like a simple task (it's seems obvious why the brand was created, doesn't it?), but in my experience it is often complicated and confusing. Invest as much time as required to define this and don't cut corners. The effort will be worth it.

See page 46 for the list of questions used to identify the voice and tone.

**TIP**

**01**

### Ask why

The best way to reveal the vision is to ask the brand's key personnel **why** it was created. For every answer they provide, make it hard on them and keep asking **why**. After a few rounds of **why**, you'll get to the heart of the matter. For example:

**Why was the microscopy studio, Nemala, created?** In order to write better microscopy and teach others how to do it.

**Why?** So that digital interfaces will provide a more pleasant and human experience.

**Why?** Because people spend most of their day in front of these digital interfaces, and if our experience is warmer and more pleasant, our lives will get better.

**Nemala's vision:** To create a human, bonding and heartwarming digital experience for people and improve their lives.

## Examples of vision and mission taken from brand websites

### Ikea

**Vision:** To create a better everyday life for the many people.

**Mission:** We shall offer a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them.

### TripAdvisor

**Vision:** To help people around the world plan and have the perfect trip.

**Mission:** To offer advice from millions of travelers and a wide variety of travel choices and planning features with seamless links to booking tools that check hundreds of websites to find the best hotel prices.

### Samsung

**Vision:** Inspire the World, Create the Future.

**Mission:** To develop new technologies, innovative products and creative solutions.

### World Wide Fund (WWF)

**Vision:** To build a future in which humans live in harmony with nature.

**Mission:** To conserve nature and reduce the most pressing threats to the diversity of life on Earth.

**TIP**

**02**

### Search the attic

The vision and mission are usually defined at an early stage of setting up the organization. It's probable that they have been phrased and documented in the brand book, UX concept guide, the elevator pitch, in presentations to investors, and in other foundation documents. Find them there, make sure you still hold them to be true, or change them.

## 2. Define values

Ideals and principles that guide the brand's actions and direct its path

Select the five most important values that the brand cannot do without, and for each one write a short description of between 1-3 lines. These values will be expressed in the brand's messages and its voice and tone. If you are not sure what "values" are, take a look at the 116 values that follow on page 27.

### TIP

03

#### Prepare your word toolboxes

Every characteristic and value can be described using words, expressions and phrases that are connected to them or carry relevant meaning. Prepare a toolbox of words that you can pull out whenever you need to express a certain value. Use a thesaurus and also collect the terms you have heard directly from your users (more on that later).

For example, here is the toolbox of words for the value "practicality" for the voice and tone guide of an academic institution:

Relevant, entrepreneurial, daily, tools, management, practice, platform, changing / dynamic reality, advantage, decision making, real time, toolbox, applicable, practical, flexible, apply what I have studied, wages, the job market, career, employment, employers, graduates, post graduate, a set of tools that will help me.

## Examples of values taken from brand websites

### National Public Radio (NPR)

**Rigorous** – Nobody does what we do.

**Independent** – We are 'unbought and unbossed'. The listeners own us.

**Connected** – We talk to people without their makeup on.

**Immersed** – People don't come to NPR just to be told 'Everything you think is right'.

**Inventive** – We want to connect with people in ways that fit their lives.

### Whole Foods Market (first 6 core values out of 8)

**We Sell the Highest Quality Natural and Organic Products Available** – We appreciate and celebrate the difference natural and organic products can make in the quality of one's life.

**We Satisfy, Delight and Nourish Our Customers** – Our customers are our most important stakeholders in our business and the lifeblood of our business.

**We Support Team Member Excellence and Happiness** – Our success is dependent upon the collective energy and intelligence of all of our team members.

**We Create Wealth Through Profits & Growth** – We are stewards of our shareholders' investments and we take that responsibility very seriously. We are committed to increasing long term shareholder value.

**We Serve and Support Our Local and Global Communities** – Our business is intimately tied to both the neighborhoods and the larger global community that we serve.

**We Practice and Advance Environmental Stewardship** – We wholeheartedly believe in active environmental stewardship so that the planet continues to flourish for generations to come.

# Cut out & keep



## 116 values

The following list will give you food for thought when defining your brand's values. From these 116 values, select those that are most important to you (and your brand) to uphold and promote.

Sustainability	Altruism	Sharpness	Love
Relevance	Dedication	Elegance	Sensitivity
Community	Professionalism	Decency	Enthusiasm
Curiosity	Ambition	Sincerity	Generosity, giving
Accessibility	Joy	Mystery	Intimacy
Adventure	Perseverance	Belief	Knowledge
Aesthetics	Determination	Authenticity	Service orientation
Fun	Versatility	Softness	Solidarity
Accuracy	Humor	Pleasure	Team work
Achievement	Charm	Discovery	Health
Empathy	Transparency	Familiarity	Nostalgia
Courage	Passion	Justice	Success
Competitiveness	Contemporary	Communication	Spirituality
Courtesy	Relevance	Diversity, variety	Personalization
Excellence	Innovation	Freedom	Quality
Friendliness	Clarity	Loyalty	WOW factor
Peace, calm, ease	Affinity	Proactivity	Tradition
Internationality	Coolness	Economic	Convenience
Creativity	Respect	Independence	Richness
Leadership	Intelligence	Imagination	Expertise
Caring	Brilliance	Logic, rationality	Change
Security	Growth	Safety	Commitment
Reliability	Development	Learning	Value for money
Practicality	Optimism	Flow	Stability
Simplicity	Organization	Originality	Flexibility
Accountability	Excitement	Liveliness	Focus
Connection	Provocation	Satisfaction	Challenge
Customer focus	Harmony	Effectiveness	Gentleness
Dynamism	Openness	Inspiration	Moderation

### 3. Describe the personality

If the brand was a person, it would...

Imagine that your brand is a person (yes, yes, just imagine for a minute...), then write down their personality traits: the way they behave around others, their sense of humor (or indeed if they have a sense of humor), and so on. Even describe the way they dress, their hobbies, personal preferences, anything that will help you characterize their personality, and from it – the way they talk. To make it much easier and fun go to the list of questions on page 46.

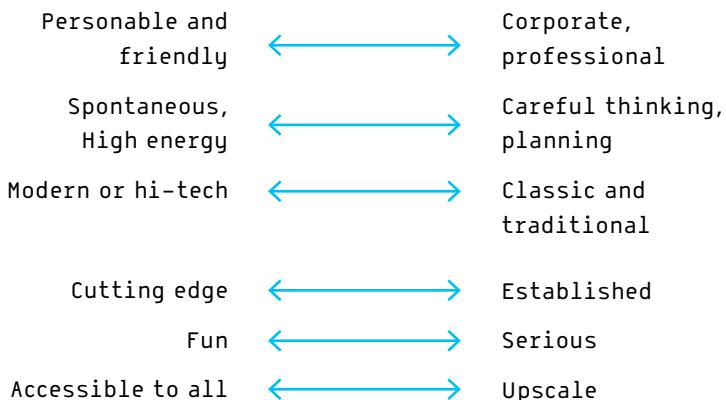
Note that the brand's personality is not your user's personality, and indeed might be very different, depending on the relationship you wish to conduct with your users (see also page 42).

## TIP

## 04

### Where are you on the scale

In addition to using the personality questionnaire (on page 46), I usually use this characterization tool developed by Pamela Wilson from **Big Brand System**. Ask your brand's key personnel to rate the brand's personality on the following 6 scales. Sometimes their answers are surprising and insightful.



## Example: a charismatic mom

During the three hours over coffee that I spent with a sleep consultant to design her voice and tone, she told me a lot about her target audience – first time moms. These young mothers are exposed to a constant stream of information that makes them feel insecure in their own intuitions and in their ability to understand the child and know what's best for him or her. Based on this description, we constructed together the brand's personality:

**If the sleep consultant brand was a person,** she would be a 30-year old woman, a mother, and she would wear comfortable but fashionable clothes. She would read the Parenting and Health section of the newspaper first, and would spend the limited free time she has in DIY projects, running, and socializing. She is generous and devoted, attentive and empathic, but authoritative and precise. She's funny and happy, and radiates that nothing is really catastrophic. She has abundant knowledge, but she listens instead of preaching, and respects rather than patronizes. She combines authenticity and sincerity with professionalism and experience – and that creates trust. Her formal knowledge is plentiful and up-to-date, but she also respects a mother's intuition.

### How is this personality reflected in the voice and tone?

- Despite the anxiety that surrounds the subject, it is important not to fall into the trap of sounding too serious; on the contrary, add humor and keep it light and natural.
- Keep the professional material flowing, conversational and authentic. Don't let the style become know-all and preaching on what's allowed or forbidden. The voice and tone should generate a good experience, encourage curiosity and also challenge the mother.
- Generosity and devotion are conveyed by presenting organized lists of everything the mother receives at each meeting and during the whole counseling process. Thus she can easily see the wealth of help provided.
- To express attentiveness and respect, the new mother should be the focus of the texts.
- On the scale between friendly and professional, the personality is bang in the middle: she'll talk to the mother as an equal, but she won't be her best friend.



## Writing microcopy doesn't mean being cute

There is no rule that says everyone should be funny, witty, clever, or entertaining. It would be a disaster if all brands try to be funny and entertaining in their use of each word on the interface. The Internet would become a circus that would make it very hard for users to focus on what they need and to do what they want quickly and easily without getting distracted in all the wrong places.

Writing entertaining microcopy that doesn't derive from a voice and tone design misses the goal and misrepresents the brand (in fact, even if you decide that your brand is entertaining, don't try to be too clever with every word because you'll exhaust your users. Use humor wisely and adapt the voice and tone to each situation).

**But your brand must have a clear and consistent character that was chosen and designed using a rational process.** Yes, even a conservative character, serious and concise, IS a character, and perhaps that is exactly what you need.

**What is important is not to make assumptions in advance without completing a voice and tone design that specifies your vision, mission, values and target audience.** Two websites or apps that do exactly the same thing can sound completely different if these parameters differ. For example, if your app monitors the diet of diabetics, you might think it should sound very serious, because it involves an illness that affects the quality of life of many people. But you shouldn't take this for granted up front. You can also choose to make it humorous, explicitly to help your users to get through their challenging day with a smile and good humor. The same goes for financial matters (such as banking, insurance and pensions), government services and complex systems (for details on the voice and tone of complex systems, see Chapter 18).

**OK, so writing microcopy doesn't necessarily mean being cute,** but on the other hand, even if you decide that your brand is serious and concise, be careful not to cross the fine line between serious and alienating. You still need to be service-oriented and pleasant and to see things through the eyes of your users.

# The second part of voice and tone design: The target audience

## 1. Define the demographics

**The demographic characteristics of the target audience: who will your brand be talking to?**

With young people you can use contemporary language and slang, whereas seniors might not follow you. You also need to explain less to youngsters on how to use the interface, whereas with older people you need to provide more instructions (but this too is changing fast and has to be reexamined for each case). If your audience is of a specific age and style of living, you can spice up your microcopy with quotes from popular television series, while another group won't understand where you're coming from. There are audiences that will enjoy and be flattered when you address them in a sophisticated and witty way, yet other audiences will be offended, feel left out, or will lose patience.

So you see that it is extremely important to understand whom you are addressing. **The main characteristics you need to define are age, gender, socio-economic status, where they live, education level, marital status, other areas of interest, and technological inclination**, but any other information you gather about your target audience will help in designing the voice and tone.

Some brands have a wide target audience that covers a large part of the population (such as banks or Waze), or pretty large (such as Starbucks), whereas others have a distinct and easy to define target audience (such as Snap). **The more the target audience is defined, the more the voice and tone can and must take on a specific style that suits it. On the other hand, if your target audience is wide-ranging, the voice and tone will be more conservative and less sophisticated so as to meet everyone's needs.** That doesn't mean that the voice and tone has to be boring or without a personality. It still needs to be well defined, rich, welcoming, and fit the general persona you have defined.

## Example

A good example of a brand that addresses a very wide audience, but still has a clear personality, is **Ikea**. It uses a voice and tone that is very simple, unsophisticated, not particularly humorous, sometimes even banal; but it displays a consistent and pleasant personality, provides a warm and homely atmosphere, and has a practical tone with conservative messages that nearly everyone can find appealing. For example:

The perfect compromise – he wants a sofa that has a high level of firmness, you want a sofa you can sink in to. Maybe, if you combine both, you will live happily ever after.

## 2. Define the needs and problems of your target audience

**The practical challenges and emotional worries felt by your users – in their own words**

Every product or service should improve the user's life, make it easier, answer a need or solve a problem. The better you understand the problem that the product or service is solving, and its influence on the lives of its users, the easier it is to more precisely address their motivations throughout the website or app (in the various messages, calls to action, and instructions). You will also find it easier to gain the trust of your audience, and show them that you listen to them, understand them, and that you offer the best solution to their problem or need.

Let me emphasize that this is not manipulation: Your product or service will not succeed if it doesn't provide real value to your users and solve their problems. The real challenge is to accurately pinpoint these problems, and describe them with your users' words to motivate them to choose your solution.

## Example: how we made it (a bit) easier for job seekers during a challenging period of their lives

Looking for a job is a sensitive and especially painful process, as it touches a basic, existential and urgent need: our livelihood. In the interviews conducted with job seekers, which I listened to when writing microcopy for an online job board, I heard a long list of difficulties and hardships that they endured during this period. Following is just some of the input, and I'll show how it influenced the voice and tone and how that affected the relationship created between the job board and its users.

Hardship	Influence on the voice and tone
The average period someone looks for a job is 60 days, and during this time the job seekers provide their details and upload their resumes on dozens of sites and for many positions. We're talking about a daily disheartening task that seems interminable.	Wherever possible, we explained to the users <b>why</b> we need them to provide a certain piece of information or to fill out a form. We described the benefit <b>to them</b> , and reminded them that this action would bring them one step closer to <b>their</b> goal, making it a little less discouraging. But we were careful not to be repetitive – job seekers encounter many such forms every day. Our voice and tone was brief, professional and straightforward, with many active verbs demonstrating progression and speed.
Job seekers rightly feel that thousands of other applicants are applying for the same job, and that it is nearly impossible to stand out from the crowd and catch the eye of the potential employer. And this is quite depressing.	This fear of being swallowed up by the crowd, was used by us to motivate users to add a cover letter to their resume. We wanted them to add a cover letter as employers respond to these much more, so it was in <b>their</b> best interests to provide it; but often they would skip this because they lacked patience, were disheartened or simply lazy. So just before the cover letter form, we spoke <b>directly to their hardship</b> and reminded them that a cover letter is a good way to stand out from other applicants.

Hardship	Influence on the voice and tone
<p>Loneliness is one of the strongest feelings that job seekers experience. Alone, they have to face one of the hardest periods in their lives while everyone else continues with their daily routine.</p>	<p>To relieve the loneliness, it was important to us to provide a very human interface, supportive and understanding. We used a <b>conversational and soft</b> voice and tone, we reflected feelings and concerns, and showed a lot of <b>empathy</b> in our texts.</p>
<p>In usability testing, it was found that because job seekers usually don't receive a reply from employers, they are not sure if the form they filled on a job board was actually sent, and if sent, was it with all the right attachments, and was it received by the employer.</p>	<p>In order to address these concerns, we added clear unambiguous feedback throughout the process that it was proceeding well – that the form had been successfully received, that the resume was sent to the employer, that the current stage of the process had finished successfully, and so on.</p>

## TIP

# 05

### Users are the best copywriters

When you are expressing what your users think, it is best to use **their** words. They will always be more precise and use the most authentic phrases. Take the words of your users, and use them to describe the benefits of your brand and to get users to act.

**Where can you hear what your users say?**

- Surveys and questionnaires that use open questions
- Feedback/comments made about your brand **or your competitors** on social media
- Thank-you letters and inquiries received from the Contact form
- Recordings of usability testing
- Transcripts from focus groups

**Lacking any of these resources?** Interview 5-10 of your potential users. It only takes a few hours and it can entirely change the way you think, and write, about your brand and product.

**What will you find? Treasure.** You'll find excellent, precise wording that you would never find on your own when analyzing in a professional, planned and rational manner. Simply take your users' words and embed them in your copy.

### 3. Describe the hopes and dreams of your target audience

#### Their purpose in using your website or service

In the previous section we looked at what negative things would be solved by using your website or service. This section looks at the positive outcomes, what the users gain from using it. People need a good reason to act, they need to believe that the action will bring them closer to their goals, and will make their dreams and hopes come true. These hopes are the reason that they got to your website, and they will be the drivers to sign up, make contact, buy an item, or do anything else you want them to do on your site or app. Therefore, these hopes and dreams are what you'll talk about when you want the users to do something or when you want to give them the feeling that they are in the right place and doing the best thing for them. And for that to happen you need to know the users' words to hit the right spot ([see tip 05](#)).

#### Example: let's talk for a minute about your budget

When a big bank uploaded to its website a new tool to manage a customer's budget, it was easy for me to connect to the hopes and dreams of the target audience: while I regularly keep an eye on my bank account, I'd still love something simple and efficient that will give me an overview of my budget, and show me where I spend more, and where less. This tool might help me finally achieve some of those goals I've put on ice because I haven't had the time to arrange a budget for them (such as to finally travel and see the northern lights).

As part of the voice and tone design for this new tool, we learned about the hopes and dreams of the bank's customers concerning their budget. We discovered three key groups of aspirations: 1. **Peace of mind and long term financial security**, realized by putting money aside; 2. **Control**, by tracking and understanding the big picture; 3. **Quality of life** and

realizing dreams, realized by careful planning of the budget and by accumulating savings.

Now we just had to show the users how this budget management tool would move them closer to achieving these aspirations:

- When we wanted to motivate customers to check out and use the tool, we spoke about peace of mind, security, and realizing dreams: "*So that you can realize a new or old dream and be prepared for anything life puts in your path*".
- So that users would set themselves objectives in the various expense categories, we spoke about being in control: "*Keep your finger on the pulse and at any point in time see where you stand in relation to your life goals*".
- The need for control and being informed was also used as a motivator to get users to correctly categorize each expense: "*A good budget is an accurate budget – expenses that you don't categorize stop you from seeing the big picture*".
- So that they would use the follow up and comparison tools, we spoke about achieving goals: "*To plan forward and achieve goals, you need to also look back. Here you can see your budget over the whole year*".

As you can see, you don't need to rack your brains to find the phrases or messages that will motivate your users to act. They visited your website or app to achieve something that would improve their lives. You just need to find out what that is and remind them of it.

## 4. Define the objections and concerns of your target audience

The barriers that will stop users from actually using your product or service

Objections need special attention, and on no account should they be ignored. On the contrary, you need to address them, at least implicitly, dispel them or prevent them from occurring in the first place. There are some well-known and constant objections, such as reluctance to spend money or provide personal details; and then there are those unique to a specific product or service. Either way, map out and fully understand the objections and concerns, and provide your users with compelling reasons so that they overcome them and trust you.

### Example: will you marry me?

We all have a clear picture of what a classic marriage proposal looks like, drummed into us after watching thousands of hours of romantic dramas: one man, one woman and a diamond ring. The man on bended knee, the woman weeping with joy, and the ring's a perfect fit. A photo of the ring is uploaded to Facebook and they live happily ever after.

A large and well established diamond company decided to challenge its traditional business and put up a website focused entirely on engagement rings. The target audience is male – those selecting the ring, not those who will wear it. On the website the men are offered an extensive catalog with a large selection of designs to choose from, and then they can select a diamond according to their budget. In this way anyone can create online the exact ring they want that also fits their budget.

A man selecting a ring and diamond – usually for the first time in his life – has many concerns, but only one dream: a fairy tale marriage proposal and one happy and very satisfied woman. True, the sky won't fall if his fiancée wants to change the ring or alter its size, but that

will be an unromantic twist in an otherwise glittering picture. So some of the man's concerns are about his girlfriend: can he find something to suit her taste? How does he know the correct size? Other fears concern the diamond: based on what criteria does he select the diamond? What does he need to examine and question? How does he know that the diamond is genuine and of high quality? And the biggest concern of all: what will he do with the ring if she surprises him and says no... On top of all that there are the usual concerns of buying online: security, shipment or pick-up options, and so on.

Any one of these concerns is enough to cause the user to abandon the online process and look at another site, or go to a brick-and-mortar shop. But this company really studied its target audience, and in its online selecting and purchasing processes it provides clear reference to each one of these concerns. Before selecting a ring, the site offers links to short articles that suggest to the user that he take a look at his girlfriend's jewelry box, see what other rings she has bought herself, and measure the diameter of her favorite ring. Later on there is a promise by the company to change the size if necessary, with no extra charge. Every technical term, such as color or clarity, is accompanied by an explanation and illustration. There are references to the certificate of authenticity and assurance that comes with the ring; and towards the end of the process the security of the site is emphasized, and a full refund is promised if the ring is returned within 30 days.

**Preparation of an organized list of objections and concerns, and the provision of a solution at exactly the right moment, enables a user to finish the process of selection and purchase of an item smoothly and with peace of mind, without abandoning the site or turning to support. It's better for both the user and the website operators.**

## 5. Make a list of the preferences of your target audience

The main reasons that your target audience will choose your brand and not that of your competitors or similar brands

What differentiates your brand and makes it better than others? In professional terms it's called "competitive advantages", and you should flood those messages on the website and highlight them.

**TIP**

**06**

### Put your users in the center

Keep in mind not to write about the brand's advantages, but rather the advantages important to your target audience. For example, if you use an emerging technology, that in itself does not interest your target audience, it does not provide a competitive advantage, and there is no point writing about it. But if this technology enables your users to do things they couldn't do previously anywhere else, then that's the bit that interests them. **They don't care how you do things behind the scenes to get their desired result, it is the result itself that is important.** A competitive advantage is only a real advantage if it provides your target audience with a distinct benefit that your competitors cannot provide them. So focus on what interests your target audience, not what interests you.

## Example: Israel's Harvard

Israel has nine universities and about 50 colleges of higher education. Thus, when one of the leading academic institutions decided to upload a new website, brand differentiation was the key challenge. Naturally, the voice and tone needed to meet the challenge, as did all the other elements of the site.

During the voice and tone design, the college admissions advisor described to me the mood of candidates when they access the site: On the one hand they are flooded with information from all the academic institutions plus other sources, and on the other hand they feel as if they don't have enough information to make a decision. They are subject to uncertainty, are confused and afraid to make the wrong choice about something that will determine the course the rest of their lives will take. **Based on what they will read on the website, they want to make a decision. They are searching for a clear answer to the question: why this institution? Why should I choose to study specifically here?** It is our job to provide a simple answer to this question and lay out, in a clear and transparent manner, the competitive advantages that our institution has over others, advantages that give real value and are important to future students.

On completing the voice and tone design, we had a list of the main competitive advantages that this academic institution has over the others in Israel: exceptional opportunities; social and professional networking; an international experience; personal attention, always, for everyone; a clear connection between theory and practice and their future careers; leading professors; a well groomed and intimate campus; values of social responsibility and giving to others; great people come and study here, and there are numerous extracurricular activities.

As we saw in the section on target audience hopes and dreams, you need to explicitly highlight the competitive advantages if you want to motivate and arouse curiosity in your target audience, and get them to feel that you have something unique that your competitors lack. For example, to motivate candidates to read more on the site, you can lay out for them the competitive advantages from the list we prepared, thus:

*"You are more than welcome to read about our excellent professors, the entrepreneurship programs that will open every door for you, and the beautiful green campus that will be your home for the next few years. Soon you'll discover that we offer an enormous range of opportunities for personal growth, more than anywhere else, and that our graduates are at the top of the 'highest earners' lists.*

*We recommend you read about the international experience (why not start right away networking globally?), the top-notch students who will attend classes with you (and will become your friends for life), the practical curriculum (a career is waiting for you at the end of this road) and everything else we offer, apart from academia (endless experiences)."*

**After you have prepared your list of competitive advantages, you will no longer need to think time and again about how to persuade your users to stay on your site or select your product or service. Simply ask yourself what you are better at than your competition - and say it.**

---

## **6. Define the relationship between the brand and its users**

### **The long-term relationship you wish to create**

Everything you write needs to fit the relationship you aim to create, so as to establish and support it. Following are some examples of relationships:

- |                             |                                  |
|-----------------------------|----------------------------------|
| • Friends                   | • Business partners              |
| • Best friends              | • Leader and led                 |
| • Mentor and mentee         | • Salesperson and buyer          |
| • People with a shared goal | • Celeb and fan                  |
| • Parents                   | • Couple                         |
| • Acquaintances             | • Manager and personal assistant |

## Example: the two of us against the high cost of living

Every few years, someone invents a new way of buying online that dramatically reduces prices. Users of B4Upay go to this website after they've done the market research, register the lowest price they found, order the product, and give B4Upay the permission to buy it for them at an even lower price. The site promises not to charge the user's credit card if they can't obtain exactly the same product at a lower price than the one that the user found. Once the order is placed, B4Upay contacts many suppliers and asks them for their best quote for that product. Since the suppliers are aware that the product has been ordered and paid for, they are strongly motivated to close the deal straightaway. This leads them to lower the price for the guaranteed purchase to below its regular market price.

The relationship we wanted to create between B4Upay and its users was very well-defined: the users and the site are a team, fighting on the same side against the high cost of living, and act together to get the lowest price. To create such a relationship, we emphasized at every opportunity this cooperation and the fact that the site is working with them, and for them: "*Tell us the lowest price you found, and we'll get it for you at an even lower price*"; "*Now you can sit back and relax while we contact the best suppliers*"; "*Your item doesn't appear on the list? Give us a moment to find it for you*"; "*Thank you for ordering with B4Upay! We were happy to help you save money at the click of a button*".

## Done: what a voice and tone design looks like

The voice and tone design can be written in a number of ways and styles, and each brand should produce a design that best suits its purposes.

For most brands and organizations it is enough to prepare an **internal working document** that summarizes all the sections we have discussed in this chapter. This will be used by the content people to create microcopy, copy or content.

But for a large corporation, that prepares a voice and tone design as part of its branding effort, or that wishes to instill a new voice and tone to many writers on various media (site content, microcopy, social media, newsletter, contact with users via chat or email, and so on), it is worthwhile to produce a formal guide, branded, organized and with many examples.

On the Internet you can find many examples of voice and tone designs. Three of my favorites, and that differ considerably from each other, are the guide of the University of Leeds ([www.leeds.ac.uk/comms/tov/tone-of\\_voice.pdf](http://www.leeds.ac.uk/comms/tov/tone-of_voice.pdf)), Mailchimp's guides (<http://styleguide.mailchimp.com/voice-and-tone>; [www.voiceandtone.com](http://www.voiceandtone.com)), and Salesforce's guide (read more about this one in Chapter 18). Read these three documents and learn a lot about written communication in general and voice and tone design in particular. Discover and enjoy.

## The beacon and anchor: how to use the voice and tone design

Voice and tone design includes answers to two of the most important questions in writing: **what style** should you write in, and **about what**. That is why you should constantly refer to it when writing content for your website, app, newsletter or social media.

**The beacon:** When answering the question in **what style** to write, the voice and tone design sets the course, provides the character, and maintains the voice and tone you'll use so that it fits the values and personality of your brand. Once you have a good understanding of the voice and tone

design, you'll only need to consult it occasionally to brush up on the spirit of it and get into character.

**The anchor:** When answering the question **what to write about**, the voice and tone design provides all the answers. Whenever you ask yourself how to motivate to action, what are the barriers and how to remove them, or what messages will do the best job, simply open and browse the voice and tone design – the answers will always be found there.

## A personal note to end this chapter

The voice and tone design is not an end in itself. I have seen organizations that have created great voice and tone designs, beautifully decorated in the brand's colors, but failed to write according to what's in it.

Why does this happen? Writing is a habit that is hard to break. It is much easier to run with the usual words in familiar sentences, with our set thought processes. These threaten to return again and again.

The voice and tone design requires us to shake off old habits and start thinking afresh every time so that we write texts that fit our values, emphasize what's important to our users, and achieve the goals we have set.

**The voice and tone design is only the beginning**, and once we have completed it we should write accordingly – to get out of ourselves and write as if we are the brand.

It's challenging, fascinating, and it can improve your writing skills, taking you one large step forward.

So don't be tempted to return to your old ways. If you persevere, you'll quickly turn the voice and tone design to your new second nature.

# The questions that will lead you

\* Incorporate these questions in your branding process or conduct a group interview with key personnel.

## Part 1. The Brand

### The vision

- what change does the brand aspire to promote in the world? How will the world be a better place if it succeeds?

The answer lies in the **future**, and doesn't necessarily need to be attainable, but rather serve as a beacon to point the way and highlight the ideal outcome.

### The mission

- What are you doing to fulfill this vision? How are you promoting the change?

The answer relates to the **present**, and should concisely describe your main ways and areas of action.

### Values

- What values are important for the brand to maintain and act accordingly?
- What values are important for the brand to promote in the world?
- From these values, which are the **five** most important for you and the brand?
- Describe each value in a few words. What does it mean to you and what does it mean to the brand?

### The personality of the brand

- If the brand was a person, and they walked into the room, what are the three things we'd think about them **at first sight**?
- If they sat down to coffee with us and we got to know them better, what else would we discover about them?
- If the brand was a person: How old are they, how do they dress, what is their marital status? When they open the newspaper, what section do they read first – Sports, Arts, News? Which type of smartphone do they use – Galaxy or iPhone? What are their hobbies and areas of interest?
- Do they have a sense of humor, and if so, when do they use it?
- What are they **absolutely not**?
- Which famous personality best represents your brand?

# to your voice and tone



## Part 2. The Target Audience

### Needs and problems

- What **practical** problems are solved by your product/service?
- What **emotional** worry or stress will your product/service directly ease or solve for them?

### Hopes and dreams

- What do your users want to happen because they used your product/service?
- What excites them about the idea of the product? What hope does it give them?
- What are the important values in their lives that will be furthered because they used your product?
- What promise does the brand offer? What does it promise to deliver over time?

### Objections and concerns

- What could be the reasons that someone who needs your product or service, and who knows your website or app, won't end up using it? What could prevent them from trying it out?
- What are the main concerns users might have throughout the process (before starting, during and after)?
- What could confuse or not be fully clear to users?

### Preferences

- Who are the main competitors of the brand?
- Does the brand have competitive advantages **with genuine value for users**?
- Your users could have received a similar product or service elsewhere - why should they come to you?

### The relationship between the brand and its users

- What is the relationship you want to create between your users and the brand?
- What do you want your users to feel when they are on the website or app, or in the brand's presence?
- What do your users like to think and feel about themselves? Which self-perceptions do you want to encourage?
- When asked about your brand, what do you want your users to say about it?

## CHAPTER 2

# CONVERSATIONAL WRITING

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### IN THIS CHAPTER

- Why interfaces need to talk
- What is conversational writing
- How to achieve this - rules and tricks

## How much will you invest in your customer service representatives?

On the day that the digital interface you are currently working on – website, app, SaaS, expert system, interactive kiosk, and so on – goes live, it will become an official representative of your brand to your customers. It will invite them to visit, greet them when they enter, show them the product or service, explain to them how it works, and bid them farewell when they leave.

What type of costumer service rep do **you** like to find in front of you? What type of costumer service rep will get **you** to trust that the brand really is good for you and that they see you? Personally, I much prefer reps with a sincere, natural smile and a genuine willingness to help; who are service-oriented, talk pleasantly in a manner that respects themselves, their brand and me; and who make little jokes that break the ice (and who react to nonsense on my part); in short, skilled representatives that provide me with such personal service that I totally forget that I'm one customer out of thousands.

