

UX Writer's Guide



Intro



This guide gives advice on how to write copy for the Osome product.

For more general advice about writing for Osome, such as how to write for blogs, please see our [Style Guide](#), [Glossary](#) or [Preferred Terms](#).

In short: product copy is the words and language applied to a customer's digital journey. Adding an item to your basket on eBay, booking a holiday on Expedia, applying for a job on LinkedIn; each of these actions are made possible by product copy.

CTAs (call to action), navigational buttons, headers, menus, and fields; these are all examples of UI (user interface) elements where product copy may appear.





We're all guilty of being skim readers these days, often glancing over apps and websites and picking out a handful of words; just enough to get us through to the next page.

Articles, emails or blog posts are usually picked out by the user, with specific intent applied to the opening and reading of said content. In the UX and product world, we aren't given that luxury. People usually just want to get the job done as quickly and easily as possible.





Steve Jobs' approach to design and UX was to create products that you'd forget you were using. Thinner, lighter, foolproof UI, wireless connectivity, fuss-free.

We approach UX copywriting in the same way: if you can help a user complete their goal without them even considering or noticing your copy, then you've done the job.

Users often won't even 'read' your words. Realistically they're just looking at them and subconsciously navigating, using your words as signposts to complete the task as quickly and effortlessly as possible.

And that's ultimately the very crux of UX: be clear, be helpful, and try to become invisible.





Our four pillars
of UX writing

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1. Plain English



We want to empower and support our users in their business journeys, making it as simple and easy to understand as possible. Jargon, bloated copy and technical language are big no-nos. We don't want our customers to have to look up definitions, so if we have to use a technical word we find a way to explain it.



2. Less is more[⚡]

Referring back to Steve Jobs and Apple's approach to design, limiting the intrusion of a product or process is an essential part of UX. The fewer intrusions (needless words or punctuation, emojis etc) the more likely a user will complete their task.





3. Assume nothing

Many of our customers will have little knowledge of business or finance, so assume this of all our users. Explain and describe steps in a journey, consider contextual help and pointers, and provide everything a user needs to complete a task.





