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Webinar On

Writing With Empathy: Creating Content for Real People

Speaker

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Senior Technical Writer
Docusign

Overview

- What is Empathy?
- 1: Plan with Empathy
- 2: Write with Empathy
- 3: Test Your Empathy
- Questions and Thoughts

What is Empathy?

Sympathy
is concern for someone who is experiencing something difficult or painful.

Empathy

is actively sharing in the emotional experience of another person.

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A **sympathetic** person says, “It’s too bad this person is unhappy.”

An **empathetic** person says, “I wonder why this person is unhappy?”

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And, ideally, “How can I help?”

Empathy in Tech Writing

So what does this mean for tech writing?

How can we be empathetic?

1. Plan with Empathy

Who is an administrator?

“A person who manages and supports a computer system or network.”

I asked A.I.

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What do we think of when we think of administrators?

- Chief
- Commander
- Authority
- Captain
- Leader

Who are administrators in real life?

- **Age:** 40–48 years
- **Education:** 10% Master's
  63% Bachelor's
  27% High School or Associate
- **Tenure:** 17% Less than one year
  31% One to two years

Languages:

Spanish: 38.5%

Portuguese: 7.7%

Chinese: 7.7%

German: 7%

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Skills:

Troubleshooting: 7%

Technical support: 6%

Software applications: 4.5%

Jobs:

Head of legal

Technical support

Systems administrator

Executive assistant

CEO

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Who is an “end user?”

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“Consumers who use goods and services.”

I asked A.I.

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So how do we create for these users?

Ramp & Stairs

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Ramps are built for wheelchairs.

But who also uses ramps?

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Who uses stairs?

...people training to be the heavyweight champ?

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“Ramp and Stairs” for Tech Writing

Show Prerequisites

Workflow linking prerequisites

- Purchase a Docusign Intelligent Agreement Management (IAM) plan.
- Install Docusign Apps Launcher version 7.4 or higher.
- Install the Maestro for Salesforce Application from the Docusign App Center.
- Assign Workflows Create permissions to your Docusign user, or be an account administrator.
- Build a Maestro workflow to be triggered by your Salesforce flow.
- Prepare your Salesforce organization for linking flows to Maestro workflows.
- Prepare your Salesforce users for linking flows to Maestro workflows.
- Configure a Start Docusign Maestro workflow step in a Salesforce flow.

Make Prerequisite Task Topics

Before you can link flows and Maestro workflows, you must prepare your Salesforce organization.

Use this procedure to prepare your organization:

1. Install Docusign Apps Launcher version 7.4 or higher.
2. Disconnect and reconnect Docusign and Salesforce.

   Important: Disconnecting removes Docusign access from all Salesforce users. Disconnecting does not remove users from your connected Docusign account.

3. Open Docusign Apps Launcher.
4. Go to **Docusign Setup** > **User Management**.
5. Re-add your Docusign users.

   Important: Users must re-activate their Docusign access in Salesforce. After re-activating, users can trigger Maestro workflows.

You have completed the task. You have prepared your Salesforce organization. You can add a **Start Docusign Maestro workflow** action to a Salesforce flow. Prepare your users for triggering Maestro workflows from Salesforce.

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Leave Breadcrumbs

Use this procedure to install the Docusign Apps Launcher package of apps in your Salesforce organization:

1. As a Salesforce administrator, choose a Docusign app from the AppExchange:
    a. Select the App Launcher grid and choose **View All**.
    b. Select **Visit AppExchange** > **Go to AppExchange**.
    c. Enter **Docusign eSignature**, **Gen**, or **CLM** in the search field.
    d. Select an app and choose **Get it Now** when the app page opens.

Offer Alternatives: Blog Posts

Offer Alternatives: Video

Docusign Gen for Salesforce Admin Guide

Step 2: Create Docusign and Salesforce Anchor Text Fields

Also in **Docusign Gen for Salesforce Admin Guide** | Last updated: Jan 27, 2025 | 2 min read | Tags

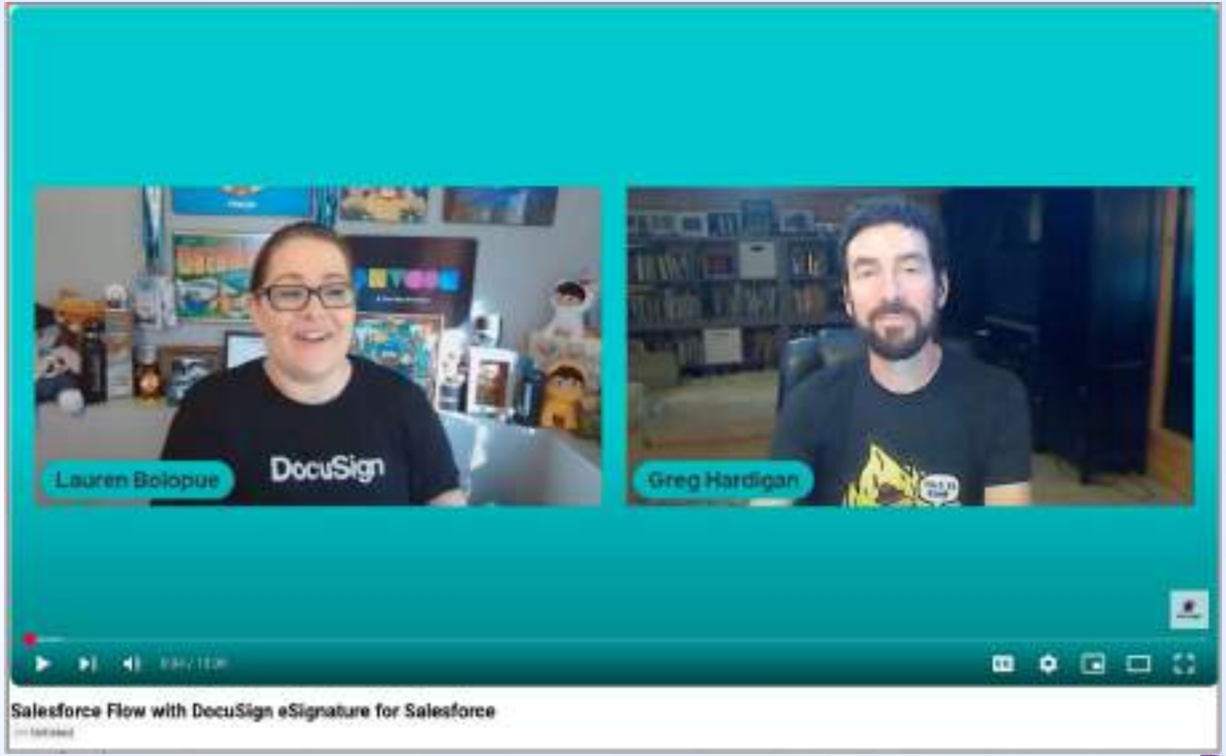
Docusign for Salesforce | Gen for Salesforce