To create in writing the experience of trust and closeness that flesh and blood costumer service reps provide, you need to recognize that **the written words of the interface are actually your conversation with the customer**. And the more authentic, warm and human it sounds (yes, even if you are an insurance company), the better the customer experience will be.

## Are you ready to shatter a myth?

As we saw with the Clifford Nass experiments in the previous chapter, the more human the interface, and the more it abides by our social norms, the more users connect and respond to it, and are persuaded by what it offers them. Therefore, it is important that the voice and tone of the interface is as close as possible to a human conversation.

In practice, most digital interfaces are far from sounding human. The writing is often robotic, formalistic and meager, and creates no sense of personal attention. It offers a formal voice and tone that is rigid and aloof, where you can hardly find a smile, invitation, warmth or sincerity.

### Examples

- Error. Please try again
- Log in to perform this action
- Enter a valid e-mail address
- If you do not have an account, you must create one and verify your identity on this page in order to continue and complete your transaction.

**Why does it happen?** Because from a young age we are taught to write and speak in two different styles. **The written style** is usually formal, more complicated, and considered respectable; whereas **the spoken style** is lighter, flowing, more commonplace, understood and accessible to all. In the past, written style was used in delayed communication, when the recipient read the content after receiving a real piece of paper (such as a letter), which often arrived many days after it was written. However, spoken style was only used in face-to-face communication or on the phone. In other words, it was used in personal communication where the message was heard at that moment and got an immediate response.

Then the internet came along and messed things up. Emails reduced the gap between delayed and immediate communication; the advent of instant messaging closed it almost entirely. When we communicate via Facebook or WhatsApp, are we writing or talking? And accordingly, what style do we use for a chat app: written or spoken?

Carmel Wiseman and Ilan Gonon presented a lovely answer in their book

Internet Hebrew (published in Hebrew by Keter, 2005). They expressed it as follows (page 21):

*The Internet breaks down the age old boundary between the written and spoken language, and gives rise to a third option: conversational writing.*

So we are not looking at a written or spoken language, but rather a new one that combines elements of both.

**So, are you ready to shatter a myth?**

**You are allowed to write as you speak, using a spoken style.**

**But we can't talk to our customers using incorrect language!**

True! No way should you speak to your customers in substandard language, but the spoken style is not necessarily substandard. When you are holding a formal conversation with your boss, customer or important supplier, you use the spoken style, and it's not inadequate.

**What's the difference?** An inadequate style is rough, riddled with mistakes and leads to misunderstandings. The sentence structure is confusing, and it's inconsistent and sloppy. That is not what I mean. Spoken style is polite, respectful, and grammatically correct (unless you purposely decide otherwise - like with intelligent use of slang); it is consistent, precise and unambiguous. Don't be negligent or confused, conversational writing needs to be excellent, but excellence doesn't imply rigidity and aloofness.

**In other words, interfaces can and should be both: both representative and pleasant; both professional and smiling; both respectful and relating as equals. Look around you, humans are like that too.**

Yes, I know, in reality it's not that simple. Many of those who write for digital interfaces have a hard time giving up these distinctions between the two language styles, and the concept that one is respectful and the other isn't. Thus they stick to the formal written style, even when the character and style of the actual interface requires a different voice and tone entirely. Sometimes, it is only a matter of not having the right tools to write in a conversational style. In the following pages I provide tools that will help you with that.

## Don't write something you wouldn't say out loud

Even if your brand is really serious, such as a big bank, insurance company or government office, you still don't need to make users feel that you have sent your lawyers to talk to them. It is better to send the customer service rep. You don't want to make your users feel alienated or threatened, rather give them the feeling that the interface is a worthy substitute for a human attentive customer service rep.

Written style includes words or phrases you simply wouldn't say out loud, even in a formal situation. To create the experience of a service-oriented authentic conversation, you need to refrain from using formal stiff phrases. **The rule is: don't write what you wouldn't say out loud.** In the following examples I have underlined words that I recommend you remove from your digital dictionary. In their place I offer an alternative in suitable conversational style.

- Enter the phone number you would like to dial >> What number do you want to call?
- If you have previously registered for this site, please provide your email address and password >> Already signed up? enter your email and password
- For verification purposes, an email will be sent to the email address you provided >> A verification email is on its way to your inbox (or more formally: was sent to your email address)
- It is also possible to make a purchase by phone >> You can also call in your billing info
- The products you wish to purchase >> Your shopping list
- Your sign in information is detailed below >> Your email and password are:
- In the event that you forgot your password >> If you forgot your password

## A sentence isn't constructed that way

Two other things we do when writing, that we tend not to do when speaking, are related to sentence structure.

### 1. Use the active rather than the passive voice

When writing formally you might come up with the following sentence:  
**Please select the preferred payment method.**

But "preferred" is the passive form and we wouldn't put it this way when talking out loud (the preferred method instead of someone preferring it). We'd simply ask the person standing in front of us in the active form:

**How would you like to pay?**

Or request:

**Please select a payment method.**

The active structure of the spoken sentence is better because it focuses on the person you are talking to. So always use it when writing microcopy.

### 2. Don't drop the connecting words

When we talk we connect the parts of the sentence together using prepositions, so that it's clearer and because it is more natural and personal that way. But in writing these connections seem to disappear. This makes the sentence more complex and hinders the flow of the message.

#### Examples

- Order details >> **Your** order details
- Close map >> Close **the** map
- Number of items in basket >> Number of items in **your** basket
- Save settings >> Save **these** settings
- Select item >> Select **an** item

Sentences written using passive voice and without connecting words sound forced or awkward, and hinder understanding. So write in active voice and make sure to properly connect all the parts of your sentence.

## Tricks for excellent conversational writing

### 1. Take the words out of somebody's mouth

Are you undecided about how to phrase something? Imagine a customer service rep standing right in front of you, how would they phrase it? Try to be as natural and spontaneous as you can, without processing or structuring beforehand. It helps when two people do this - one asks and the other replies with the first answer that comes to mind.

### 2. How does it sound?

Read out loud what you've written. Does it sound natural? Does it flow? Does it sound as if a real human said it? Great.

### 3. Formats are soooo boring

What's fun about a real conversation is that you never know what to expect, and you can't have the exact same conversation twice. To make your texts feel like part of a real conversation, you need to converse. Instead of using the usual formats ("*The transaction completed successfully*"; "*Please wait*"; "*Error, try again*", and so on), ask yourself: what do I **really** want to say to the user in this specific situation? And then say exactly that.

### 4. Good questions

Questions create a feeling that the conversation flows, as if someone asks and the other responds. So instead of "*Type the email address you want us to send the password to*", you could say "*Where should we send the link?*" This form of sentence also propels the user to act because humans find it difficult to leave a question unanswered when they can answer it. But you need to be careful not to ask too many questions, because then it sounds like an exhausting interview.

**TIP****07****Slang - allowed or forbidden?**

Language spiced with slang sounds more human and authentic. That's great, but the interface, like any customer service rep, needs to stay representative. So you have to keep within the framework of mainstream and acceptable slang. How do you know if the word or phrase is acceptable? If you write in your mother tongue, you will know. Trust yourself and your instincts. If you write in a language different from your mother tongue, have the text checked by someone who is a native speaker, to make sure that the slang used is light, gentle and representative.

Second, don't use culturally specific slang unless writing for a mono culture.

And if it is not obvious: slang that is hurtful, sexist or racist is completely off limits.

## CHAPTER 3

# MICROCOPY THAT MOTIVATES ACTION

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### IN THIS CHAPTER

- Benefit is the greatest motivator
- Excited users are more prone to act
- Sometimes you just need to open a door
- Social proof works

## 4 Important principles to motivate action with writing

Just before we look at each interface component in depth, here are 4 principles that will help you motivate to action with every component, and in fact wherever you write to your customers, even outside the digital interface.

### 1. Talk about the value, not the method

It only takes a few seconds for a user to decide if the page, website or specific action is relevant to them. That means that you only have a few seconds to make clear to them the value of staying and performing the action. For that to happen, everything needs to be extremely simple, clear and persuasive. Explicitly point out: what they'll receive from using your product or service, what problems you are solving for them, or how it will better their lives. If you created a voice and tone design (see Chapter 1), this is the time to open it and look inside. Everything is written there.

**How do you do that?** Change the focus of your texts to what users will gain rather than what they need to do to benefit.

#### Examples

**Instead of the heading:** A variety of tools to properly manage your finances

**Write:** Put your debts behind you

**Or:** Get rid of your debt once and for all

**Instead of the heading:** A new way to purchase a second-hand car

**Write:** Buy your next car with peace of mind

**Or:** Second-hand car – no hassle, and with a full warranty

**Ask yourself:** What will change for the people who have used your product or service? What can they do that they couldn't before? What problems have you solved for them?

And talk about that.

Note that we are naturally inclined to talk about our brand, product or service: how good it is, what it provides and its relative advantages. These are indeed important questions that need answering, but when you want users to act, stop talking about yourself, and **talk only about them**, not what you give, but what they receive; not how **you** solve their problems and fulfil their dreams, but how **they** will get rid of their problems and fulfil their dreams.

**Sometimes it is entirely a technical matter. Check who is the subject of the sentence, who are you talking about.**

**Instead of writing:** Registration will allow you to quickly go through checkout (the subject is registration)

**Write:** Sign up to checkout quickly

**And instead of writing:** The gift card will let you buy things in 25 selected stores

**Write:** With this gift card you can shop in 25 selected stores

## **2. Amuse me, excite me**

Clifford Nass (see Chapter 1) discovered in his research that **humor** makes people feel better about themselves, like and appreciate the interface more, and especially, cooperate more and accept its suggestions. With that being said, he emphasizes that it is important not to use humor that is too intellectual or to use a complex play on words that can leave some of your users out of the picture and make them feel stupid. Here too, as with slang, avoid using racial, sexist or otherwise offensive humor, and never refer to pain or hardship endured by the users. Stay within the boundary of good innocent humor.

**Excited** users are also easy to motivate: they are more focused on the half full glass, willing to take more risks, and are ready for action. Actually, Nass found that they want to do something so much that they prefer to make any decision rather than no decision at all. So if you succeeded in exciting your users, the conversion is just around the corner.

### 3. Respect your users: invite them to act

When I'm talking about a Call to Action, I sometimes call it an **Invitation to Act**. Why? Maybe because I myself don't like it when people tell me what to do (on the contrary, I immediately don't want to do it). I prefer that they clearly point out the benefits to me of taking the action, open the door for me and let me decide if I want to enter.

Aggressive service or selling techniques work in the short term, but don't serve the relationship that we want to create on websites or apps. Our objective is usually to establish a relationship of trust, continuity, and an emotional connection to the brand; provide pleasant memories and create a long-term relationship, not just for this encounter, but for continuous use, forever. Think about the well-known brands you love most - their appeal, elegance, and the sense of mutual respect.

**How do you do that?** Explain to your users how they benefit from performing the desired action, then invite them to do it. Write in an active and attractive but not aggressive voice, and leave out the dirty tricks ([see tip 08](#)).

Ask yourself if the invitation provides your users with something that is important to them, if it respects them, and if it fits the type of relationship you want to create with them in the long term.

### 4. Social proof: and what if everyone jumps off the bridge?

Humans are social animals, and sometimes it's amazing to see how much so. Social proof is a psychological phenomenon where people decide how to act based on the actions of others (also known as the herd mentality). For example, we'll always prefer to visit a crowded restaurant rather than a deserted one, and we'll "like" those statuses that have already received a few likes rather than a status no one has reacted to yet.

The fact that others were at this same crossroad, and decided to act in a certain way, reduces the level of uncertainty in the situation, creates confidence, and makes us feel that we belong to an imaginary community of those who've already taken this action.

Research has found that social proof dramatically increases the conversion rate (take a look at the book **Influence: The Psychology of Persuasion** by Professor Robert Cialdini). Positive social proof can be placed right next to buttons so that they act as click triggers (we'll deal with this more in Chapter 11 that focuses on buttons), or as part of the call to action at the beginning of the process. Many more examples of social proof will be presented later in the guide.

### **Types of social proof**

- **Numbers tell** – How many people have already bought this product today or in total; how many people use this service; how many people are looking at this right now; how many people have downloaded the guide; how many hours was this video watched cumulatively.
- **Concrete facts** – The name of the last person who used the service; in which state the product was bought most. In general, the more concrete the social proof (name, photos, quotes), the more reliable it is.
- **Opinions, reviews and testimonials** of other users.
- **Ratings**, for example using stars or quotes from rating sites such as TripAdvisor.
- **Official awards and good reviews in the press**.
- **Social media** – buttons to share or like, with the number of users that have clicked them so far.
- **Other customers** – the logos or names of respected customers who already use the product or service.

**TIP****08****No thanks, I want to stay stupid**

A trend that is currently popular is the use of buttons that seek to provoke self-doubt, undermine the confidence of the users, and tell them that if they don't do what is wanted, then they are apparently stupid.

**Examples**

- No thanks, I want my sales to remain low
- No thanks, I don't want to save money
- No thanks, I prefer to miss this opportunity

Whenever I see such a button, I'm amazed. What logic brings brands to make their users feel bad about themselves? The answer of course lies in the logic of making conversions. The more users press the button, the better the sales. This works, but only in the short term. In the long term, the users will remember that their last interaction with your site left them feeling stupid, or that they did something they didn't want to do just because you told them they would be stupid not to. Why would they ever want to return?

**When you write microcopy, be on the users' side.** Make them feel good about themselves, don't belittle them. Create a place that they love to visit and return to. This might result in a reduced number of immediate conversions, but also with many more loyal users that return whenever they need your product or service.

So instead of writing buttons that callously push your emotional ones, invest a bit more in motivating to action through highlighting value.

PART 2

PART 2:  
EXPERIENCE AND  
ENGAGEMENT

# Every word is an opportunity

In the first part of the book, which dealt with voice and tone design, we saw how to define the central messages that we need to share with our users so that they are motivated to action. What advantages are worth stressing, which concerns we should address, how we want them to feel when in our company, and so on. In part 2, you'll see how to actually do this on your site or app.

In each chapter I'll cover one popular element that we find in sites and apps, and how we can turn a regular page to one full of character, a page that is distinctive to your brand, one that communicates directly to your users' hearts and motivates them to act willingly.

In the following chapters, you'll see that every word, every page and every form on your site is an opportunity to prove to your users that they are wanted and loved, to increase their activity and to establish your brand's differentiation. Every heading, every field and every button, even the most annoying errors, are an opportunity to surprise your users, to excite them, and to show that you thought about them and that you have something really, really good to offer them. Within each chapter you'll find clear principles that are easy to understand, that you can use when writing, and that you can implement immediately.

## Chapters in part 2:

- |   |                                |
|---|--------------------------------|
| 4. Sign up, login and password recovery | 9. Empty states                |
| 5. Sign up for a newsletter             | 10. Placeholders               |
| 6. Contact us                           | 11. Buttons                    |
| 7. Error messages                       | 12. 404 errors: page not found |
| 8. Confirmation messages                | 13. Waiting time               |

## CHAPTER 4

# SIGN UP, LOGIN AND PASSWORD RECOVERY

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### IN THIS CHAPTER

- An excellent sign up form in 3 steps
- Signing up using a social media account
- Login for registered users
- Password recovery process

## Sign up forms

When you ask users to sign up to your website (or service or app), you are basically telling them that this won't be their last visit, and that you expect to create some sort of relationship with them.

They have at least two good reasons **not** to sign up:

**First**, signing up usually includes a form or connecting using a social media account. Users really hate filling out forms. It takes time and requires the use of a keyboard, they'll be asked to provide personal details, they'll need to remember, or create, yet another password, and they also risk an unintended commitment or payment. The ability to connect using a social media account has become more acceptable, but even here users sometimes prefer to skip the registration because of privacy concerns.

**Second**, a relationship is a commitment, and who likes to commit to something if they don't really have to? Why should users register on a site if they can simply visit it and then peacefully carry on with their lives?

**How much do users hate to register?** A lot! They'll even pass on the items they put in a shopping cart, and then look for that exact same item elsewhere, if they are forced to register before check-out. After a large company removed the requirement to register before purchasing anything, their profits rose by \$300,000,000 a year (read the article "The \$300 Million Button" by Jared M. Spool). That's how much people hate to register.

If so, whether the registration is optional or mandatory, it's in our interest to remove these obstacles so that users will sign up willingly, and will understand why **they** want a relationship with us, and how signing up will benefit **them**.

The following form, similar to dozens of others on the Internet, does **not** help users. There is nothing to support a decision by a user to sign up or not, and it doesn't say anything that will stop them from giving up and leaving. The site simply displays a form, which they hate, and doesn't say a word. So why should they sign up?

Create an Account

First name\*

Last name\*

Email\*

Password\*

Confirm password\*

REGISTER

**It's not enough to design and display a sign up form, you need to also motivate users to register. And to achieve that, follow these three steps:**

### 1. Change the title

Never call your users "users", so don't write **New user**, **Existing user**, or **Login for registered users**. Don't leave the title as **Sign up**, **Register**, **New customer** or **Create an account**, it's technical and boring. Appeal directly to your users, welcome them or make them laugh, use conversational writing and vary it.

#### Examples

- Nice to meet you
- You haven't signed up yet? You're in the right place.
- Good to see you :)
- Join now and start to... (edit photos, find friends, make an album, or whatever it is users do on your website)

- New here?
- Do you come here often?
- Let me in!
- Not a member? Let's fix that!

If possible, connect the title to your content and use your voice and tone. For example, the Israeli site **mit4mit** enables couples who are getting married to upload and read reviews on suppliers. The title when you open the sign up form is: **Why don't we formalize our relationship?**

On the other hand, don't take the creativity too far. You want users looking to register to know that they have arrived at the right place.

**Note** that I only encourage you to spice up the title of your sign up form. Don't alter the **sign up / log in** links that appear in the navigation bar. Users are looking for exactly those words, and every change will make them harder to find. Be creative only on the actual sign up page.

## 2. Tell your users why it's worth it for them to sign up

Even if registration is required, give your users good reasons to invest the next two minutes of their lives in registering on your site. First, prepare for yourself a list of all the advantages users have after signing up that they won't have if they don't sign up. Then, at the top of the form, or next to it, write one crucial advantage or 2-3 important advantages in a bulleted list. Don't go overboard, 2-3 is enough.

### Examples

- Fast checkout
- Create a wish list
- Only enter your details once
- Track orders, delivery, and purchase history
- Track the progress of a process
- Access to a restricted area of the site, or to special features
- Monetary perk available only to registered users

Don't be careless, select significant advantages that will really benefit your users.

### 3. Remove the obstacles

Why don't you register on every site you visit? Let me guess:

1. Because of the time and effort involved in filling out the form.
2. Because you don't want to give them your email and be swamped by spam.
3. And sometimes because you are worried they'll request payment at some later stage.

All users fear this, so talk to them and ease their fears. Clearly promise them that the sign up process is short and simple, that you won't pass their email address on to anyone else, and that you won't send them too many emails yourself.

#### Finally, don't forget the button, the confirmation and the error messages

Signing up for a website or app is one of your most important processes. Don't forget to add a call to action on the button (see tip 19 in Chapter 11), and an excellent confirmation message that makes users feel that signing up was the right thing to do (see Chapter 8). Naturally, you also need to provide clear and pleasant error messages (see Chapter 7).

## Examples

Nike offers a lot of sporting, personal and economic value, conveyed in a dynamic and convincing way.

REGISTER WITH NIKE+

The Plus Means More. More Gear.  
Events. Coaching. Just For You.

- Free shipping on every order, every time
- Access to our workouts and events
- Coaches and apps to be your best

JOIN

[www.nike.com](http://www.nike.com)

**Life is Good**, the T-shirt site, provides three classic reasons to register in a bulleted list, and points out that the process is easy. However, they could spice up the title a bit and make it more fun to sign up.

## NEW CUSTOMERS

Creating an account is easy. Just fill in the form below and enjoy the benefits of having an account.

### CREATE AN ACCOUNT NOW

- Save shipping address & billing information
- Track orders & View order history
- Enjoy faster checkouts

[www.lifeisgood.com](http://www.lifeisgood.com)

**TED**. The title and first sentence work well together and give users the feeling that they are really welcome. Then come the benefits (carefully selected), presented in a simple and clear style. For those signing up with their Facebook account, there is also a promise not to post anything without their permission (see more about signing up using social media accounts later in this chapter).

## Welcome to TED.

You and your ideas are welcome here. When you join TED, you can leave comments, save talks to watch later, track TED-Ed lessons and generally be in good company.

Already a member? [Log in.](#)



[Sign up with Facebook](#)

Or

First name

Last name

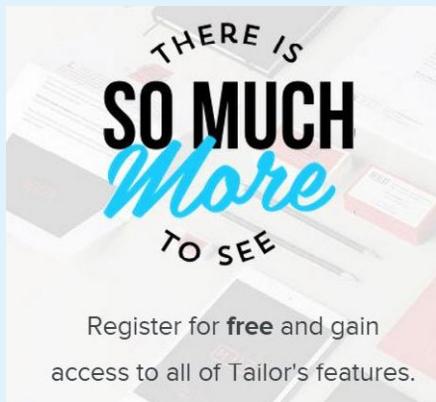
Email

Password At least 6 characters

TED will not post anything to your Facebook account without your consent.

[www.ted.com](http://www.ted.com)

**Tailor Brands.** Access to all the features on the site is definitely a good motive to sign up, and because you receive a designed logo at the end – an expensive and desirable asset – they stress that signing up is free.



**Priceline.** With a little effort now, your next visit will be quicker. There are also exclusive benefits, and they mention the fear of spamming: Your info is secure with us.

## set up an account today & get the most out of priceline.com

- Make your next visit at priceline faster and easier.
- You'll get exclusive deals and discounts reserved only for registered customers.



Your Info is secure with priceline

[www.priceline.com](http://www.priceline.com)

**food.com.** You don't need a title, you can get straight down to business. In this way, instead of alarming users by declaring that this is where they register, the users read benefits that are important to them, and thus keep on reading. This site offers registered users all sorts of advantages relating to cooking and hosting. An offer no one in the kitchen can refuse.

Save your favorite recipes, share your photos, create meal plans and grocery lists — and do it all from any device.

Sign Up Easily With:



[www.food.com](http://www.food.com)

**B4Upay** is an Israeli company we already mentioned in Chapter 1. Even though signing up to their service is required, they explain why it's good for the users and how filling out the form will make their lives easier later. And at the bottom, they promise that signing up and the service they provide is totally free.

Create an account with **b4upay**  
And get the best prices on the Internet



**Why do you need to sign up?**

- So that we can send you an email as soon as we close the deal
- So you can easily track your orders
- So that the delivery address can be used for your next order

Signing up and service are free.

You can only gain.

[www.b4upay.com](http://www.b4upay.com) (Design: KRS | Translated from Hebrew)

PayPal tells their users what they can do after they have created an account, things that they couldn't do beforehand. They clearly explain what will change and how their users' lives will improve after signing up, and that's an excellent way to present the main value. The title also assures the user that signing up is free, thus removing the payment barrier.

Join PayPal now. Signing up is free!

Choose from 2 types of accounts:



**Personal Account**

Shop in Israel and around the world from your computer or on your mobile – all without sharing your financial info with the sellers.



**Business Account**

Accept payments and send Detailed Payment Requests to your customers. It's easier and more secure to sell to anyone, anywhere, and any time.

**Continue**

[www.paypal.com](http://www.paypal.com)

## Signing up using a social media account

Signing up via social media lets users register without filling out a form, and enables us to get much more information about them – a win-win situation. Today, this is considered the standard, and many sites and apps offer this as their main sign up method.

Still, users need to give up a certain measure of privacy, therefore, at the top of the page, you should still write about why it's worth the user's while to click the sign up button.

Because the concern over privacy is a real problem, and because we ask the users to provide much more information than just their email, it is wise to add at least one of the following:

- 1. A promise that you won't publish anything on behalf of the users.** This appears again, immediately after, in the Facebook settings; but if you want your users to get that far, you need to write it here also, next to the sign up button.
- 2. The benefits of signing up via the social media:** It's the fastest, simplest, and most up-to-date way.
- 3. Your users' privacy is important to you and you will do everything in your power to protect it.**

Today, in most cases, there isn't enough (or even any) mention of these issues. In the near future maybe we can give it up, because this way of registering will be so commonplace, but in 2017 it is still important and necessary. I saw with my own eyes users give up on registering using their social media accounts only because the site didn't promise to guard their privacy.

## Examples

**Nuvango** uses both the design and microcopy to indicate that signing up using a social media account is the obvious choice, whereas signing up using email is old-fashioned. And who wants to be old-fashioned?

The image shows a comparison between two sign-up forms. On the left, a blue box contains three buttons: 'Sign-up with Facebook' (with a blue 'f' icon), 'Sign-up with Twitter' (with a white bird icon), and 'Sign-up with Google+' (with a white 'g+' icon). To the right is a standard sign-up form with fields for 'Email Address', 'Name (eg. Pablo Picasso)', and 'Password', followed by a large grey 'Create Profile' button.

Or do it the old-fashioned way

www.nuvango.com

**ASOS**. When signing up, they provide the benefits to motivate users to choose the social media way, using a friendly voice and tone.

The image shows the ASOS sign-up process. It starts with a large 'Join ASOS' button. Below it, text reads: 'Signing up with social is quicker than email. No extra passwords to remember - no brain fail.' Four circular icons represent social media integration: a blue 'f' for Facebook, a red 'g+' for Google+, a blue bird for Twitter, and a dark grey envelope for email.

And when signing in - what a cool way to put it!

The image shows the ASOS sign-in process. It features the text 'Sign in with social. Pow!' above three circular icons: a blue 'f' for Facebook, a red 'g+' for Google+, and a blue bird for Twitter.

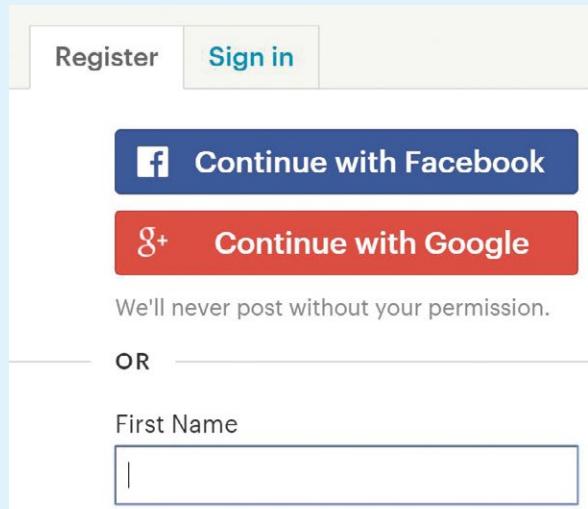
www.asos.com

For all the users who chose to sign up with their email and password, ASOS provides an elegant last chance:

✓ Yay! You're all signed up. If you link up a social account, it'll be even easier to sign in next time. [Link Up Here](#)

[www.asos.com](http://www.asos.com)

**Etsy** promises never to publish anything on behalf of the user, and the option of signing up using email is secondary.



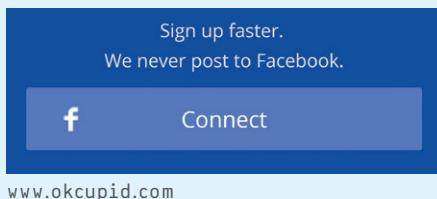
[www.etsy.com](http://www.etsy.com)

**Rounds** only lets users sign up using their Facebook accounts, so privacy is of the upmost importance. Rounds promises users to look after their private data and also promises not to publish anything in their name.



Rounds app

**OkCupid** is short, direct and calming. The promise never to post anything in the name of a user is extremely important to sensitive sites such as dating, diet, pregnancy and birth, medical, and financial sites.



## TIP 09

### Register vs. Sign up vs. Join

**Sign up** indicates to the user that this is a simple and quick digital process; whereas **Register** would be more appropriate when the user needs to fill out a form and provide loads of details, such as for a bank or health insurance.

I recommend using **Join** if you are trying to create a sense of community, and not just invite individuals to receive content or services.

You need to think about not only how the user joins or registers, but also how they access the site later. It's preferable not to use **Sign up** and **Sign in** side by side. Users find this confusing and need to stop for a second, and we want to make access as easy and intuitive as possible. So if you use **Sign up**, pair it with **Log in**. Different colors can be helpful too. These are the links on **PayPal**:



Note that **Log in** phrase is two words, but when referring to the page or process it becomes one word – **Login** page or **Login** process.

One last point, if you use **Register**, make sure your text talks about registering or registration to ensure consistency. The same goes for when you use **Sign up** or **Join** – just keep it consistent.

## Login for registered users

Returning registered users can be seen as regular customers of the website or app; and just as in brick-and-mortar shops regular customers are welcomed with warmth, so they should be treated online. Instead of writing only **Log in** or **Registered users**, you can say something that will raise a smile and show your users that you are happy they chose to return, that they are welcome and loved here.

### Examples

**envanto** are glad you returned.

The image shows a screenshot of the Envanto login page. At the top, it says "Great to have you back!". Below that is a "Username" field with a placeholder "I" and a "Remind me" link. Underneath is a "Password" field with a "Reset" link. The URL "www.envanto.com" is visible at the bottom left of the page.

**www.envanto.com**

**Nuvango** return your love.

The image shows a screenshot of the Nuvango login page. It features a large "Welcome back" message at the top. Below it, a smaller text says "Thanks for coming back. We love you too." The URL "www.nuvango.com" is visible at the bottom left.

**www.nuvango.com**

**PicMonkey** have since replaced their login form, but they used to write something funny above it and change it each time the user came back. I loved it.

Hi, you! Sign in like you've never signed in before. Type that password with passion and intent!

Hey, friend. Let's use teamwork today. You make something cool and we'll be like: Yesss!

Hey, friend. While you were gone we ate those chips you had on your desk. Hope that's okay.

Hi, you! Last night, we fell asleep on your keyboard. Sorry about the drool on your insurance forms.

[www.picmonkey.com](http://www.picmonkey.com)

But there's no need to go this far. It may even become annoying after a few times. So just be nice, not too clever.

## Password recovery

Users who want to log in but have forgotten their password are not interested in anything else except getting a new password. This is not the place to be clever, and there's no need to elaborate. Keep it short, simple and effective.

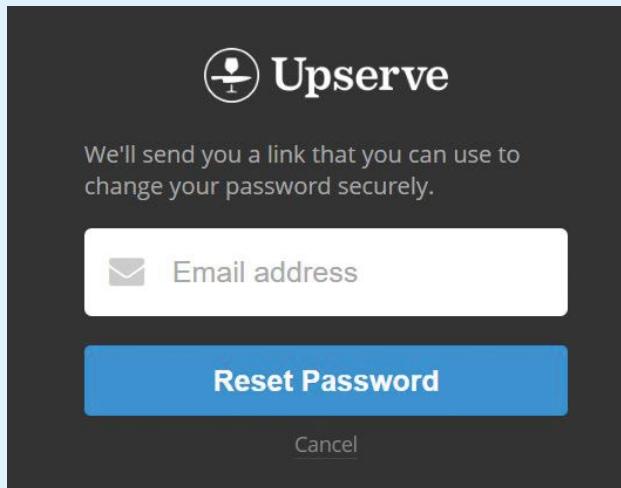
### Examples

Tumblr proves that extra words are superfluous.