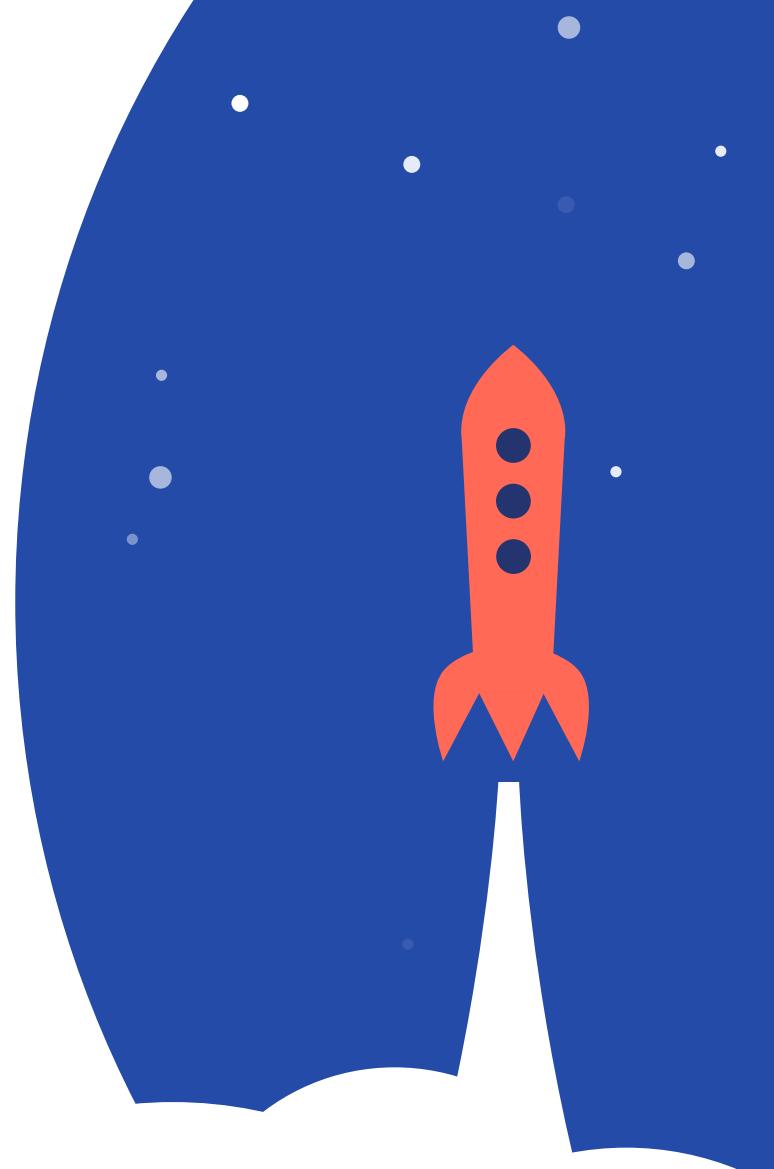
4. All about the user

UX writing isn't one's opinion like a newspaper or a blog, it isn't a stylistic piece of fiction or entertainment like a novel. It's copy that's crafted purely for the user's benefit to help them complete a task, like an instructional manual. A user centric approach is ultimately what defines user experience.



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Abbreviations and acronyms



The rule of thumb is to use the abbreviated form (or acronym) if it's better known than the spelled-out version, eg: VAT, NATO or the BBC.

Spell out lesser-known acronyms, particularly finance ones, such as CAGR (Compound annual growth rate) or ROIC (Return on Invested Capital).

For abbreviations, we don't use full stops at the end but we do use a colon for 'e.g:' and 'i.e:'

Most abbreviations are already clear and obvious (etc, Nov/Dec, Mr, Mrs, inc, PDF XLS), and removing the full stop is a good opportunity to declutter.



Accordions

Accordions are a set of vertically stacked headings that users can click to reveal more information. They help to reduce the length of pages.

Users should feel confident that when they click a heading, they'll get the right information. When a user doesn't get the right information they might give up on their journey.

For that reason, copy becomes particularly important in making sure that the heading matches the content that will be revealed.



Accordions cont.

Accordion titles must be:

- Concise and descriptive
- Clear and obvious
- Consistent in length, grammar and tone
- Written in sentence case
- Numbered i.e: 'Step X:' if the user has to go through the accordions in a specific order

Use consistent language for each section, either:

- a) Descriptive i.e: 'Personal details' or 'Account services'. Descriptive headings work best when there are different form fields within a section and you can't include all of them in a button.
- b) Actionable i.e: 'Enter your personal details' or 'Manage account services'. Direct headings work best when you're asking the customer to do only one thing within a section.



Active and passive language

Write active sentences, not passive ones. Say “The accountant filed the paperwork”, not “The paperwork was filed by the accountant”. Active sentences are easier to read as it’s clear who has done what.

Passive sentences do have their uses, like avoiding blaming a user, e.g: ‘An error occurred’ isn’t quite as accusatory as ‘You caused an error’.

Even then, it can be useful to be clear about what’s gone wrong - so if you do use passive, do so sparingly and with consideration.



Bullet points

Bullet points can be a useful way to draw attention to important information, helping your reader to identify key facts and information.

There's no 'in-stone' rule when using colons to support bullet points, as it will often depend on the case. Consider the narrative or purpose when using a colon, as sometimes it will be unnecessary and increase clutter.

Each bullet should begin with a capital letter.

When signing up for an account, we'll need:

- *Your business name*
- *Proof of address*
- *Proof of identity*

Osome 2.0 update features

- *New invoice management*
- *Notification redesigns*
- *Easier file uploading*



Bullet points cont.

Begin each bullet with the same type of word where possible. If you start your first bullet with a verb, each subsequent bullet should also begin with a verb in the same tense.

Each bullet point should usually contain a singular point, object or sentence, and be of a similar length where possible.

