

12:22



# Welcome to Handshake

Track Projects, Manage Payments



Get started



rimasharma.com

# Fundamentals of UX Writing

I completed the Fundamentals of UX Writing course which is designed to give a thorough explanation of UX writing and how to create the right content for the right time.

It covers key principles to:

- Develop voice & tone
- Assess user needs
- Write for UI components and onboarding experience
- Write customer emails.
- Follow best practices for localization and accessibility

It also covers using AI as part of the UX writing process and how to work within a design team as a UX writer.

The course contains exercises to:

- Assess user needs
- Define voice, tone, style, and terminology
- Write taglines, headlines, and body sentence pairs
- Write error messages and text for destructive actions
- Write onboarding and account cancellation emails
- Make content precise
- Offer a copy-based solution to a business problem

# Handshake App

Handshake is a fictional payments app designed for freelancers and business owners. Each of these users has a view of one side of the app: one uses it for billing and the other for paying. Freelancers are the primary users, and business owners are the secondary users.

Freelancers use the app to:

- Bill business owners
- Report progress on a paid project (billing and tracking)

Business owners use the app to:

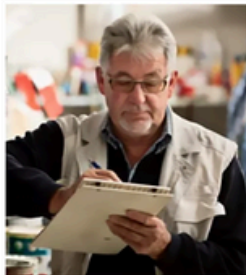
- Pay freelancers
- Track the progress of hours worked (paying and tracking)

It is assumed that these two users already know each other and have agreed to work together. Both freelancers and business owners can start a project and invite the other to join.

# User Personas

The project and the exercises included in this course are based on these two personas provided by the Handshake UX research team.

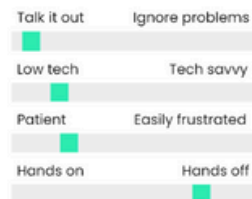
## Tom Stewart, small business owner (SBO)



"Running a business is crazy."

**Age:** 62  
**Work:** Owner, Stewart HVAC  
**Family:** Married, 3 kids, 2 grandkids  
**Location:** Fresno, CA

### Problem-solving



### Goals

- Have an up-to-date business website that clients can find
- Get the website updates done soon, but get it right
- Get reliable leads from the website (people keep calling him for plumbing but he's a heating and air conditioning contractor)

### Frustrations

- When he hires subcontractors, he likes to keep up on their progress.
- He doesn't like slackers or people who don't get their work done on time.
- He'd like a simple tool for tracking hours and progress that isn't complicated and doesn't require much time.
- He'd much rather that his workers reported in on progress so he wouldn't have to call them or go physically check the work.
- He can learn anything with enough time, but he also doesn't like to focus on administrative or bureaucratic tasks (his job is installing heating and cooling systems).
- Tom manages money pretty well, but sometimes his funds run low, like when he has to pay for a lot of materials before he gets paid at the end of a job.

### Bio

Tom grew up in the Midwest and moved to California after learning his trade as an apprentice. His dad was a carpenter and his mom was a homemaker. His current wife retired from teaching when their kids were born. One of his sons is now a business partner running the commercial side of the business while he runs residential services.

Tom's wife does the bookkeeping using QuickBooks. He's good with money, but doesn't like to press clients to pay late bills. He prefers a gentleman's handshake over a lengthy legal contract for work.

## Kelly Chan, web developer (freelancer)



"Work hard, but have fun doing it."

**Age:** 24  
**Work:** Freelancer  
**Family:** Single, no kids  
**Location:** Fresno, CA

### Problem-solving



### Goals

- Work for herself and save money
- Pay off student loans
- Learn how to run a business

### Frustrations

- Kelly is a digital native and sometimes forgets that other people aren't as technical.
- She doesn't like when her parents or her friends hit her up for tech support.
- Freelancing is new to her but she loves the flexible hours.
- She fears complicated legal paperwork and tax forms.
- Kelly is good with money and budgeting but worries she's not charging enough for her services, especially after working at unpaid internships in college.
- She's received excellent feedback on her writing and design work but still worries that clients might not like what she creates for them.