Use this procedure to create Docusign and Salesforce anchor text fields for your Gen template. You can add child objects from up to four levels of relation to the parent Salesforce object. You can add fields from up to two levels of related lists.

Tip: This video explains the step.

1. Select **+ Add** in the Salesforce Fields section.

Offer Alternatives: Casual Video



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- 83% **prefer videos** over written content.
- **87%** of viewers prefer **real people vs. A.I.**
- People prefer **10-19 minute videos**.
- **66%** watch at least **one how-to video/week**.

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Plan Your Content Structure

Choose Topic Types

- **Concept**: What is this?
- **Reference**: What are my tools?.
- **Task**: How do I build this?
- **Troubleshooting**: How do I fix this?

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Choose Your Layout

Long scrolling "omni" documents that cover everything from concept to troubleshooting.

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Scrolling Data Layout

Good:

- Gives support one link that contains everything.
- Good for mobile phones.

Bad:

- Hard to find information.
- “I can’t do this!”

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Choose Your Layout

Information broken into bite-sized chunks, with linking.

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Chunking Data Layout

Good:

- Gives you just the information you want.
- Doesn't overwhelm.
- Good for large sequences of steps.

Bad:

- Relies on linking and context.

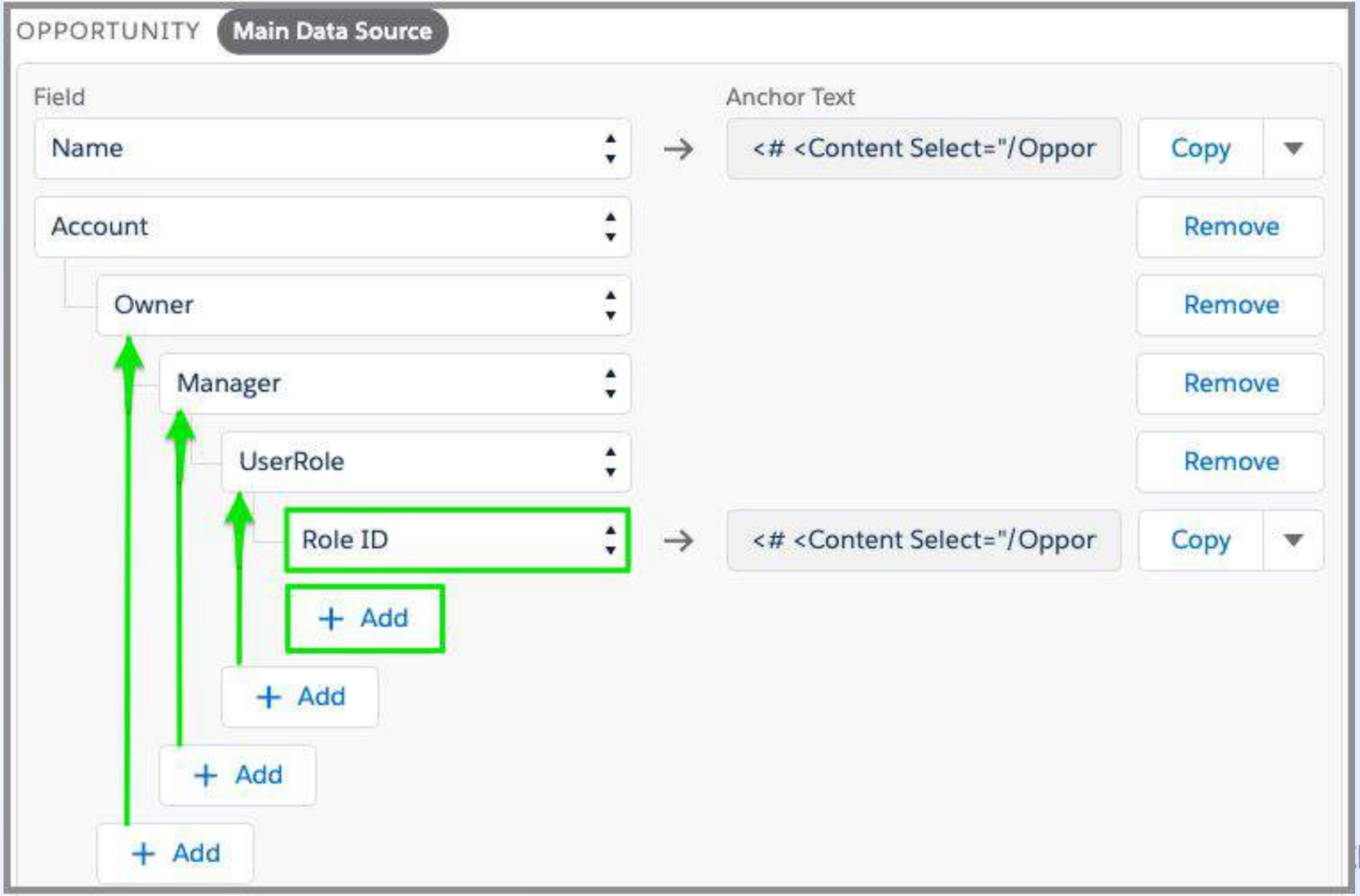
2. Write with Empathy

Choose Your Tools

- Style guide
- Hemingway (free)
- A.I. tools (Chat GPT, Gemini)
- Grammarly (free)

When to Use Screenshots

- When the user interface is “busy.”
- When it’s hard to describe.
- When you want to add visuals to a long procedure.


