



Voice & Tone qualitative testing

2023

Lauren Englisbe, Sam Chang
Content Design



Kickoff agenda

- I. What we're doing and why
- II. How we're doing it
- III. What we found
- IV. High-level takeaways
- V. Tones in action



What we're doing and why



Goal

What: Given urgent churn and acquisition issues, we're looking to explore new voice tones through existing dotcom and in-app content, and validate the efficacy of those tones through user testing — which we've never done.

Why? Although we can't control product delivery cycles, tech mishaps, or global circumstances, we can always lead and inspire our audience to make the best decision via communication — and get their feedback on what works and what doesn't.

Current vs. proposed tones: some data-backed tweaks

plainspoken → **Clear Communicator**

genuine → **Empathetic Persuader.**

translators → **Confident Expert**

dry humor → **Real Person**

Hypotheses: dotcom

V&T refinements allow us to tease out claims and content in more dynamic — and sophisticated — ways.

- **Optimized product messaging:** We can use the new tones to tease out product values around powerful claims and mitigate doubts and concerns. We can also use keywords (like “e-commerce”) more prominently so users are clearer on our offerings.
- **Increased sign-ups, upgrades:** Updated V&T principles (via copy) will help persuade Yachts & Speedboats to convert to paying and/or upgraded plans.

How do we achieve these things via V&T? We can expertly and efficiently engage with Clear Communicator, Real Person, Confident Expert, and Empathetic Persuader tones.

Hypotheses: in-app

V&T refinements will assure high-value customers that Mailchimp is no longer a tool they “need to graduate from.”

- **Optimized product messaging:** We can use the new tones to tease out product values around powerful claims and mitigate doubts and concerns. We can also use keywords (like “e-commerce”) more prominently so users are clearer on our offerings.
- **Decreased churn:** Sophisticated marketers are going to Klaviyo because “they do the same things as Mailchimp, only better,” so we wish to persuade Y&S that MC is **the right choice from start to finish** given our incomparable experience in the space + the features in our premium plans.

How do we achieve these things via V&T? Leaning on Clear Communicator will provide greater, quicker clarity on our offerings so users know we have the solution/tool for them while Real Person and Confident Expert tones can assure more.

How we're doing it



Dotcom testing: A/B test (existing content vs. new copy)

Copy tones can “make or break” the content they deliver by focusing on the user’s perceived intent and behavior (with precise tones and language choices) — we’re looking to optimize MC content with the best copy drivers in these tests.

Dotcom/in-app testing process:

- Test high-value pages/places on the main HP (condensing scrolling content, fine-tuning “Learn More” CTAs, and optimizing precise places on the H1 space).
- Validate conversion: Will new V&T recommendations persuade prospective + existing Yachts & Speedboats to upgrade, sign up, and sustain MC memberships?
- Validate that Yachts & Speedboats confidence *and* conversion are highly dependent on our dot-com messaging.
- Create clear best-practice standards for dotcom copy.

Summary: A new V&T will elevate and fine-tune marketing content — new testing data will help confirm our path forward.

In-app testing: qual tests (no A/B)

We're always concise and clear in-app. These users are task-oriented, so we don't want to get in their ways, however, we can invite/inspire them to upgrade and perform an optimized "next" action.

In-App Testing Process:

- Test high-value pages via the major navs (Create, Campaigns, Audience, Automations, Analytics, Website, Content, Integrations), the dashboard, data-feedback pop-ups, and select journey content laserizing in on headlines, sub-copy, and prompts.
- Validate that new V&T recommendations persuade existing Yachts & Speedboats to upgrade and, most importantly, sustain MC memberships.
- Validate that Yachts & Speedboats churn can be mitigated with our in-app messaging.
- Create clear best-practice standards for in-app + related marketing copy.

Summary: These V&T qual tests will really tell us what works/doesn't. They'll be running at the same time as dotcom to maximize efficiency and learnings.