[www.tumblr.com](http://www.tumblr.com)

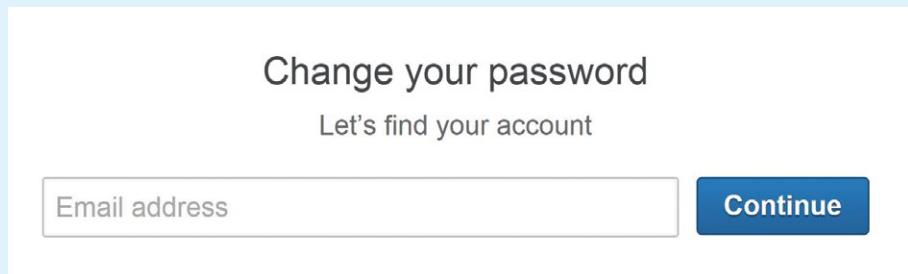
Upserve. If you are concerned that your users don't fully understand how it works, you can add a short explanation.



[www.upserve.com](http://www.upserve.com)

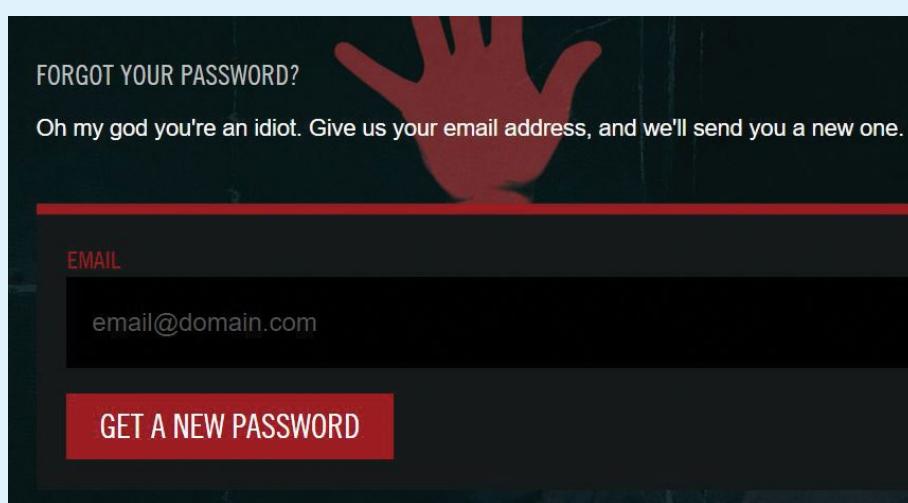
And yet, you can still be nice, and soften the process just a tiny, tiny bit without burdening the user.

LinkedIn teams up with the user:



And there's one person that doesn't need to be polite. He's just being himself, and it's perfect:

Louis CK.



It gets worse in the restore mail. Check out the temporary password :)

(Thanks to Joseph Weitzman for the screenshot)

New password 

---

 Louis C.K. support@louisck.net via amazonses.com  
to me 

Apparently you forgot your password? Ok, so here's your new one, stupid:

EMAIL: [REDACTED] @gmail.com  
PASSWORD: stupid.ydcvy

Here's the login page in case you forgot that too:  
<https://buy.louisck.net/account/signin>

[...]

And last, but not least, **Mailchimp**. They announce the successful update of the password in their own funny style.



Roger Dodger.  
Your password has been updated.

[www.mailchimp.com](http://www.mailchimp.com)

## CHAPTER 5

# SIGN UP FOR A NEWSLETTER

---

**IN THIS  
CHAPTER**

3 styles of CTAs to sign up for a newsletter  
A persuasive invitation in 3 steps

# Why should I sign up?

To you it is obvious why a newsletter is necessary. It delivers value to your customers over an extended period of time, keeps them aware of your brand, and develops a relationship with them based on familiarity and trust; it keeps them up-to-date on new developments, and of course – it sells. As a result, nearly every business tries really hard to generate a mailing list and distribute a newsletter on a regular basis.

The problem is that however much we want our users to sign up, they likewise don't want to. They see it as an invitation to spam them and receive piles of unwanted information. They need a really, really good reason to risk signing up.

The invitation to sign up for the newsletter appears in a variety of ways: a pop-up displayed when the user accesses the site or after they have scrolled down a bit, a check box when signing up to the site, a form in the footer or on the side bar, or all of the above ([see tip 10](#)).

**Generally, invitations shown today on the Internet can be divided into three main categories:**

## 1. The boring

A drab one sentence invitation using a well-worn template that can appear on any website, and doesn't arouse any interest.

### Examples

- To sign up for our newsletter, please provide the following details:
- Sign up for our newsletter!
- Sign up here and get our newsletter delivered directly to your inbox
- Join the X mailing list

Even if you put such a sentence in a beautiful well-designed pop-up, you need to remember that your users see a dozen similar pop-ups each day, and they need to decide which one they should sign up for. Why would such

a sentence cause the user to give you their email address, something they guard zealously? When have **you** recently signed up for such a newsletter?

## 2. The keeping-you-up-to-date

Receive updates, be the first to know, stay in the loop and don't miss out! How many variations there are to the promise, and they all say basically nothing.

### Examples

- Do you want to keep up-to-date? Do you want to receive perks and discounts? Sign up for our newsletter now!
- Be the first to hear about our hot offers, new products and exclusive events.
- Why miss a great offer? Sign up for the newsletter.

On the one hand, if the users are already on your site, they know what it has to offer, right? And if you offer to keep them up-to-date via the newsletter, they'll know what will be updated, right? And they'll definitely want to never miss a thing, yes? Well actually no. That is to say, they basically know what the site deals with, they generally want to stay updated, and they more or less know about what they will be updated, but that isn't enough.

Users see these update invitations, like the first boring category, all the time. The invitation could appear on practically any site, and it leaves the users guessing how they'll benefit from signing up for that specific newsletter.

But our users don't have the spare time, patience, or overview of your business to understand by themselves what you offer in the newsletter and how they benefit from it. You need to explicitly tell them.

### 3. The persuasive

The invitation to sign up for the newsletter must be exactly like any other sales pitch. Do you want your users to give you their email? Give them a good reason why! A good reason is one that is good for **them**, one that will add something to their lives, and will change them even if ever so slightly. Don't present a general and vague reason that anyone else could have written, rather tell them exactly what they'll receive in their inbox that is worthwhile and help them overcome their aversion to providing their email address and the fear of exposure to even more spam.

If you have created a voice and tone design, you already know what the users want to happen to them as a result of using your product or service. Use this knowledge to phrase your invitation.

## TIP

### 10

#### Excuse me, have we met?

If you display the newsletter invitation pop-up immediately after users land on your site, it is like a complete stranger coming up to them from out of nowhere and offering a relationship. Strange, right? At this stage they have no reason to sign up, they don't know you yet, and they certainly don't trust you.

Invite users to sign up for the newsletter only after they more or less understand what you have to offer them. For example, after spending one or two minutes browsing on the site, after they have read about half an article, perhaps only after they access another article. The point is that you should have some sort of an indication that the users understand what the site is all about.

## This is how you can motivate users to sign up for the newsletter

### 1. Change the title

Sign up for our newsletter or join our mailing list are not effective titles because they tell users what we are asking them to do (sign up) rather than what we are giving them. In other words, they tell the users the road they will be taking rather than the benefit they will be getting. So write the value the newsletter provides in the title, tell them up front how it will alter their lives.

For example, if your newsletter deals with relationships, instead of writing "sign up for our newsletter", write:

**Were you told that a successful relationship is hard work?**

**Make it an exciting adventure!**

### 2. Tell your users what's in it for them if they sign up

Only after your users understand from the title that the offer is interesting, can you invite them to sign up and tell them what they'll receive. Updates, news or the latest offers are not enough. Be more specific and relevant to your unique brand. What exactly are you planning to send your users? Naturally you should choose those elements that you think will interest your users most. Remember that you are selling your brand's newsletter, so this is the place to demonstrate your marketing writing skills.

Offer benefits that users can immediately understand and say:

**Yes, that's something I really want to know. I'd be happy to receive this in my inbox.**

Continuing with the previous example of a newsletter about relationships:

**Were you told that a successful relationship is hard work?**

**Make it an exciting adventure!**

Sign up now for our newsletter and every week you'll receive:

- Tips on rejuvenating relationships that you won't find elsewhere
- Exclusive interviews with leading marriage counselors
- Recommended romantic spots, and more

### 3. Remove the obstacles

Spam is the most common obstacle that stops users from signing up for a mailing list. And spam for your users is not only emails that they didn't ask for, but also too many emails that they did request (i.e. yours). To deal with these two concerns:

- a. Promise them that the frequency of your newsletter is low, and you can even mention how often.
- b. Promise that the email addresses are well guarded and that their privacy is important to you.

### Finally, don't forget the button, the confirmation and the error messages

Signing up for a newsletter is like any other digital process. You need to provide text for the button so that it motivates the user to click it (see Chapter 11), and an excellent confirmation message that will leave your users curious and expectant to receive their first newsletter (see Chapter 8). It is also worthwhile to invest a bit in writing a gracious error message, in case the user made a mistake when entering the email address (see Chapter 7).

## TIP

# 11

### Free content! Download now!

If you offer free content for download or by email, the invitation to download works in exactly the same way as when signing up for a newsletter.

1. Provide an attractive title.
2. Tell the users about the benefits they'll receive from the content - how their lives will improve after reading it.
3. Guarantee privacy and that you won't pass on their email address.



### Are you concerned your users won't read? Don't worry

The secret of persuasion is to always tell your users how they'll benefit. Michael Aagaard of **ContentVerve** tried it on his site and published his findings in the article "How to Write High-Converting Sign-Up Form Copy".

The control form had:

**Get Fresh Updates from ContentVerve.com**

The non-generic version had:

**Get Fresh Updates**

- Case Studies & test results
- How-to videos & articles
- Podcasts w/thought leaders

Actually, Aagaard only provided a very short list of what his users would actually receive if they read his newsletter (and of course he carefully selected those items that most interested his customers).

**What was the impact? An 83.75% increase in sign-ups.**

Worth it, don't you think?

**TIP****12****But we really do only offer deals....**

If your newsletter is strictly a sales channel, and simply provides updates about discounts and offers, then first of all you should think about upgrading it to be more magazine-like and include added value, such as recommendations from professionals ("our stylist will turn you into the office star"), an interesting list that you have assembled ("the five top restaurants last month"), interviews, success stories, and even in-depth articles.

If you don't have the time or budget to change the newsletter, then at least add a few specifics to the sign up form. Remind the users of the brand and make it your unique invitation. For example:

- Not only "You'll receive a discount", but rather "Receive a discount on our new awesome summer collection".
- Don't just write "We'll send you offers", but rather "Receive special offers for the best rooms in the most sought after hotels".
- Don't write simply "Updates", but rather "Receive updates on new job openings before they are uploaded on the site".

This is how Walmart did it:

**Sign up for Savings.**

Get Walmart values delivered to your inbox.

We'll notify you when the Black Friday online circular launches, send you offers for free photo prints, plus much more.

Email address

Sign Up

[Privacy policy](#)

[www.walmart.com](http://www.walmart.com)

## Examples

Photojojo, a photography gear shop, seizes its users' attention with a title that offers great value. Afterwards it tells the users how the content in the newsletter will help them achieve this goal.



The BBC details what is in its newsletter, and also tells users exactly when they'll receive it. At the end, they even let the users see a sample, thus truly helping them decide if the newsletter is for them or not. The BBC only want users interested in their content to sign up. And that's what I call TRUST.

## Sign-up

The BBC newsletter is a comprehensive summary of the day's most important news, compiled by the world's largest and most trusted news organization, and delivered to your email inbox each morning. To subscribe, simply provide us with your email address and country. [See a sample.](#)

www.bbc.com

**YFS Magazine** provides clear value, a weekly "fix" of entrepreneurship that will help you work smarter. The frequency of the newsletter is clear, and just beneath the button, the exact spot where the user is debating whether to click or not, they help them make the choice by promising not to spam.

## Get your weekly entrepreneurship fix.

Fresh, provocative, and insanely addictive content delivered weekly.

Sign up for YFS Magazine's FREE agenda setting newsletter and work smarter. Don't be left out!

👤 First Name

✉️ Email

JOIN US

[Privacy](#)  
 No spam. Promise!

[www.yfsmagazine.com](http://www.yfsmagazine.com)

**Barking up the Wrong Tree** offers on the newsletter sign up form:

- Social proof (Featured in + over 270,000 subscribers)
- A value for its subscribers (to be awesome at life)
- Precise frequency (weekly)
- A promise that there will be no spam (ever!)

### Join over 270,000 subscribers!

Featured in the New York Times, Wired Magazine and Time Magazine, BARKING UP THE WRONG TREE provides science-based insights on how to be awesome at life.

Get a free weekly update with exclusive content. No spam, ever.

[www.bakadesuyo.com](http://www.bakadesuyo.com)

unbounce provides a service for designing, publishing and testing landing pages. If you are dealing with conversions (and that is a high probability if you are reading these lines), you know that we are all searching for tips and practical techniques proven by others to work, that we can simply put into practice ourselves. That's exactly what unbounce promises you'll receive in their newsletter.

## Conversion Optimization Tips You'll Actually Use

Proven strategies from marketing experts, delivered straight to your inbox

[www.unbounce.com](http://www.unbounce.com)

And finally, the invitation to sign up for a newsletter that I like best is from **Marie Forleo**, the American life coach (by the way, Forleo already replaced it, but it's still my favourite).

*You deserve a business & life you love. We can help.*

GET OUR **AWARD-WINNING** VIDEOS DELIVERED  
WEEKLY TO YOUR INBOX:

- Be inspired to go after your dreams and get em'
- Learn how to fuel higher profits & your higher purpose
- Become your happiest, wisest & most loving self

[www.marieforleo.com](http://www.marieforleo.com)

**What's so good about this invitation?**

1. **The title, which offers a precise, super attractive value** – we'll help you create the life and business you'll love.
2. **The value is shown, not the act of signing up** – The invitation uses words

and values that the users are looking for. Forleo doesn't hide behind long explanations on how you'll get there, but rather focuses on the ultimate goals, to fulfil your dreams, increase your profits, become happier and wiser, and to love yourself more. Note that the invitation hardly mentions Forleo and her business, but instead focuses entirely on the users.

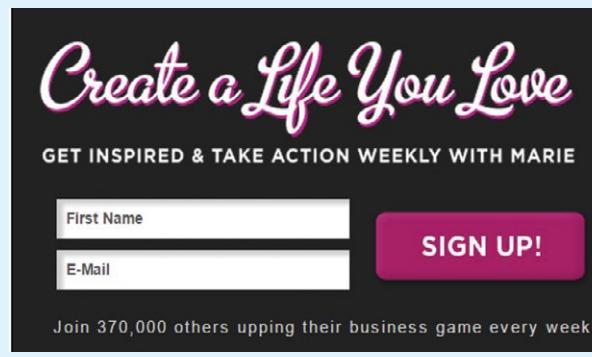
3. The frequency of the emails is clearly stated – weekly.
4. There is social proof – winning an award.
5. You can feel Forleo's personality in every word she writes – charismatic and sees you as a peer, she sets demanding goals but is warm and empathic, business-like but human, and very, very feminine.

## In the margins but not marginal

Even secondary invitations to sign up for the newsletter, those that always appear in the footer or on the side bar, need to be more than just "Sign up for our newsletter", otherwise they are not persuasive, and then there's no point in using them. Despite the limited space, try to say in a few words why it is worthwhile to sign up (what's in the newsletter or how it will change the users' lives), state the frequency, assure privacy (this can appear in a small font near the button), and even provide some social proof along the way.

## Example

This is how Marie Forleo did it all in the footer:



Even the social proof is phrased as value to the user

[www.marieforleo.com](http://www.marieforleo.com)

## CHAPTER 6

# CONTACT US

---

### IN THIS CHAPTER

- Why the Contact page is so important
- A Contact page for interested customers
- A Contact page for support

## How may we help you?

Your website or app is the virtual version of your organization or business. The Contact page is therefore customer service, the place users turn to when they want to engage with you or need help. In both cases – whether it is a potential customer, or an existing customer who needs support or an answer – the Contact page should be the most inviting and service-oriented page on your website.

That's why it always surprises me when I see the contact form presented as if someone forced the site's owner to put it up. They can be well designed, but there is nothing that even hints that the person who provided the page actually wants you to contact them, that they really want to help, or that there is actually someone who reads what was written. For example:

The form is contained within a light blue rectangular border. At the top, the title "Contact Us" is centered in a bold, dark blue font. Below the title are four input fields, each with a label and a corresponding empty input box. The labels are "Name\*", "E-mail\*", "Phone", and "Comment\*". The "Comment\*" field is significantly larger than the others. At the bottom of the form is a single, solid blue rectangular button labeled "Submit" in white text.

Mute forms like these are like the customer service rep who instead of brightly welcoming you with "How may I help you?" stands in front of you with a vacant expression and simply waits. A bit strange, don't you think?

By the way, sentences like "*We'd be happy to hear from you and answer any question you might have*", "*Your input is important to us!*" "*Our company*

*invests heavily in the satisfaction of its customers*", or "*Dear customer, please fill in your details and we'll get back to you during the next working day*", are so banal and lack credibility, that it is as if you didn't write anything. Also, avoid one of the many versions of "*In the continuing effort to improve our service, we'd love to hear any question you might have*". Improving your service is not what I'm here for, I need you to solve my very specific problem now, and if possible, receive personal attention, that will help me a lot.

So to write a great Contact page, first ask yourself in what specific situations users who visit your site will need it, and what will they want to achieve using it. Then create a unique message that fits them, and only them.

## 1. A Contact page designed for potential customers

The purpose of corporate sites and service provider sites (such as therapists, studios, agencies etc.) are for users to contact them. In fact, the sole reason these sites are created is so that users will write to them or contact them and start to work together. This can be to arrange a meeting, order the service, check the price, find out more about the work process, and so on. In a way, all the persuasive effort you have invested in the content pages is channeled to the Contact page. There it should turn curiosity or desire into action, such as filling out a form, sending an email, or picking up the phone.

Now is not the time to take your foot off the gas, on the contrary, you need to strengthen the user's feeling that contacting you is an excellent choice, and exactly the right thing to do.

Like signing up on a site or for a newsletter, here also you start by changing the usual title **Contact Us** with a title that provides value. After that, tell the users how they will benefit by contacting you. If you prepared your voice and tone guide, you'll find in it what your users want to achieve most from a relationship with you. If you haven't prepared the guide, now too is a good time to ask this question.

## Examples

**Netcraft**, a UX agency, considers its Contact page exactly as if it were a sales page, and gives users, potential customers, five good reasons to make contact. Reasons 1+2 create trust, reason 3 promises value, and reasons 4+5 are to inject some fun, an inseparable part of their brand. Wonderful!

The screenshot shows a contact form on the left with fields for Full Name, Company, Phone, Email, and a message area. Below the form is the URL [www.netcraft.co.il](http://www.netcraft.co.il). On the right, a sidebar has a blue border and contains the heading "5 GOOD REASONS TO CONTACT US" with a large red number 5. It lists five numbered reasons: 1. We're happy to help, 2. We want to understand your needs, 3. It's the fastest way to your dream product, 4. We serve cookies in meetings, and 5. We're cool :).

**Epipheo**, a company that produces videos for their clients, used to have on their Contact page a superb invitation that explains exactly what I mean when I say that you should continue selling right to the end. It creates trust, is authentic and full of character, and most important, it reminds users that Epipheo can help them achieve their business goals. The excellent wording summarizes for the users, just before they make contact, why in fact they should be contacting Epipheo.

## Get A Free Consultation

When we say consultation, we mean it. We're not going to just sell you a video. Of course, if you want one, we're turbo-good at it. But we'll also be the first to tell you if we're not the right fit for you. Let's talk about what you need to accomplish and how video could help you get it done. Fill out this form, and we'll get in touch with you. Or, you can call 888-687-7620.

[www.epipheo.com](http://www.epipheo.com)

## 2. A Contact page designed for support

If your service or product does not entail the need to contact you, then the Contact page is usually used for support, inquiries, and questions.

And if good service is one of your values, you surely understand that the moment a customer needs support or an answer is exactly the time to be at your most service-oriented, and show them that you are there for them, that you'll be happy to help them, and that the faith they have placed in you is justified. That's what your Contact page should do. How can you achieve this?

1. **Write the invitation honestly, willingly and generously.** Your service will be judged not only when everything goes smoothly, but mostly when your users need you. Don't fake it, it doesn't work.
2. **Be precise.** Switch slogans like "*any question or suggestion*" with wording that is directly related to your product or service. Question about what? Suggestions relating to what interest?
3. **This might sound strange, but even the contact form includes obstacles that need to be removed.** Users fear that their request is one out of a million, that you won't read it, or by the time they do receive an answer they'll have forgotten why they contacted you. Promise them that you read all the support inquiries and mention how long it takes you to reply.

**TIP**

**13**

### Joking aside

In most cases, a little joke or an authentic smile can break the ice, create rapport, and improve the atmosphere. But if you have a Contact page dedicated to inquiries and support, your customers will sometimes go there when they are angry, frustrated or simply don't know what to do.

If you have written an amusing contact text, reread it as if you are a dissatisfied user, and make sure that it doesn't make you even angrier or might be construed as sounding cynical. It's better to play it safe when it comes to a Contact page.

## Examples

Ikea provides a range of possible reasons to contact them. They emphasize that they'll solve the problem quickly and easily, and enable you to get back to relaxing on your new sofa, the reason you came to Ikea in the first place.

### **Customer Support Center**

Whether you're looking for answers, would like to solve a problem, or just want to let us know how we did, you'll find many ways to contact us right here. We'll help you resolve your issues quickly and easily, getting you back to more important things, like relaxing on your new sofa.

[www.ikea.com](http://www.ikea.com)

**Marie Forleo**, the successful life coach, warmly invites you to contact her, whether with questions or compliments, and she writes in the voice and tone that fits her personality and brand. Even more importantly, she understands that users are not sure where their inquiries are sent when talking about a virtual company, who reads them, and how long it takes to receive a reply, if at all. Forleo addresses all these concerns and promises that all inquiries are read and that they endeavor to answer them within 48 business hours.

*Got a question, comment or gushing love note to send our way?*

We're thrilled. The best way to get in touch is to write [info@marieforleo.com](mailto:info@marieforleo.com). We read every message and do our best to respond within 48 business hours. Generally, we work Mon - Fri, 9am - 5pm Eastern US Time.

When it comes to customer care, we're obsessive. So if you don't hear back from us, that means we didn't get your note so please do send it again.

[www.marieforleo.com](http://www.marieforleo.com)

**Oh Happy Day** is a cool party shop that does include a small smile on its Contact page (but you need to be careful about this, **see tip 13**). They also promise to reply within two business days max.

### SEND US A NOTE

Have a question? Need to return something? Want to tell us a funny story about your cat? Contact us at [shop@ohhappyday.com](mailto:shop@ohhappyday.com) We'll return your email within two business days! (usually sooner!)

[www.shop.ohhappyday.com](http://www.shop.ohhappyday.com)

But it is better to be more specific than "*If you have any questions*" or "*Need to return something?*" Connect the sentence to the subject matter of the site. For example:

- Do you have any questions about our colored confetti?
- Does the color of the balloons not match the napkins and you need to return them?
- Do you want to share with us other cool accessories that we haven't thought about?

If you have several different groups of customers, and want to say something slightly different to each group, you can provide a separate link for each one that leads them to the relevant form, like they do in **JetBlue**.

[CONTACT US HOME](#) > [EMAIL US](#)

We'd love to help. Send us an email using one of the buttons below and a JetBlue representative will get back to you as soon as possible.



#### Ask a question

Got a question? Submit one and we'll get an answer for you as soon as possible.



#### Give a suggestion

If you have an idea or suggestion that will help us serve you better, we'd like to hear it.



#### Voice a concern

If you experienced any issues during your JetBlue experience, please share them with us.



#### Share a compliment

If you have something nice to say, by all means—say it!

[www.jetblue.com](http://www.jetblue.com)

NPR, the US public multimedia news organization and radio program producer, also uses this system, and clicking a button displays a form relevant to that subject.

I want to:

Contact an NPR show or blog

Contact an NPR department

Find a story or music

Request technical assistance

Pitch a story or music

Answer the Sunday Puzzle

Submit a correction

Contact the Ombudsman

[www.npr.org](http://www.npr.org)

And there are a number of other ways to tackle this issue, more or less complex. For details ask the UX person closest to you.

## **What if you don't want people to contact you? After all, that's why you have the FAQs page on your site**

Okay, FAQs or online help is a service that many users will be happy to use instead of waiting for an answer from you. That's why it is an excellent idea to refer them to that page when they are on the Contact page.

Having said that, users might feel that you are trying to shake them off and stop them from contacting you. Of course, that not the feeling we want to give them. There are ways to refer them to your online help page without them feeling unwanted. For example:

1. Place the link to the FAQ page or the help section **next to** the contact form, and not **before it**, so that both carry equal weight.
2. Don't qualify the invitation to contact you ("*We are happy to hear from you but...*"). Keep each option completely separate, such as "*Here you can contact us*" and "*Here you will find answers to frequently asked questions*".
3. Explain to your users why it is in **their** best interest to look first at the FAQ (usually to get an immediate answer and save time).

Even if the price is a few inquiries that could have been avoided, you will have gained customers that trust you more and will keep on being faithful to you and the brand in the long run.

## Examples

**Envato Studio** promises to find you the best web designers and developers, and has an honest and unqualified invitation to contact them. On the left is the contact form, and on the right are the various information and support pages on the site, accompanied by explanations.

### Contact Us

We would love to hear from you! For Envato Studio related feedback, questions and comments please use the form below.

Please note that questions related to Envato Market (ThemeForest, GraphicRiver, VideoHive) should be directed to [Envato Market's Help Center](#).

\* Name

\* Email

\* Reason

\* Comment

**Send**

studio.envato.com

#### General FAQs

Read our General FAQs for answers to common questions about Envato Studio.

#### Service Provider FAQs

Envato Studio service providers can find a range of answers here regarding working on our platform.

#### Express FAQs

Answers related to Envato Studio's Express services.

#### Affiliate Program FAQs

Answers related to Envato Studio's affiliate program.

#### Envato Market Help Center

ThemeForest, GraphicRiver, VideoHive or other Envato Market related questions? Envato Market's Help Center is for you.

InVision provides tools to design, review and test products. It promises that they are there for you, and suggest that you look for the answer on the FAQ page. There is no implied preference for one or other of the options, so that even users who decide to use the form can feel good about themselves.

## Get In Touch

We're here for you, and we're wearing our thinking caps. You might also find what you're looking for by visiting our [FAQ page](#)

Name...

[www.invisionapp.com](http://www.invisionapp.com)

**Photojojo**, the photography gear shop, prepared a contact form and next to it links to questions and answers, and also various instructions for each type of inquiry. And they're funny too!

## Contact Us

### Got a shipping question?

Check out our handy [shipping help page](#)!

### Returning something to our store?

Read all about our [easy return policy](#).

### Are you a blogger or journalist?

Whether you're chasing a story or looking for product samples for review, tell us how we can help!

### Sending us an idea for our newsletter?

Please include links if you can. (If you've got a site or make a gizmo you want us to check out, that's cool too.)

### Wanna link to us?

Bad-ass! Here's some [logos & badges](#) you can use.

[www.photojojo.com](http://www.photojojo.com)

Name \*

Email \*

What are you writing about?

I'm writing about... (CHOOSE) ▾

Message

SEND MESSAGE!

**TIP****14****Categorizing inquiries by topic or urgency**

When you are creating the subject categories or the level of urgency for the contact form, change your internal professional terminology into the language of your users. In other words, ask yourself what this inquiry is referring to from the point of view of your users, not you.

For example:

- Ordered products > My orders
- Billing issue > Question about payment
- System error > Problem with the site
- General > Something else

That's how **Men with Pens**, a site that offers to design and write content for websites, did it:

**The reason you're getting in touch:**

I'd like you to design my business website.  
**I'd like you to design my business website.**  
 I'd like you to write my website copy or content.  
 I'd like to say nice things, like hi and great work!  
 It's complicated. I'll explain more in my message.

[www.menwithpens.ca](http://www.menwithpens.ca)

If your form includes levels of urgency, this is how **buffer**, a site that provides tools to increase social media activity and engagement, puts it. Simply great.

Please choose how urgent this is ▾

**Please choose how urgent this is**  
 This is just a heads-up  
 I can cope, but please fix this  
 I'm stuck - nothing I try works  
 I'm pulling my hair out  
 Emergency: this is critical

[www.buffer.com](http://www.buffer.com)

## CHAPTER 7

# ERROR MESSAGES

---

### IN THIS CHAPTER

- The 3 goals of error messages
- A useful error message in 2 steps
- The voice and tone of error messages
- The error messages every site needs

# First aid for the baffled user

Error messages are the only text we write that we hope users will never see. Therefore, the correct thing is to prevent users making errors, and you can read about that in Chapter 17, which deals with preventing errors and frustration. However, users are most likely to see some of your error messages, and thus you need to word them so that they offer real help.

An error message temporarily stops the process the users are trying to complete. As far as they are concerned, the message delays them and requires them to understand what went wrong and how they should continue. Since their motivation is already fragile, error messages could be the last straw, leading them to abandon the process, especially if messages are unclear, intimidating or make them feel bad.

**Therefore, error messages need to fulfil three goals:**

1. Explain simply and clearly that there is a problem and what that problem is.
2. Provide a solution so that users can return and complete the process immediately.
3. Turn the delay into an experience that is as pleasant as possible.

Usually, error messages concern technical problems that need resolving, so the emphasis should be on **clarity** and **practicality**. Don't be too clever with the text, and make it as simple as possible. It's also not the place to make fun of the user or to make light of the delay they endure. But that doesn't mean the messages need to be cold. On the contrary, precisely because errors cause discomfort, write the messages in a natural and human voice, so that they will make the delay as pleasant as possible, just like a good customer service rep would do if you encountered this problem when meeting them face to face.

## The perfect error message in 2 steps

1. Describe the problem and what went wrong as precisely as you can.
2. Provide a constructive suggestion on how to solve the problem and carry on forward. If the problem can't be solved at that moment, tell the user what can be done to help them, and who they can turn to.

**Note:** In the standard error messages associated with the sign up form or login (such as an incorrect password or an existing username), you can sometimes leave out one of these two (description of the problem or its solution), because the situation is so well known to users that both the problem and the solution are obvious.

### TIP

### 15

#### "You cannot proceed" is not an answer

In your error messages explain to the users why the input they provided is not acceptable. Don't leave it at "*You cannot proceed*", rather explain **why** they can't.

**For example, instead of:** You cannot book this flight. Please select another destination or date.

**Write:** Direct flights to Dublin are only available in August. Please select another destination or date.

Adding details like this means that you need to prepare a unique error message for each special situation, plus you need to fully understand the process; but your incentive is providing a personal, professional and very effective service for your users.

## Voice and tone of error messages: human and service-oriented

In Chapter 2, I described how to write in a conversational style, and how to avoid the formal writing style. One very important place to implement this is when writing error messages, so that they'll be really helpful and readable and stop users from closing the alert before reading it all the way through.