Where two sentences in one bullet point is unavoidable, use a full stop to break up the two sentences and use a full stop at the end of the bullet. Apply a full stop at the end of the other bullet points for consistency.

Where possible you should consider arranging the bullet points to limit irregular white space created by new lines, but only if not sacrificing layout or narrative (i.e: a chronological list).

When signing up for an account, we need you to:

- *Add your business name*
- *Provide your proof of address*
- *Upload a copy of your passport*

When signing up for an account, we need:

- *You to add your business name*
- *Your address*
- *A copy of your passport*



Buttons and CTAs

First and foremost, a button's copy should indicate what will happen if a user clicks it. Sticking to verbs to indicate the action is a quick and easy way to do this, though not always appropriate.

Secondly, buttons should be clear and concise, remember: less is more. Try not to use more than two words and certainly no more than three. There may be rare occasions where more are needed.

Pronouns, adjectives and other words like 'now' or '!' are normally unnecessary. Conjunctions can usually be removed or swapped with punctuation.

It's also important to consider the user's journey and their [progress](#) when writing button copy. Does their next click end a process? Use 'Finish', 'Complete' or 'Submit'. Is there another screen they need to navigate to? Use 'Continue' or 'Next'.

Avoid generic 'Click here' or 'Find out more', and instead try to communicate the value of the customer's click: why they should click and what will happen.

If your copy does its job, there's no need for supporting text around the button. 'Click below to find out more' or 'Buy this product below' are among the most pointless phrases, as the button will usually indicate this already. Use 'Create account' on a button instead of 'Create an account below!' + a 'Create account' button!



Capital letters

Generally speaking, avoid using all caps. That being said, our design architecture uses capital letters across our UI and CTAs, and is used to catch the eye of the user.

It's important to consider accessibility with capital letters. Screen readers announce each letter individually, and people with dyslexia struggle to differentiate the letters when they're all at the same level.

Title case is very rarely used. It's unnatural to see on a page, and even harder to read.

File types such as PDF or XLS should always be capitalised for extra clarity.

As ever, proper nouns are still capitalised:

- Names
- Brands
- Companies
- Titles of people
- Books
- Articles
- Publications
- Countries
- Nationalities



Checkboxes

Checkboxes are used when the customer can select multiple options. Each should be short, succinct and of equal lengths to each other where possible.

It's also important to use supporting text to indicate how many options a user can select, or needs to select. See [error messages](#).



Contractions

We love contractions - they make our copy approachable, human and easy to follow.

Use them as often as you can, but there may be some occasions where the full words are better to use for emphasis or importance i.e: 'We will be forced to close your account.'

There are some contractions that can be a little more colloquial and difficult for users to understand. These are best avoided:

- That'd
- It'd
- Could've
- Must'n've
- Should've
- That'll
- Wouldn't've



Currencies

We prefer currency symbols to letters when writing out figures. You can consider supporting symbols with currency codes or other copy for extra clarity and to avoid confusion between similarly named currencies:

The total bill is \$40,000 USD

Conversely, you should use letters when displayed as part of a sentence and leave out the symbols. There's normally no need to spell out the whole thing.

All currencies are displayed in GBP

All currencies are displayed in Great British pounds (£)

For large amounts, you can suffix the number million, billion or trillion, with a lowercase m, bn or tn:

'300m' not **'300M'**.



Dates and times

There's lots of ways to display dates, with regional variations and the option of letters or numbers. We use the UK system of date, month then year.

Dates offer lots of opportunities to clutter, so simplify it as much as possible by not using suffixes like 1st or 2nd, just use the number.

Spell out dates within body copy or places that allow for more room using day, date, month (Tuesday 1 April).

Use the numbered date in places where space is limited, like fields and forms i.e: (DD/MM/YYYY).

Days and months can normally be shortened but it's dependent on the situation. Shortened is less cluttered and less to consume when in a list of months, whereas it's clearer and easier to read the full month when it's by itself. Use your best judgement by balancing clarity with clutter.