### Bio

Kelly moved back with her parents in Fresno after graduating with a degree in Web Development from California Academy of the Arts.

Kelly doesn't want to work for a big corporation until later in life. For now, she wants to save up more money to travel before getting serious or settling down. She has a lot of friends and a busy social life. Freelancing suits her. She's a night owl and doesn't like to get up before about 10:00 a.m.

Developing websites is easy for her, so it's a great way to make money. Her boyfriend, James, is a house painter. James met Kelly's first client, Tom, on a job site. Tom called Kelly the next day to ask if she could help with his website redesign. Kelly had just completed a project for another big client and had some hours available to work for Tom. She discovered the Handshake app because her sister used it to track and bill clients for her catering business.

# Handshake Style Guide

# Handshake Style Guide

For the project, I created a [Style Guide](#). I have included a few sections in this document.

## Principles

These content principles will help make the user experience helpful and simple for our users. When writing for users, you should:

- Make sure user questions are answered with tooltips or microcopy.
- Use the same term to mean the same thing. Consistency helps readers comprehend information efficiently and builds familiarity and trust.
- Make sure the most important information stands out, whereas the less important information is more subtle.
- Make sure it is clear what a user has to do and how the user can do it.

## Voice

When we write for the Handshake app, we want to use a consistent voice. Here's how to sound like Handshake.

- **Friendly and encouraging:** Hi Kelly, Let's get started.
- **Empowering:** Set up a payment schedule to keep on top of your payments.
- **Informative:** Your automatic payment is scheduled for Dec 30. If you want to make changes, update your payment schedule by Dec 27.

# Handshake Style Guide

## Tone

Adjust the tone based on the situation at hand.

- It should be uplifting for success messages and welcome screens. For example, Welcome aboard! Let's create your first project.
- It should be serious but friendly and guiding for error messages. For example, We're sorry, but we're experiencing a problem on our end. Reload the page, and don't worry, all your work is saved.

## Style

Follow these style rules throughout the app interface.

### Tooltips

- Use sentence case.
- No punctuation for tooltips with less than three words; use standard punctuation for longer tooltips.
- Use a tooltip to provide more explanation and context, show truncated text, or prevent drop-off at friction points.

### Onscreen instructions

- Use sentence case.
- Use standard punctuation.
- Onscreen instructions should:
  - Be concise and tell users what to do.
  - Provide instructions immediately beside or after interactive elements.
  - Create a positive user experience.

# Exercises

# Taglines and Headlines

What would be a good 8-10 word tagline for the Handshake app? Write down at least 3 ideas.

- Track Projects, Manage Payments
- Fast, Secure Contracts and Payments
- Collaborate Better Together
- Connecting Freelancers and Business Owners
- Worry-Free Payments and Tracking

The designer asks you to brainstorm some headline and body sentence pairs for the app's onboarding tour screens. Provide options that describe shared benefits for both freelancers and business owners.

- You focus on the work  
Let Handshake handle everything else
- Simply Online Contracts  
With Handshake as your friend
- Collaborate easily  
With Handshake's project and payment tools
- Get work done  
Securely and quickly with Handshake

# Error Messages

The server went down while a developer was fixing admin permissions. He broke the build and now the website won't work for another 15 mins. Users have to wait until it's fixed and then they should be able to return to whatever they were doing.

Write a brief error message (50 characters max) using this pattern.

[This thing happened.] [Take this action to fix it.]

## Error Message

Sorry, our website is down. We'll be back shortly.

We tried to charge \$250 to the user's credit card, but the credit card company rejected the sale because the security code wasn't correct. We can't process this payment unless the user fixes the problem.

Write a brief error message (50 characters max) using this pattern.

[This thing happened.] [Take this action to fix it.]

## Error Message

The security code doesn't look right. Try again.

# Customer Emails

Write an email for people who just signed up to use the Handshake app for the first time in the following pattern:

- Headline
- Body text
- CTA (button text)

Put the primary message in the email headline. In the body, make sure people know what the main features of the app are and that they can learn about Handshake at the company support website: [support.handshake.com](https://support.handshake.com). If they need to, they can also open a help ticket if they have any trouble. What are some options for CTAs for the email? Choose one for the button text.