Recruiting audience

- Mix of advanced mid-market customers and prospects
- Unmoderated user test

What we found



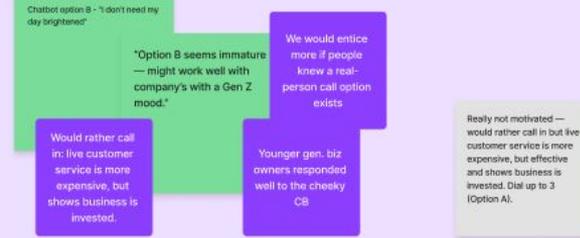
Dotcom synthesis

Patterns: What clear themes are coming up?

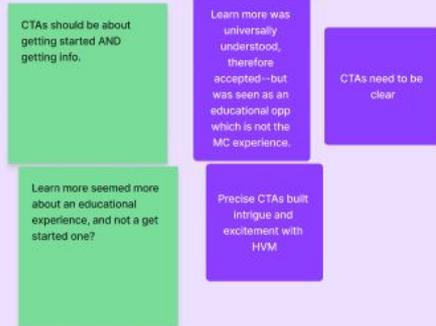
Show me the money



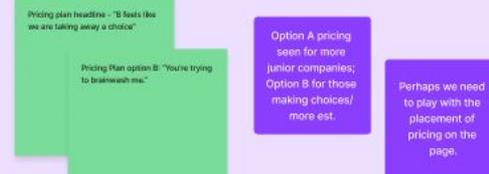
Cheeky Chatbot polarizing, younger



CTAs need to relate to customer journey



Pricing page = too early to close the deal



We have commercial vibes



Dotcom



Hypotheses dotcom: positive results

- **Optimized product messaging:** We can use the new tones to tease out product values around powerful claims and mitigate doubts and concerns. We can also use keywords (like “e-commerce”) more prominently so users are clearer on our offerings.
 - **Result: positive—with caveats.** We can mitigate product doubts and concerns with voice tones, but **revenue, profit, and data-driven values** must be teased out *the most* on dotcom.
 - **Evidence:** Profit/revenue value was consistently most effective in headlines and in sub-copy related to pricing plans, and “growth” and “data-driven” had positive responses.
 - Email features (product features) had the least tone impact at the introductory homepage stage.
- **Increased sign-ups, upgrades:** Updated V&T principles (via copy) will help persuade Yachts & Speedboats to convert to paying and/or upgraded plans.
 - **Result: positive.** On a scale from 1-10, the average interest in signing up after the entirety of the test was 8.25/10.
 - **Evidence:** Revenue language led users to express belief that their profit potential would be increased.
 - Overall features on the page were seen as substantial by users, and user “confidence” in Mailchimp was noted.

Dotcom tones: data results

1. Clear Communicator > Plainspoken:

Clear language is foundational to the V&T—so dial-up *everywhere*.

- Clearly stating profit and revenue values will always be sought/well-received—from the H1 space to the integrations block.
 - Growth language was also well-received, but we should combine this with profit for the highest efficacy.
- Concision is important to clarity—plainspoken brevity is not.
 - We found users have an appetite to read, especially in sub-copy content relating to metrics and important features re: our tenure in the space and products. That said, long, dense language was universally unappealing, i.e., the retro scrolling slide section.
- Headlines + CTAs should be clear and purposeful.
 - Although “Learn more” was globally understood and praised for clarity as an educational experience—this is disconnected from MC’s actual Learn more navigation. **Page mapping + extra care around “Learn More” usage should be considered.**

Dotcom tones: data results

2. Empathetic Persuader > Genuine: Dial-up as the user journeys toward a decision; dial-down in persuasive content areas (Pricing, etc.) to avoid overkill. **(Opposite to in-app.)**

- The Empathetic Persuader tone should be mapped to the marketing funnel—as you move down the funnel, it’s more about closing the deal.
 - The test suggested that persuasion should be increased as we lead to a sign-up/sale, but users indicated that they needed to feel “freedom” in making their choices. Persuasion should be softened with empathy.
- Most users did not express affinity for persuasion in the pricing header.
- **Note: It would be interesting to play with HP hierarchy in a live test, i.e., if the pricing page were on the lower part of HP, could the headline tone be more persuasive and better received?**

Dotcom tones: data results (cont.)