**1. Write without rigidity, threat or giving orders, and generally without sounding like a lawyer.**

**Not this way:**

- Fill in this field
- This field is mandatory
- You cannot proceed, the following fields are incorrect
- You must provide a mobile phone number
- Dear customer, you are not allowed to perform this action

**2. Write without a trace of the words error or failure.**

**Not this way:**

- Error! Please correct the field
- Error in one or more fields
- The action failed. Try again

## Cut out & keep



### Four things you need to know to write good error messages

1. What was the user trying to do when they got the error message?
2. Why did the system respond with an error?
3. What can (or need) the user do to carry on and complete the process?
4. If there is no solution, is there an alternative action you can offer them (such as turning to support or a brick-and-mortar shop)?

**3. Write without using technical terms, such as validation or verification, legal, certified, unsupported action, system, permission or the serial number of the error. And worst of all is combining technical terms with legal formulation, and the terms error and failure.**

**Not this way:**

- FATAL ERROR: Unhandled c0001du exception at 31c71014h
- The validation of media ids failed
- There was a problem retrieving the XML data: undefined
- Dear surfer, this action is not supported, consequently the page you requested cannot be displayed
- Illegal email address
- Validation error
- This user does not exist in the system
- Error 5647GV

Instead of writing such intimidating texts, you need to write error messages that do not blame the user, but simply describe the problem, in the most service-oriented way and in a pleasant conversational tone, and then propose a solution.

## TIP

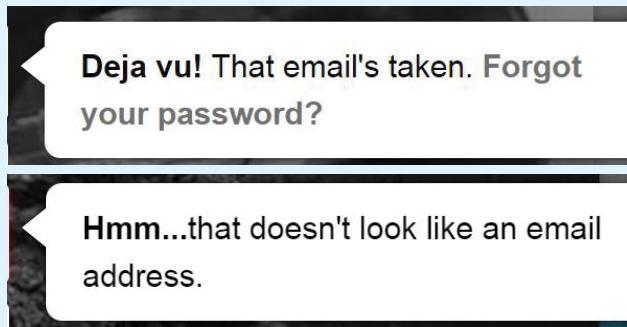
## 16

### Humor in error messages - yes or no?

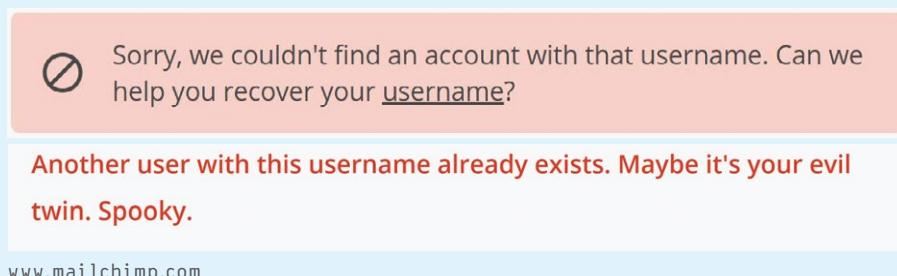
The amount of humor you can use in error messages depends on your brand's voice and tone. If your brand is light and flowing, you can definitely write messages that make the user smile; but remember that first and foremost the message needs to be clear and practical, and provide a solution to the problem. Being too clever could delay users and might be seen as belittling their problem. Keep the humor light and make sure it doesn't make it difficult for the user to understand.

## Examples

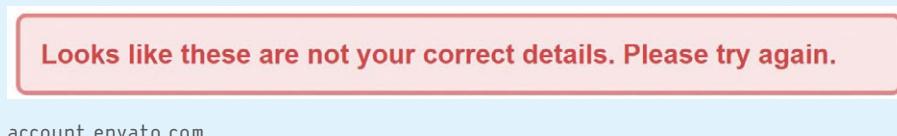
Pinterest's error messages raise a smile, but never get in the way. In the message relating to an existing user, they also provide a link to the password recovery process. Very efficient.



MailChimp is always service-oriented and provides solutions on the spot, or a dash of humor.



envato shows that you don't need to be clever, you can be simple and still pleasant.



Even for this very specific error, Google has a special and humorous message.

### Choose your username

rgf...kjh

@gmail.com

A fan of punctuation! Alas, usernames can't have consecutive periods.

[www.google.com](http://www.google.com)

**TIP**

**17**

### Don't leave it up to your techies

All error messages, both the standard messages and the special ones, need to be written, or at least approved, by your microcopy writer. It is advisable to give the software developers as many carefully worded error messages as possible before they even start working on your system (a list of most common errors that need to be worded is at the end of this chapter). In this way they can easily integrate them. Having said that, you will discover new scenarios requiring error messages as development progresses. Don't leave these to the developers to write. It's not their job to write them, and maybe they'll be good at it, but maybe not. First off, instruct the developers not to leave any default messages in the system. Second, instruct them that if they do discover a need for new error messages, they should pass them along to your microcopy writers with a description of the scenario so that they can reword them.

Asos' messages are human and excellent, and for each mandatory field they provide unique wording.

The screenshot shows a sign-up form with four input fields:

- Email address:** A red placeholder box with a speech bubble saying "Oops! You need to type your email here".
- First name:** A red placeholder box with a speech bubble saying "We need your first name – it's nicer that way".
- Last name:** A red placeholder box with a speech bubble saying "Last name, too, please!".
- Password:** A red placeholder box with a speech bubble saying "Hey, we need a password here".

Below the form, a red box contains the message "Oh dear. Something went wrong:" followed by a bulleted list:

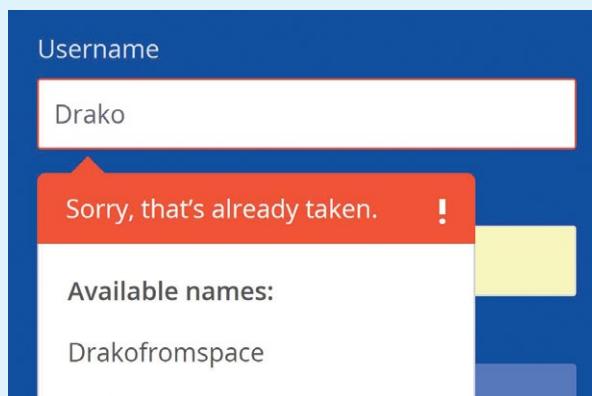
- Looks like either your email address or password were incorrect. Wanna try again?

[www.asos.com](http://www.asos.com)

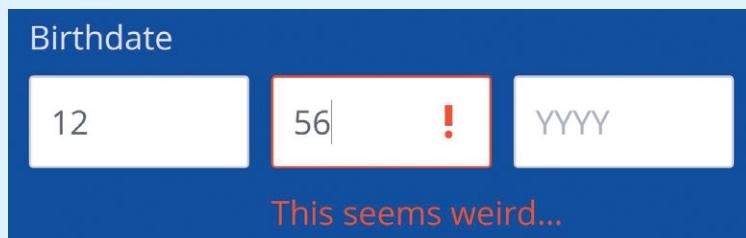
tumblr's message about a field left unfilled is very human.



**OkCupid.** If the username you selected is already taken, it provides an alternative but similar username right away, in the error message.



And their other error messages are also cute, but not necessarily helpful:



[www.okcupid.com](http://www.okcupid.com)

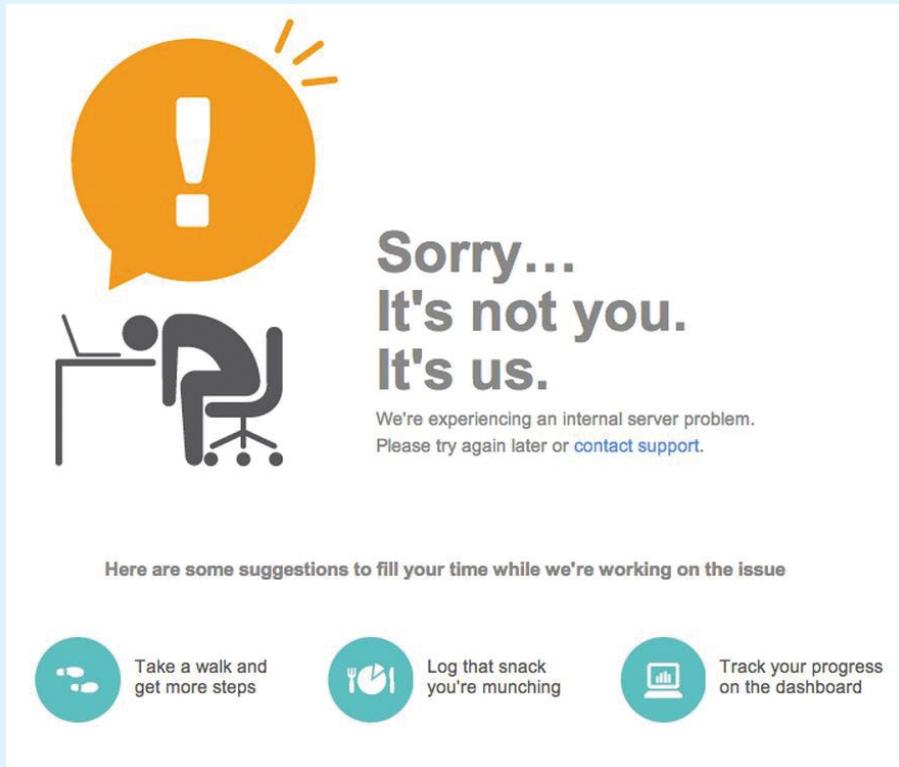
**Facebook.** If you open two accounts on the same browser, you receive a very human error message, followed by two solutions to the problem.

**Sorry, we got confused**

Please try refreshing the page or closing and re-opening your browser window.

[www.facebook.com](http://www.facebook.com)

Fitbit. Even if the user can't do anything to fix the problem, for example a communication failure, it's important to tell them it's out of their hands, so they don't try and fix it, resulting in even greater frustration. Fitbit describes the situation well, both in words and with a lovely graphic. After apologizing and explaining what the problem is, they suggest a few ideas on how to pass the time, and lighten the mood after an annoying experience. This is a good example of a graphic and microcopy that support each other well and fit the message.



**Sorry...  
It's not you.  
It's us.**

We're experiencing an internal server problem.  
Please try again later or [contact support](#).

Here are some suggestions to fill your time while we're working on the issue

-  Take a walk and get more steps
-  Log that snack you're munching
-  Track your progress on the dashboard

[www.fitbit.com](http://www.fitbit.com)

**PicMonkey.** This isn't exactly an error message, but it does relate to a very annoying scenario of the browser being out-of-date and unable to properly display the site. This sort of scenario is a headache both for us and our users. PicMonkey, a site that lets users edit photos, turned the lemon into lemonade, and the frustrating experience into a good laugh befitting the style of their brand. Users still need to install a new browser, but at least they'll do it in good spirits.

### Love your vintage browser!

Unfotunately it's a little too vintage. PicMonkey no longer supports version 5 of Safari.

Visit [Browser Happy](#) to upgrade your browser, or try out [Google Chrome](#).

Okay

[www.picmonkey.com](http://www.picmonkey.com)



**Cut out  
& keep**

## Errors that need to be worded on (almost) every website

### Sign up

1. The username or email already exists (if possible, provide a link to the registered users login page)
2. Email address error (usually the system checks if the @ or the suffix are missing, and should tell the users what the problem is)
3. The telephone number, or ID, doesn't fit the rules (tell the users what the rules are)
4. The password doesn't fit the rules (the message must detail the requirements, and if they are strict, it is worthwhile providing them up front next to the field and so avoid the error in the first place)
5. Verification of the two password fields fails because they are not identical
6. A mandatory field was not filled (I recommend you prepare a specific message for each field, and not one generic message for all of them)
7. They didn't agree to the terms of use

### Login for registered users

1. The username or email does not exist (try to provide a link to the sign up form)
2. The password is incorrect
3. The username and password don't match. Sometimes, for security reasons, it is unadvisable to tell the user which of the two fields was problematic. In such cases, the message needs to say that they don't match, or that there is a mistake in one of them (without saying which)
4. Either of the two fields, username or password, was not filled

**Contact us (and every place where you ask the users for their email, such as when signing up for the newsletter)**

1. Email address error
2. The telephone number doesn't fit the rules
3. A mandatory field was not filled

### Password recovery

1. The username or email does not exist (I recommend you provide a link to the sign up form, or ask them if they registered using another name or email address)
2. Email address error

## CHAPTER 8

# CONFIRMATION MESSAGES

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**IN THIS  
CHAPTER**

4 goals of confirmation messages  
4 components of a good confirmation message

# All's well that ends well

In the first part of this book, I presented the fascinating results from the research of Professor Clifford Nass. He found that when humans use a digital interface, they expect it to behave according to acceptable social norms, even though they understand that they are dealing with a computer. This includes reacting to their actions, complimenting them when appropriate, and helping them when something has gone wrong.

Confirmation messages that users see after they have performed an action are one of the most important responses that they expect to receive.

**Following are some examples of actions that conclude with a confirmation message:**

- Signing up or joining a site/event/service
- Purchase or order of a product/service/subscription
- Joining a newsletter
- Removal from a mailing list
- Downloading a free guide
- Sending a contact form
- Download/upload of file/program/plugin
- Import/export of data/files
- Validation of email address, and so on

**Why are confirmation messages so important? They have four goals:**

1. **Provide certainty.** The message confirms to the user that the action completed successfully and that everything is okay.
2. **Instruct.** The message tells the user about the next optional or mandatory step.
3. **Calm.** There are some actions that users have doubts about beforehand, and that doubt resounds after they perform the action. **Did I do the right thing?** A well-written confirmation message will boost their confidence: Yes, you did the right thing.
4. **Connect.** The message is the final piece of the process, and it can be moving, funny or even exhilarating. It leaves users with a good positive feeling about your brand and the pleasant experience they had with it.

You don't have to always accomplish all these goals. Sometimes a simple tick that appears for a few seconds and then disappears is enough. But the more important the action is for users, the fuller the confirmation message should be.

**So how is it done? Not this way:**

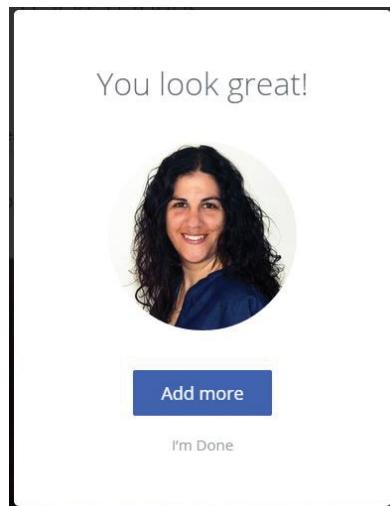
- The transaction was completed successfully
- Registration was successful
- Your order was successfully received
- Your email address was successfully confirmed

The template "*X successfully completed*" serves only the first goal, to provide certainty, and it does it in a boring, impersonal, detached manner. So avoid it or make sure that it isn't the main part of the message, and provide content to achieve at least some of the other goals.

Instead of using a worn out template, do one or more of the following, or even better, do them all.

**1. Talk about or to the user, not about the action they just completed.**

Refer to the person who completed the process, and not the process itself. For example, after uploading a photo on the dating website OkCupid, you don't see "*Photo Uploaded Successfully*", but:



[www.okcupid.com](http://www.okcupid.com)

Note that they also refer the user to the next action they want them to take – upload another photo. We'll return to that further on in the chapter.

**2. Give a clear indication that what the user wanted to do, did in fact occur,** but you don't need to write using the template "*X successfully completed*". Try to be as clear as possible but slightly different. Note that in the previous example, from OkCupid, this was implied by showing the uploaded photo and reacting to it.

**3. Reinforce the feeling that the action and process were the right thing to do, and that the users did what was best for them at that moment.**

How? Remind them of the value they received from the action, how it effects them and is important to them. For example, what can they do now that they couldn't do before? How is their life better now that they have completed the process?

If they signed up for a newsletter, remind them that treasure will be delivered soon to their inbox, so that they can't wait for the first newsletter to arrive.

If they bought a leisure product, be excited with them and make them feel good about buying it.

If they contacted you via the contact page, make them feel that their faith in you is justified and that you're on the case.

And so on.

Use the words, hopes and expectations of your target audience. These appear in your voice and tone design, and if you haven't prepared it yet, you should invest a few minutes and articulate to yourself what makes users who completed the process feel that this was the correct choice.

A confirmation message that does this really well is the one provided by **WordPress** after installation:

## Success!

WordPress has been installed. Were you expecting more steps? Sorry to disappoint.

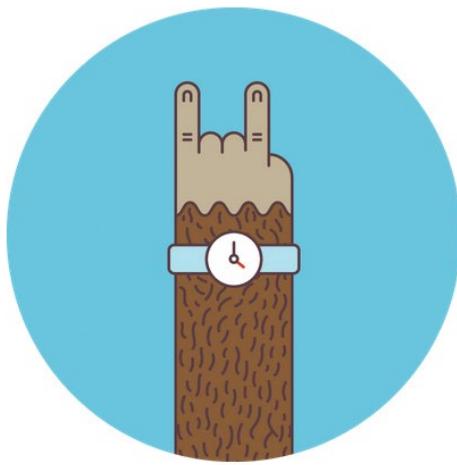
[www.wordpress.com](http://www.wordpress.com)

The message is funny, but says two main things: the first is that we are great and stand behind the simple process you've just experienced, as promised by our core value of simplicity; and second, selecting our product was an excellent choice, and your lives from this point on will be simpler than you expected. And all in one line.

**4. Present and promote the next step for you and your users.** For example:

- What's going to happen now (how long will it take to answer their mail, when you expect to send the purchase, when will the subscription start, if the registration process needs activation, and so on).
- Refer them to their inbox If you are going to send them an email (to verify the address or to see an order summary).
- Further actions that you want users to perform (a link to the page where users start working on the site, invitation to download your app, invitation to share on social media).
- If you don't have another step, send them back to the site to something that really interests and is important to you, such as promotions or blog.

For example, in the **MailChimp** confirmation message that appears after preparing an email campaign, they tell the users two things that will happen in the future. The first is the exact date the campaign will be sent to their mailing list, and the second is an invitation to download their app so that the users can track how their campaign is performing.



## Rock on!

Your email has been scheduled.

Your campaign will be sent on 5/28/16 9:00AM.

[Get The Mobile App To Track Reports](#)

Make a paper buddy while you wait for your reports to come in.

[www.mailchimp.com](http://www.mailchimp.com)

Note that this message does not include the template "*X successfully completed*", but the confirmation is still entirely clear and leaves no room for doubt. This example also demonstrates the big difference design makes. The addition of a graphic or photo adds a lot to the user experience, it's funny, it brands the experience and it connects.

## More examples

**Epipheo** creates videos for businesses. The goal of the site is for users to contact them and order a video. After the contact form has been sent, users receive the following confirmation message. This message refers to both the user and the people behind the website, and conveys the feeling that both are looking forward to working together. Also, it makes the users believe that the Epipheo guys will actually get back to them soon, and the action button takes them back to the site.

# THANKS.

Aw. You contacted us. We appreciate it.

You can expect to hear back from us very shortly. In the meantime, we invite you to watch a butt-load of more video or read up a bit about us.

← GO BACK HOME

WATCH VIDEOS →

[www.epipheo.com](http://www.epipheo.com)

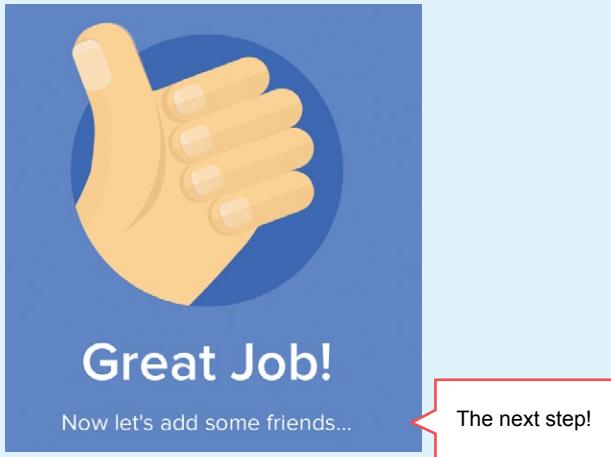
**Apple** are correct and polite, thanking us and telling us how our lives will change for the better after downloading iTunes.

## Thank you for downloading iTunes.

Now that you've downloaded iTunes, you're just a few steps away from starting a digital entertainment collection and enjoying it on your Mac, PC, iPad, iPhone, or iPod.

[www.apple.com](http://www.apple.com)

**Rounds.** This is the confirmation message after installing their app. Some people claim that a pat on the back can be seen as condescending, but Clifford Nass discovered with his research that even though users realize that the compliments are entirely random and not personal, they still feel good about themselves, and appreciate the interface. Yes, we humans are weird, so go ahead and compliment your users, no biggie.



Rounds app

**Envato's** confirmation message upon completion of the security check is very short, but also surprising, funny, conveys a true sense of cooperation, and tells the users how **they** benefited: by having a secured account.



[www.envato.com](http://www.envato.com)

## CHAPTER 9

# EMPTY STATES

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### IN THIS CHAPTER

- How to turn a dead end into an open door
- Empty states for features before first use
- Empty states for an empty cart and previous orders
- Empty states for search results

## Nothing to see here, move along?

Words don't only empower and sharpen an experience, they can also create it, even when it seems that there is nothing to experience. Microcopy for empty states is the best example of this.

But first, let's go back to the definition. Empty states are those states where there is nothing to show users. They can appear when the user first encounters a website, app or feature, and they can also appear as a result of use, such as running a search that returns no results.

When you leave the empty state empty, you are basically telling your users what there **isn't**. You are missing out on the opportunity to tell them what **there is**. For example, what could have been here, what they could gain from it, and what they can do to get things moving. A feature that hasn't yet been used is an opportunity to present its benefits and encourage them to use it. An empty cart is an opportunity to encourage a sale. A search that ended without results provides the opportunity to show you care, by offering similar items and preventing the users from leaving empty handed. This isn't only a chance to offer good service, but also to direct the users towards the next step and get them back in business.

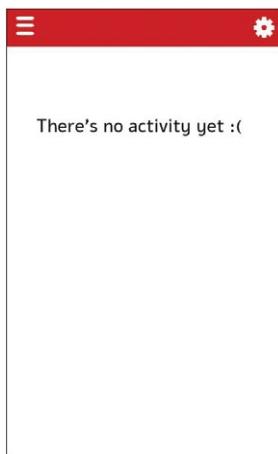
## 1. Empty states of features before first use

77% of all app downloads are discarded within three days of being downloaded, so wrote Dina Chaiffetz in "Why Empty States Deserve More Design Time" (InVision Blog). Obviously we can't put all the blame on empty states, but they do play a very important role in creating the user's first impression of your website, app or service.

Imagine users browsing through your site after registering (or app after downloading), and all they see is:

- There are no items in your basket (or cart, or even bag)
- Your wish list is empty
- No previous actions were found
- You haven't saved any favorites
- You don't have any friends in your network, and so on.

Often these empty state messages appear on a totally blank page - inches and inches of emptiness.



What a waste! After a short tour of such a static and ineffective site or app, users will feel that you don't have much to offer and that this site won't exactly change their lives.

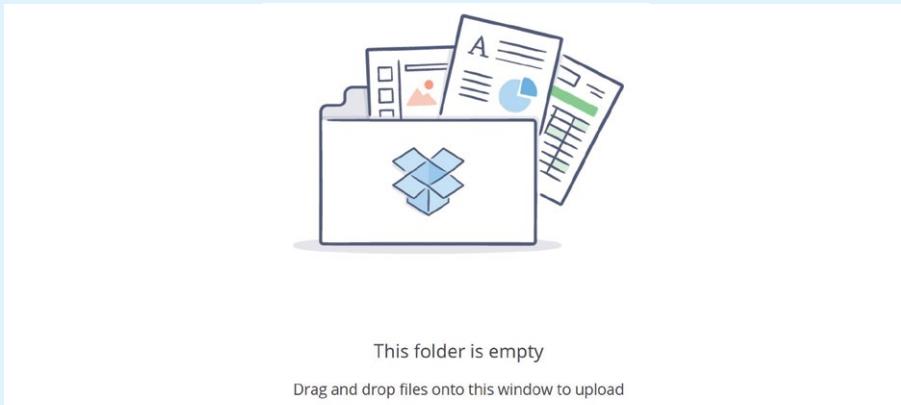
When users open a page or feature that they haven't used before, you have an opportunity to show them the feature's potential and motivate them to start using it.

Instead of saying that there is nothing here, write about what is supposed to be here or what they can do here, what this feature does and how it can help them.

If relevant, add instructions. Tell users exactly how to start using the feature (if possible, its best to add a visual), or provide a link.

## Examples of empty states of features before first use

**Dropbox** says that the folder is empty, but doesn't leave its users at a dead end. It explains how to add files to a folder. They could even add some value: "...to upload, backup and always keep available".



[www.dropbox.com](http://www.dropbox.com)

The inbox of **OkCupid**, the dating site, is one of its most important pages. They encourage users to start a conversation, explicitly encouraging them to overcome shyness, and adding a shortcut button to browse matches.

**Looks like you don't have any messages yet**

Don't be shy, start a conversation with someone you like.

[Browse matches](#)

[www.okcupid.com](http://www.okcupid.com)

tumblr doesn't say that you have no notifications, instead it tells you when to come back and check. Not what isn't there, but what will be there.



Check out this tab when you make a post to see Likes, Reblogs, and new followers.

[www.tumblr.com](http://www.tumblr.com)

Audible is Amazon's audio book app. For those who have just downloaded the app, the question in the title is very relevant and the answer is definitely yes. The text that follows tells users exactly what they need to do to start using the app. Imagine the reaction if there was only "There are no audiobooks in your library". What would be the user experience? What would they think and how would they feel about this app that they've just downloaded? They'd probably think and feel nothing, and that's exactly the problem.

By the way, even the choice of the word "Discover" makes you want to start using the app, much more than simply "Search".

Cloud   Device

All Titles   Recent   Delete   Refresh

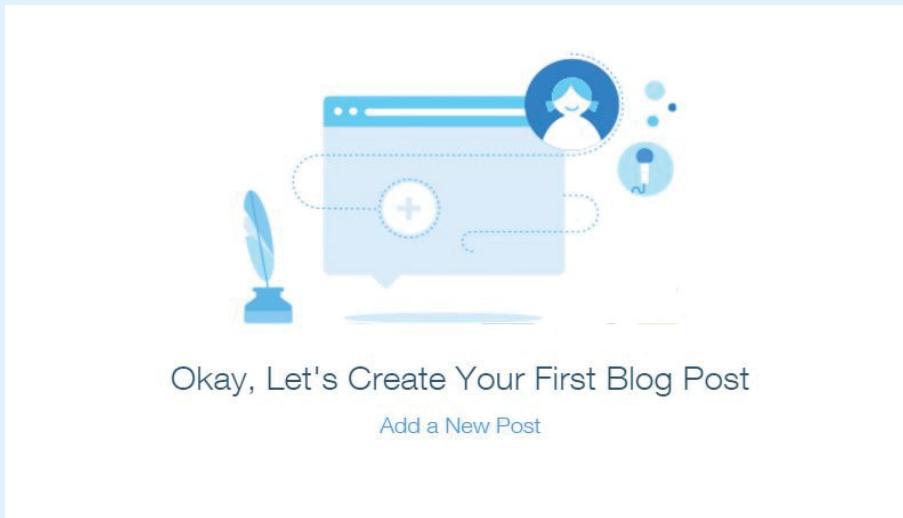
Looking for audiobooks?

Tap on "Discover" below to sample any Audible title.

My Library   Discover   Me   More

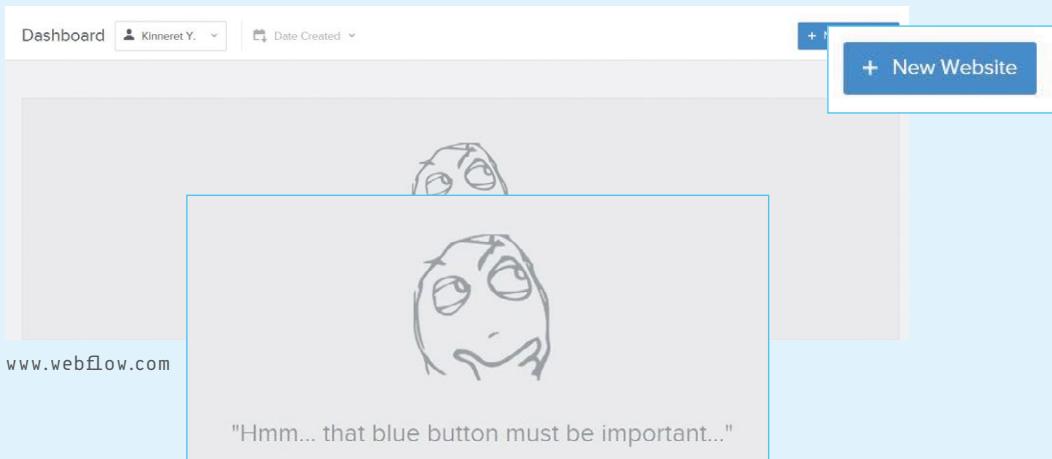
Audible app (a previous version)

If you want to set up a blog on your site, **WIX** helps you create your first blog post, and provides a link to the next step. They don't tell you that your blog is empty, but motivate you to start. Note that the illustration makes the text more dynamic and interesting and complements it.

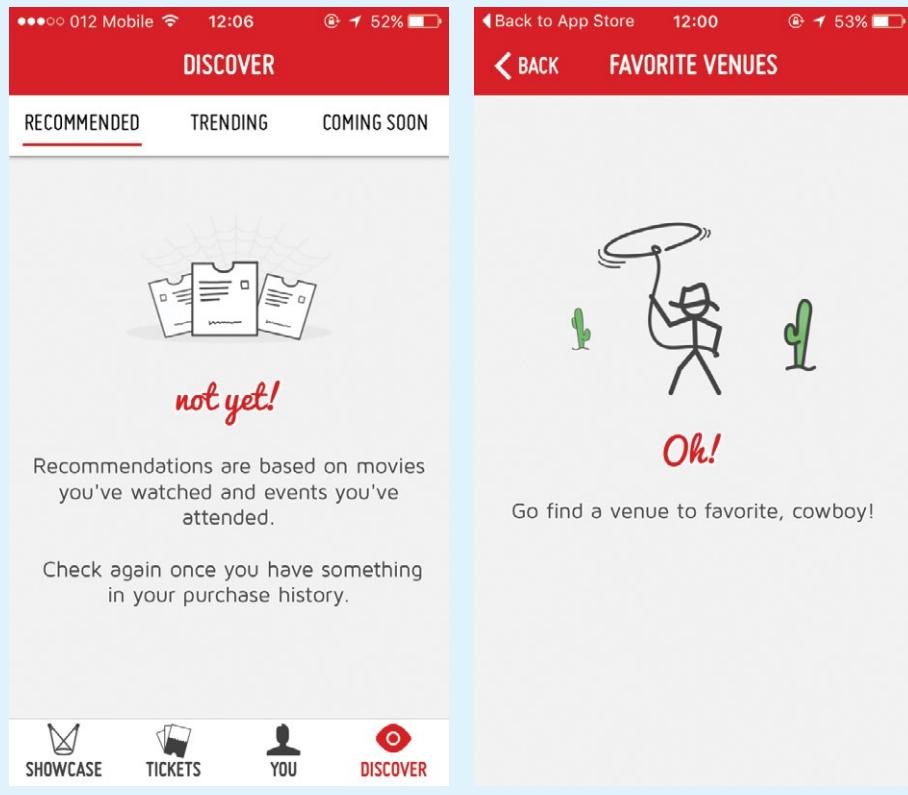


www.wix.com

**Webflow** point users in the desired direction, with a great combination of text, graphic and humor.



Last but not least, is the BookMyShow app. Every empty state looks and sounds slightly different according to its relevance to a specific user's goal. Regarding the screenshot on the right, I would have added a benefit of having favorite venues. For example, "...so that you can keep track of what's happening at your favorite venues".