## Email

**Headline:** Welcome to Handshake, Kelly!

**Body text:** We're happy to have you on board. Handshake makes it easy for freelancers and business owners to:

- Manage invoices and payments
- Track project hours

You're now all set to create your first project, but if you want to learn more about Handshake, check out [support.handshake.com](https://support.handshake.com).

**CTA:** Get Started

If needed, don't hesitate to create a help ticket.

We're here to help.

The Handshake Team

# Customer Emails

Write an email for a customer who just canceled their account.

What is the main message to convey to a user who stops using the app? Consider the voice and character of Handshake. Keep it positive, and avoid making the customer feel bad or guilty for canceling. Make sure they have a way to send feedback so we can learn from their experience (feedback@handshake.com).

## Email

**Headline:** We're sorry to see you go, Kelly.

**Body text:** As you requested, we've canceled your Handshake account. Thanks for giving Handshake a try.

We'd appreciate it if you could spare a few minutes to share your experience with Handshake. You can take this short survey or write to us at feedback@handshake.com.

**CTA:** Take Survey

If you change your mind, get in touch at support@handshake.com to reactivate your account.

We're here to help.

The Handshake Team

# Edit

Edit and shorten this first draft of a landing page for Handshake.

## HEADLINE

Welcome to the 1 and ONLY Handshake App!!!

## BODY TEXT

Why would you want to use this app? Well let me tell you its because there are so many awesome things about it. Here's what you can do: you can add up all the hours of work you did for your boss and then send them a request for payment, you can subtract all your hours from the budget, you can keep track of how much money your boss has paid you!

If you're the boss hiring someone, don't feel like you can't use this product to keep your workers inline, you can! Its the only application that you can use right this second to see whether your overbudget on that project. For the most part, there's no need to even talk to the guys who work for you. Everythign is in the app that you need to know: Accounts Recievable info and everything. There's even a feature called NOTIFY so you can send a question about why your bill is so high. Or there's another feature where you can add in the dates for important levels of work called milestones.

Back to the freelance 1099 people, you guys can add other workers that get paid different amounts so that means you can even charge for people who work for you!

Aren't you sick and tired of all that paper? Isn't it so annoying that you never know if your workers are even working? Well now you can and do it all on the go!!

## PRIMARY CALL TO ACTION (CTA)

Click here to get this incredible app!!

## SECONDARY CTA - ADD EMAIL TO MAILING LIST

Not interested in getting this app right now? How about you submit your phone number and email address for us to contact you in the future? Do that right here!

Type your valid email address:

# Edited

## HEADLINE

Welcome to Handshake!

## BODY TEXT

Handshake provides a paperless and hassle-free way to manage projects and payments. As a business owner or freelancer, there are many things that you can do with Handshake.

As a business owner, you can use Handshake to define project milestones and budget, track projects, and make payments. If you have any questions related to high billing, there is an in-built feature that lets you raise a query with the freelancer. You can also receive project proposals from freelancers.

As a freelancer, you can use Handshake to track billable hours, create invoices, send payment requests, and receive payments. You can also send project proposals to clients and hire other freelancers to work for you.

