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Writing for digital experiences

Rita Kutner

Meet the team

Sachi Brown

Agenda

What is UX writing?

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Voice that guides user through the digital journey

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Voice that guides user through the digital journey

Clear, concise, and helpful

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Voice that guides user through the digital journey

Clear, concise, and **helpful**

Tool that helps **establish and maintain** brand personality

What do we do?

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Collaborate
Work with product, design, and tech from the start of production to understand product and goals

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Sync with marketing to ensure a cohesive user journey

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Write!

UX copy. Marketing copy. What's the difference?

Step 1 of 5: Account selection

Choose brokerage account type

✓ **Individual account**
For one owner

○ **Joint account**
For two owners

○ **Custodial account**
For the benefit of a minor

Continue

UX

Simple, helpful guidance through a digital product.

Marketing

Piques a potential customer's curiosity and tries to convince them to try a product or service.

How does good UX writing benefit your business?

Bill Buxton Keynote on UX

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First impressions matter. Good UX writing sets the tone for the dynamic between you and your customers.

# How does good UX writing benefit your business?

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Generates conversations
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Expresses empathy
Good UX copy will anticipate pain points and speak to them, address fears and concerns, and reassure the user you have their best interests in mind.

Product

Design

Technology

UX Writing
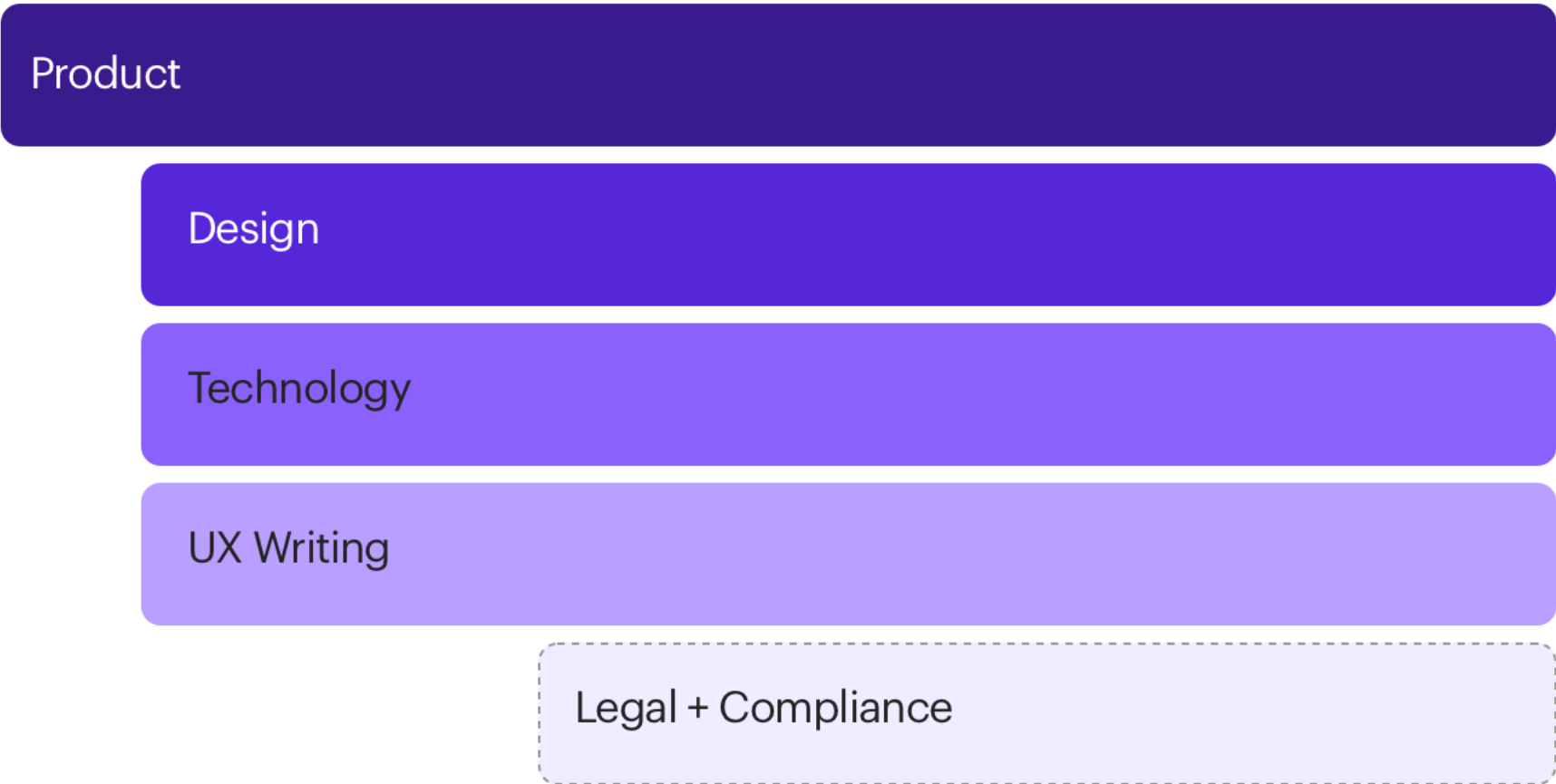
Legal + Compliance

Optional based on project

Product

Design

Technology

UX Writing

Legal + Compliance

Best practices

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Tell a simple story

Use clear calls to action (Place order, Add to cart)

Be consistent

Write a draft, then cut it in half

Keep it relevant to the user

Best practices

Tell a simple story

Error message formula: [Problem]+[Why it happened]+ [How to fix]

Use clear calls to action (Place order, Add to cart)

Use exclamation points scarcely

Use sentence case—it's easier to read

Be consistent

Write a draft, then cut it in half

Use progress bars to orient users and give them idea of how long a process will take

Keep it relevant to the user

Best practices

Tell a simple story

Avoid salesy/spammy language (20% off entire store!!)

Error message formula: [Problem]+[Why it happened]+ [How to fix]

Avoid slang

Use clear calls to action (Place order, Add to cart)

Use exclamation points scarcely