OPPORTUNITY
Main Data Source
Field
Anchor Text
Name
<# <Content Select="/Oppor
Copy
Account
Remove
Owner
Remove
Manager
Remove
UserRole
Remove
Role ID
<# <Content Select="/Oppor
Copy
+ Add
+ Add
+ Add
+ Add

5. **Template ID**: Add the ID of the Gen template used in the Flow.

a. Select the **Docusign Gen Templates** tab.

b. Select the Gen template that you want to use in the Flow.

c. Copy the alpha-numeric template ID at the end of the URL. Do not copy the slash marks.

d. Paste the ID (without slash marks) in the **Template ID** field.

e. Select **Done**.

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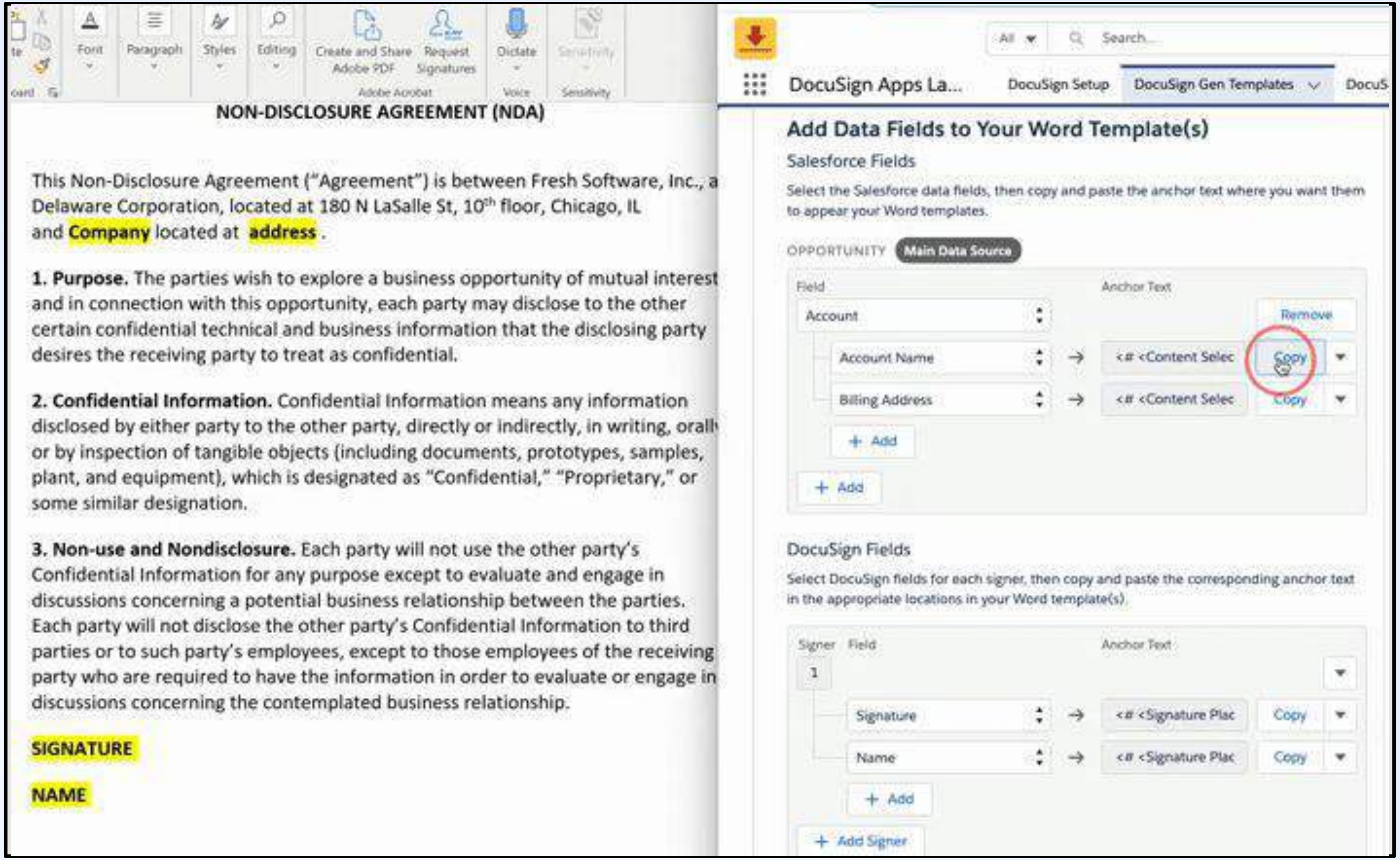
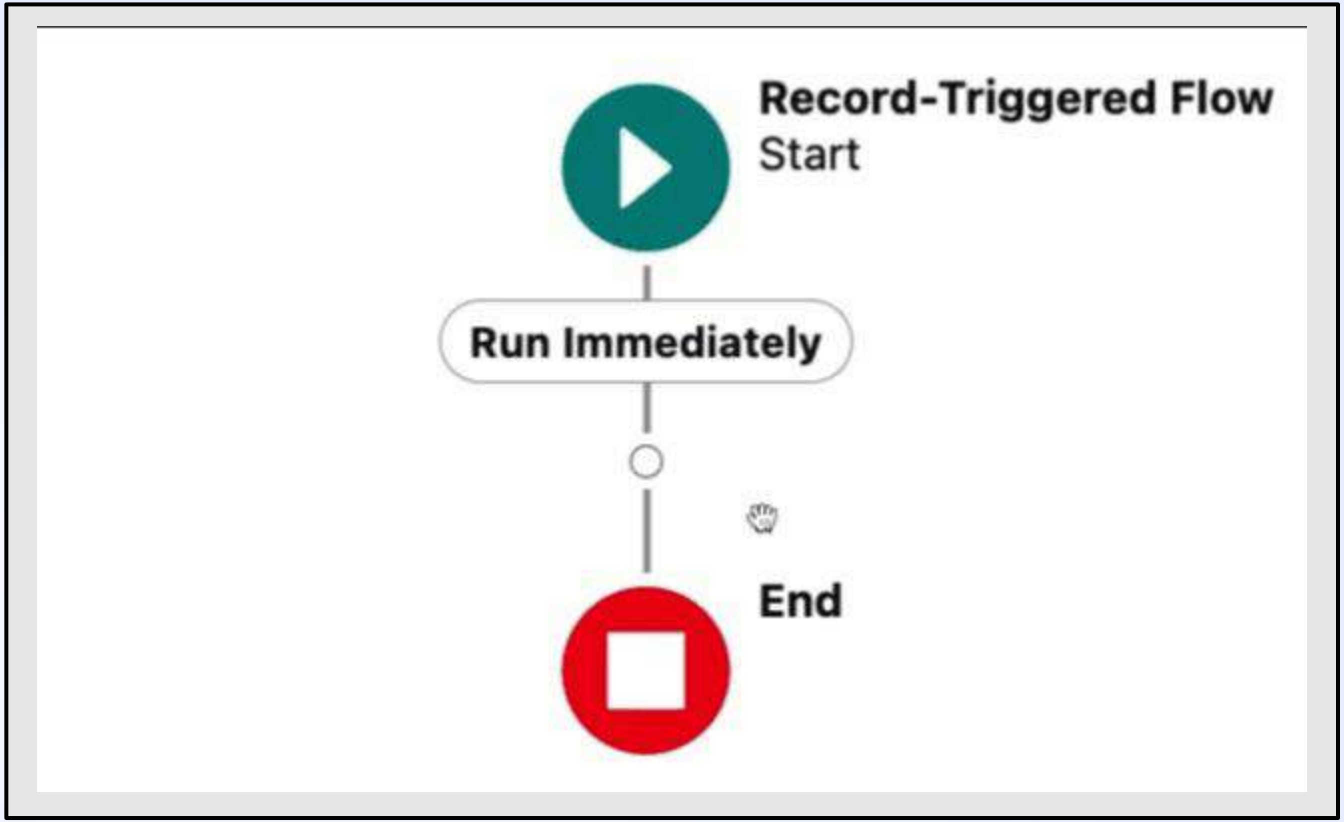
Use this procedure to install the **Salesforce** app and connect it to your Salesforce organization:

1. Log in to your Docusign eSignature account with administrator credentials.
2. In a new browser window, open the appropriate Docusign account:
   - [Docusign Production]
   - [Docusign Demo]
3. Select the **Salesforce** tile and select **Install App**.
   The Install and authorize "Salesforce" app page opens.
4. Select **Continue**.
   The page refreshes.
5. Select **Connect Account**.
   The Connect a Salesforce account page opens.
6. Connect to your Salesforce organization:
   a. Select a Salesforce organization to connect to Docusign:
      - **Salesforce Sandbox (test.salesforce.com)**: Connect to a Salesforce Sandbox organization.
      - **Salesforce Production (login.salesforce.com)**: Connect to a Salesforce Production or Developer organization.

When to Use GIFs

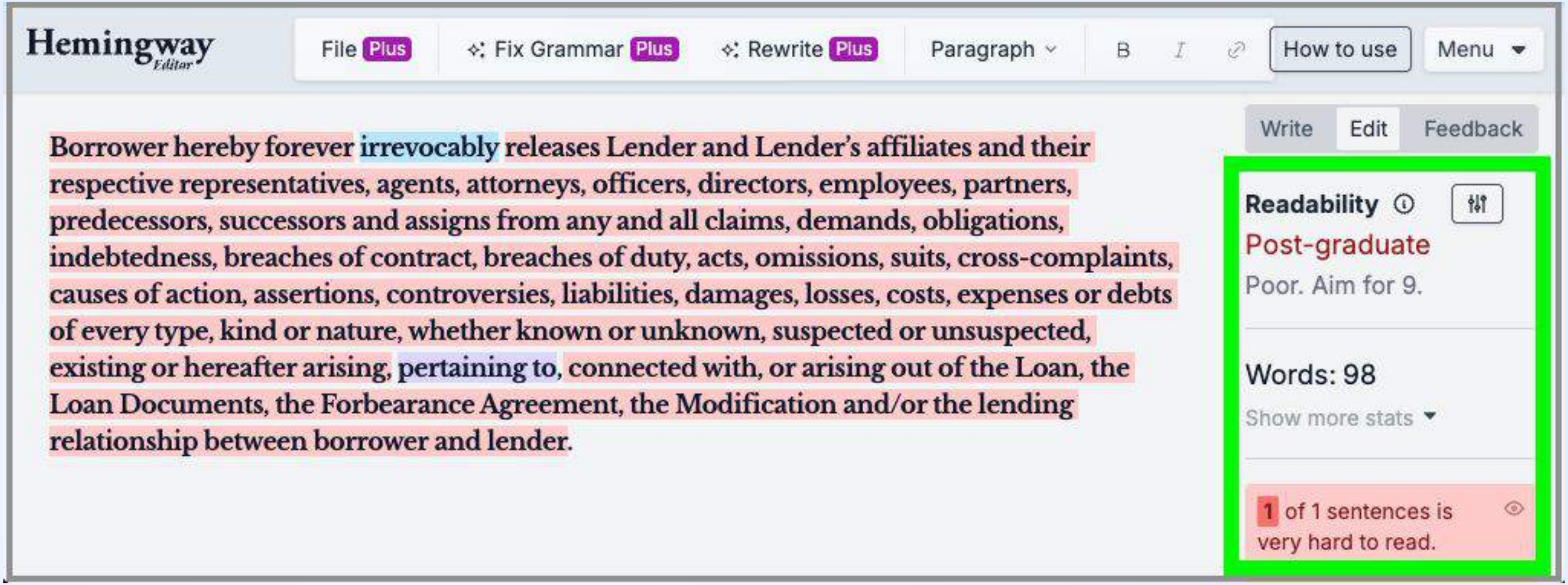
- When describing a multi-part sequence.
- When cursor moves make user interface elements appear.