3. Confident Expert > Translator: Dial-up in sub-copy, prominent headlines, and educational spaces. **(Opposite to in-app.)**

- Users spent time with the fine print, i.e., sub-copy, and stats/metrics when it was relevant to their business.
- Users expressed an appreciation for guidance and support.
 - The majority of users demonstrated a preference for the precise CTAs of the feature pages, and the assuring sub-headline/sub-copy tones that related to our tenure and/or our capabilities.
- **Note: Do not use the Confident Expert tone in conjunction with the Empathetic Persuader tone—too strong.**

Dotcom tones: data results (cont.)

4. Real Person > Dry Humor: dial-up in chatbot, customer success/svc; dial-down in decision-making areas.

- Real human support is needed in both our messaging and problem-solving—we should prominently feature it in our chatbot, CTAs, etc.
- Different generations of users responded differently to cheekiness.
 - Dry humor should be used sparingly, especially when speaking to a global audience (many of our testers were non-native English speakers).
 - Users demonstrated understanding of “friendliness.”
- **Note: Friendly, real-person language is always most effective when paired with the Clear Communicator tone.**

Dotcom user insights

- **High-value marketers are not of a set age or locale**, so we should be sensitive to generational nuances of language, and we need to speak to a global audience.
- **There will always be interest in revenue or profit-related content**, no matter the stage/age of a business.
- Per this test and in general, people get information fatigue. We need to be intentional about the content we feed users: from imagery to copy.
 - CTAs should be clear/precise (Learn more is distinctly an educational opp).
 - We should be concise but always offer enough lead-in context (through sub-copy)—there was appetite for sub-copy context: many users expressed appreciation when they saw sub-copy.
- We observed strong negative *and* positive reactions when users encountered Empathetic Persuasion in decision-making areas. We can find an effective middle-ground with this tone by softening persuasion with empathy and making users feel they are driving their decisions (with our support if needed).
 - **Empathetic Persuasion should not be used with an overt Confident Expert tone or in overtly persuasive areas of content** (Pricing page). **(Differs from in-app.)**

In-app



Hypotheses in-app: positive results

- **Optimized product messaging:** We can use the new tones to tease out product values around powerful claims and mitigate doubts and concerns. We can also use keywords (like “e-commerce”) more prominently so users are clearer on our offerings.
 - **Result: positive.** We did not need to use keywords to do this, but we did use clear, persuasive headlines and made pricing text bold in sub-copy.
 - **Evidence:** We heard positive feedback when we used clarity and persuasion at the beginning of the in-app users’ journeys in both headlines and sub-copy.
 - There were no users that churned.
- **Decreased churn:** Sophisticated marketers are going to Klaviyo because “they do the same things as Mailchimp, only better,” so we wish to persuade Y&S that MC is **the right choice from start to finish** given our incomparable experience in the space + the features in our premium plans.
 - **Result: positive.** We made upgrade pricing sub-copy text bold with positive results.
 - **Evidence:** We saw positive results when we used confidence and persuasion in the sub-copy of the tasks (not the headlines).
 - There were no users that churned.

In-app tones: data results

1. **Clear Communicator > Plainspoken: Clear language is foundational to the V&T—so dial up *everywhere*.**

- Explore CTAs were met very favorably; precise/clear CTAs were especially met with effusive/positive reactions from more experienced marketers.
- **Long, dense language was universally unappealing; however, context was appreciated.**

In-app tones: data results

2. Empathetic Persuader > Genuine: Dial-up in headlines as the user gets started and in pricing-relevant sub-copy; dial-down overall as the user gets into task mode. (Opposite to dotcom.)

- Most users expressed appreciation for the persuasion and context of plan upgrades in the sub-copy further down the task funnel vs. headlines. *However, in some instances, heds could be mildly persuasive if aligned with upgrade info. In sub-copy.*
 - Prominent styling (bolded language) of the pricing plans in the sub-copy was noted as favorable/helpful.
- **Our Empathetic Persuader tone is inverse to the marketing funnel in-app (and to the dotcom strategy): the deeper into the customer journey, the less persuasive the headlines should be in-app.**

In-app tones: data results (cont.)