Use sentence case—it's easier to read

Be consistent

Avoid line breaks and widows

Don't shame (No, I'd rather pay full price)

Avoid jargon

Use progress bars to orient users and give them idea of how long a process will take

Write a draft, then cut it in half

Keep it relevant to the user

Visit our style guide at etrade.design

DESIGN

UX Writing Guidelines ˅

UX Goals and Principles
Voice and Tone
Accessibility
People
Grammar
  Abbreviations and Acronyms
  Active vs. Passive Voice
  Contractions
  Currency
  Dates
  Fractions
  Names and Job Titles
  Numbers
  Percentages
  Products
  Pronouns
  Slang and Jargon
  Title and Sentence Casing
Punctuation
  Ampersands
  Colons
  Commas
  Dashes and Hyphens
  Ellipses

UX Writing

UX writing is writing for digital experiences. It is particularly important at E*TRADE because our digital experiences are inherently complex tasks. Our goal is to make these tasks feel effortless.

This style guide serves as a resource to drive efficiency within our product team and consistency across our product content. We use it to help keep voice, tone, and messaging standards in check, while maintaining brand personality. All this works together to deliver a seamless, end-to-end user journey.

In this guide, you'll find our formatting rules, standards, and clear examples. Consider this guide a living document—if you think it's missing something or could be enhanced, let us know! We're continually iterating and welcome all feedback.

UX Goals and Principles
What we aim to do and how we do it.

Learn more

Voice and Tone
How we write our content to maintain brand consistency.

Learn more

Accessibility
How we write to ma[...] content accessible [...] anyone using a scre[...] reader or keyboard navigation.

Learn more

People

Grammar
How we lay out our style and ensure we apply it to all of our content.

Learn more

Punctuation
How we use those tiny marks that help us clarify our messaging.

Learn more

Web Elements
Our style within the [...] but important, com[...] on the page.

Learn more

Slang and Jargon

Avoid slang. It's too casual and colloquial and is generally better suited to marketing materials

Try to avoid jargon where possible. This can be challenging in the financial industry, as there are a lot of industry-specific words and phrases that new users may be unfamiliar with, but that we can't change (exchange-traded funds, cost basis, tax lot, capital gains, etc). If you have to use jargon, use simple words and sentences around it, as well as context clues to help users understand any unfamiliar words and phrases.

Usage

✓	✗
Make your money work harder	Bring home the bacon
Money-saving investment ideas	Investment ideas that won't break the bank
If you file your taxes online, you can also pay them that way.	You are able to request an electronic funds withdrawal only if you electronically file your tax return
Commissions and fees aren't included in your cost basis.	Your cost basis is shown net of commissions and fees.

Q&A