BookMyShow app

## 2. Empty states of an empty cart and previous orders

Users have a variety of reasons to open their empty cart (or trolley or basket or bag). For example, if they thought they added an item to the cart by mistake and went to check if there's anything there, or if they didn't remember if they added an item or not and wanted to check, or if there was something in the cart but they removed it, leaving it empty.

An empty cart is a terrible waste of real estate. I've seen quite a few like this one:



So how can you use this empty area? To motivate users to shop of course:

1. Make it clear that the cart is empty, that it doesn't have any items in it.
2. Start an interesting and persuasive sales dialog. Try to be funny or exciting or make them curious, and best of all be all of them. As we saw in the first part of the book, when users are happy or excited they want to act. A combination of text and graphic works very well here.
3. Direct your users to interesting parts of the shop, such as special offers, popular or new items, and so on.
4. You can also provide social proof or interesting statistics about other buyers or items, and only then direct the users to specific items in the shop.

For example, on the site of a very famous chocolate shop, they write "*Your shopping bag is empty*", and the rest of the page remains blank. Instead of this vacant lot, they could have started a sales pitch, and from there direct the curious users to the shop, while they have the urge to buy. For example:

### **There are no chocolate in your bag yet**

But our chocolatiers never cease to amaze.

The new 2017 chocolate collection has arrived in the shop and it's addictive

[Explore our new flavors](#)

Or:

### **There are no chocolate in your cart yet :(**

We really understand - its hard to choose.

Maybe this will help:

[See our most popular flavors](#)

In another online shop, selling health and beauty products, they didn't even write that the bag was empty. The only thing users saw when they opened the bag for the first time was a space so empty that its cleanliness dazzled them. What could they have written? For example:

You haven't added any items to your basket yet,  
but here are some of our hottest offers:

25%

Product photo

25%

Product photo

30%

Product photo

Of course, make sure that the offers don't look like products the users add to their basket. We're trying to motivate them, not to confuse them.

You can combine this with social proof and write:

**Items that have been purchased the most this week**

Or: **Items that someone else is looking at right this moment**

And under each title add photos of the products and a link to buy them.

Many sites have a **Previous Orders** page, where you can browse the list of your past purchases, and sometimes even reorder one of them. Before purchasing the first item, users will of course see an empty state, but if you only write "*There are no previous orders*" you miss out on a sales opportunity, just as with the empty cart. Both the users' experience and their willingness to buy something will be dramatically enhanced if you write something substantial like:

You haven't ordered a delivery yet, but our seasonal fruit will have you drooling.

Find out what we found today in the market

## Examples of empty carts

Belle and Sue is an Israeli fashion store. They first make it clear that your bag is empty, but they do it with a smile. They then motivate users to buy something and provide links, the first to the shop and others to specific items, with a title that touches the shopping nerve.

### Your shopping bag

Your shopping bag is empty, neglected and poor.  
Add items to revive it.

[To continue shopping](#)

What's fun?



comfort zone / Jeffrey Campbell	Inter Galactic / Belle&Sue
₪ 389 ₪ 549	₪ 559 ₪ 690

[www.belleandsue.co.il](http://www.belleandsue.co.il) (Translated from Hebrew)

Nuvango makes it clear that the shopping cart is empty and offers to make the cart's empty stomach happier by buying in their gallery. Lovely.

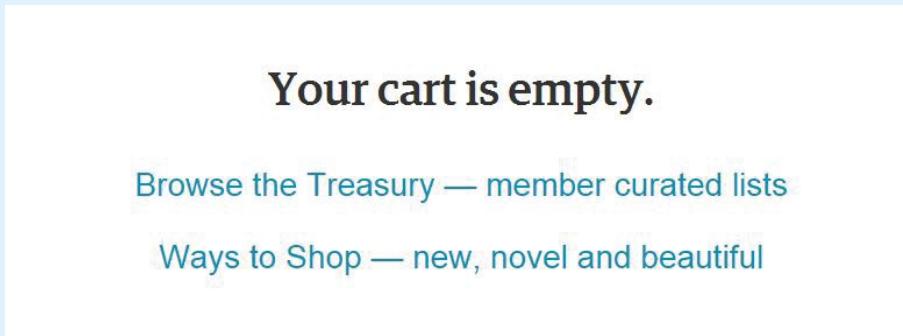


### Your shopping cart is empty

Carts are like stomachs. They are much happier when they're full. Fill up on low-carb, guilt-free art in our [gallery](#).

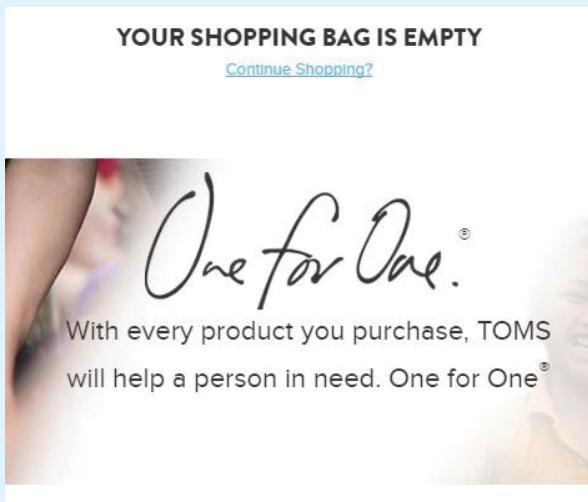
[www.nuvango.com](http://www.nuvango.com)

Etsy directs you away from your empty cart with a link to lists curated by other members – using social proof and arousing curiosity – and with a second link to the home page, not with just "Continue shopping" but with interesting wording. The design, however, could be much more interesting and engaging, especially on a website that appreciates aesthetics and visuals so much.



[www.etsy.com](http://www.etsy.com)

TOMS points out on its empty bag page that for every item users buy, TOMS contributes to the community. A great motivator to filling up your shopping bag.



[www.toms.com](http://www.toms.com)

### 3. Empty states of search results

When users are searching for something, but the system can't find it, it returns an empty state. As developers put it: "*The query produced no results*", or "*No results were found for the values entered*". But you must never write anything about the system to your users, nor about queries or values. Never mention any of these terms outside the confines of your office. Also, don't ask them to perform another search, they simply won't find it again. And of course, don't leave it at "*No results*" or "*No results were found*". Here also, instead of leaving your users at a dead end, you can direct them to the next step and keep them moving on your site.

1. **Explain the situation.** Tell your users clearly that you didn't find what they were looking for. You might want to use empathy or even humor in the message.
2. **Suggest one of the following:**
  - a. Other ways to search for the same thing. Select the method that is most relevant to your type of content:
    - Search by category
    - Search for a more general term
    - Search for a more specific term
    - Check if the spelling is correct
    - Try to use synonyms
  - b. Things that are similar to what they searched for. Suggest items or links that are as close as possible
    - Other items by the same designer, writer, manufacturer, and so on (for example, other Toyota cars)
    - Other items with similar specifications but from other manufacturers (for example, other cars from 2009)
    - Other items of the same type or style or feature (for example, other family cars)
  - c. Did you mean... If your search engine can find similar terms, like Google does, it's worthwhile offering these results to your users and maybe save

them the need to run another search.

With each of these three options you need to really understand what the users are trying to accomplish by making their search, and then offer them something that gets them closer to that.

## Examples of empty states of search results

**Pinterest** suggests searching by category, the main mode of navigating their site.

Sorry, we couldn't find any Pins for **sdjrtj**.  
Try another search or explore Pinterest by category.

[www.pinterest.com](http://www.pinterest.com)

**Zappos** provides four search tips, and next to them a new search field. Very efficient.

We were unable to find results for "dsjvnhy"

[www.zappos.com](http://www.zappos.com)

Try another search

Search field: boots, slippers, wedges

Search button: Search ↗

Search Tips

- Double check your spelling.
- Try using single words (e.g. loafers, pants).
- Try searching for an item that is less specific.
- You can always narrow your search results later

Cast a wider net...

...and catch more jobs!

Switch is out of job postings within your radius. Want to check out 2 postings within a 100+ radius?

[OK - CHANGE RADIUS](#)

[NO THANKS](#)

Switch app

**Switch** is a job seeking app. If it doesn't find a suitable job opening within the radius defined by the user, it automatically calculates how many jobs are available within a larger radius. It then enables users to go directly to the new results. Who wouldn't be curious enough to click the button and see what opportunities were waiting for them?

## CHAPTER 10

# PLACEHOLDERS

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### IN THIS CHAPTER

What to write next to a field and what to write inside  
When should you use placeholders  
6 types of placeholders and how to use them

## When a placeholder is needed, and more important, when it isn't

Placeholders are the text you write inside a field, usually in a light shade, until the user starts to type. If everything works properly, the placeholder should either disappear or move as soon as the user places the cursor in the field.

Since mobile phones took over our lives and introduced the need to use space sparingly, the practice of writing the field labels inside the fields as placeholders became popular. For example:

Current password

New password

Confirm new password

This practice made its way to the desktop, even when there is no real space restriction. In fact, it has become so pervasive that sometimes designers are incapable of leaving the fields empty, and feel the need to fill them, even if it creates a weird redundancy:

**Details of person receiving the gift**

Receiver name Receiver name

Receiver email Receiver email

---

**Your details**

Sender name Sender name

Sender email Sender email

And even if it means overcoming the redundancy in creative ways...

### Email

Enter your email address

So first thing, here are two important principles:

#### 1. Separate the labels and the placeholders

The label is the title or question that tells the users what information they are supposed to enter in the field. That is its only function, nothing else.

If you put the label inside the field, you present users with a challenge to their short term memory. The label disappears when users start typing, and there is no way for them to go back and remember what they were supposed to provide here. The most important piece of information just isn't there anymore. Granted that when talking about email and password fields the problem is less severe, because users know what is expected of them, but it hasn't completely disappeared. For example, two fields were displayed in a login form. Force of habit made me type my email address in the first box, but then...

kinnerety@gmail.com

Email address

Wait a minute, what was I supposed to provide in the first field? I had no idea and needed to delete the email address so that I could find out.

One way of solving this problem is that as soon as the user places the cursor in the field, the placeholder doesn't disappear but moves above or outside the field.

Look what happens at **Walmart** before placing the cursor in the field:

Street address

And after:

Street address

www.walmart.com

Another option, which is always best (unless you have an extreme shortage of space), is to leave the labels as labels, **outside the field, permanently displayed and in a contrasting color** (also good for accessibility!). The rule is simple: making it obvious, eye catching, easy to understand and unchallenging will make it easier for all users. And if you have a problem of space, you can always place the labels above the fields not next to them.

## 2. Don't add placeholders if there isn't a good reason

When users first see a form, it needs to look as simple as possible and provide the feeling that there's not much work, or that it's easy to fill out.

Blocks of text immediately negate this feeling, because users need to read all those words, work in itself; and also a lot of text hints at a lot of work. Therefore in forms and other areas where users need to complete tasks, the rule is always, **as few words as possible**.

When you add both labels and placeholders to every field, you are actually **doubling the amount of text on the form**, and it looks busy, crowded and difficult to fill. For example, the following form is simple enough, but the placeholders make it look crowded, especially as they don't add anything to what the labels provide, and thus don't serve any purpose.

First and last name	
Full name	<input type="text"/>
Mobile or landline number	
Phone number	<input type="text"/>
Your email address	
Email	<input type="text"/>

This is totally unnecessary. Without placeholders, and with the right labels, the form seems as simple as it actually is:

Full name	<input type="text"/>
Phone number	<input type="text"/>
Email address	<input type="text"/>

Note that the empty fields really make you want to type something in them. If you want users to express themselves, give them the space to do it. When the fields are empty, the form seems simple, and users feel a need to complete it.

In conclusion, don't add placeholders just to fill up the space. Only add them when there is a good reason and they help you accomplish a specific goal. When you know what that goal is, you will be able to choose the placeholder that best suites it. In the following pages, I provide examples of the various types of placeholders and how to use them.

## TIP

### 18

#### Wait a minute, how many characters did you say?

It's unadvisable to put hints or instructions as placeholders, because your users might need to refer to them while typing, and they'll need to delete what they've already entered to see the advice.

If you have instructions about a specific field, such as the rules for a password, restrictions on specific values, or a limitation on the number of characters, write these beneath the label, or in a small tooltip that appears on hover over a small i or when they put the cursor in the field and that remains open for as long as they are on that field, or in any other way you see fit - as long as users can come back and see the instructions at any time, even while typing.

## When you should use placeholders

If you shouldn't put labels as placeholders, and you shouldn't use placeholders as guidelines that the users need to remember, when should you use placeholders?

1. **Fields that you especially want your users to complete.** For example, if you have a search box on your home page that encourages users to explore the site. You usually find this at the top of the home page, in its place of honor, with motivational text next to it, and a search button after it (you'll see examples soon). Another very important field is the one that serves the main goal of the site or app. For example, the status field in Facebook or the profile fields on a dating site (without statuses or full profiles there isn't anything users can do on these sites). In these important fields, putting a placeholder motivates users to action and moves things along.
2. **Fields that users might not understand, avoid or shy away from.** For example, questions that can be answered in a number of ways, open questions that require consideration and time, questions where it is difficult to pin down the answer, questions requiring sensitive information, or questions where users might have other aversions to answering them (examples coming right up). In such fields it pays off to use placeholders that help users overcome the obstacles, and pave the way to filling in the fields with peace of mind.

Another reason to add placeholders is simply to make your users laugh, and I'll go into that in the last section of this chapter.

# Six types of placeholders and how to use them

## Type #1: Questions

An interesting personal question in an especially important field, will awaken in your users the need to answer, drive up in-site traffic and increase user actions on your website. Ask a direct question (preferably in the second-person: you) that interests them, that they want to answer, and that has a simple and short answer.

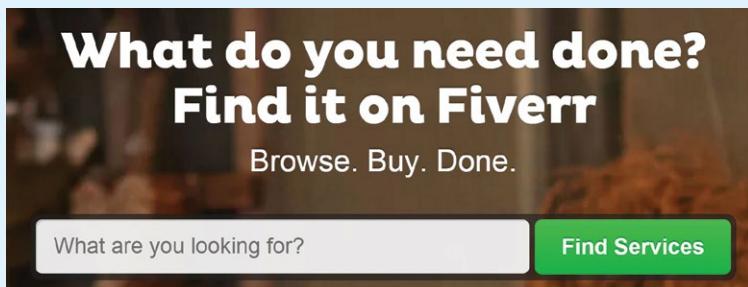
## Examples

Airbnb asks me where I want to travel to. Show me the person who doesn't have the answer to this question... Moreover, the question makes me want to take a quick peek and check what is available at my dream destination. I expect that this is exactly what Airbnb wanted to happen.



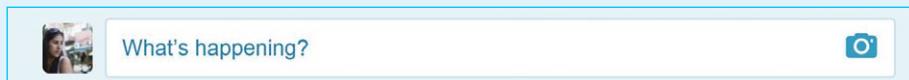
[www.airbnb.com](http://www.airbnb.com) (a previous version)

**Fiverr** asks "What are you looking for?" in the field. The text that precedes the field and the button make it clear the real question is actually: What kind of **service** are you looking for? It might have been better to put the central message in the placeholder: "What do you need done?" which is more precise and attractive, thus avoiding multiple questions. Alternatively, they could have used examples or clear search definitions (examples of these come later in the chapter).



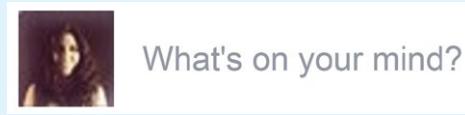
[www.fiverr.com](http://www.fiverr.com)

**Twitter** asks "*What's happening?*". The question that you decide to put as a placeholder on your site, dictates the style of the answer you'll receive. So it's no wonder that Twitter became the preferred social media users check to get up-to-date reports from the field.



[www.twitter.com](http://www.twitter.com)

**Facebook** asks me what I'm thinking about. They don't steer my thoughts towards something that's happening outside, but towards something that is happening in my own head. And endless passing thoughts are exactly what you'll find there.



[www.facebook.com](http://www.facebook.com)

In the Fiverr and Airbnb examples, the placeholder on the site's home page not only motivates users to find their personal answer and dive into the site, it also enables them to go directly to what interests them, instead of searching through a hierarchical set of menus, categories, and so on.

WeTransfer does the same thing with the placeholder in its support area.

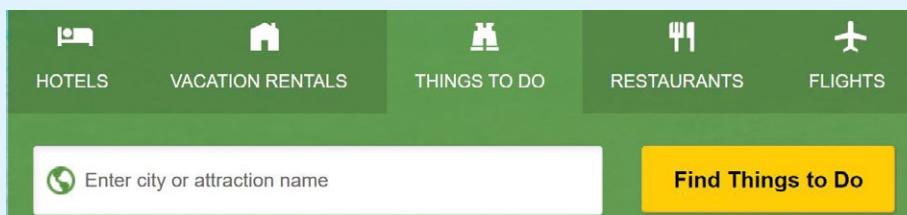
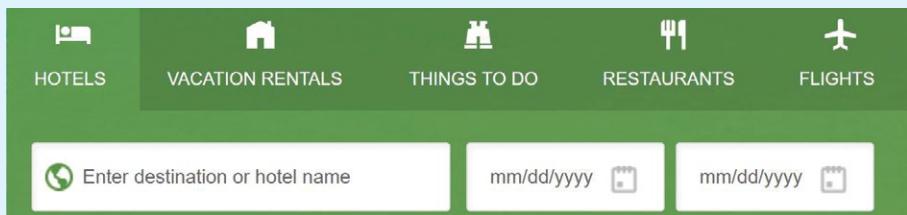
The screenshot shows a light blue header with the text "Quick Help" on the left and "All Systems Operational" with a green dot on the right. Below the header is a search bar containing the placeholder "What can we help you with?". To the right of the search bar is a blue button labeled "Search". At the bottom left of the page, the URL "www.wetransfer.com" is visible.

## Type #2: Categories

Defining categories helps reduce the choice range, enabling users to focus on the possibilities, and guiding them on the best way to use the field. As with question placeholders, categories also encourage users to enter something that personally interests them.

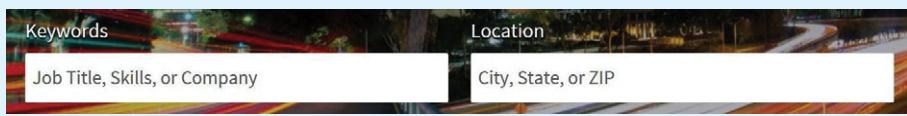
### Examples

**TripAdvisor** offers users several tabs above the main search field, and the placeholder text changes according to the selection. It points the users to the exact categories relevant to their choice, telling them what kind of information they need to type in each case.



[www.tripadvisor.com](http://www.tripadvisor.com)

The job board **SimplyHired** demonstrates the proper use and excellent combination of labels and placeholders, **without confusing them**. The labels define what the user needs to provide, and the placeholders provide categories to help users focus on getting the best answer.



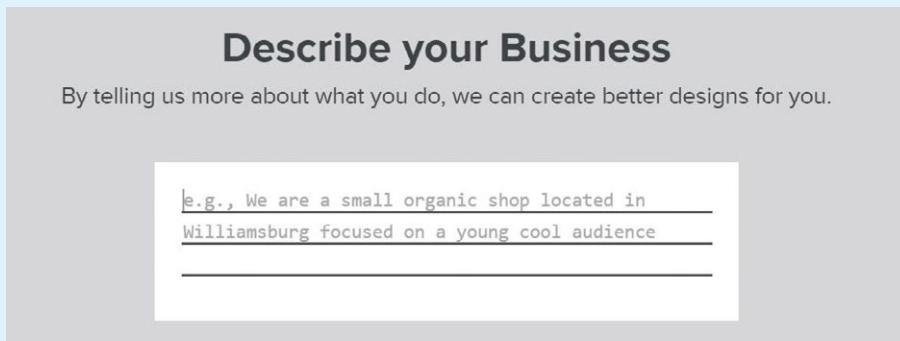
[www.simplyhired.com](http://www.simplyhired.com)

## Type #3: Examples

Sometimes an example (or even two or three, but no more) will show your users the best way of using the field.

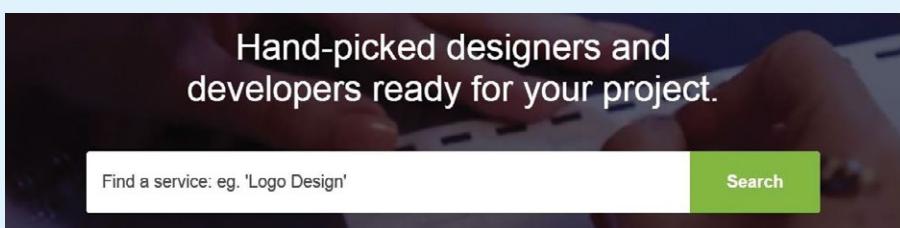
### Examples

**TailorBrands** enables users to automatically create their own logos. In order to do so, they ask the users to describe the business that they want the logo for. The users are invited to enter a description, and this request is illustrated by an example displayed as the placeholder. The example provides the type of information that is important to the site so that it can create a suitable logo: size of the business, what it does, location and target audience.



[www.tailorbrands.com](http://www.tailorbrands.com)

**envato** combines category ("a service") and example ("logo design") in its placeholder, a combination that leaves no room for questions.



[www.envato.com](http://www.envato.com)

## Type #4: Guiding sentence

Open questions require users to think. But if there is something users don't like doing, it is needing to think in the middle of a task. All they want to do is fill out the form and carry on.

So, when you use open questions, the purpose of the placeholder is to give the users a lead and focus them on what's important, thus making it easier for them and encouraging them to answer.

### Example

On the **RealMatch** job boards, applicants can attach a cover letter to the resume they are sending via the board. Writing a cover letter demands a lot of thought, and many candidates decide to skip this step, even though it can significantly increase their chance of receiving an answer from prospective employers. To help them start, the placeholder makes clear the purpose of the cover letter and provides the main topics the users can write about.

The screenshot shows a mobile application interface. At the top, a dark header bar contains a back arrow icon on the left and the text "Add Cover Letter!" on the right. Below the header is a light-colored section containing a list item with a pencil icon and the text "Stand out from the crowd". Underneath this is another list item with the text "A cover letter increases your chances by up to 25!". A callout box with a light gray background and a thin border is positioned below these items, containing the text "Show them that you're the best person for this job. Go ahead and brag about your skills, experience and magic touch." The overall design is clean and modern, typical of a mobile job search app.

RealMatch Job Boards

## Type #5: Remove obstacles

If you know that users have an issue that prevents them from answering your question, the placeholder can appeal directly to this obstacle and try to remove it.

### Example

When filling out the profile on the **OkCupid** dating site, there are a number of open questions that are challenging to answer. Each question appears above the field, one of which asks:

I spend a lot of time thinking about 

[www.okcupid.com](http://www.okcupid.com)

Users need to enter here an area of interest that they think about a lot. But they might worry that most things they think about are not very interesting to potential partners (too trivial, too heavy, a bit strange, not important enough or too important...). This apprehension might cause them not to answer honestly, or even not to answer at all.

So, the placeholder puts it this way:

|Global warming, lunch, or your next vacation... it's all fair game.

[www.okcupid.com](http://www.okcupid.com)

The placeholder removes the obstacle by combining examples that are very important (global warming), not important (lunch) or very common (next vacation). And at the end they also add a calming phrase – exactly what the users need to hear so that they can let go and give an honest answer.

And if we are already talking about **OkCupid**, I warmly recommend – even to the happily married among you – to visit the site and check out profile labels and placeholders. The microcopy around fields greatly reduces the confusion and concern and makes filling out the form simple and even fun.

## Type #6: It's also possible just to have some fun

Sometimes placeholders are simply designed to amuse users. That's excellent, but remember that with forms the purpose is to let users complete them as fast as possible. So usually, that won't be the place to joke with them, unless it's an integral part of your voice and tone, and fits the atmosphere of the site. Or it might just be a fun form where no one is in a hurry.

### Example

On the **Trello** sign up form the placeholders are meant to make users smile (obviously no one needs an example to enter their name). Each time, a different fictional character from a TV series, film, book or video game, appears in the field, and an appropriate email address is provided in the email field.

<p>Name e.g., Ender Wiggin</p>	<p>Name e.g., Arya Stark</p>
<p>Email e.g., ender@battle.edu</p>	<p>Email e.g., needle@mail.wi.wes</p>
<p>Name e.g., Hermione Granger</p>	<p>Name e.g., Dana Scully</p>
<p>Email e.g., hg@spew.org.uk</p>	<p>Email e.g., dana.scully@fbi.gov</p>

[www.trello.com](http://www.trello.com)



# CHAPTER 11

# BUTTONS

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## IN THIS CHAPTER

Basic principles of writing converting buttons  
What click triggers are and how to use them

# Push the right buttons

The importance of buttons cannot be overrated. So that users can get what they came for to the site or app, and so that their browsing turns into your desired outcome, i.e. a conversion, users must click a button. The button is therefore the point when a decision becomes an action, so give it the time and thought it deserves (and also time to test it if possible). Don't settle for generic terms that won't move your users, that's like slowing down just before the finish line.

Before we dive into best practices of writing text that accompanies buttons, an important remark:

**Test, test, test** - Microcopy for buttons is full of surprises, and changing just one word on the button can increase or drop conversion rates significantly (there are many examples of this on the Internet, just google "buttons copy"). If you want to maximize your conversion rate, invest in A/B testing. It's an investment that will pay off. Why do you still need best practices? So that you can select one of two excellent choices, instead of from two mediocre ones.

## "What do I get" rather than "How do I get it"

Generic words like **Download**, **Search**, **Send**, or **Register** don't help users make a decision. When users get to one of these generic buttons, they need to balance up the pros and cons on their own, remember what they have read and understood so far, and decide for themselves if it's worth it or not to click the button.

Another problem with these generic words is that they usually emphasize what users have to do, the hard work.

So what do you write instead? Michael Aagaard tested buttons for four years and came up with the following formula:

**Value + Relevance = Conversions**

In the article "How to Write a Call-to-Action that Converts", Aagaard writes that instead of writing on the button what the user **does** (the action), we need to explicitly write what the user **gets** (the value). For example, when he changed the copy on a button from **Order information** to **Get information**, conversions went up by nearly 40%!

The reason for this is that the "order" button emphasizes what users have to **do**, not what they're going to **get**. It doesn't give them enough value to want to click the button.

When the button focuses on the action and not the value, we are leaving it up to the users to draw conclusions, and there's no way of knowing where their train of thought might take them. However, if you write the value on the button, you are offering the exact bottom line they're looking for, and that's a much bigger motivator.

The second variable in Aagaard's equation is **relevance**. Value by itself could still be too general, and Aagaard's tests showed that buttons with specific microcopy relevant to a certain context, convert better. In other words, not only **Download for free**, but **Download the guide for free**, or even better: **Get your free guide**. Here also, the right fine-tuning can increase conversion by dozens of percents. And if the length of the button copy seems daunting, you can relax. Buttons offering the relevant value raise conversions even if they are long. But don't just take my word for it, check it out for yourself.

**Heads up: not every button on your site needs to provide significant value.** When I talk about value I mean **only those buttons that generate conversions or an action that's important for you**, such as signing up, generating leads or downloading. And if the most important action on your site is, for example, search, comment, or watching a sales video – then those are the buttons you should invest in.

However, most of the button microcopy on your site or app will probably be functional guidelines, that can remain – and it's even best that they remain – standard, obvious and well known to users: **Continue, Add to basket, Chat with a rep, Pay securely, Edit, Share, Compose, Upload, Save**, and so on.

## Example

Three different digital invoicing systems offer a 30-day free trial. Their buttons are slightly different from one another:

	<b>Button on the home page leading to the sign up form for the free trial</b>	<b>Button at the end of the sign up form for the free trial</b>
1	Sign up now	Create account
2	Sign up now 30-day free trial	Start free trial
3	Sign up now 30-day free trial no commitment	Send and start using the system

In the **first system** (row 1), both buttons refer to the action that users need to take, and neither of them provides the value that makes it worthwhile to click the button (unless one of your hobbies is creating accounts all over the Internet). There's also no relevancy, both buttons are completely generic, and you could put them exactly as they appear here on any other site – and they'll fit in just fine.

In **systems 2 and 3** (rows 2 and 3), the buttons on the home page (left column) do indeed talk about the action users need to take, but immediately remind them of the value: a 30-day free trial. However, as these buttons appear on the home page, maybe it would have been better to write **only** the value: Get a 30-day free trial, and not even mention the sign up process, which might sound complicated and deter users from clicking the button.

If we wrote on the home page button the benefit of a 30-day free trial, what should the button at the end of the form say (right column)? The final value, creating invoices. In **system 3** (row 3, right column), they indeed provided a similar value, **Start using the system**, but the relevancy is only partial here, as this button could actually fit into any system, and it still hints at the hard work users have to do and not what they get as a result of that work. A more relevant phrasing is: **Start creating digital invoices**.

## More examples

unbounce has buttons with loads of values that are super-relevant for their users. They seem long and as a writer you might feel that you want to get rid of quite a lot of words, but to the users they deliver important information, and no-one said that buttons need to be short.

BROWSE OUR LANDING PAGE TEMPLATES

BUILD A HIGH-CONVERTING LANDING PAGE NOW

GET MY FREE EBOOK

Start My 30-Day  
Free Trial

[www.unbounce.com](http://www.unbounce.com)

**Duda.** Each of the buttons here could have been Start, Try it or Read more, but instead they tell the user what the bottom line is, what makes it worthwhile clicking the button.



**duda one**  
Responsive Website Builder

[GO RESPONSIVE](#)



**duda mobile**  
Mobile Website Builder

[GO MOBILE](#)



**inSite by duda**  
Website Personalization Tools

[PERSONALIZE YOUR SITE](#)

[www.dudamobile.com](http://www.dudamobile.com)

## And a few more in conclusion

**Register**

→ **Save My Seat >>**

[www.leadpages.net](http://www.leadpages.net)

**Sign up**

→ **YES, KEEP ME INSPIRED**

[www.marieforelo.com](http://www.marieforelo.com)

**Search**

→ **Find Jobs**

[www.indeed.com](http://www.indeed.com)

**Try it**

→ **Create My Resume**

[www.myperfectresume.com](http://www.myperfectresume.com)

**Contact Us**

→ **get a consultation**

[www.epipheo.com](http://www.epipheo.com)

**Start**

→  **Start Hanging Out**

Rounds app

### TIP

**19**

#### Remind me why I wanted to sign up

The Sign up button at the end of the sign up form can be much more interesting and motivating if you ask yourself how users benefit from signing up, or what they can start doing afterwards. Thus instead of writing only **Sign up**, you can write **Sign up and - start saving recipes, start learning French, create a professional logo, see jobs that suit you**, and so on.