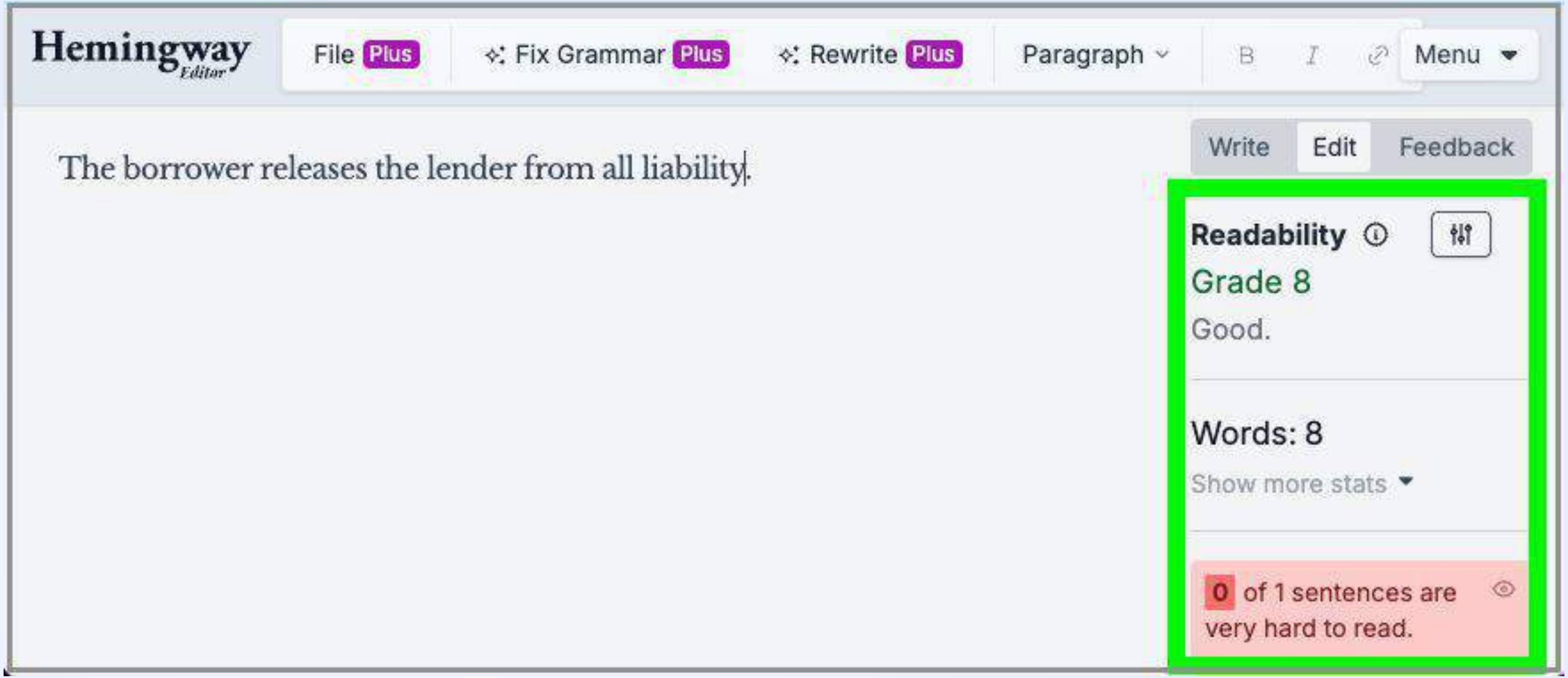

Font
Paragraph
Styles
Editing
Create and Share Adobe PDF
Request Signatures
Dictate
NON-DISCLOSURE AGREEMENT (NDA)
This Non-Disclosure Agreement ("Agreement") is between Fresh Software, Inc., a Delaware Corporation, located at 180 N LaSalle St, 10th floor, Chicago, IL and Company located at address .
1. Purpose. The parties wish to explore a business opportunity of mutual interest and in connection with this opportunity, each party may disclose to the other certain confidential technical and business information that the disclosing party desires the receiving party to treat as confidential.
2. Confidential Information. Confidential Information means any information disclosed by either party to the other party, directly or indirectly, in writing, orally or by inspection of tangible objects (including documents, prototypes, samples, plant, and equipment), which is designated as "Confidential," "Proprietary," or some similar designation.
3. Non-use and Nondisclosure. Each party will not use the other party's Confidential Information for any purpose except to evaluate and engage in discussions concerning a potential business relationship between the parties. Each party will not disclose the other party's Confidential Information to third parties or to such party's employees, except to those employees of the receiving party who are required to have the information in order to evaluate or engage in discussions concerning the contemplated business relationship.
SIGNATURE
NAME
All
Search...
DocuSign Apps La...
DocuSign Setup
DocuSign Gen Templates
Add Data Fields to Your Word Template(s)
Salesforce Fields
Select the Salesforce data fields, then copy and paste the anchor text where you want them to appear your Word templates.
OPPORTUNITY
Main Data Source
Field
Anchor Text
Account
Remove
Account Name
<# <Content Selec
Copy
Billing Address
<# <Content Selec
Copy
+ Add
+ Add
DocuSign Fields
Select DocuSign fields for each signer, then copy and paste the corresponding anchor text in the appropriate locations in your Word template(s).
Signer
Field
Anchor Text
1
Signature
<# <Signature Plac
Copy
Name
<# <Signature Plac
Copy
+ Add
+ Add Signer


Record-Triggered Flow
Start
Run Immediately
End

Structure Your Words

- Write at an 8th grade level or lower.
- Use 20 words or fewer per sentence.
- Use empathetic word choices.
- Don’t write like a robot.


Hemingway
Editor
File Plus
Fix Grammar Plus
Rewrite Plus
Paragraph
B
I
How to use
Menu
Write
Edit
Feedback
Borrower hereby forever irrevocably releases Lender and Lender's affiliates and their respective representatives, agents, attorneys, officers, directors, employees, partners, predecessors, successors and assigns from any and all claims, demands, obligations, indebtedness, breaches of contract, breaches of duty, acts, omissions, suits, cross-complaints, causes of action, assertions, controversies, liabilities, damages, losses, costs, expenses or debts of every type, kind or nature, whether known or unknown, suspected or unsuspected, existing or hereafter arising, pertaining to, connected with, or arising out of the Loan, the Loan Documents, the Forbearance Agreement, the Modification and/or the lending relationship between borrower and lender.
Readability
Post-graduate
Poor. Aim for 9.
Words: 98
Show more stats
1 of 1 sentences is very hard to read.