3. Confident Expert > Translator: Dial-up in sub-copy and educational spaces. (Opposite to dotcom.)

- Users wanted to read sub-copy to get context before making decisions—and we should assure them in our sub-copy, which is a gentler approach vs. in a headline.
- Users were put off by vague headline and sub-copy language that did not clearly assure guidance.
 - Anything that seemed “laborious” or solely the users’ responsibility was met with apprehensive or negative feedback.
 - Alternatively, any headlines that were too overarching were seen as unbelievable or “bossy.”

In-app tones: data results (cont.)

4. Real Person > Dry Humor: dial-up in surveys and preliminary/welcoming spaces (dashboard); dial-down in decision-making areas.

- Our evidence suggested that real-person language is best utilized in preliminary actions (dashboard set-up), surveys, etc., to ignite action. *However, most in the app appreciated “friendly” tones.*
- **Note: Friendly, real-person language is always most effective when paired with the Clear Communicator tone.**

In-app user insights

- High-value marketers are not of a set age or locale, so we should be sensitive to generational nuances of language, and we need to **speak to a global audience.**
- **There will always be interest in revenue or profit-related content**, no matter the stage/age of a business.
- Per this test and in general, it's clear that people get fatigued with information. We need to be intentional about the content we feed users: from imagery to copy.
 - Headlines should be clear, not subjective or salesy but always value-driven vs. plainspoken.
 - CTAs should be intentional (Learn more is distinctly an educational opp).
 - We should be concise, but when it comes to upgrades and features that the user needs to upgrade for, offer enough value-driven context through sub-copy (there was demonstrated appetite for this, especially in later tasks).
- Our existing customers are budget-conscious and must have a biz need to upgrade—they expressed a desire to have research options and no manipulation. Hence, we **lay off the Empathetic Persuader tone as the user further journeys through tasks.**

High-level takeaways



High-level comparisons: dotcom vs. in-app

- **Clear Communicator** is used everywhere in-app and on dotcom. It's got main character energy + foundational value in both spaces.
- **Empathetic Persuader** increases per the marketing funnel on dotcom; it decreases as the user travels down the task funnel in-app (*except for task-oriented, upgrade-driven content*).
- **Confident Expert** fills the sub-copy, CTAs, and educational spaces on both in-app and dotcom. It flexes in select sub-headlines on dotcom.
- **Real Person** is used in support areas on dotcom (including the Pricing page). It is used in support areas *and* at the top of the task funnel in-app because we have a more established relationship with our signed-up users, and they expect a friendlier tone.

High-level tone recap on dotcom

- **Clear Communicator:** Clearer headlines and CTAs with immediate profit/potential value are critical.
- **Empathetic Persuader:** Precise persuasive headlines that follow the cadence of a marketing funnel should be used in areas like the homepage—but when we get to the final action (the Pricing section), we should lay off.
- **Confident Expert:** More confident expertise—that is clear about customer value—is needed in sub-copy and CTAS.
 - We also use it in educational spaces and in select sub-headlines—but not too much.
- **Real Person:** “Real person,” aka human support (not cheeky or immature humor), should be infused into areas where support is sought, like survey pop-ups, the chatbot, and lightly on the Pricing page. We should make human availability very clear (a phone call) to instill trust in our users.

Former tone note: Dry humor can still be a tone tenet of the above MC pillars, but it’s more of a complementary visual execution vs. a content one.

High-level tone recap on in-app

- **Clear Communicator:** Clearer headlines and CTAs with immediate feature value + task info are critical.
- **Confident Expert:** More confident expertise—that is clear about customer value—is needed in sub-copy + pop-ups (requested) that allow the content to be better digested, yet never incomplete.
 - We also use this tone in educational spaces + select CTAs.
- **Empathetic Persuader:** Infuse persuasion at top of user journey and in appropriate pricing-related sub-copy and heds (very selectively).
- **Real Person:** “Real person,” aka human support (not cheeky or immature humor), should be infused into the top of the journey and in surveys (+ other data mines).

Former tone note: Dry humor can still be a tone tenet of the above MC pillars, but it’s more of a complementary visual execution vs. a content one.