To avoid any confusion, times should be written in the 24-hour clock. Split times with a – and a space either side, i.e: 12:00 – 16:00.

Sometimes you may need to add a timezone. Use capital letters, a space after the number and no brackets i.e: 17:00 GMT.



Emojis

While emojis do have their place within marketing copy, generally speaking they don't belong within product copy. They're distracting, disrupt readability, and affect accessibility.

In very rare cases where copy needs to be 'broken up' or supported with something other than words, work with designers on graphics or illustrations instead.

The one exception for emojis' use is within live chats or notifications. But even here they should be used with consideration. Really excitable smiles or love hearts can be annoying and over-the-top, and could also be misconstrued. Try to be as neutral as possible by using agender faces and yellow skin tones.



Error messages

There's a few considerations when crafting error message copy. Do your best to communicate the problem to the user, and more importantly what they can do to fix it. You may also want to explain why the issue has occurred, but sometimes this isn't necessary.

Error messages are a good place to add a dash of character or personality, although it should be used with moderation as it can be easily overdone. We don't want to [annoy the user further](#).

Consider where the fault lies: remember the customer is always right, so don't put the blame on them. 'Make sure X' and 'Try Y' are gentler ways of showing users where they might have gone wrong. On the flipside, we also don't want to take ownership of something that isn't our responsibility.

Apologies, pleases and thank yous can sometimes be overkill, so be careful when offering it for something that's often only a minor inconvenience. Being polite to nudge users in the right direction is always a good rule of thumb.

You messed up - try again!

Silly - look what you've done! Try refreshing the page.

We're so sorry that's happened - please can you try again

You haven't entered in your details

Oops - something went wrong!

That's our bad - please try refreshing the page

Please try again, there seems to be a problem

Please make sure every field is filled out correctly



Footnotes

Footnotes can be used to reference additional information from a point within the main body of copy.

Care should be taken when using footnotes. Ideally, all important information should be presented to the user upfront within the main body of copy. As such, footnotes usually supply additional instructions for the user (like ‘*indicates required field’) or adding extra information that is relevant by not disrupting the design (like ‘Currencies are displayed in GBP’).

We use asterisks (*) to indicate footnotes, and the colour will depend on its use and the design.



Forms and fields

Well-designed forms are critical to the success of our business. It's even more important when we're trying to relay complex information while asking them to enter details. So our fields often need to do these two things.

Fields need to be labelled clearly and correctly, and is a design element that shouldn't be influenced by personality, character or TOV. They need to be to-the-point and matter-of-fact:

- Name
- Contact number
- Bank account number
- Bank name

- Your name is?
- Number (call me maybe?)
- Bank acc. no.
- Account name

Sometimes extra information needs to be provided. For example, specify whose email address is being requested: 'Your personal email address', 'Your business email address' or 'Your accountant's email address' for example.

You may also consider using tooltips to elaborate or provide extra contextual help.

You should only capitalise the first letter of each field, besides the usual proper nouns, abbreviations, brand names etc.



Formatting

Formatting and design choices normally fall to Product Designers, with UX Writers supporting with suggestions and ideas. Therefore, formatting should be decided on in collaboration with the team.

Generally speaking:

- Bold text should be used to emphasise
- Italics should be used sparingly as its normally used to quotes or reference
- Underlined text should be used to indicate links
- Never use strikethrough text



Gender

Avoid gendered terms like chairman (where 'chair' would do). If you have to use a gendered adjective, use 'male' and 'female', not 'man' and 'woman'.

Always use 'they' and 'them' instead of 'he' and 'she'.



Headers

Headers are among the most important elements within UX. They help distinguish pages from others, manage user journeys and expectations and provide guidance.

As obvious as they may seem, headers can often be underutilised or used incorrectly altogether. It's important that the header gives as much context for the rest of the page.

It's important to consider formatting and layout when crafting header copy, as they'll nearly always be differently sized or coloured.

As such headers should typically be no more than three words, depending on the circumstance.

The capitalisation of headers varies across the Osome product, so often this will be taken out of our hands. Do not use title case.