## PRIMARY CALL TO ACTION (CTA)

Get Handshake

## SECONDARY CTA – ADD EMAIL TO MAILING LIST

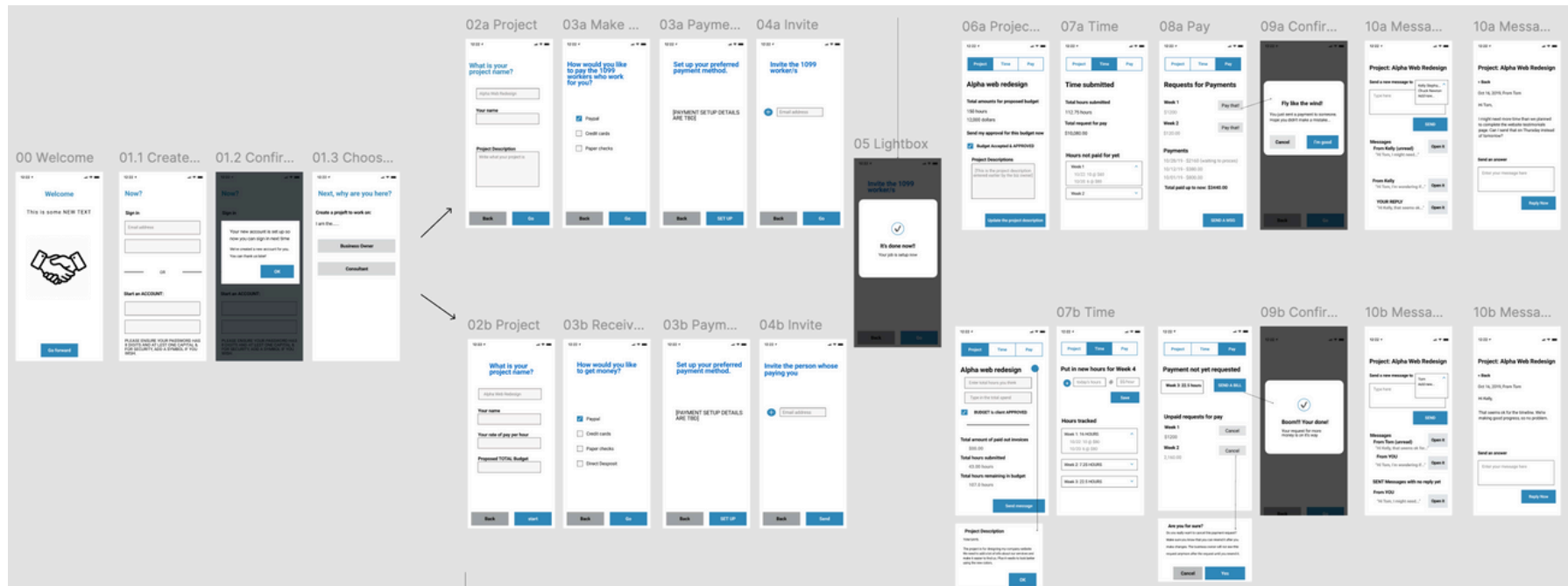
Want to know more? Share your email for more information and updates about Handshake.

Enter your Email:

# Figma Project

# Figma Project

The project involved working on a Figma file the designer shared. I had to review and edit the screens for the following three user flows for each user: Welcome, Onboarding, and Ongoing use.