Tones in action

See the [Voice and Tone Experience Map](#) for a digest of this guidance



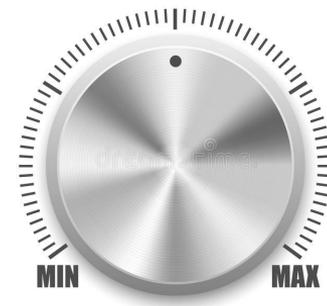
Dotcom



Clear Communicator in action on dotcom

We use Clear Communicator everywhere, especially in heds and CTAs where we overuse/improperly use “Learn more.” **This is our #1 main character tone.**

Tone Pillar	Low volume	Medium volume	High volume
Clear Communicator	<p><i>We fully share essential info—no matter the space.</i></p> <p>Sample copy: Grow your audience (feature CTA)</p>	<p><i>We avoid piling on fluffy/filler context to tell a narrative.</i></p> <p>Sample copy: Find the right plan based on where you are—and where you wish to be. (Pricing page sub-copy)</p>	<p><i>We’re always concise, yet never sacrifice full context for brevity.</i></p> <p>Sample copy: Our integrations drive data, growth, & profit potential (feature headline)</p>



Empathetic Persuader in action on dotcom

We breadcrumb Empathetic Persuader tones parallel to the marketing funnel—we then stop short of the final action to let the user take the reins. **This is our #2 dotcom-centric tone designed for acquisitions.**

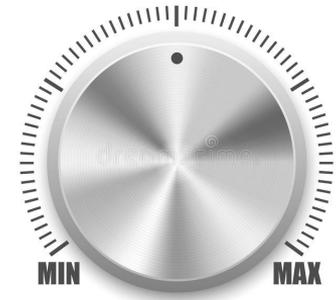
Tone Pillar	Low volume	Medium volume	High volume
Empathetic Persuader	<p><i>We persuade in parallel to the user's increasing interest.</i></p> <p>Sample copy: Profit via precision (CTA)</p>	<p><i>We mitigate doubts with assuring tones that make the user feel in control.</i></p> <p>Sample copy: Build lifelong customers with intelligent predictions (feature headline)</p>	<p><i>We persuade with metrics that can move the needle toward a sign-up.</i></p> <p>Sample copy: Turn emails into revenue with the #1 email & automations brand* (h1 headline)</p>



Confident Expert in action on dotcom

We use Confident Expert to clearly convey customer-centric values in sub-copy, educational spaces, and select sub-headlines. **This is our #3 foundational tone that fills in the cracks.**

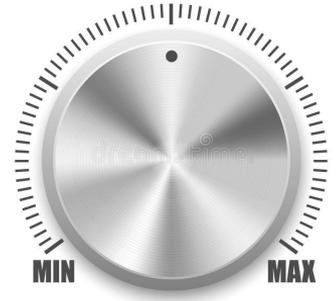
Tone Pillar	Low volume	Medium volume	High volume
Confident Expert	<p><i>We use sub-copy as ways to convey trustworthy, intelligent, and customer-centric values clearly.</i></p> <p>Sample copy: We've sifted through 100+ million data points so you don't have to. (edu sub-copy)</p>	<p><i>In dense copy areas that educate on features, we confidently assure doubts about us.</i></p> <p>Sample copy: Since 2001, we've helped accelerate profits with data (top-funnel sub-copy)</p>	<p><i>We sparingly flex in headlines where we feel we need to assure our value—to our customers.</i></p> <p>Sample copy: We send 500 million emails daily: we can make all of <i>your</i> sends matter. (feature sub-headline)</p>



Real Person in action on dotcom

We use Real Person in areas like the chatbot where users expect human support. **This is our #4 accent tone that adds flair.**

Tone Pillar	Low volume	Medium volume	High volume
Real-Person	<p><i>We are always approachable and friendly.</i></p> <p>Sample copy: Have a question about Mailchimp? (chatbot text 1)</p>	<p><i>We make it clear that we are here to help.</i></p> <p>Sample copy: Got it—you have another issue. Maybe I can help you with one of these? (chatbot text 2)</p>	<p><i>We make it clear that human help is on the way/a step away.</i></p> <p>Sample copy: Let's sync you with a real human, aka one of our Customer Success reps! (chatbot text 3)</p>