As with accordians, use consistent language for headers within the same section, for example:

Descriptive i.e: 'Personal details' or 'Account services'. Descriptive headings work best when there are different form fields within a section and you can't include all of them in a button.

Actionable i.e: 'Enter your personal details' or 'Manage account services'. Direct headings work best when you're asking the customer to do only one thing within a section.



Help text

Help text is a form of contextual help – it's any copy that provides more information for the user. It can be included in-line, providing necessary information to help users complete forms quickly and accurately.

If you believe a user journey might be unclear or complicated, work with the our designers on developing an area for help text, or other contextual help.

Ensure that the copy you provide:

- Summarises the point as succinctly as possible – aim for one sentence
- Doesn't contain hyperlinks that would take users away from completing the form



Hyphens and dashes

We like hyphens. They encourage readability and flow, and can be used as a cleaner, softer punctuation choice. See below:

Your accounts are now connected - we'll take care of the rest

Your accounts are now connected. We'll take care of the rest.

Use hyphens when including a period of time in a compound adjective describing a noun:

- We will publish our first-quarter results in May
- He had a long-term plan

Use hyphens in compound adjectives that express quantity:

- A five-star review
- One-dollar coin



Links

Text links are used to provide extra information or context usually on a separate screen, as buttons and other UI elements are normally used for navigation. Linked text should be carefully used within UX, as they can sometimes distract or confuse a user from completing their task.

Also consider whether the link will navigate the user from their current screen, or open a new window. This means that an indicative 'links out' icon might be needed, which may impact design or copy decisions.

Text links allow users to navigate between pages or content items. They're used primarily for navigation but can also be used for low-priority calls to action or if there are multiple actions that are all the same priority.

Linked text should always be underlined, and this is normally the only instance where text should be underlined.



Live chat

Live chats are an important part of our business model, with its importance and influence on our product growing with each release.

In many ways, live chat slots between UX and marketing as an extension and representation of both.

While live chat will point users towards certain things and provide extra context or help, it's also an opportunity to communicate our brand and value proposition.

As such, we're given more leeway with our copy within live chats, and are encouraged to use more personality, character and even the odd emoji.

It's important to be friendly, approachable and human in our language, as this is a defining Osome feature: having real humans on hand to help and provide expert advice.

That being said, it's easy to get carried away with niceties, greetings, flowery language or other unnecessary extras. Maintain our 'fuss free' approach and try to be as succinct and clear as possible.



Menus

Menus are perhaps the most important element of UI, and allow users to navigate through websites or apps to find what they're looking for.

As such menus should be nothing but descriptive, just like a street sign or a map. There's no need for character, personality or style, it just needs to show people where things are.

It's also important to consider the type of menu you'll be creating copy for, as there are many variations with different purposes and designs.

Toolbar - A fixed navigational bar normally placed along the top of websites and their homepage, could also be located to the side, known as a sidebar

Drop down - A menu that 'drops' downwards when a user interacts with it, to reveal extra options or choices

Hamburger menu - Three lines used to indicate a hidden menu or toolbar, great for use on mobile devices

Kebab menu - The same principle but using three vertical dots, Google Chrome's a good example of this

Breadcrumb menu - Used to show a user's journey history, by [indicating the steps they've taken](#)

Tabs - Used to identify different areas within a similar space, usually without navigating away or reloading the page

Footer menu - Like a toolbar, a fixed navigation bar found at the bottom of the page. Usually has less important or deeper information, or perhaps a sitemap.



Mobile

Copy can be more challenging to read on mobile than on desktop.

Users see less copy at a time – often they have to remember something they've seen on a previous screen, and users' short-term memory is notoriously unreliable.

Users have to scroll through the page – they can't scan-read a whole page quickly, and instead have to move around. This takes time and makes it more likely that a user will forget what you've already told them.