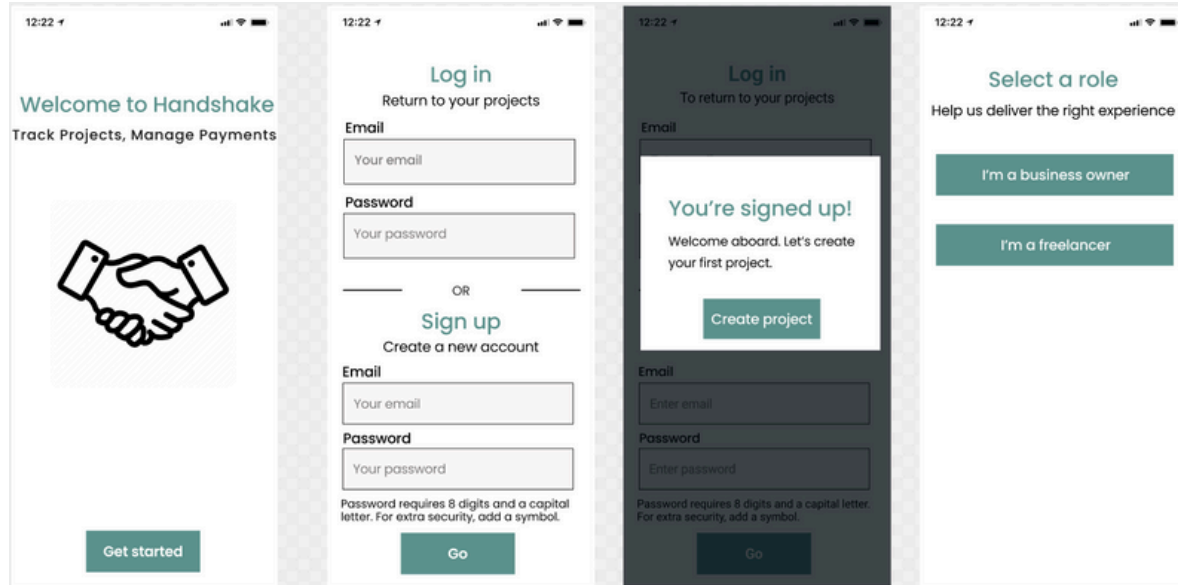


All the text had to be according to the voice, tone, and style defined in the Handshake Style Guide. A few visual/layout changes were allowed, but I had to avoid big design changes requiring new work from the development team. I also had to point out any design or flow flaws, ask questions, and suggest improvements to the designer.

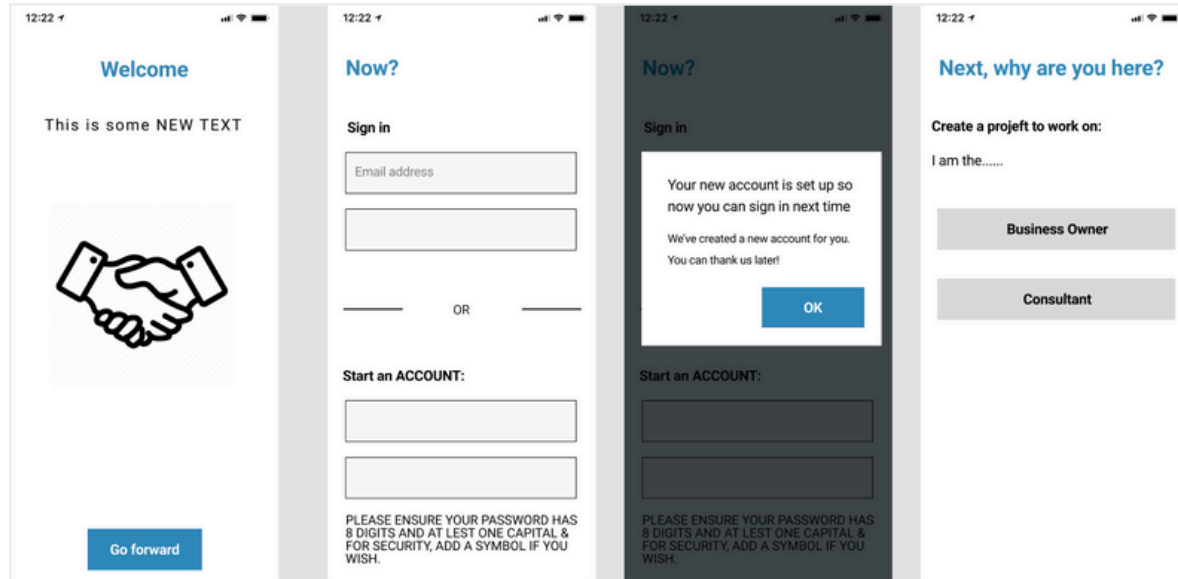
I have included the edited flows for a business user in the following sections.