Hemingway Editor
File Plus
Fix Grammar Plus
Rewrite Plus
Paragraph
Menu
Write
Edit
Feedback
The borrower releases the lender from all liability.
Readability
Grade 8
Good.
Words: 8
Show more stats
0 of 1 sentences are very hard to read.

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Choose Empathetic words

- Avoid ableist words.
- Avoid problematic terms.
- Avoid techno-jargon.

- **Ableism** is the belief that bodies that don’t look or work the same as others are **less important or less valuable.**

- **1.3 billion people** have a significant disability. That’s 16% of the world population.

- Differing abilities are only disabling **if we don’t offer help**.

Alternative Text (Alt Text)

- Required for Americans with Disabilities Act (ADA) and the European Accessibility Act (EAA.)
- Helps visually impaired users gain context.
- Helps with search engine optimization (SEO.)

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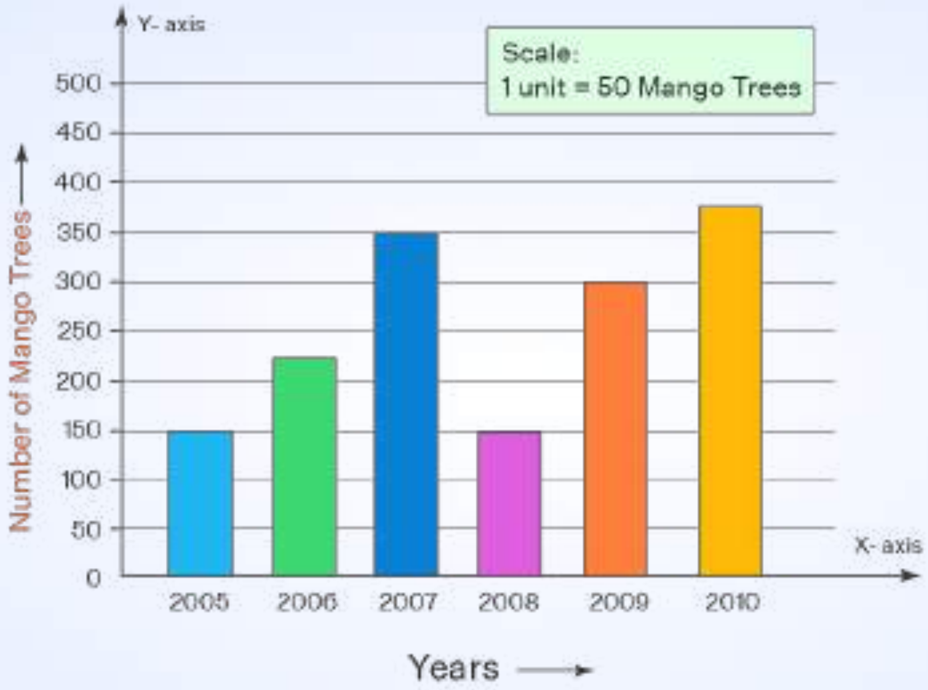
Alt Text Tips

- Use 125 characters or fewer.
- Use a period at the end.
- Describe only the important things.

Alt Text Examples



Bad alt text:

"Bar chart with colors"

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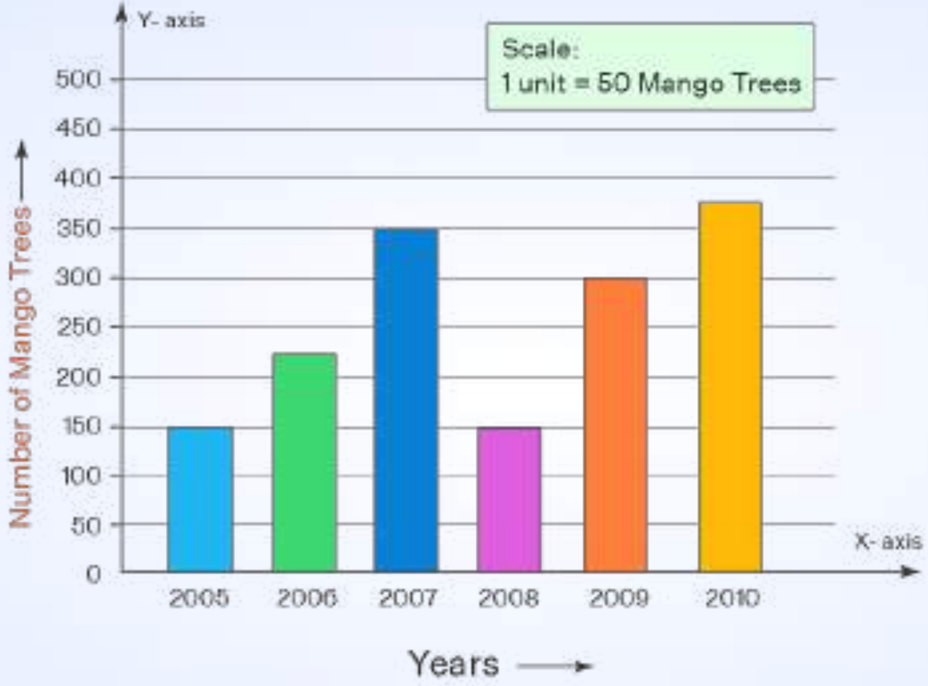
Alt text examples



Good alt text:

"A bar chart shows that 375 mango trees were planted in 2010, the highest number in six years."

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Avoid Ableist Words

- Use **select** instead of **click**.
- Use **enter** instead of **type**.
- Use **turn on** instead of **enable**.
- Use **turn off** instead of **disable**.

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Avoid Problematic Terms

- Use **allowlist** instead of **whitelist**.
- Use **denylist** or **blocklist** instead of **blacklist**.
- Use **edits** or **markups** instead of **redlines**.

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Avoid Undefined Acronyms

Define acronyms before using them.

NO: “Add keywords to enhance SEO.”

YES: “Add keywords to enhance search engine optimization (SEO.)”