Make sure that mobile copy is:

- Concise, so that more copy can fit on a single screen, cutting down the amount a user has to scroll through or remember.
- Self-contained, so that a user doesn't have to remember something they've read before.
- Scannable, so that a customer can navigate a longer page faster and also gather the information they need quicker. Use clear sub-headings to help users jump around a page, and use bullet points so a customer can understand a lot of information more quickly.



Modals

Modals are pop-up boxes that can be used for notifications, or information and contextual help. They can also be used for taking customers through new products and user journeys, without taking them out of the journey they're on.

Make sure that the modal title is clear and descriptive, and explains exactly why it has appeared and what the user needs to do next.

Align the title with the body copy and CTAs, but be careful not to repeat this same information. Any additional body copy should offer succinct clarification and elaboration.



Notifications

Notifications are used to flag a milestone within the journey – often indicating something that's gone right (success messages) or something that's gone wrong ([error messages](#)).

Notifications give us copywriters an excellent opportunity to really 'get it right' for a customer, by injecting tone of voice and making sure our copy is as directional and helpful as possible.

There's usually less room to work however, particularly when compared to the aforementioned modals.

It's also important to consider the differences between some notifications and when and where they appear, for example: mobile notifications that appear on a user's iPhone lock screen, or a message that appears on their desktop homepage. For example, the former is one of a few chances to spice up copy with [emojis](#).



Numbers

Contrary to the correct usage of spelling out numbers one to nine, within product we use the digits (1-9). It's more direct and easier to read, and particularly within the tech and finance space.

For the same reason, add commas to divide numbers higher than 999, with one comma preceding each group of three digits i.e: 1,000; 10,000; 50,000,000 etc.



Progress

Progress trackers are an essential part of user experience, and are essential in managing a user's journey and expectations. Progress indicators like bars or checklists show users how much time or effort they need to complete a task, and visual queues like ticks and crosses are encouraging and motivational.

It's important to understand the subtle differences between progress tracking phrases so that a user's expectations are managed correctly, especially within finance. Many verbs are similar in theory but different in practice, such as 'Pending' and 'Processing'. Also consider how vague words are in practice as well, such as 'Finished'. What is finished? What does that mean for the user? Are these things clear?

Try to be as definitive as possible with your copy, but often words can be supported with indicative colours, ticks, progress bars and other design elements. Work collaboratively with designers on this.

Tense is a simple yet important consideration when writing to indicate progress. Present tense indicates something ongoing or in motion, while past tense indicates something is completed.

While less is usually always more, progress is somewhere where you could consider using extra words for clarity, depending on the situation. For example, is 'Completed' or 'Payment completed' better to use?



Punctuation

Full stops .

Unlike editorial copy, product copy is given more leeway when it comes to punctuation. The rule of thumb is to avoid full stops where possible; they're normally unnecessary, they formalise things, and they're extra clutter.

Therefore, we don't use full stops for:

- Headings
- Field labels
- Buttons and CTAs
- Bullet points
- Any other navigational constructions unless the copy has more than one sentence
- After a title, i.e: Mr Thomas not Mr. Thomas

Exclamation marks !

Like all punctuation, the exclamation point has its uses like expressing surprise, humour or shock via error messages or notifications. Use tentatively, as they can easily be too much.

Percentages %

It's important that users can quickly scan text and understand the meaning within seconds, so we use the percentage symbol '%', and not 'per cent' or 'percent'. There's no space between the number and the sign either: '23%'. Use a full stop to separate digits, not commas i.e: 2.4% not 2,4%.

Brackets ()

Avoid using brackets to create plural versions of a term like 'Select item(s)'. Just use the plural version. Also avoid using brackets to indicate less important information, just use without.



Punctuation (continued)

Slashes /

Add a space either side of a forward slash when dividing two distinct terms, e.g: part-time / full-time. This makes it easy for the user to see each individual word when scanning copy.

We do not capitalise the words after the slash, even if the slash follows the first word of a sentence i.e: 'Credit / debit cards.'

Avoid backwards slashes.

Quotation marks “/”

Use single quotation marks and avoid doubles where possible. Use them when quoting from another source, and less so for emphasising.