Besides, if those who sign up receive a discount or gift, you can write it on the button. **Sign up now and get free credit**, or **Get a 25% discount on your first purchase!** Buttons like these transfer the weight from the registration to the reason for registering, and can be very effective.



## Go look

When the button has **Search** on it, is it the interface telling the users to search or are the users telling the interface to search for them? Who is the button microcopy talking to?

The truth is that there is no answer. Sometimes we command or address users (such as **download**, **sign up**, **start**), and sometimes it's the users referring to the interface or whoever is running the site (such as **send me the guide**, **show me the results**, **add me to the list**, **let me know when registration opens**, and so on).

There is no right or wrong way here, it all depends on the context, and you don't even need to be consistent. Different forms on the same site can use different practices according to need and what flows best.

## TIP

20

### What on earth am I cancelling?

Other buttons that need special attention are the cancel action buttons. These buttons can be really confusing. For example:

Cancel the action?

What is cancelled by the **Cancel** button, the action or the cancellation request?

In such cases, instead of **Confirm** and **Cancel**, it's better to use the words **Yes** and **No**, and add a word or two to make it conclusive. For example:

**Cancel Free Order**

Are you sure you want to cancel this order?

[www.eventbrite.com](http://www.eventbrite.com)

## Click Triggers - the last minute message that tips the scale

Joanna Wiebe shows in **Buttons and Click-Boosting Calls to Action** how short messages written next to the button can significantly increase conversions just like the main microcopy on the button. She calls these short sentences **click triggers**.

The goal of click triggers is to tell users exactly those words required to tip the scale at the split second it takes for the decision to be taken. They are supposed to get users to respond immediately and turn intention into action.

Next to (or beneath or above) every button important for you, it's worthwhile writing at least one click trigger, whether it's signing up for a newsletter, signing up for the website, watching a demo video or purchasing something.

Just like the microcopy on the button, click triggers can also remind users about the value they'll get if they click. But they can also work in another very interesting way: remove concerns that accompany clicking and pave the way to make it happen.

You should carefully choose the click trigger based on the objectives of your users on the site and according to the things that deter them most. Even if you have already addressed these issues in other places on the site, a short reminder next to the button can create the desired response.

If necessary you can even write two click triggers, but don't overdo it: carefully select those that are the most influential, and as usual, run A/B testing.

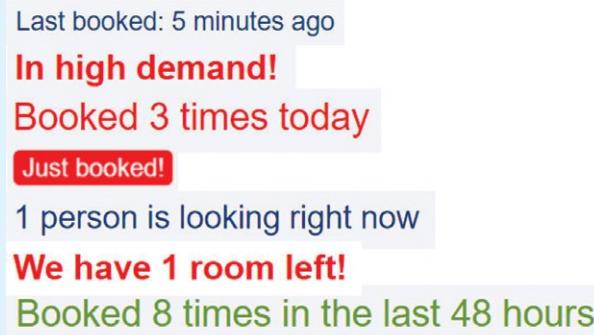
## Examples

The best click triggers are relevant to the concerns or objectives of the users at that point in time. The following **Priceline** trigger does not alleviate concerns but reminds users about the value: save money and earn miles. That's the main objective of users visiting the site, so the click trigger was carefully chosen.



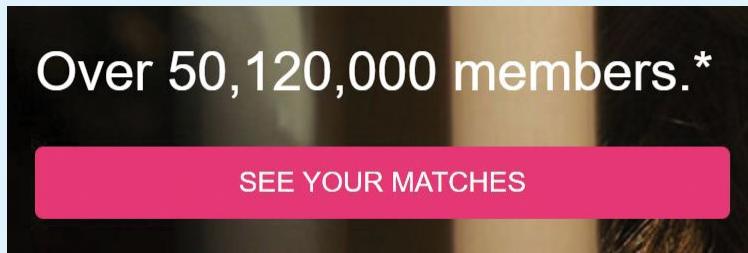
[www.priceline.com](http://www.priceline.com)

**Booking.com** excels in writing effective click triggers. They use loads of social proofs to show the value of the room, and especially to induce a sense of urgency. When users are deliberating on whether to click the button or not, the social proof that the hotel is well liked by others can be a trigger, and it also provides the feeling that if they don't book now they'll lose the room.



[www.booking.com](http://www.booking.com)

Next to the button offering users to join the **Ashley Madison** dating site for married people, social proof is provided to show that it is legitimate to join, just when they need it most. If over 50 million other men and women are doing it, maybe it isn't so bad?



[www.ashleymadison.com](http://www.ashleymadison.com)

Here is an example of a click trigger appearing on the button itself:

InVision - free forever!



[www.invision.com](http://www.invision.com)

## CHAPTER 12

# 404 ERROR: PAGE NOT FOUND

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**IN THIS  
CHAPTER**

4 things every 404 page needs to include  
Ideas for perfectly branded 404 pages

# Black holes on the Internet

Renny Gleeson summarized his very short TED lecture on 404 pages ("404, the story of a page not found") thus:

*A simple mistake can tell me what you're not,  
or it can remind me of why I should love you.*

Users encounter a 404 page when searching for one that no longer exists on your site (or that was never there in the first place). This might happen if you leave a link somewhere on your site or the Internet to a page that no longer exists, or its address has changed; and it can also occur because users typed a wrong URL.

Ideally, your users are not supposed to see 404s, or at least only see them rarely. However, it is still an important page. If the users got here from the Google search results page or from another site that referred to you, and found only this:

## **404 error: Page Not Found**

they will immediately hit "back", and you lost them. The chances they'll explore other pages on your site are zero. They have no idea how to continue from here, and they have no good reason to try. Moreover, as Gleason said, the 404 page tells users a lot about your brand. For example, how you deal with your own mistakes, how you deal with user errors, and how you treat users when they encounter a problem or are disappointed.

The standard message as above shows that the writers of the page did not understand either the users or the problem (if someone even gave it some attention). Technically, such a message does not help users understand what went wrong, nor help them get to where they want to go. It's a dead end. Even emotionally, it doesn't show any empathy for the disappointment felt by users because they couldn't find what they were looking for.

It's important to understand that the design of a 404 page is important, but it's not enough. An image without microcopy might raise a smile, but won't help users get to where they want to go.

## How to write microcopy for a 404 page

### 1. Explain to the users what happened and how they ended up here.

Remember that they don't know what a 404 is. In fact, you don't even need to mention the number 404 or the word error, just explain in simple words, without technical jargon, that the page wasn't found or is no longer here.

### 2. Show empathy.

Because users are disappointed that they didn't find what they were looking for, and sometimes it's our fault, it's worthwhile to show empathy, that is add a word or sentence that demonstrates to the users that you can relate to the way they are feeling right now. You can apologize and you can reflect their feelings (many examples coming up soon).

### 3. Point to the way out. It's worthwhile to put one or more of the following:

- Links to central areas of the site, to categories that lots of people search for, or pages that you want to direct users to for business or professional reasons.
- A search field
- A link to the home page
- If the main menu appears on the 404 page, turn the users' attention to it either with words or a visual sign, and don't count on them seeing and understanding that it's their way out.

### 4. A 404 page can, but doesn't have to, include one of the following:

- A great design
- Humor that will turn the negative experience into a positive one (but be careful not to laugh at users when they are confused).
- Provide a way they can report the broken link, something along the lines of: "*If you got here from another site, we'd appreciate it if you told us from where so that we can fix it and save others from ending up here*". Then add a link to the Contact page or a special support form dedicated to this purpose.
- List the contact details of customer service and support.



## Put things into perspective

There are sites that invest a lot on their 404 page. **Blue Fountain Media** developed a Pacman game in the shape of 404 (see the screenshot below), and on **Romain Brasier's** site ([www.romainbrasier.fr](http://www.romainbrasier.fr)), there's a game where you need to save 404 lemmings. In the world of microcopy and design, it seems as if more has been written about 404s than any other page, and there are dozens of articles of the type "The 30 best 404 pages ever".

But let's be honest, we are the people who enjoy it most, our users only rarely get to see the page, and then they don't stay around but move forward towards whatever they were looking for in the first place.

It's important that the page creates engagement and a desire to continue from there to the rest of the site. But it's even more important that the page provides full details and the required service. A simple design or funny picture, clear text with a touch of humor, and three links to central areas on the site, will do a great job. There's no need to go overboard.

Mind you – Successful 404 pages have provided their owners with a great marketing service, because users shared them. Blue Fountain Media is one example, as is the **Nosh** video that went viral (look for "Nosh 404" on YouTube). So if the purpose of your 404 is sales, go for it and invest!

**Oops! That page couldn't be found.**

Want to play some Pacman instead?

« GO BACK

[www.bluefountainmedia.com](http://www.bluefountainmedia.com)

## Examples

The 404 of the **Belle and Sue** Israeli fashion shop does not include any design, but it's very funny. It reflects the frustration of users, but also puts things into perspective, using lots of humor. It simply states that there's a problem (users are not interested in the technical details of the problem), and at the end of the message, ways to exit to other pages on the site are offered. Simply lovely.

new / clothes / jeans / shoes / accessories / sale / blog

Disaster! Tragedy! Scandal! Heads will roll!  
There's a problem with the page you're looking for.  
In the meantime, why not try out one of our other  
pages, or stay here and enjoy the peace and quiet.

[www.belleandsue.co.il](http://www.belleandsue.co.il) (Translated from Hebrew)

On this simple page from **Barnes & Noble** you can find all three pieces of a good 404 page: an explanation (without even mentioning 404), apology with empathy, and links to other pages on the site that are of interest to the site's owners or the users.

That's Odd! The page you were looking for can't be found.

We apologize for the inconvenience.

Visit Your Local Store

Find Author and Storytime Events

[Find a Store >](#)

Free \$10 eGift Card

When you buy \$75+ in Gift Cards

[Learn More >](#)

Barnes & Noble Café

Relax and Refuel

[Visit BN Café >](#)

Member

BARNES & NOBLE  
BN.COM

B&N Membership

Don't Miss Out on Savings

[Learn More >](#)

[www.barnesandnoble.com](http://www.barnesandnoble.com)

The vintage shop J. Peterman wrote the 404 that I personally love most of all, exactly because its simplicity demonstrates that words by themselves can create an excellent service experience. The voice and tone of the page is pleasant, presenting an especially service-oriented style. It explains the entire problem clearly and without mention of 404, and provides two solutions, a phone number and links to the central areas of the site.

WHAT WAS HERE IS NOT HERE ANY LONGER.



**It went poof.**

Some of our promotions are time-sensitive.  
Or you may have reached this page in error.

May we help you find what you need?  
Please call us at 888.647.2555 for assistance.



Shop  
Women's  
Accessories



Shop  
NEW Owner's  
Manual No. 132



Shop  
Men's  
Accessories

www.jpeterman.com



## Ideas: What else can you put in a 404 apart from microscopy

- Funny pictures
- Graphics that express the frustration the user feels
- Animation
- An explanation, in the voice and tone of your brand, that explains to the user why the page is missing
- Excerpts from songs or films
- YouTube videos

The Israeli UX studio, **Uniq UI**, explains the problem beautifully, using simple words (the term 404 is hinted at for those that understand it), takes full responsibility for the problem, and at the end offers a few links as the way out.

4:04

## This is the first time it happens to us, Really!

We didn't drink our coffee this morning and our links got confused.  
The page you wanted isn't here. **We're really sorry.**



Until we take care of it, here are some other pages that might interest you:

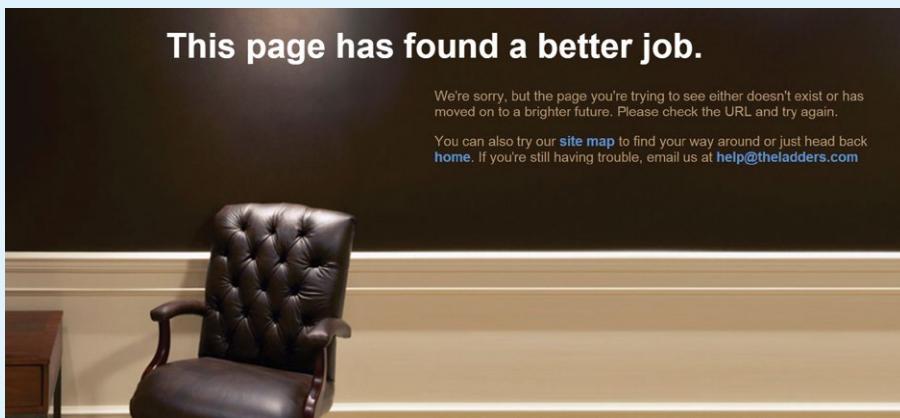
[www.uniqui.co.il](http://www.uniqui.co.il) (Translated from Hebrew)

## Brand content in 404 pages

In the quote that opened this chapter, Gleeson says that the 404 is also an opportunity to remind users why they love the brand, why they are here. In other words, the page is not only there to help users recover from the error, but is also an opportunity to engage them. To do this, I recommend including on your 404 page ideas taken from the content of your brand. For example, to explain the missing page, use reasons connected to what the brand does, using terminology from relevant content.

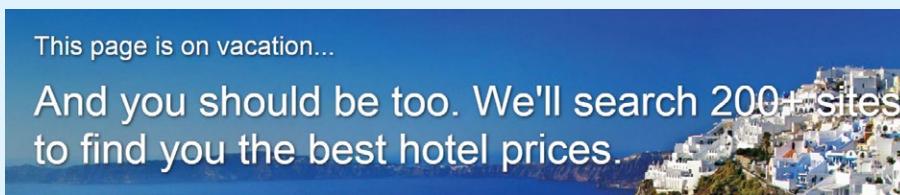
## Examples

The Ladders, a company that offers career advancement tools, found the missing page a better job.



[www.theladders.com](http://www.theladders.com)

TripAdvisor tells us that the page we are looking for has gone on vacation, and so should we.



[www.tripadvisor.com](http://www.tripadvisor.com)

Every time we see a 404 on the IMDB database of cinema and television, it provides a different movie "quote" – there are about 15 of these.

# 404 ERROR

Webpages? Where we're going, we don't need webpages.

*Dr. Emmett Brown, Back to the Future (1985)*

# 404 ERROR

There is no page.

*Spoon Boy, The Matrix (1999)*

# 404 ERROR

Always remember, Frodo, the page is trying to get back to its master. It wants to be found.

*Gandalf, The Lord of the Rings: The Fellowship of the Ring (2001)*

[www.imdb.com](http://www.imdb.com)

NASA thinks astrophysics and sends users beyond the event horizon.

**404** The cosmic object you are looking for has disappeared beyond the event horizon.

[www.nasa.gov](http://www.nasa.gov)

It appears that the **Financial Times** spent many hours on its 404 in order to explain why the missing page is not there – there are 22 (!) possible economic theories. You really should read the page (type [ft.com/404](http://ft.com/404)).

# Page not found



Unfortunately, the page you asked for does not exist on this FT website.  
You may like to see a [list of topics](#), [search](#) or [go to the homepage](#).

## Why wasn't this page found?

We asked some leading economists.

### Stagflation ⓘ

*The cost of pages rose drastically, while the page production rate slowed down.*

### General economics

*There was no market for it*

### Liquidity traps

*We injected some extra money into the technology team but there was little or no interest so they simply kept it, thus failing to stimulate the page economy.*

### Laissez Faire Capitalism

*We know this page is needed, but we can't force anyone to make it.*

### Monetarism ⓘ

*The government has limited the number of pages in circulation.*

### Efficient Markets Hypothesis ⓘ

*If you had paid enough for the page, it would have appeared.*

### Moral Hazard ⓘ

*Showing you this page would only encourage you to want more pages.*

[www.ft.com](http://www.ft.com)

**NPR**, the news and radio network that stands for brave and responsible journalism, presents on its 404 page news stories about people and items that were lost and never found, exactly like the page you were looking for. Go visit the site and look at the gripping list.

It's a shame that your page is lost, but at least it's in good company; stick around to browse through NPR stories about lost people, places and things that still haven't turned up.



### Amelia Earhart

Researchers are still trying to figure out what happened to aviator Amelia Earhart, who disappeared while flying over the South Pacific in 1937.



### 18 1/2 Minutes of Watergate Tapes

Rose Mary Woods, the loyal secretary of President Richard Nixon, took responsibility for erasing tape that was crucial to the Watergate investigation.

[www.npr.org](http://www.npr.org)

## CHAPTER 13

# WAITING TIME

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### IN THIS CHAPTER

Why it's important to invest in the waiting time experience  
Some ideas on how to pass the time with your users

## Quality time with your users

The waiting time is the period it takes a system to load, process data, search, download a file, and so on. And if you are asking yourself why you need to deal with such menial pursuits, then a great article (only in Hebrew for now) by Tal Mishaly, the professional consultant for this book, throws some light on this. One fascinating insight from his research on user experience versus usability, is that animation, changing text, or a progress bar all shorten the **perceived** time that passes for the user. In other words, if there is something that keeps users busy while waiting, something to read, look at or follow, time passes quicker, and they perceive the waiting period as being shorter than it really is.

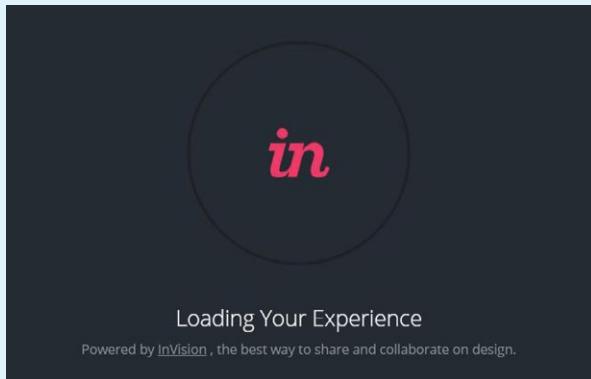
Another reason is that you have a few moments where the user is simply staring at the screen and waiting. Why not use this time to impart something wise, heartwarming or branded? With minimum investment you can prepare another surprise for your users that shows you thought about them and that they are important to you. These small things make all the difference!

It's important to make clear that you can use only graphics, without a single word, during this waiting time. So if you are able to invest in a fun animation - that's great. But words need much less design and development, thus providing a quicker and cheaper solution that works just as well.

So what text can you display during waiting times to make it appear to go a bit faster, and change it from a waste of time into time to engage with your users? Choose one or more of the following.

## Get your users in the mood

InVision promises an experience for user experience designers.

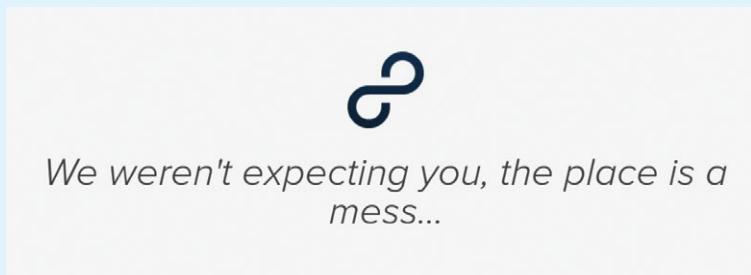


[www.invision.com](http://www.invision.com)

**WIX**, the websites building platform, wants its users to be in a good mood while they work.



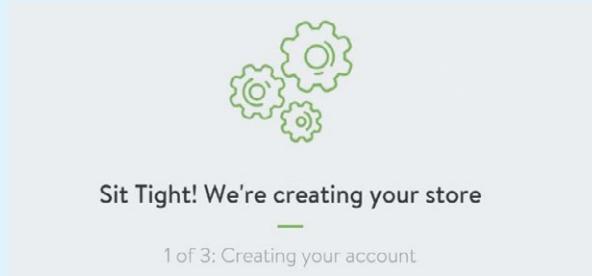
**8tracks**, an app for making and discovering playlists, is fun and funny.



## Get the users involved with what the system is doing for them

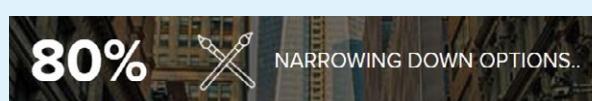
Users follow the progress of whatever is happening, and that helps pass the time, makes them feel they are taking part in the process, and also builds expectation about what the result will be when the process completes. As we'll soon see, this works even if the stages aren't real...

While waiting for an online store to be generated, **Shopify** updates the users on the stages.



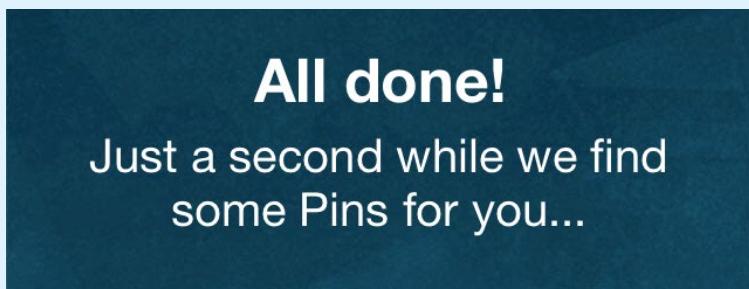
[www.shopify.com](http://www.shopify.com)

**Tailor Brands** are very specific, giving a real sense of thought invested in the logo design. These are only few of the stages they mention. I assume they want to emphasize that even though the process is automatic, it is detailed and complex, so that the result looks like it was designed by a real designer.



[www.tailorbrands.com](http://www.tailorbrands.com)

At the end of the registration process, when users go to their home page for the first time, Pinterest updates them that it's finding some Pins for them. And this is exactly what the users are here for.



[www.pinterest.com](http://www.pinterest.com)

Videostream, the app for Chromecast, offers a humorous take on what's happening.



Videostream app

## If the wait is expected to take a long time, you can suggest that users do something else in the meantime

**Twitter Counter**, the site that monitors a user's follower count on Twitter, promises that at the end of the waiting time, we can look forward to valuable information. It suggests that while the system collects data and analyzes the results, the user can make a cup of coffee or read a random article on Wikipedia, and it includes a direct link (not to the coffee :( ).

**Just a few more minutes!**

We have begun collecting data on your tweets. Soon you'll be able to view detailed analytics and recommendations for all your Tweets.

Why not grab a coffee or

[Check out a random article on Wikipedia](#)

[www.twittercounter.com](http://www.twittercounter.com)

On the app **HouseParty**, waiting for your friends to join the video chat is a part of the experience and may take a while. In the meantime, the app provides you with dozens of remarks, things to think about and fun facts. When your friends join you, you're sure to have something to talk about.

Wait here for your friends to join...

**You look really smart from this angle.**



Wait here for your friends to join...

**According to doctors, friendship can make you live longer.**



Wait here for your friends to join...

**How good would nachos be right now?**



Wait here for your friends to join...

**There is no angry way to say the word "bubbles".**



Wait here for your friends to join...

**There are 19 types of smiles.**



Wait here for your friends to join...

**Ombrophiles are people who have a passionate love for rain.**



HouseParty app

PART 3

# PART 3: USABILITY

## How to prevent and smooth out friction

Our users need very little reason to abandon the process. It's enough that they hit a single field that is not entirely clear on how to fill it, a task that looks too much like hard work, the smallest concern regarding their privacy, or a question for which they have no answer. There are users that give up at the first bump in the road or the first sign of any friction.

Good microscopy appears anywhere friction might occur, and provides an immediate solution. Sometimes it can even prevent the friction from the start.

In the previous part of the book, we spoke mainly about the microscopy that is shown before or after a user's action. In part 3 we'll talk about the microscopy that **accompanies** their actions so as to guide them and make the task simpler and quicker. The goal is to enable users to successfully and quickly complete the task – both for them and for us.

### Chapters in Part 3:

- 14. Microcopy and usability: basic principles
- 15. Questions answered and knowledge gaps bridged
- 16. Alleviating concerns and suspicions
- 17. Preventing errors and other setbacks
- 18. Microcopy for complex systems

## CHAPTER 14

# MICROCOPY AND USABILITY: BASIC PRINCIPLES

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### IN THIS CHAPTER

- Be succinct
- When and how to reveal the instructions on a form
- How to know where microcopy is needed

## The fewer words the better

With messages and calls to action, discussed in previous chapters, the purpose of the microcopy was mainly to create or enrich the emotional experience and engagement of the users. Now, once you have got them to act, and they have started the process on the website or app (such as signing up or buying something), the purpose of microcopy changes. Now it needs to increase usability and help users avoid friction, so that they finish the process quickly and easily. Therefore, the focus moves from the emotional experience you created for your users, to enhancing clarity and practicality. Here good service is not measured by how pleasant it is (and it must, of course, stay pleasant), but by how much you helped your users complete the task with minimum effort (or thinking, as Steve Krug put it) on their part.

That doesn't mean that you go back to writing like a lawyer in an aloof and condescending manner, most certainly not. It does mean that you write microcopy only when it's needed and in as few words as possible. It also means that as long as your users are trying to complete the task, and as long as you want them to progress from field to field until they hit the conversion button, don't be too clever or complicate things. Say only what is required, precisely, concisely and using simple language.

In the following real-life example, it looks like the writers went out of their way to provide a good service, but took the wrong turn and made the most simple and standard form into something complicated, even daunting.

Name*	<input type="text"/>
	<p>* Your name is how your friends will see you * Name length must be between 4 to 40 characters.</p>
Email address*	<input type="text"/>
	<p>* e.g. yourname@address.com * This is what you will use to log in. <input type="checkbox"/> Yes, I would like to receive email regarding news, products updates and special offers. * We will never share your email address or other information with third parties.</p>
Password*	<input type="password"/>
	<p>* A strong password consists of a mixture of uppercase and lowercase letters, numbers and/or special characters. * Must be between 5 and 40 characters.</p>
Confirm password*	<input type="password"/>

Most of the explanations are totally unnecessary, and those that are required should be much shorter. It's true that you need to write in a personable way, but in such practical processes, it's important to provide the information in the most intelligible and clear way, avoiding long sentences.

**For example, instead of:** Must be between 5 and 40 characters

**Write simply:** 5-40 characters

So before stacking your interface with words, ask yourself:

1. Are they really necessary?
2. How can you phrase it in as few words as possible?

## Check your UX

If you find yourself explaining a lot of things in many words, you might have a UX problem. A good process should have its UX designed so that it motivates and is self-explanatory. The microcopy is only supposed to support the process and clear up any remaining issues. If you feel that the process is overloaded with words, I highly recommend that you check wherever you wrote text and find UX ways to avoid them.

## Don't reveal everything at once

If your explanation is a bit long or complicated, or if you have a unique complex process that really requires a lot of explanations (such as setting up an online store, starting a crowd-funded campaign, booking a guided tour to Papua New Guinea, or using a professional system), it's best if the explanations don't appear all the time next to their fields, so the process doesn't seem jam-packed and threatening for a first time user.

One way to hide explanations is to put them in tooltips that are displayed only when a user puts the cursor in the field (brings the field into focus). For example, when signing up to **WalMart**, only when the user clicks inside the field does the tooltip, with the relevant information, appear close to the field. In this way, the form looks clean and simple at first glance, and at any one moment only the information the user needs is displayed.

A screenshot of a web form from [www.walmart.com](http://www.walmart.com). It shows a password input field with a placeholder 'Password'. Above the input field, there is a tooltip box containing the text: 'Your password must be between 6 and 12 characters.' The tooltip has a light gray background and a thin black border. The overall form design is clean with a white background and blue borders for the input fields.

[www.walmart.com](http://www.walmart.com)

And similarly at **Tesco**:

A screenshot of a web form from [www.tesco.com](http://www.tesco.com). It shows a postcode input field with a placeholder 'POSTCODE\*'. To the right of the input field, there is a tooltip box containing the text: 'Format = LLN NLL'. The tooltip has a light gray background and a thin black border. The overall form design is clean with a white background and blue borders for the input fields.

[www.tesco.com](http://www.tesco.com)

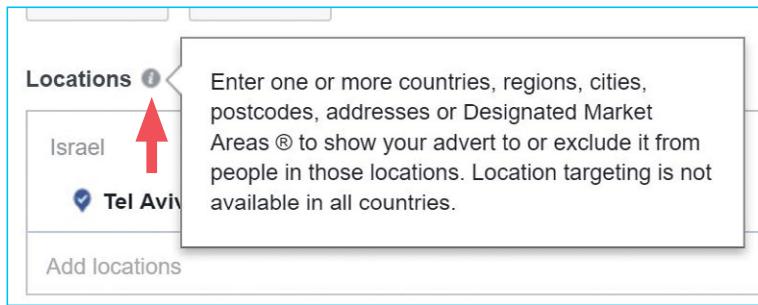
PayPal does it too, but displays the information below the field:

The screenshot shows a light blue input field with the placeholder text "Create your password". Below the field is a white box containing two lines of text: "8 characters or longer." and "Include at least one number or symbol (like !@#\$%^)". A large blue button labeled "Continue" is at the bottom.

[www.paypal.com](http://www.paypal.com)

Another, more common, method is to hide the microcopy in an icon shaped like an exclamation mark, question mark, i, or link, that opens when the user clicks it or hovers over it (**see tip 21**).

For example, when creating a new **Facebook** ad, there's an i icon next to every field, and hovering over it opens all the information one needs to get the most out of the feature.



[www.facebook.com](http://www.facebook.com)

The drawback is that users won't necessarily open the explanation, either out of laziness or a lack of understanding that it is important to them. **Therefore, I recommend that the important explanations, those that could determine the success of the task, are displayed next to the field and not hidden in a tooltip** (unless it appears automatically as shown before).

# How to know where microscopy is needed

In those places where friction may occur between users and the interface, that's where you need microscopy. Friction could be caused by a delay, misunderstanding, concern or error. The question is of course how to know where potential friction might occur and to solve or prevent it.

In the book **Web Form Design** by Luke Wroblewski (Rosenfeld Media, 2008), he provides a variety of ways to find weak spots in forms. Following are the three most relevant to microscopy.

## Usability tests

Watch the recordings (paying attention to the words users use) and write down where users were delayed, hesitated or became stuck, and what was it that they didn't understand in each place. Sometimes, all it takes to solve a delay is a few words of explanation.

For example, if you have a drop-down field that offers auto-complete and the user has to select one of the values from the list, but you see in the tests that users prefer to finish typing the full name and not to select from the list, it's a good idea to add a short instruction under the field and make it clearer.

City

Start typing your city, then click the full name in the list that appears

Of course it's preferable to allow users to type in the full name if that's what they want, but when there's no other choice, microscopy can help.

## Customer support reps

Ask your online customer support team what are the most frequent questions customers have, and why they feel they need to turn to support. You'll discover where in the process customers have problems and need help, and what exactly is difficult for them. These weak spots either need a UX repair or the help of microcopy. For example, if a lot of users turn to support during the payment process, and request to complete the purchase on the phone, it might be that they are afraid that the online payment is not secured enough. In such cases, it's worthwhile emphasizing in a variety of places and ways that the payment is secured, and maybe even point out what kind of payment security you offer and how good it really is (see examples in Chapter 16).

## Monitoring and analysis tools

Web analytics tools, such as heatmaps, can show you where users abandoned the task, what the last thing was that they tried to do, where many error messages were displayed, and other important data that will highlight those squeaky hinges that you can grease with microcopy.

For example, if you discover that users skip the date of birth field, or get errors because they didn't fill it, it's probable that they don't understand why you want this private information. It's recommended that you mark that field as mandatory and add a short explanation offering a convincing reason (i.e. required by law, see examples in Chapter 16).