# Welcome

After



Before

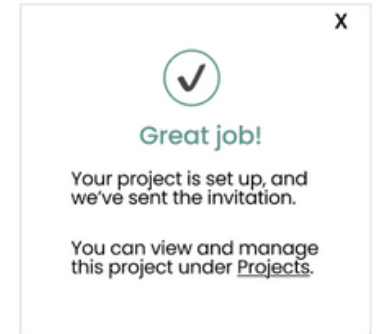


# Onboarding – Business Owner

After

The 'After' onboarding flow consists of four sequential screens:

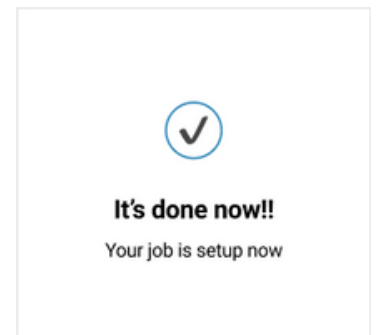
- Screen 1: Create a project**
  - Project name: Alpha web redesign
  - Project description: Project goals and requirements for freelancers
  - Proposed hours: 50
  - Proposed budget: \$1,000.00
  - Buttons: Back, Next
- Screen 2: Add a payment mode**
  - Choose how you want to pay:
    - PayPal
    - Credit card
    - Paper check
    - Direct deposit
  - Text: You'll be able to add or modify a payment mode later through [Payment Settings](#).
  - Buttons: Back, Next
- Screen 3: Set up payment**
  - Text: [PAYMENT SETUP DETAILS ARE TBD]
  - Buttons: Back, Next
- Screen 4: Invite a freelancer**
  - Text: Invite one or more freelancers to this project. We'll email them the project link to join.
  - Email: Freelancer's email
  - Text: [+ Invite another freelancer](#)
  - Message: Your message for the freelancer
  - Buttons: Back, Send invite



Before

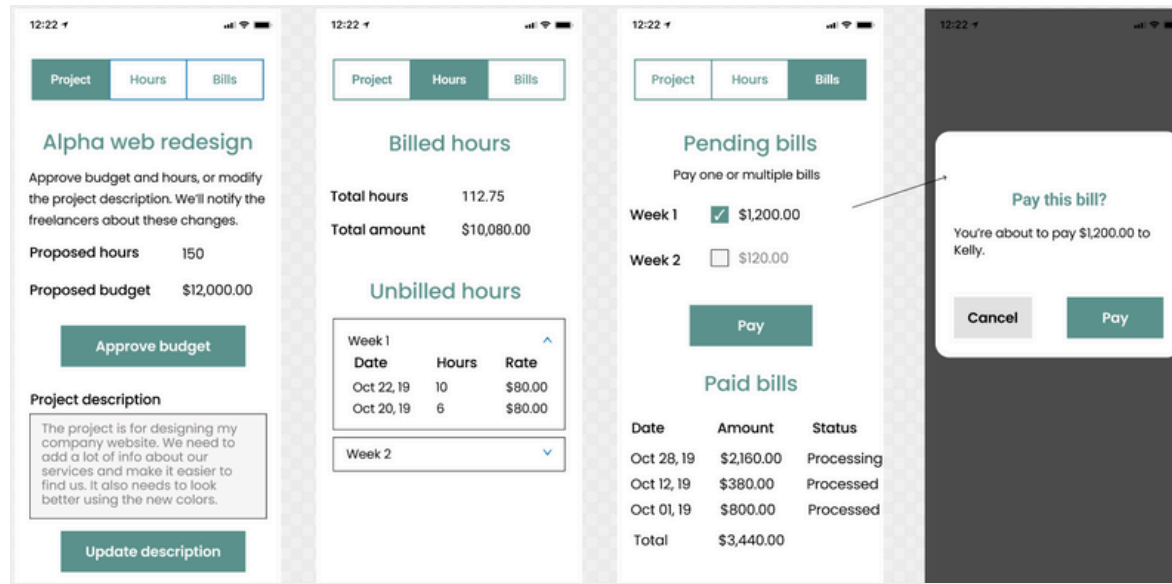
The 'Before' onboarding flow consists of four sequential screens:

- Screen 1: What is your project name?**
  - Project name: Alpha Web Redesign
  - Your name: [Empty field]
  - Project Description: Write what your project is
  - Buttons: Back, Go
- Screen 2: How would you like to pay the 1099 workers who work for you?**
  - Payment options:
    - Paypal
    - Credit cards
    - Paper checks
  - Buttons: Back, Go
- Screen 3: Set up your preferred payment method.**
  - Text: [PAYMENT SETUP DETAILS ARE TBD]
  - Buttons: Back, SET UP
- Screen 4: Invite the 1099 worker/s**
  - Text: [+ Email address](#)
  - Buttons: Back, Go