Use double quotation marks if you have a quote within a quote: 'Our customers love our new features, describing them as “essential new tools for my business”'.

Ampersands &

We don't use ampersands. They stick out unnaturally against the height of regular text and disrupt the flow of a sentence, making it more difficult to read quickly.

They can be a challenge for some users when considering accessibility as well.

There may be rare occasions when an ampersand could be used, perhaps in a header that must be below a certain character count, or as part of a widely recognised acronym like Q&A or R&B. Brand names like M&M are another exception.



Radio buttons

Radio buttons allow users to select an option from a list of choices. They differ from checkboxes in that users can only select one option, as opposed to many.

As such you must be careful with your copy, and ensure it functions with the purpose of radio buttons. See below.

Please select your bank account

- **Halifax and RBS**
- **HSBC**
- **Lloyds TSB**
- **Natwest or Nationwide**

This opposite wouldn't work because if users have more than one account they cannot choose multiple options. 'And' and 'Or' are also words to be wary of using with radio buttons, as the user may want to select some but not all of the option (like Halifax, but not RBS).

Here's how you could alter the example.

Please select your primary bank account

- **Halifax**
- **RBS**
- **HSBC**
- **Lloyds TSB**
- **Natwest**
- **Nationwide**



Responsive design

Responsive design means that content can be replicated on any size of device. Design components shrink, expand and reflow depending on whether the user is on a desktop, tablet or mobile. However, the copy itself will stay the same.

Wherever possible we write copy that can be used on all digital platforms, across desktop, mobile, tablet and any other relevant contexts.

Some tips include:

- Avoid platform-specific language such as 'click' or 'tap', use 'select' or 'choose' instead.
- Not making assumptions about how your content is displayed: using 'above' or 'below' in a form instruction may not work on a mobile.
- If you're worried about the length on desktop, it's definitely too long for mobile.



Search

An essential element of UI, one that many users may rely on for navigation.

Placement is an important part of working with search bars, with copy often a supporting part of the design.

Does the text around the search bar already indicate where the search will look? If it's not immediately clear you may consider adding a word after 'search' i.e: 'Search invoices'.



Sort options

Sort options allow users to change the order of content on a page.

The sort option should be labelled with 'Sort by: [followed by sort option]', such as 'Sort by: most popular'.

Each sort option should be labelled in a concise way, describing the effect of selecting it.



Success messages

Success notifications communicate when an action has successfully been completed and recognised by the system.

This is a particularly good opportunity for building relationships with our customers and celebrating milestones, as well as reinforcing our brand, by infusing our copy with personality and tone of voice.

Look at using more emotive words to express moments of delight, and as ever, use the active voice.



That and which

Simply put, use 'which' when the clause that follows isn't essential to the meaning of the sentence – it just offers extra detail. Use 'that' when the clause is essential and affects the meaning.

Consider the different meaning of these two sentences:

If you want to close the bank account, which has been open since 2015, you need to visit your local branch.

If you want to close the bank account that has been open since 2015, you need to visit your local branch.

The first is giving extra detail about the account; the second is making specific reference to an account open since 2015.



Warnings

Warnings communicate upcoming potential issues for the user. These are yellow and use the warning icon.

The copy should clearly communicate what the issue is and how it will affect the user:

Consider tone of voice. The more serious the issue, the more urgent your tone might become – but the language you use should be human and conversational.

Present how the issue will affect the user, rather than what's happening. Use 'you' instead of 'us'. For example, 'Our service will be unavailable between...' should be 'You won't be able to access your accounts between...'.

Avoid using 'Warning' as a heading for these types of messages. Instead, use a heading that will explain the issue.



We and you

Personal pronouns make our copy more human and easier to read. Watch out for text that includes more 'we' than 'you' – that means we're talking about ourselves, not the customer.

Avoid disingenuous clichéd terms like 'At Osome, we understand...'

Similarly, don't put words in the customer's mouth, as in 'You'll be delighted to know...' It's presumptuous and can irritate the customer.