In the next few chapters I will mention this list of weak spots you can find in almost any process. For each item I'll write about microcopy that can fortify this weak spot, enhance usability and increase conversion rates.

## TIP

### 21

#### (?) or (!) or (i) or maybe a link?

When should you use an exclamation mark or a question mark icon? Maybe it's better to create a short link? It's not clear cut, but the answer lies within the minds of your users.

If you think (or discovered in usability tests) that they'll ask a relatively common question - such as **what is this**, **what do you mean**, **what does that do**, **why do you want this piece of information** - put a question mark icon, that will resonate their question and provide a hint that it is answered here.

If a specific question might arise - such as **how was that amount calculated**, or **where do I find the data you are asking me to provide** - it is certainly possible to provide a text link next to the relevant field, in the way your users would phrase it. For example, "*How did we calculate that*" or "*Where should I check*". The question must be short and simple (there are many examples in the following chapters).

You can put the exclamation mark or i icon when you want to provide information or instructions that don't necessarily answer a user's question. Maybe they don't even know that they need to ask something.

But, as I said, it's not clear cut. If you are debating which is more appropriate, it's probably borderline and whichever you choose won't affect things much. Most important is that the microcopy is efficient, simple and really smooths out friction.

## CHAPTER 15

# QUESTIONS ANSWERED AND KNOWLEDGE GAPS BRIDGED

---

**IN THIS  
CHAPTER**

4 common questions that microcopy needs to answer

## Remove the curse of knowledge

Practically all digital processes arouse some sense of uncertainty within users. Someone else designed this process for them, and they are completing it in the belief that it will benefit them, or at least won't cause any trouble. We, who designed the process, see the full picture, but users only see a few steps ahead. So when they don't understand a term and can't find an explanation for it, or they don't understand how to use the interface, this fundamental uncertainty increases, and they lose their confidence in the process, and in us.

**Microcopy can offer users an immediate and accessible answer to any question they might have, and thus create a feeling of certainty.** The copy doesn't only answer the question, it also shows users that we take them into consideration and that their question is legitimate, and thus they can trust us.

The difficulty for microcopy writers stems from what is known as the **Curse of Knowledge**. This is the inability of a person who already has some knowledge to see things from the point of view of someone who lacks that knowledge. When you write microcopy you know everything about the website or app that you are writing about, the subject matter of the site, the specific task, and also about interfaces in general. Things that seem to you well known and obvious, might be new and incomprehensible to your users. To identify those places where users might ask **What's that?** or **What does that do?** or **How do I use that?** you need to take a fresh look at the process, and it is also well advised to use the resources discussed in the previous chapter (usability tests, customer support reps and analytical tools).

This chapter shows some common questions that users might ask. Even before the usability tests, try to look at the process through the eyes of completely new users, identify those places where questions may arise, and write microcopy that answers them.

## Question #1: What's that?

- a. Go over the process and look for **internal technical terms** and for terms that might be **unusual** or **new** in the eyes of the users, making them ask **What's that?**
- b. For every such term, check if you can replace it with **simpler words**.
- c. If you can't simplify the term, **add microcopy with an explanation**.

## Examples

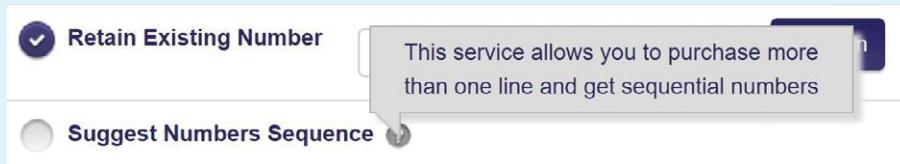
Commonwealth Bank's customers are not used to being asked to provide their credit card pin code. This might lead to them not understanding the banking term "Card PIN". For that reason, a clear explanation is provided right by the field. It would have been better to put a question mark icon, because the explanation answers the question **What's that?** (see tip 21).

The screenshot shows a form field labeled "Card PIN" with a blue information icon. A tooltip box appears over the field containing the text: "Your card PIN (personal identification number) is the number you are asked to enter when you use your card for purchases or at an ATM." The URL [www.commbank.com.au](http://www.commbank.com.au) is visible at the bottom.

Claire's accessory shop replaces the technical term CVV with simpler words and puts the explanation always on view, together with an explanatory graphic.

The screenshot shows a form field labeled "Security Code" with a blue information icon. A tooltip box appears over the field containing the text: "This is the last 3 digits of the number on the back of your card." The URL [www.claires.co.uk](http://www.claires.co.uk) is visible at the bottom.

Golan Telecom is an Israeli mobile operator. When a user orders a new line, they can order "Numbers Sequence". But what's numbers sequence? Hovering above the question mark icon displays the explanation - to buy a few sim cards that have sequential numbers. It's worth mentioning that if Golan Telecom really wants to sell sequential numbers, and I guess they do, they should phrase the explanation as a call to action. For example, "Order more than one sim card and get sequential numbers".



[www.golantelecom.co.il](http://www.golantelecom.co.il)

During the process of upgrading a Dropbox account, they ask if we are interested in an "Extended Version History". It might have been better to find a more attractive name for this service, something that is self-explanatory, but at least they added an explanation, displayed when the user hovers over the link. In principle, a question mark icon would have sufficed because the question is simple and common (what's that?), but maybe they wanted to highlight the possibility and draw attention to it. A 3-word question (What is this?) in blue does that job better than a small icon.

Extended Version History (\$39.00/yr)

[What is this?](#)

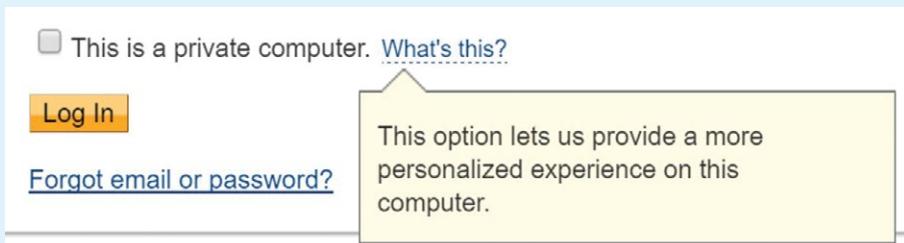
Extended Version History keeps previous file versions and deleted files for one year without taking up your space.

[www.dropbox.com](http://www.dropbox.com)

At the bottom of PayPal's last transactions list (on the previous version of the website), there was a button with the word **Archive**. For users who aren't familiar with this action, and are not sure what it does, there was an explanation displayed when hovering over the link.



In another place they asked if this computer is private. The first time I saw this, my immediate question was what is meant by "private" (if I share it with my partner, does that count as private?). So I expected them to explain this term when I hovered over the **What's this?** link and help me understand if my pc fitted the requirements. But, as opposed to the Archive explanation, which was complete, this one provided only a partial answer that didn't help me at all.



I still don't know if my computer is considered private, and the claim of a "more personal experience" is a bit strange, since my PayPal account is very personal anyway. So it isn't enough to simply present a tooltip with an explanation. The microcopy needs to precisely answer a user's question and really help them.

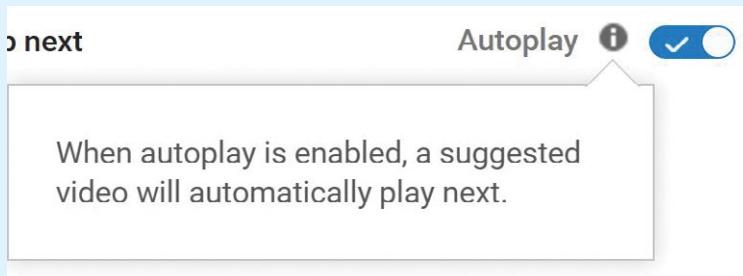
## Question #2: What does that do?

When you have features that operate as an on/off switch (toggle) or check box, and if the action is not entirely obvious, write near the control what happens, or doesn't happen, when you turn it on or off. If necessary, explain to the users not only how to use the feature but also the advantages and disadvantages of turning it on or off.

Also, if you have a special interest in making users use the feature, phrase your explanation as a call to action in an attractive, interesting way rather than using a neutral-technical tone.

### Examples

**YouTube** has an autoplay toggle and an i icon that when hovered over answers the question **What does that do?** This enables users to decide if they want to turn it on or off. Because YouTube has a clear interest in us using this feature to increase the number of views, it would have been better if they worded the explanation more actively. For example, "*Turn this on so that the next suggested video plays automatically*". By the way, if you have a toggle on your site or app, it is recommended that you set the default action to the one that best serves your desired intention.



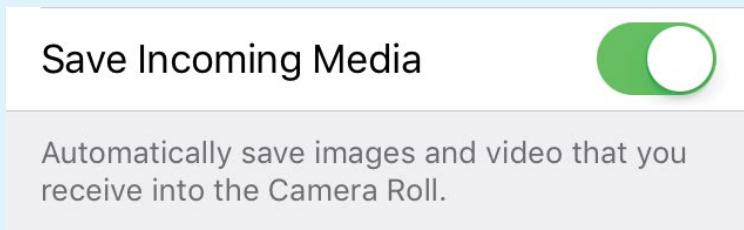
[www.youtube.com](http://www.youtube.com)

**Notica**, an app that processes and stores photos as visual notes, explains to the user all the consequences of turning on or off the high resolution feature. The explanation is a bit long, but the information is important for users that invest time and effort in organizing their photos, and enables them to make a decision most suitable to their individual needs.



Notica app

In **WhatsApp**, even though the feature has a simple and clear label, it still needs the sentence underneath. This explains precisely what is included in "incoming media" and where and when is it saved.



WhatsApp app

## Question #3: Where can I find this?

On forms where users are requested to supply specific information (such as finding what class driving license you have, your account number on your utility bill, and so on), it is a good idea to explain in a clear manner next to the field how to find this information, and even accompany it with a picture highlighting the exact location.

If the value includes dashes or slashes, or a combination of letters and numbers, mention if they need to be typed in or not, in what order and more (or even arrange the input field as a number of boxes that skips the symbols).

### Example

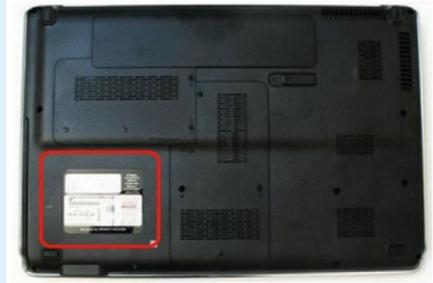
When registering an HP laptop, you need to provide the product name or number. The form provides a link saying: "*How do I find my product name/number?*" It opens in a new window, there they have a video and many other ways the user can find the number.

Note that they could use fewer words: the instruction "Enter the..." isn't necessary because the field label and the placeholder are doing a great job, and the link could be shorter too: "Where do I find it?"

Enter the name/number of the product you want to register. [How do I find my product name/number? >](#)

\* Product Name or Number:  SEARCH

Figure 5: On the back of a notebook



[register.hp.com](http://register.hp.com)

## Question #4: How do I use that?

In theory, the user experience should be self-explanatory, and text used only as a last resort. But will users really understand all by themselves what they need to do? This is where the Curse of Knowledge is at its most confusing. You understand interfaces, you understand the latest Internet fashions, you are technologically inclined, and can intuitively survive nearly all digital interfaces that you come across. But what about your users? What can be considered a basic skill for anyone living in the 21<sup>st</sup> century, and what still needs explaining? When do you need to write **drag**, **type**, **click** and **select**, and when is it obvious?

And what is right for all other aspects of UX is absolutely correct here: the best way to find out if you need or don't need written help is by performing usability tests.

### When an explanation is not required

Fields, buttons, drop-downs, exclamation or question mark icons, links, asterisks, radio buttons, and check boxes, all these don't need instructions. You can simply write the label next to it, for example "*Email*", and not "*enter your email address*", because users already know what to do in these fields. In most cases also next to radio buttons and check boxes you only need the label and don't need to add **select**, and you don't need to add **click** on a button.

## Examples

The image shows a portion of a web form from OkCupid. It features three horizontal rows, each consisting of a label on the left and a dropdown menu on the right. The first row is labeled 'Special Diet' with a dropdown menu. The second row is labeled 'Smoking' with a dropdown menu. The third row is labeled 'Drinking' with a dropdown menu. All three dropdown menus have a single visible option, represented by a small grey square with a minus sign.

[www.okcupid.com](http://www.okcupid.com)

OkCupid provides drop-downs, without telling the user what to do, simply because the drop-down is so well known, and thus the interface remains free of words and very simple.

Instead of all this:

**Car details**

Manufacturer

Select the car manufacturer ▾

Year of manufacture

Select year car was manufactured ▾

Model

Select the car model ▾

you could have only this:

**Car details**

Manufacturer

---

Year of manufacture

---

Model

---

And on this form they only needed to keep four words:

**Log in**

Please provide the following details  
(required fields)

Enter username

Enter password

**Log in**

Username

Password

(Though, as I said earlier, its best to make the title more attractive on a site's gateway).

And the following instruction is not required above these buttons, as they already convey all the information needed:

Click below to sign in using  
your social account

 Sign in with Facebook

 Sign in with Google

## When an explanation is necessary

If you have developed a unique interface to meet your needs, or the interface is still considered innovative, it is worthwhile telling users how to use it. Write short, simple and precise instructions in exactly the right place.

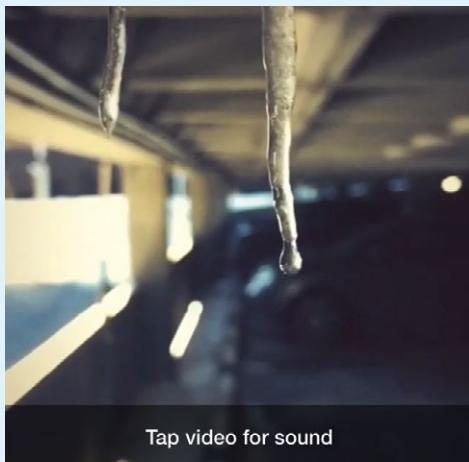
### Example

A good example of a precise instruction, appearing exactly when it is needed, is from Instagram:

*"Tap video for sound"*

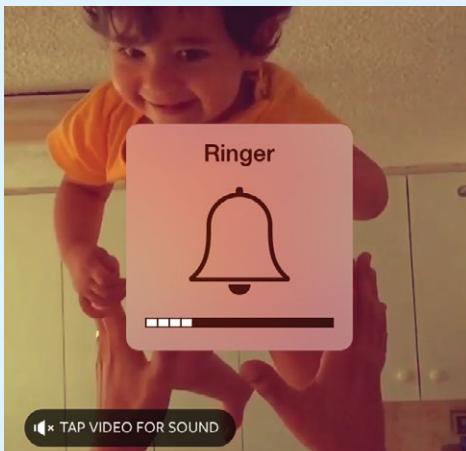
Tapping the video to start or stop the sound is (still) not an intuitive action, though it will be soon because Instagram has adopted it. But at the time of writing these lines, it is actually the opposite of what our intuition tells us, because we are used to YouTube, where clicking the video stops it.

When they first introduced the feature, Instagram wrote the instruction at the bottom of a video when it played:



Instagram app (photo: Elazar Yifrah)

But with the passage of time, when the instruction became better known to users, it started to appear only in those instances where Instagram had grounds to believe that the users weren't acquainted with the interface. For example, if they tried to increase the volume while the video was playing, when in fact the sound was turned off.



Instagram app (photo: Elazar Yifrah)

## TIP

## 22

### Save users from themselves

If incorrect use of the interface can cause a problem for the users or to the process, for example to exit a process, to open a new window, to delete everything entered so far and so on, you should provide instructions clearly and prominently, even in those places that seem obvious to you. The more repercussions an action might have, the more reason to explain it.

## TIP

23

### You can select more than one option

As you know, radio buttons are used when only one option is possible, whereas check boxes are used for multiple selection. But the general public doesn't necessarily know that. It might be that most users don't even notice that there are two type of selection controls. Therefore, when it's possible to select more than one option, it's worthwhile pointing that out explicitly.

## TIP

24

### Be nice – even when writing instructions

Instructions need to be simple and clear, but in a nice service-oriented way, not as an order to do something. If it fits your voice and tone, you can even inject some humor (but never at the expense of clarity).

The first time I transferred a file using **WeTransfer**, I laughed out loud.

Drag the file here and then –





## CHAPTER 16

# ALLEViating CONCERNs AND SUSPICIONs

---

### IN THIS CHAPTER

7 common concerns and suspicions that you need to address

## If you ignore it, it won't go away

Users have many good reasons not to trust us. Everyone is trying to sell them something, be it directly or indirectly, and what's free now will require payment later. Each time users provide their email address, they are swamped by spam, and sometimes they hear about yet another giant company whose database has been hacked, and credit cards or other private details were exposed. When they download a small widget, three other things they didn't request are also downloaded, and in general, to survive the Internet they need to be constantly on their guard and with their eyes open.

There is no reason why users, not yet acquainted with your company, should place their trust in you. This trust needs to be earned. First and foremost, you need to earn it by genuinely and practically and **really** being on the side of the users in all your service interfaces. But you also need to show them that you are worthy of their trust. Instead of ignoring their legitimate concerns and suspicions, you need to explicitly tell your users that you are aware of their concerns and respect them, and that they are in good hands.

In this chapter I'll demonstrate a few weak spots that could arouse the concern or suspicion of users, and how to overcome them.

## Concern #1: Providing an email address

In the chapter on signing up for a newsletter, we said that users have two main concerns when they provide their email address:

- a. **That you'll drown them in emails.** That's why you need to reassure them about the low frequency of the newsletter, and the more exact you are about the frequency the better.
- b. **That you'll pass their email address to others who'll drown them in spam.** That's why you need to promise them that their email address stays with you and that the privacy of users is important to you.

### Examples

See also the short and simple phrases on the sign up forms on page 91.

**Important!** We hate spam as much (or more!) than you and promise to NEVER rent, share, or abuse your e-mail address and contact information in any way.

[www.metromsp.com](http://www.metromsp.com)

**metroMSP**, an IT support company in North Jersey, tells users that it hates spam even more than they do.

On the form for creating a new team on **Slack**, there is a check box offering their newsletter. The fear of a flood of emails is dealt with very gently.

It's ok to send me (very occasional) email about the Slack service.

[www.slack.com](http://www.slack.com)

**Yes, it's another pop up!**  
In order to connect your calls, we need your Push Notifications permission.  
We promise to treat it well!

Rounds app

Push notifications may be seen as spam, and when asking for permission it is advised to address this concern. **Rounds** app asks for your permission and promises to treat it well.

## Concern #2: Providing special personal information

Users are vigilant nowadays about privacy and are reluctant to provide any information that is not absolutely necessary, mainly date of birth, telephone number, gender, home address, and so on. If asked to provide such information, they become suspicious and ask **what do you need it for?**

We need to supply a good answer:

- If it's a required field**, explain why you need these details and guarantee their privacy.
- If it's an optional field**, explain why it is **worthwhile** that users give you these details, and how it will benefit **them**.

### Examples

During payment, when the cursor is placed in the telephone number field, **Tesco** displays a tooltip explaining why they ask for the number. They also calm users and promise that it is the only use they will make of this information. Simple and perfect.

We will only contact you with questions relating to your order.

[www.tesco.com](http://www.tesco.com)

**ASOS** tells users about the benefit of providing their date of birth, and how many days remain until then – lovely.

Date of birth

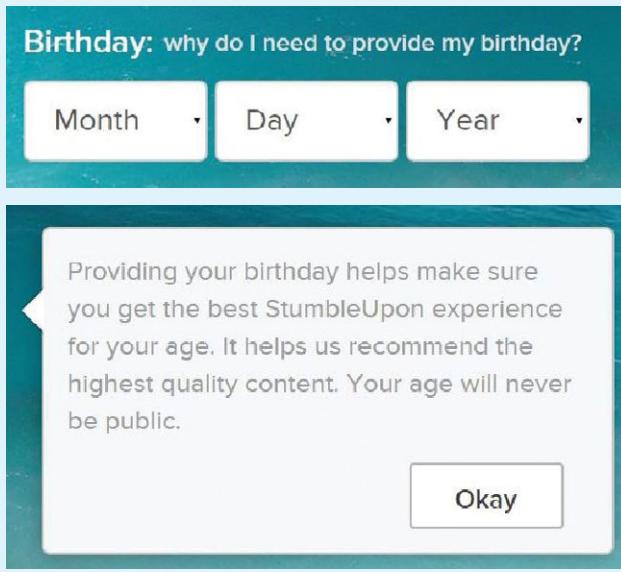
5 ▼	October ▼	1978 ▼	21 sleeps to go!
-----	-----------	--------	------------------

Tell us – you'll get a birthday treat if you do

[www.asos.com](http://www.asos.com)

However, the user gets the feeling that this is an optional field because the microcopy under the field explicitly states "if you do". But in fact, the field is required and I think this is a bit confusing. I received an error message because I preferred privacy over the gift, and I reckon that I wasn't the only one. So, if you have a required field, phrase the explanation in a way that makes it clear why the information is important and not optional, or at the very least mark the field as mandatory.

**StumbleUpon.** Next to the date of birth field there is a link asking the exact question the users are asking themselves: **why do I need to provide my birthday?** The question clarifies that this is a required field, and clicking the link opens an explanation that age is required so that users receive content suitable for them. I find the phrasing to be quite convincing.



[www.stumbleupon.com](http://www.stumbleupon.com)

The following two examples were presented in the chapter on voice and tone design. Both explanations clarify that the date of birth field is required, but they are presented in a way that users will accept and appreciate. They also remain faithful to their brand's voice and tone.

**J. Peterman:**

**I am over 13 years  old :** (Sorry, our lawyers made us ask.)

[www.jpeterman.com](http://www.jpeterman.com)

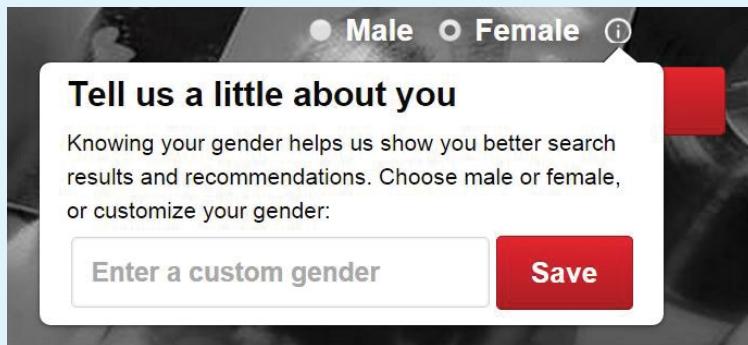
**Nike** starts with a reassuring remark.

**Nike will never share your data.** 'Birth Date' is required to support the Children's Online Privacy Protection Act (COPPA).

Read our [Privacy Policy](#).

[www.nike.com](http://www.nike.com)

**Pinterest** explains why it asks users about their gender. It also suggests a customized gender field. Well done.



[www.pinterest.com](http://www.pinterest.com)

## Concern #3: Signing up using a social media account

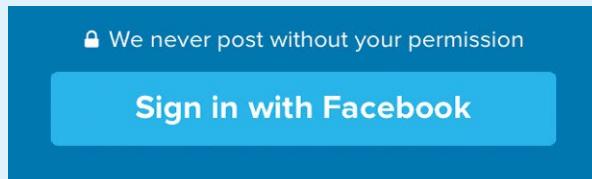
As mentioned in the chapter on sign up processes, registration using social media is widespread but still arouses concern. So it's important to promise users that:

- a. You won't post anything in their name (for example, on their wall).
- b. You won't share their information with other parties.

### Examples

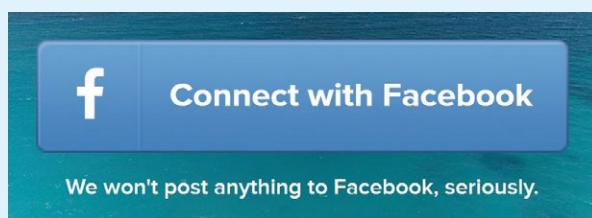
**See a few more examples in the chapter on sign up forms.** Note that in most cases there is reference to the first concern, and that is a shame because the second is also very important.

**TimeHop** is an app that helps you see the best moments of your past.



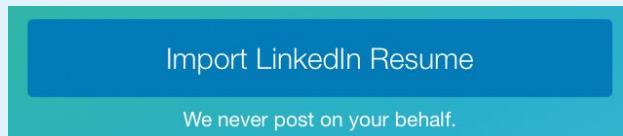
TimeHop app

**StumbleUpon** helps users discover and share websites.



www.stumbleupon.com

**Switch** is a job seeking app using LinkedIn accounts for uploading resumes.



Switch app

## Concern #4: Secured payment

Buying online appears to be one of the most worrying processes. The main concern of course is that credit card information is kept secure. It is worth your while to address this concern and relieve it right up front where users click to go from their cart to checkout.

### Examples

At Claire's fashion accessory shop, there is a Commodo Secured badge at the top, a secure padlock icon, a sentence stating that the payment details are secured, and even a button microcopy that says: "Pay Securely". Careful spatial placement and smart use of all the elements result in a very reassuring interface.

3 Enter your payment details

Card Type: \*

VISA CREDIT     VISA DEBIT

DELTA     MAESTRO

MASTERCARD     GO HENRY

Card Number: \*

Name on Card: Miss Kinneret Yifrah

Expires End: \*  
Month ▾  
Year ▾

Security Code:

This is the last 3 digits of the number on the back of your card

→ Your payment details are securely encrypted and protected by Commodo Secure

Store card details for future use

→ Pay Securely

This is Marks and Spencer's button. Exactly at the point when users are debating whether to proceed and purchase the item, and if they should click the button or not, they receive a response to their main concern: Yes, the checkout is secured!



Checkout securely

[www.marksandspencer.com](http://www.marksandspencer.com)

Tesco wrote on their payment page:



This page is secure. All of your personal details are safe.

[www.tesco.com](http://www.tesco.com)

## TIP

## 25

### Who pays for the shipment?

Another common concern when buying online is related to shipment. Who pays for it? How much does it cost? If the product doesn't meet expectations, how is it returned and who pays for the return shipment? Answer all these questions clearly right at the beginning of the process, and save your users doubts and hesitations.

## Concern #5: Free trial

The main concern for users when signing up for a free trial period is that they'll be charged as soon as that period is over. The solution, as usual, is simply to clearly refute this concern.

At the beginning of the sign up process, promise users that there is no need for their credit card details (meaning they can't be charged).

If you do need credit card details, promise that on no account will you charge it without the explicit permission of the user.

## Examples

Pipedrive provides CRM software for sales teams.

Start your 30-day **free** trial.



No billing information required at this point.

[www.pipedrive.com](http://www.pipedrive.com)

Google Cloud Platform does ask for credit card details but promises:



No autocharge after free trial ends

We ask you for your credit card to make sure you are not a robot. You won't be charged during or after your free trial ends.

[cloud.google.com](http://cloud.google.com)

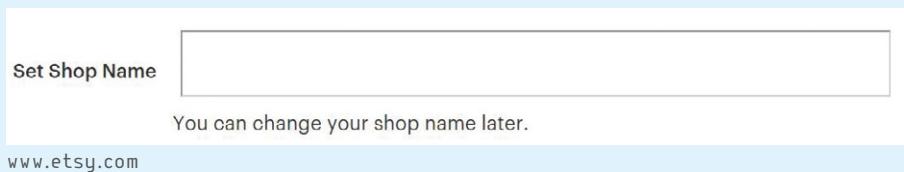
## Concern #6: Settings and configuration

When users start a process, they usually expect to finish it quickly. If the process requires some serious thinking from users, they might decide to leave it to a later date, when they have more time.

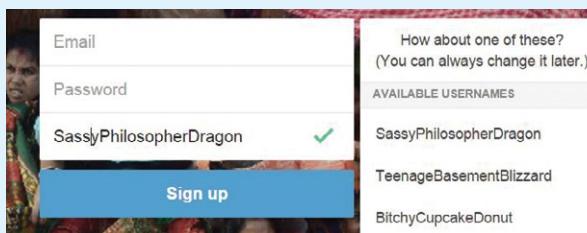
So, if possible, think about letting users skip the definition stage until later. If you do decide to offer this option, I recommend that you tell the users how they benefit by defining now and not later (see tip 26). If users must define up front, explain clearly to them that these definitions can be changed later, whenever they want to. In this way, the users won't feel like they are making a lifelong commitment, and that they'll be able to quickly define settings without worrying about future consequences.

### Examples

When opening a new shop, the dilemma about the name can continue until the last minute, and **Etsy** is aware of that. But they don't want users to delay registering, so they let them enter a temporary name, and also clearly state it to the concerned users.



**tumblr** really doesn't want users to delay sign up just because it's hard for them to select a username. Their solution is to offer loads of funny names, and promise that they can easily change it whenever they want.



www.tumblr.com

As part of the sign up process for **Pinterest**, users are asked to select their fields of interests. But so as not to delay the process, Pinterest explicitly suggests that they pick whatever catches their eye and change it later.

## What are you interested in?

Pick whatever catches your eye... you can always fine-tune things later

[www.pinterest.com](http://www.pinterest.com)

## TIP

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### It's worth the effort!

If your process includes steps that demand some extra effort on the part of your users, and regardless of whether it is optional or mandatory (such as uploading a photo, installing an add-on, or writing a few words about themselves), their inclination will be to skip that step so that they can move on.

So, write them a few words about why it's good for them to do it, and how they'll benefit. Remind them why they came to your site in the first place, and how this will get them closer to their goal.

For example, when **Facebook** motivates users to upload a photo to the profile they just created, it talks about friends easily connecting with you, and that's exactly why people come here.

#### Your profile picture

Choose a recent photo of yourself. This helps people to see that they're getting in touch with the right person.

[Learn more](#)

Skip

OK

[www.facebook.com](http://www.facebook.com)

## Concern #7: Download or installation

The big concern for users about downloading and installing is that in addition to the desired product they'll get a few other very undesirable products: viruses, spywares, toolbars and the rest of the parasites. So, if your process includes downloading a product, assure the users it is free of viruses and that the installation will not include anything else.

### Examples

This is how they say it on **Download.com**:



[www.download.com](http://www.download.com)

Before downloading the add-on for Chrome, **Rounds** says simply:



[www.rounds.com](http://www.rounds.com)



## CHAPTER 17

# PREVENTING ERRORS AND OTHER SETBACKS

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### IN THIS CHAPTER

5 setbacks that can be easily avoided with the help  
of microcopy

## A stitch in time saves nine

In Chapter 7 we discussed how to phrase error messages so that users can quickly continue with the process and make an irritating experience slightly better. But it is even better to prevent the errors in the first place. In this chapter I'll point out some weak spots where users might receive errors or otherwise be disappointed. As you, the process designers, see the full picture, and know which values the system can accept and which values will produce errors, and as only you know what's going to happen on the next page or stage of the process, you are the one responsible for letting users know what they need, and prevent them from falling into these traps.

All you have to do is go over your forms and processes, identify the weak spots (that we'll look at right now), and add a few words next to the suspect places, either as a permanently on show explanation or in a tooltip.