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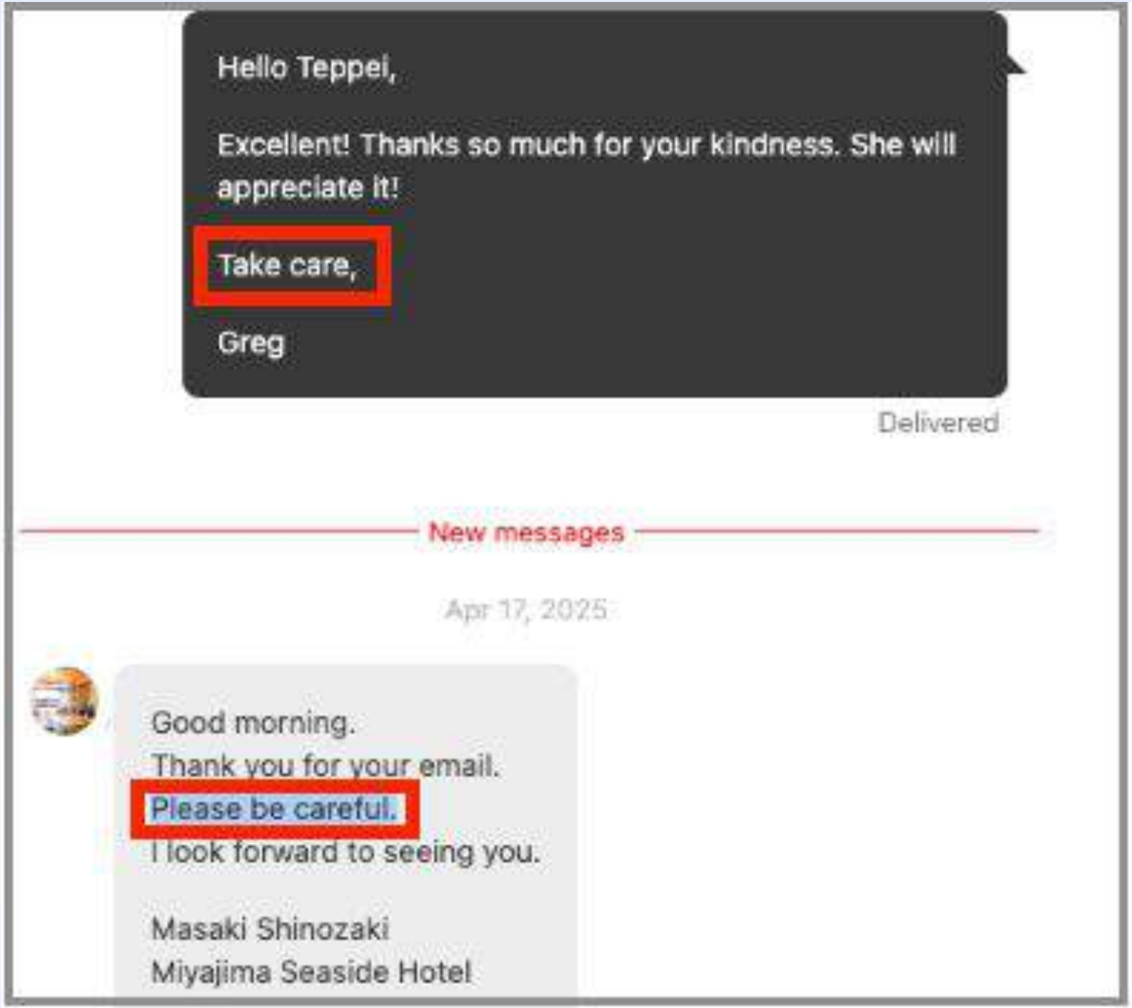
Avoid Translation Problems

- Don’t use region-specific terms and phrases.
- Limit screenshots and GIFs for translated content. Try to avoid text in images.
- Remove country-related signifiers in links.


Hello Teppei,
Excellent! Thanks so much for your kindness. She will appreciate it!
Take care,
Greg
Delivered
New messages
Apr 17, 2025
Good morning.
Thank you for your email.
Please be careful.
I look forward to seeing you.
Masaki Shinozaki
Miyajima Seaside Hotel

1. As a Salesforce administrator, choose a Docusign app from the AppExchange:
    a. Select the App Launcher grid and choose **View All**.
    b. Select **Visit AppExchange** > **Go to AppExchange**.
    c. Enter **Docusign eSignature**, **Gen**, or **CLM** in the search field.
    d. Select an app and choose **Get it Now** when the app page opens.

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Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Button Name
Change Owner
Edit
Generate Untitled
Sharing
Change Record Type
Generate DFS5250
Printable View
Submit for Approval
Clone
Generate FreshSof...
Send with DocuSign
Delete
Generate NegGenTe...
Send with DocuSign
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightn
actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of
Opportunity Detail
Standard Buttons
Edit
Delete
Clone
Change Owner
Change Record Type
Shar
Custom Buttons
Generate Untitled
Generate FreshSoftwarePurchaseOrderTemplate
Custom Button: Send with DocuSign

NO:
https://support.docusign.com/s/document-item?
language=en_US

YES:
https://support.docusign.com/s/document-item?

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Use Examples

Concept topic without an example:

Docusign Gen is a document generation application that you can use in Salesforce. Gen templates generate agreements by merging Docusign and Salesforce data with uploaded contracts. You can use Gen in a Salesforce flow by adding a **Generate agreement with Docusign** action. When your flow triggers, the Generate agreement with Docusign action generates an agreement from a record.

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Use Examples

Concept topic with an example:

Docusign Gen is a document generation application that you can use in Salesforce. Gen templates generate agreements by merging Docusign and Salesforce data with uploaded contracts. You can use Gen in a Salesforce flow by adding a **Generate agreement with Docusign** action. When your flow triggers, the Generate agreement with Docusign action generates an agreement from a record.

Example: You build a Record-Triggered flow with a **Generate agreement with Docusign** step. You configure the flow to trigger document generation when a record's stage changes to **Negotiation/Review**.

A user changes the **Burlington Textiles** opportunity's stage to Negotiation/Review. Salesforce triggers the Docusign Gen template linked to your Flow. Docusign generates a document using data from the record.