In situations where it's obvious that we're referring to ourselves, avoid using 'Osome'. This is particularly relevant for unnecessary constructs such as 'Osome transaction tools'. If the customer is within the Osome environment this is unnecessary.



Useful links and resources

XXX

YYY



Questions? Thoughts? Ideas? Feedback?



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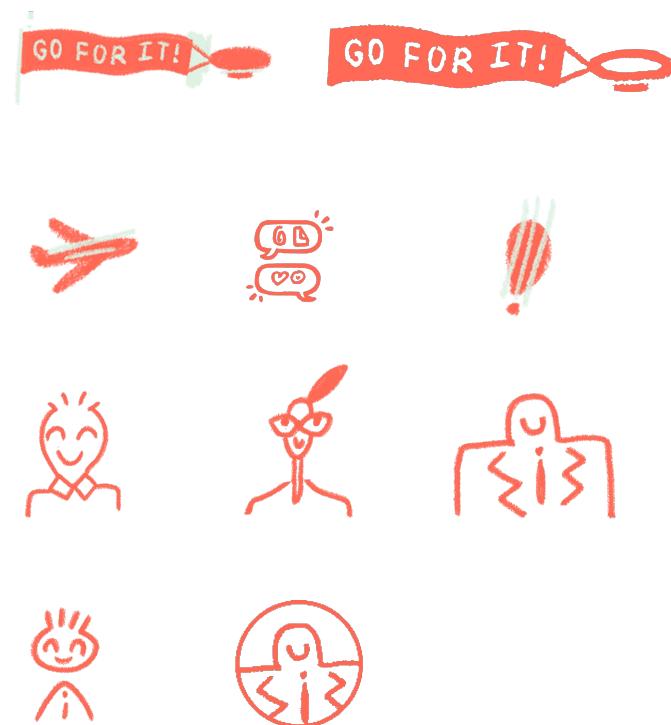


Icons

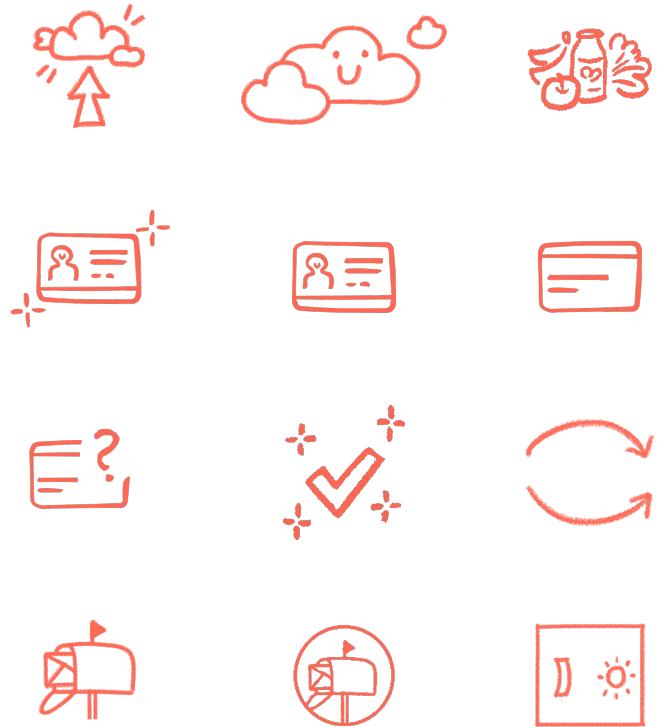
Background set



Set 1



Set 2



Icons

Set 3



Set 4

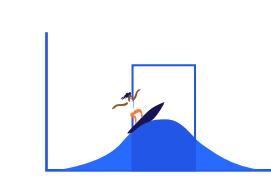
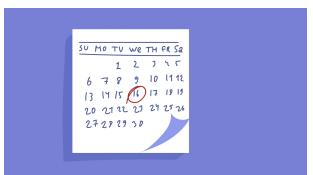


Set 5



Illustrations

Set of illustrations used by the company



Illustrations

Set of illustrations used by the company