## Stitch #1: Required fields

Mark them. Yes, with asterisks. Always. Even if all the fields are required, I suggest that you do not write a comment at the top of the form, but mark each and every field. Even more so if some of the fields are required and some optional (and after you have marked all the required fields, ask yourself if you really need all those you left as optional. The less information you request, the greater the chance that users will complete the process).

Why should you mark every required field? Because the asterisk (\*) is commonly accepted, removes all hesitation or confusion, and saves users the need to draw conclusions, employ their short-term memory, or uncover your rules for themselves. There's an asterisks? Great, required, thank you.

\* But you don't need to mark mandatory fields on a form that only has email and password fields for login. That's obvious, right?

## Examples



Upload Picture

Name:\*

E-mail:\*

Year of birth:\*

Gender:\*▼

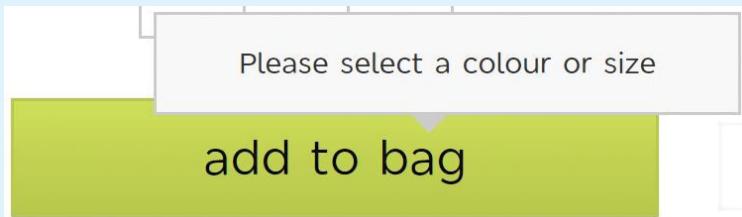
City:\*

Next

Look how simple and clear it is on the sign up form for the **Musketeer** app, that enables citizens to help each other in case of an emergency. You don't even need a sentence explaining that the asterisk indicates a mandatory field, it's perfectly obvious.

Musketeer app

This is from Marks and Spencer. It shows another way to deal with required fields: when hovering over the button (even before clicking), the instruction appears in a tooltip and says what required details are missing, thus preventing the error message.



[www.marksandspencer.com](http://www.marksandspencer.com)

## Stitch #2: Symbols or special formatting

When users are requested to type in a value that includes special symbols (such as dash, slash, a combination of letters and numbers, and so on), or there are several possible formats for this value (such as the date or phone number), they ask themselves if they should actually type the symbols, or which format is acceptable. There are of course users, and maybe even most of them, who are not even aware of the problem and don't ask themselves any questions. They just type whatever seems right to them.

The ideal should be that the system is indifferent to formats and can accept whatever the users type. If you succeeded in creating such a system, you don't need to write anything.

But if the system only accepts a value written in a certain specific way, you must point that out to the users before they start typing, to avoid the error.

## Examples

The first two examples use interface solutions to make life easier for the user.

**OkCupid** broke down the date into its component fields, so the user doesn't need to think about a period or slash. Then they wrote the exact format as placeholders in each field: day and month in two digits, year in four.



Birthdate

DD MM YYYY

[www.okcupid.com](http://www.okcupid.com)

Walmart put a placeholder to illustrate the accepted format. But they didn't stop there: when the user puts their cursor in the field, they see symbols that dictate the format.

This is the field beforehand:

Phone Ex: (415) 444 - 5555

And this is the field after the user clicks inside it:

Phone Ex: (415) 444 - 5555

(\_) \_ - \_

[www.walmart.com](http://www.walmart.com)

No matter how you present the instructions, just make sure they are super clear. Here the user is instructed (using a placeholder) not to add any dashes.

Phone

Numbers only

## Stitch #3: Size, range or length restrictions

If there are fields that only accept limited values, for example a certain range of numbers or time, a limited number of characters, format or size limitation of a file that can be uploaded, and so on, check if there is a UX way to prevent entering unacceptable values: shading dates on a calendar, turning off the option of typing when the maximum number of allowed characters is reached, etc.

Anyway, explicitly write the limitations so that users won't encounter avoidable errors and understand why these options are unavailable. If this is a field, don't write the limitations as a placeholder within it. The placeholder will disappear once the users start typing, preventing them from rechecking it if needed (see Chapter 10).

### Examples

**OkCupid** provides the minimum size of a file, and some other important instructions...

Photos need to be larger than 400 x 400px and you need  
to be in the photo. Also, no naughty bits!

[www.okcupid.com](http://www.okcupid.com)

35 post title (35 characters maximum)

140 description (140 characters maximum)

10 tags (limit 10, comma separated)

**Foodgawker**, a photographed recipe site, did put the limitations as placeholders, but outside each field there's also a countdown number indicating how many characters users have left, helping them to always know where they stand.

[www.foodgawker.com](http://www.foodgawker.com)

## Stitch #4: Passwords

Here too, it's best if you don't limit users (unless you have specific security requirements), so that they can use one of their regular passwords or one that's easy for them to remember. If this is the case, you obviously don't need to provide instructions. If you only have a very wide restriction, such as: the password should be between 4-60 characters - most passwords will answer this criterion anyway, so you don't need to write anything.

But if you do have restrictions on how the password must be constructed, write them next to the field (or above it, next to the label, for screen reader users), or in an exclamation mark icon next to the label, or in a tooltip displayed when the user puts the field into focus.

It's best to provide users with an indication that their password is acceptable immediately after they finish typing it in (in-line), or even better - display a tick for each restriction they met. In any case, it's recommended not to write the restrictions in the field so they don't disappear as soon as the user starts typing, and challenge their short term memory.

**When writing passwords microcopy, address the following points, based on what is relevant to your situation:**

- How many characters (minimum, range or exact number)
- The type of characters the password must include (such as at least one capital letter)
- Characters that the password cannot contain (such as symbols like: ? - "). You can also write it in a positive way: "*letters and numbers only*".
- Case sensitivity

## Examples

The fashion shop **Nordstrom** states right away that their password is case sensitive, and proceeds to list other restrictions.

Password

Validation:  
Your password is case sensitive. Seven-character minimum. No spaces. Must include both letters and numbers.

[shop.nordstrom.com](http://shop.nordstrom.com)

**ASOS** also writes its less stringent limitations under the field, and provides immediate feedback, a green tick, that the password fits the rules.

Password  Show ✓

Must be 6 or more characters and contain at least 1 number

[www.asos.com](http://www.asos.com)

The Israeli satellite TV Company **Yes** shows the rules as a tooltip when the user places the cursor in the password field, which is kept on display throughout. As soon as one of the rules has been met, a tick appears. Excellent!

Password \*  ... ?

Confirm password \*  ?

4 last numbers of your credit card\*  ?

At least one letter ✓ ?

At least one number ✓ ?

Minimum 8 characters ✗

[www.yes.co.il](http://www.yes.co.il) (Translated from Hebrew)

## Stitch #5: Real-life problems

The user experience doesn't end when users leave the interface, but continues wherever the customer is in contact with the brand. If the online process is connected to concrete processes that take place afterwards in real life, such as issuing a certificate, printing a document or receiving a shipment – think about each stage in the process and check if any problems could occur that you should point out right now and prevent.

Even if the potential problem is supposedly outside your jurisdiction, pointing it out to users will spare them the disappointment with the provided service, and give them the feeling that you thought about everything on their behalf. They might even thank you (or at least feel grateful).

## Examples

The deliveries of **Belle and Sue** fashion store only go out during regular working hours. But there's no going around the fact that during working hours most of their customers are at work... Belle and Sue took that into account and propose a creative solution that is offered as soon as the customer starts making the order.

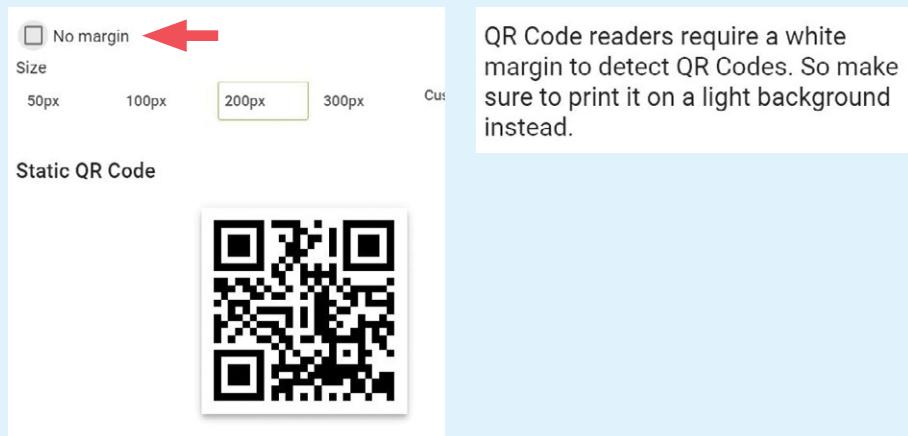
### 2 Shipping options

- In-store pick-up
- Certified mail
- Delivery

Your order will be delivered between 09:00 – 17:00, on workdays, so if you like, you can provide your office address.

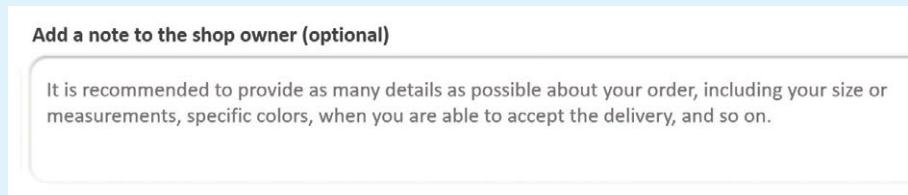
[www.belleandsue.co.il](http://www.belleandsue.co.il) (Translated from Hebrew)

The QR Code Generator lets users decide if they want a margin to their QR code or not. But the site creators thought one step ahead: if users decide to remove the margin, they receive an extra piece of information – that to scan a marginless code requires printing it on a light background. This printing suggestion is a result of the company thinking about the process of how QR codes are used after their customers leave the site.



[www.the-qrcode-generator.com](http://www.the-qrcode-generator.com) (Powered by Visualead)

**Marmalade Market**, the Israeli equivalent of Etsy, offers a wide range of products, many of them are one of a kind or handmade, that have a myriad of potential confusing features. Marmalade wants to prevent frustration and misunderstandings that might arise between the customer and salesperson, and so it suggests that the customer leaves a detailed message for the shop owner. The placeholder provides examples of the type of details that are worth pointing out.



Pekin Zahala restaurant in Tel Aviv knows that lots of people hate cilantro and that many are allergic to peanuts; so these are two ingredients that can cause problems once the customer receives the delivered meal. We can assume that in the past customers provided the restaurant with angry feedback on discovering that their delivery contained one of these ingredients (even though this is clearly mentioned in the menu). So nowadays, when you order a delivery online, and it contains cilantro or peanuts, a special alert appears in red.

**Heads up! This dish contains cilantro and peanuts. Can you live with that?**

Select one

- Select one -

Yes, that's OK, I know

Cilantro is OK, but no peanuts please

Peanuts are OK, but cilantro is definitely a no-no!

Phew, thanks for saying. No peanuts and no cilantro!

[www.pekin.co.il](http://www.pekin.co.il) (Translated from Hebrew)

This is an excellent example of holistic thinking about the process, that prevents disappointment and the feeling of receiving bad service. Not to mention the excellent phrasing that makes the issue funny and provides a good experience for all the customers.

## CHAPTER 18

# MICROCOPY FOR COMPLEX SYSTEMS

*\*This chapter was written thanks to the generous sharing of knowledge by professional UX and content women and men, who shared with me their insights, experience and screenshots: Jasmin Galker Vaisburd of UniqUI; Shani Polanski, Leah Kraus, and Naama Shapira of PTC; Elinor Mishan Salomon and Idit Peled of the Ministry of Justice; Galia Engelmayer of NICE; and Assaf Trafkant of QuickWin*

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### IN THIS CHAPTER

- A definition of complex systems
- The value of microcopy in complex systems
- Why complex systems need voice and tone design

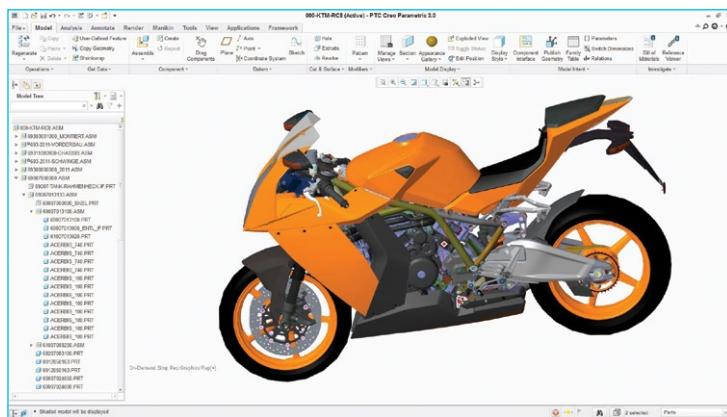
# What are complex systems?

In the context of this guide, complex systems are systems that users must use for functional or professional needs, and that have many components related to each other. These systems are not linear – that is to say that users don't enter a system in one place and leave at the other end when they have completed the task – rather they access them again and again, for various tasks, and they use many components with multiple and consistent relationships to each other.

## Types of complex systems

### 1. Expert systems

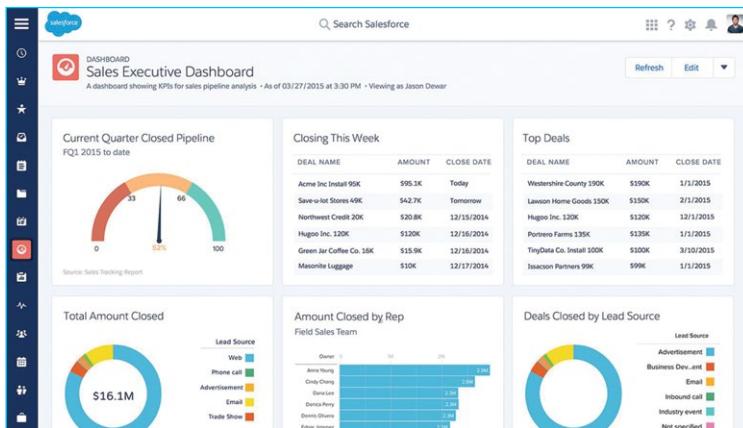
These are aimed at professionals, such as a log for genetic researchers, a graphic design program, a modelling program for engineers, a communication system for telemarketers, or a system for garage mechanics to identify car problems.



Screenshot of the program Creo Parametric from PTC, an expert system that is super professional and that engineers use to draw three-dimensional models

## 2. Intra-organizational systems

These are meant to organize and manage knowledge or processes, such as a payroll system, management of medical records, customer management, sales tracking, or project management.



A screenshot of Sales Cloud - A CRM by Salesforce

## 3. Functional systems for the general public

These are designed to perform useful tasks, for example, word processors or a bank account management application.

**What can microcopy add to your user interface?**

1. Create a positive experience and engage the user

Microcopy reduces the alienation between man and machine, and changes the relationship from a robotic functional encounter to a human personal experience.

Accurate microcopy adds a rich palette of colors to the experience you are trying to create, and adds depth to your interface. Where needed, words will reach out to your users, and enable them to perform an action. Words engage users and can make them laugh and also calm their fears.

Good microcopy changes the connection between the Interface and its users into a mutual relationship that can be rich and even moving. Microcopy will create a dialog with your users that is full of character, such that it makes them feel they are part of the experience, want to work together with the application, and return another day. Microcopy can cause your users to fall in love.

2. Increase usability

Microcopy 'greases the wheels' of the interface and reduces friction with its users.

Well written microcopy, appearing exactly where it is needed, will prevent problems in completing an action, and will save the user valuable time, frustration and a feeling of helplessness. A few small words that appear exactly where the user needs them will prevent a bad experience and unnecessary damage to your brand.

3. Enhance product branding and differentiation

Microcopy written with a full understanding of your brand and target audience highlights the brand's character and differentiates it from other brands.

Instead of a boring and predictable interface, one that your users encounter all over the Internet, your interface will be unique and full of personality. It will support your vision and the values of your brand, sharpen the key messages to your target audience, and create an authentic and unified experience throughout the whole interaction with your audience.

Microsoft Word is also a complex system, even though it is aimed at the general public

## How most complex systems are used and the effect on microcopy

Before we dive into complex system microcopy, I must emphasize that in spite of the general reference to complex systems, there are those dedicated to NASA engineers, others to manage call centers by 24-year old shift leaders, still others for designers or developers working in an agile environment, systems for medical secretaries, and more and more. Here I'll provide guidelines to writing microcopy that is common to most of them, but each system has its own voice and tone, according to the target audience, work environment and system goals. I'll write more about it in the last part of this chapter.

### Professional but practical

For expert systems, the users are dependent on the system to implement and use their professional skills, and also to demonstrate their professionalism when around their peers.

Therefore the microcopy needs to be professional. In contrast to the iron rule of microcopy for the general public, where you need to find a way to simplify professional or technical terms, here the use of professional terms is **necessary** for two reasons:

- a. **Usability** - so that the users will find easily whatever they are looking for using the terms they are used to in their work environment.
- b. **Proof of professionalism** - so that users understand that the system has been developed specifically for them by people who are experts in their field, that it understands the profession and can execute any professional task in the best possible way. The system needs to sound professional to the extent that it enables its users to completely rely on it and entrust their professionalism to it.

**BUT professional does not mean high and pompous, but rather simple and precise.**

**Why?** First of all, in most cases, we are talking about tasks performed as part of a work day, in other words – with some level of pressure. So the microcopy needs to be practical – short, direct, clear, understandable in a split second, and enabling the quick and smooth performance of tasks.

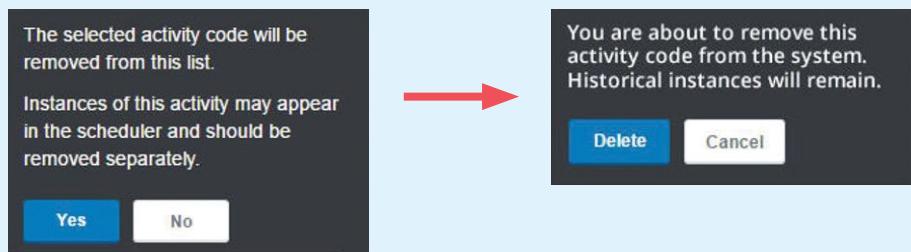
**Your technologically complex system is in daily use in the 21st century, and if it sounds like an ancient dictionary, it will be harder for your contemporary users to understand.** Complex systems require complicated explanations, so you need to avoid using academic, outdated, or irrelevant language that complicates things even more (read all about it in Chapter 2 of this guide).

This "high" language isn't evidence of professionalism but of fixated thinking. It is really worthwhile to be super clear and write **simply, precisely, in a practical and accessible language**. The rule is: write as a professional in the field would talk, and not as if they are writing their doctoral dissertation.

The second reason you should write as simple as you can is to adapt the system to the varying levels of professional understanding: beginners and experts, bright and average. Therefore a simple professional language is always preferable to a complex professional language.

## Examples

Alert from a **NICE** call center management system: Shorter, more active, more direct, and the buttons say exactly what they do.



Notification from the **Ministry of Justice** system (translated from Hebrew). Before reading all three versions, read only the last one. Is there anything unprofessional, offensive or unacceptable? Hint: No. It's excellent. It is possible to be professional and use regular language. And it is also good for accessibility!

### Before

Please note that a file already exists for the ID number entered. This fact confirms that you have already performed tasks related to us in the past. As a result, after clicking the confirmation button, you will be forwarded to an identification screen in order to generate an initial password.



### First step – short and simple

Please note, the ID number entered already exists on the site because you performed tasks here in the past. You are being forwarded to an identification screen in order to generate a password.



### Second step – in regular words

The ID number already exists because you have used the site before. You are being transferred to the entry screen to create a new password.

The title of a feature on the **RealMatch** system for tracking performance of job ads was:

**Ad Distribution Trends and Examples**

But now it is much clearer and obvious, written in simple terms:

**Where do job seekers find your ads?**

# Give your users a hand

Complex systems are, as the name suggests, complex, and they usually require studying and gradual immersion. The principle that the interface should explain itself is not always possible here, because of the proliferation of features, possibilities and elements that are related to each other.

Thus you could say that "our users are intelligent, they'll understand", "we'll solve it with training", "let them call the support desk", "they should look at the user guide". But it is possible to tackle it in another way, probably more effectively, using microcopy to help your users.

## 1. Titles

Pay special attention to the menus, field labels, feature names, graph titles, categories, options in drop-downs, and column headings in tables, and make sure that they are clear and simple, that they explain exactly what appears or needs to be typed, are easy to understand quickly and unequivocal.

## 2. Placeholders and hints

Do you want to provide a short explanation about a field? Write the explanation as a placeholder inside the field (if the user doesn't need to remember it while typing), or as a short sentence above it, or in a tooltip (see Chapters 10 and 14 for best practices). These small but powerful tools will help you educate your users without making them turn to the user guide.

## 3. Tooltips

If you want to explain something complicated about the field or about another element in the interface, put a small i icon next to the label, that when hovered over displays a tooltip with the explanation (as short and simple as possible, but still including all the required information that will save a call to the help desk or a search in the user guide). Complex systems have many more tooltips, and they are longer, compared to simple systems aimed at the general public, and that's just fine.

See Chapter 14 for more about tooltips.

## Examples

This is an effective and complete tooltip for a column heading in a table on the **RealMatch** expert system. It explains what the users need to know about the statuses they currently see in the "status" column, but also explains about other optional statuses, thus it educates the users about how to use the system.

This lets you know if the ad is active or not, and if it is close to expiry. **Possible statuses are:** Active, Expired, Pending approval, Draft, Rejected, or Archived.

Status 

Tooltips can also convey the value of the feature, thus helping the users to get the most out of it.

Compare the clicks generated by each site, to better manage your campaign strategy

Clicks by Sites 

### TIP

**27**

#### You again?!

Users will access your system daily, often a few times a day, and there are professions where all the work activity is centered on one system. At some stage the users stop reading the text and perform the actions automatically.

So don't be too clever with the microcopy of frequently performed tasks. Even if there is a place in your system for clever text, it is better not to use it on those tasks that users perform routinely. The first time they'll laugh, but what about the second time? And the third? And the 30th?

#### 4. Explicit referral to the user guide

If the explanation is long and complex, and in those places where it is clear that users must read the guide to fully understand, don't leave them to get upset about their knowledge gaps and search for the solutions by themselves. Show them that you are aware of the complexity and refer them to the exact place in the guide, as part of the system, and if possible as a direct link.

#### Example

Predictive data is unavailable for this ad.  
This may be due to a number of reasons.  
See [the user guide](#) for more details.

RealMatch expert system

#### 5. Error messages

Error messages are annoying, and if users are in the middle of a complex process and running out of time, then errors are also seen as frustrating and demoralizing. Needless to say, all error messages must be simple and effective (see Chapter 7), but in complex systems even more so. So explain the problem concisely, and guide the users on how to solve it so that they can continue. Use understandable words that are not threatening, express the problem calmly so that you don't scare the users, and add instructions that can be implemented easily.

**Very important:** Present the problem from the point of view of the users, not of the system and not of the developers. For that you should understand exactly what the user was trying to do, what went wrong, and how to fix it – not only technically, but also professionally.

## Example

Following is an error message from the PTC AgileWorx system for managing work processes in an agile environment. In such an environment, the team works for set periods (sprints), and at the end of each sprint they should have completed all the stories assigned to them for that sprint and close them in the system. If the team decides to leave a story open, it needs to be reassigned to the next sprint. This error message appears when the group tries to close a sprint when there are still open stories assigned to it. The earlier version of the message provided a technical explanation to the users about how the system works, what it allows and doesn't allow. The new version was written from the point of view of the users and with the professional understanding that what they want to do in an agile environment is to go back or to move the stories to the next sprint. Even the wording is more fluent, active, and practical, and suitable for the dynamism of agile processes.

Sprint cannot be ended while stories are open

This sprint cannot be ended until the following stories are in a Done or Canceled state:

OK

↓

End Sprint

Some stories are still open:  
S-8 (In progress)

Do you want to move these stories forward to the next sprint before ending the current sprint?

Yes      No

## 6. Empty states

Empty states in complex system are golden opportunities to educate your users and let them know how the system works. Instead of leaving them at a dead end, use this vacant space to explain what they can or should do, how this feature is supposed to work, what should be here, or how to progress.

### Examples

Instead of a frustrating "Data is unavailable" (or in other words "There's nothing to see here"), the **RealMatch** system tells the users what will be here, when, and what they should do now. In this example that is simply to wait.

Data is unavailable



Come back soon

We are still collecting data to provide an optimized prediction  
This may take up to 7 days from publication

No ads to show



Currently you don't have any active ads

Activate ads and then check here to see how they perform

Note that despite the humane and friendly voice and tone of these messages, the professionalism of the brand is not harmed. On the contrary, the new sentence is much more professional, complete and precise.

## But we've been doing it for 30 years now!

Complex systems with hundreds of features and 30 years of experience in the market, provide users with what they have already learned and got used to. On the one hand it's incredibly convenient, but on the other hand the gap between the interfaces they use outside of work and their expert system is widening. Outside of work they enjoy using new interfaces that are comfortable, written in contemporary language, and that are clear and interesting. Then a new work day begins, and they go back through the time tunnel to when their system was developed, with a language left over from the days when developers wrote all the microscopy, and everyone thought it was reasonable to let users decipher the logic of the system on their own.

The problem with veteran expert systems is that it's really hard to change the voice and tone legacy, and if you DO decide to change it – there's no way all the features can be dealt with in one go, not visually and not the microscopy. On the other hand, if we change the microscopy only for the new features, it'll create inconsistency within the system.

So what can be done? If you want the system to advance at some point, you have to start somewhere: write contemporary microscopy for every new feature, and update the microscopy for any old feature that is being updated to a new version. Naturally, you need to make sure that users are easily able to link between similar elements written for a new feature compared to the old, despite the voice and tone differences. Luckily, a change in a complex system can't be so overwhelming anyway, because the professional terminology stays, even if the surroundings become more contemporary.

Before starting this process of change, it is highly recommended to design a comprehensive voice and tone, and then decide what stays and what changes. This will ensure the continuity of the professional language and of the general character of the system and still enable regeneration. This process, in cooperation with different parts of the organization, will also facilitate the acceptance of change among employees and managers (thanks to Shani Polanski of PTC for this important insight from her experience).



## A captive audience is still a target audience

Most complex systems have some level of competition, but the massive resources required to transfer a whole organization to a new system results in many organizations continuing to tolerate a reasonable or even a less than reasonable system for many long years, just so that they won't need to go through the process of change. And there are systems where the audience is really captive, such as government agency systems, so why do we need to invest resources in improvement? They'll manage, they **have** to.

If you are concerned about user experience, and if you strive to provide your users with the best user experience just because that in itself is important enough to you, you'll surely identify with the following sentence that Elinor Mishan Salomon, UX and UI team leader in the Israel Ministry of Justice, said to me that summarizes this whole chapter:

*"Precisely because they are a captive audience! They want to work, and I want them not to get stuck without knowing what to do next. They shouldn't leave frustrated. They should have tools that are not their best friend but can be relied on to work **for** them and not against them."*

And if your users are happy, they use your system more, purchase add-ons, spread the word, and renew the contract. Here's your ROI.

## Why complex systems need voice and tone design

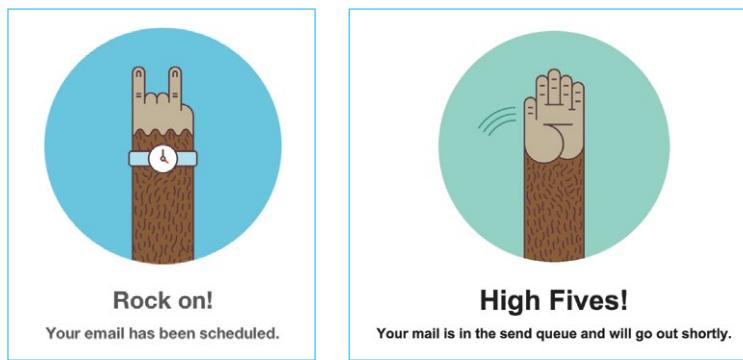
Writing microcopy doesn't mean that you have to write funny or cute text, instead you should design a voice and tone that will suit your users and the context in which they operate (see page 30). In other words, it's incorrect to say that correct and dry microcopy doesn't have character, it does, but it is a dry and correct character, and when dealing with complex systems, it is quite possible that it's exactly what your users need. Even more so if your users are exposed to a lot of uncertainty, pressure, responsibility, deadline or anxiety. Just give them microcopy that is as simple and clear as possible. This is the most empathic thing you can do for them, more than a sad smiley.

Does this mean that complex, professional or business-to-business (B2B) systems need always to be serious and correct?

Well, no, it doesn't.

### Make fun of work

MailChimp runs a B2B system that is friendly, humane and funny with millions of business users. Here are two of their confirmation messages.



And even their error messages are sometimes humorous:

**Another user with this username already exists. Maybe it's your evil twin. Spooky.**

MailChimp's users are very reliant on the system: we are talking about millions of businesses that use the system to manage their mailing lists

and email campaigns. This also involves a high level of uncertainty, tough competition, apprehension, and technical complexity. And a lot of money is at stake. This is a serious subject, worrying, complex and critical.

How come that MailChimp allows itself to be frivolous? And how come that their users are crazy about them? And how did their voice and tone design become the shining example for content writers?

Fact. It is possible to be humane and friendly even in a psychologically complex and technically demanding environment.

True, to do so successfully you need loads of sensitivity to the different scenarios that users face and the context in which every word is spoken, and a well-defined voice and tone. But it's possible. Check out **Slack** for communicating within a team, and **Trello** for managing project teams. They did it too.

A highly recommended B2B voice and tone design, that is super professional and contemporary, is the one for **Salesforce**. Just google "Salesforce voice and tone" and enjoy. Here are two appetizers:

### 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.

## 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.

The screenshots are from the brilliant voice and tone design of **Salesforce** on [www.lightningdesignsystem.com/assets/downloads/salesforce-voice-and-tone.pdf](http://www.lightningdesignsystem.com/assets/downloads/salesforce-voice-and-tone.pdf)

That doesn't mean you must be liberated and light in every system, definitely not. However, **there is no such thing as a single voice and tone that fits all professional or complex systems**. The brand and its goals, the target audience, the relationship between them, and work environment alter it a lot. Whether you're writing microcopy for consumers or experts, you always need to first specify the voice and tone. Yes, always.

**Luckily, there's a full step-by-step guide to design your own voice and tone in Chapter 1 of this book you have just finished reading. It's time to get to work.**

Microcopy is the words on websites and apps that motivate users, reinforce their bond with the brand, help them perform tasks easily, and in general – remake ordinary boring screens into an interesting, exciting and fun-filled experience. For example: text on buttons, website sign up, error messages (and preventing them), field labels, newsletter sign up, instructions, confirmation messages, and more.

"**Microcopy: The Complete Guide**" gives you the knowledge and tools needed to write smart, effective and helpful microcopy for your digital interface. It includes principles, practical tips, and dozens of screenshots from actual sites and apps of corporations, start-ups and SMBs. And no, you don't have to be a copywriter or a content writer. Anyone with an aptitude for words and interfaces can write microcopy. All you need is right here in this book.

**Who will find this book useful?** User experience professionals; Digital marketing managers; Website managers; Marketers and sales personnel; Small business owners; Bloggers; Product managers; UI designers

Fascinated by the words that light up interfaces? You'll love this one.

## Kinneret Yifrah



Runs **Nemala** (ant in Hebrew), the first microcopy studio in Israel. She has written content and microcopy for digital interfaces for over 10 years, and designed the voice and tone for businesses of all kinds and sizes. Kinneret lectures on microcopy and gives practical workshops.