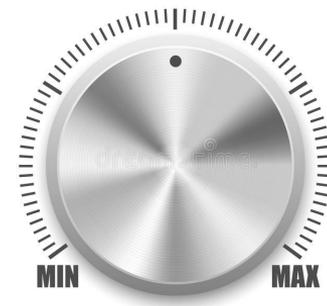
In-app



Clear Communicator in action, in-app

We use Clear Communicator *everywhere* in-app. This is a task-driven zone, and we never want to impede our users. **This is our #1 main character tone.**

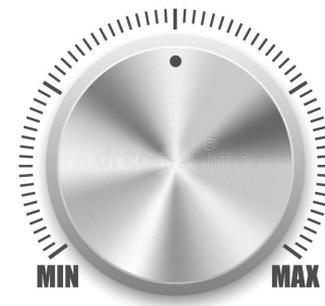
Tone Pillar	Low volume	Medium volume	High volume
Clear Communicator	<p><i>We fully share essential info—no matter the space.</i></p> <p>Sample copy: Take a 2-min survey (CTA)</p>	<p><i>We avoid piling on fluffy/filler context to tell a narrative.</i></p> <p>Sample copy: Plan + visualize multichannel campaigns with one tool (far-funnel headline)</p>	<p><i>We're always concise, yet never sacrifice full context for brevity.</i></p> <p>Sample copy: Campaign Manager is where you can execute, analyze, and optimize your marketing. (far-funnel sub-copy)</p>



Real Person in action, in-app

We use Real Person at the top of the journey and in areas of data and support. **This is our #2 tone that adds encouragement and trust for our signed-up users.**

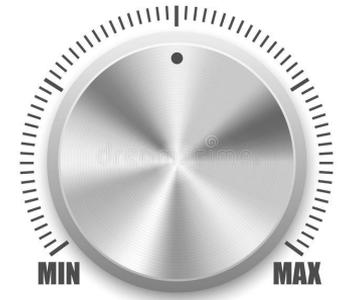
Tone Pillar	Low volume	Medium volume	High volume
Real-Person	<p><i>We are always approachable and friendly.</i></p> <p>Sample copy: Important notes before you sync your store: (legalese headline)</p>	<p><i>We make it clear that we are here to help.</i></p> <p>Sample copy: Just 2 minutes to an optimized experience (survey headline)</p>	<p><i>We add inspiring, yet authentic tones to start-up tasks.</i></p> <p>Sample copy: Your most essential, aka exciting, marketing activity will show up here once you create a campaign. (dashboard sub-copy)</p>



Confident Expert in action, in-app

We use Confident Expert to clearly convey customer-centric values in sub-copy and educational spaces. **This is our #3 foundational tone that fills in the cracks.**

Tone Pillar	Low volume	Medium volume	High volume
Confident Expert	<p><i>We use sub-copy as ways to convey trustworthy, intelligent, and customer-centric values clearly.</i></p> <p>Sample copy: New contacts can become long-term connections: make a good first impression with a great welcome email. (sub-copy)</p>	<p><i>In dense copy areas that educate on features, we confidently assure doubts about us.</i></p> <p>Sample copy: A pre-built journey can act as a successful marketing roadmap when you plan your next campaign. (edu sub-copy)</p>	<p><i>We educate with confidence where feel we need to reassure customers about our value.</i></p> <p>Sample copy: We'll help you build engaging tools that get noticed. (headline sub-copy)</p>



Empathetic Persuader in action, in-app

We use empathetic persuasion at the top of the user journey to ignite actions. We also use it in far-funnel sub-copy tasks where upgrades are needed for optimization. **This is our #4 tone designed for upgrades.**

Tone Pillar	Low volume	Medium volume	High volume
Empathetic Persuader	<p><i>We persuade with price plan sub-copy.</i></p> <p>Sample copy: Get access to our best-performing layouts in our <u>Essential</u> and <u>Standard Plan</u>. (far-funnel sub-copy)</p>	<p><i>We mitigate doubts with assuring tones that make the user feel in control.</i></p> <p>Sample copy: Access exciting marketing insights (dashboard headline)</p>	<p><i>We persuade the user to get started in top-funnel headlines.</i></p> <p>Sample copy: Every good campaign starts with a great template (top-funnel headline)</p>