Avoid Techno Jargon

1. **Parsing of Incoming Email Message (IEM):**
    a. Upon receipt of the IEM with MIME type "multipart/alternative," employing a recursive descent parser to extract the "text/plain" component containing the updated invitation details.
    b. Specifically isolate the ID in the Uniform Resource Locator (URL) pointing to the Zoom SDT session, located between the domain "yourcompany.zoom.us" and the alphanumeric password key directly following the pwd= signifier.
    c. Alternately, the ID can be located by navigating to the "text/plain" component following the URL

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Avoid Techno Jargon

1. **Parsing of Incoming Email Message (IEM):**
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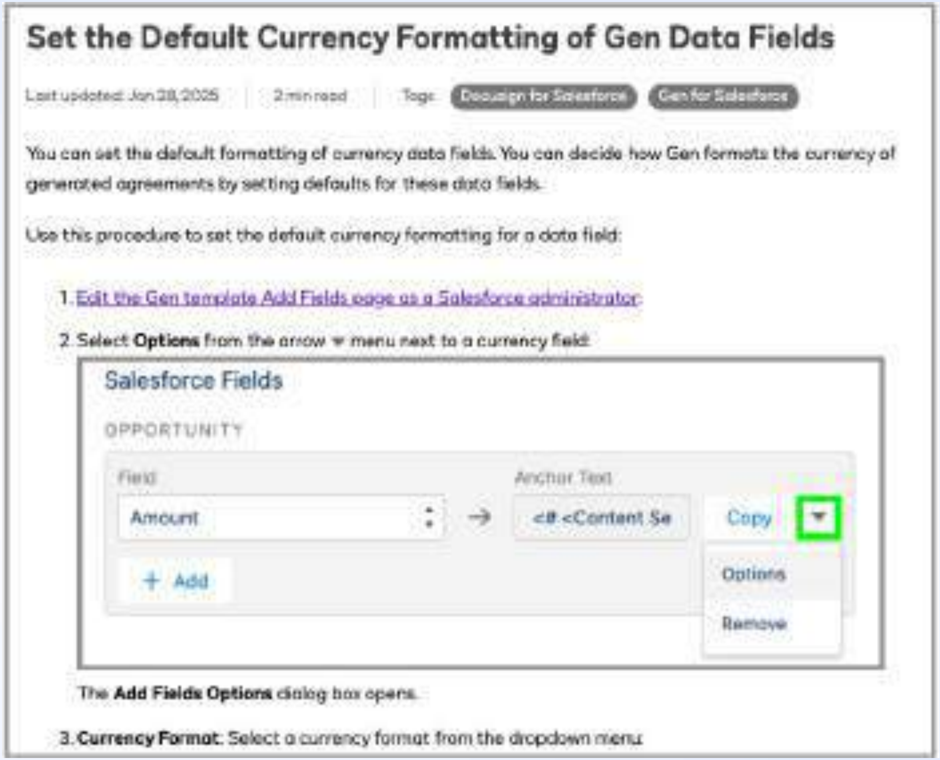
    c. Alternately, the ID can be located by navigating to the "text/plain" component following the URL

1. Open your Zoom email and copy the **Meeting ID** number in the message.

Avoid Bloat



Set the Default Currency Formatting of Gen Data Fields

Last updated: Jan 28, 2025 | 2 min read | Tags: Docusign for Salesforce, Gen for Salesforce

You can set the default formatting of currency data fields. You can decide how Gen formats the currency of generated agreements by setting defaults for these data fields.

Use this procedure to set the default currency formatting for a data field:

1. Edit the Gen template Add Fields page as a Salesforce administrator.
2. Select **Options** from the arrow ▾ menu next to a currency field:

The **Add Fields Options** dialog box opens.

3. **Currency Format**: Select a currency format from the dropdown menu.

3. Test Your Empathy

Remember who you’re writing for.

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Polish Before You Publish

Drink Your Own Champagne

Drink Your Own Champagne

- Publish content to a Dev environment.
- Save it as a PDF.
- Build or configure using your doc.

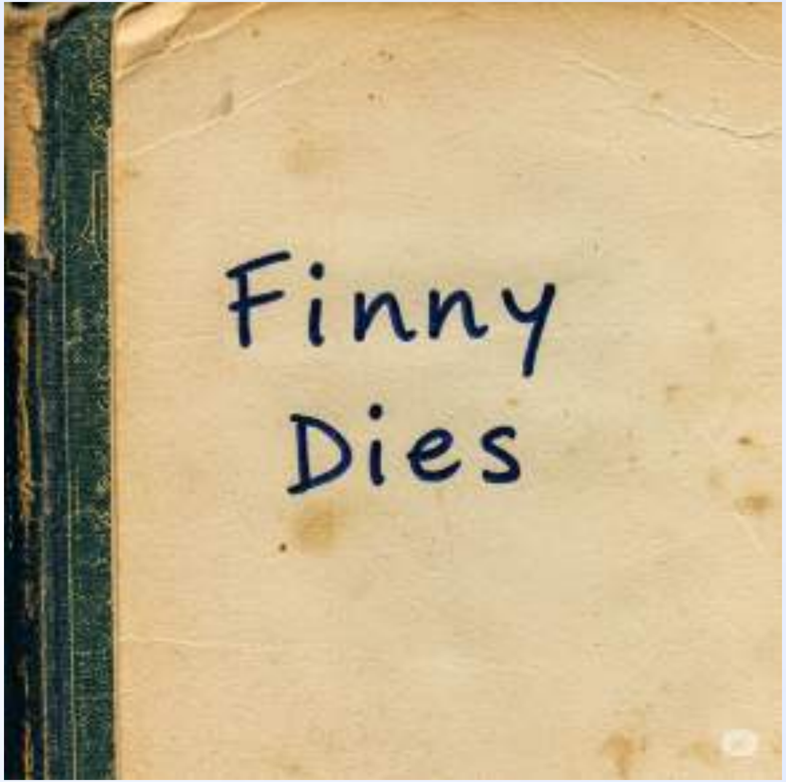
Find Peer Editors

After You Publish

After You Publish

- Work to understand the products.
- Follow channels of communication.
- Meet with support.
- Make content improvement a habit.

Find Empathy Partners



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In Closing...

- Plan before writing.
- Remember your 8th grade admin.
- Build ramps and stairs.
- Never stop listening and improving.


I THINK WE'RE
MAKING PROGRESS
SNL

Questions ?

Thank You!