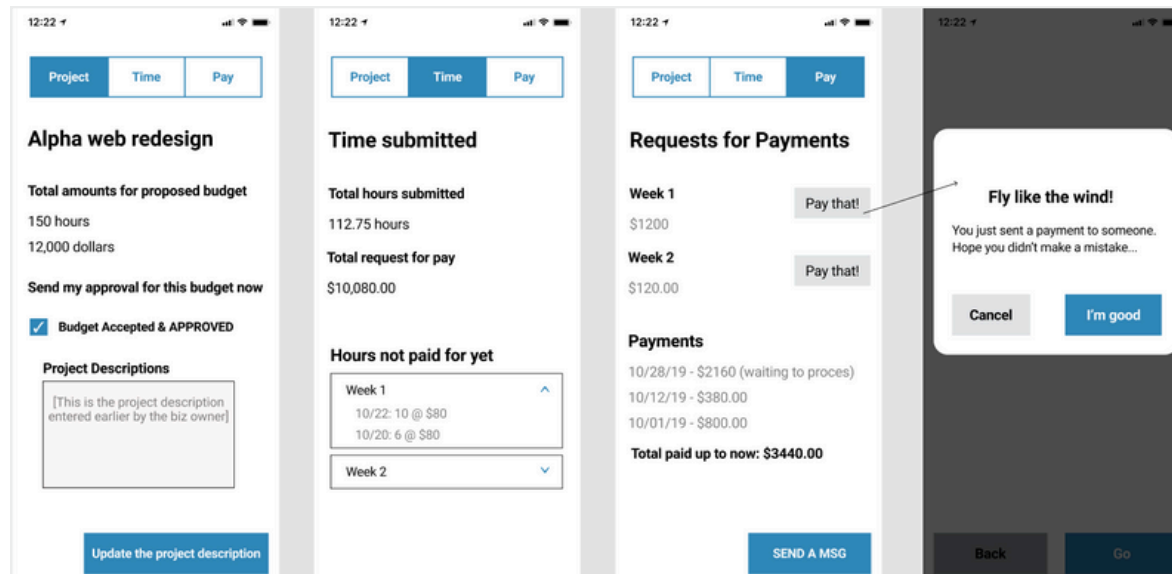


# Ongoing Use – Business Owner

After

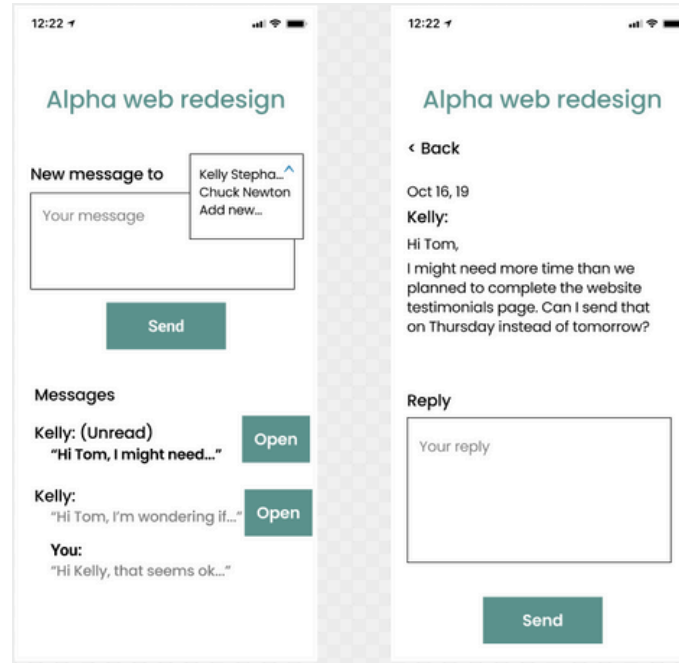


Before

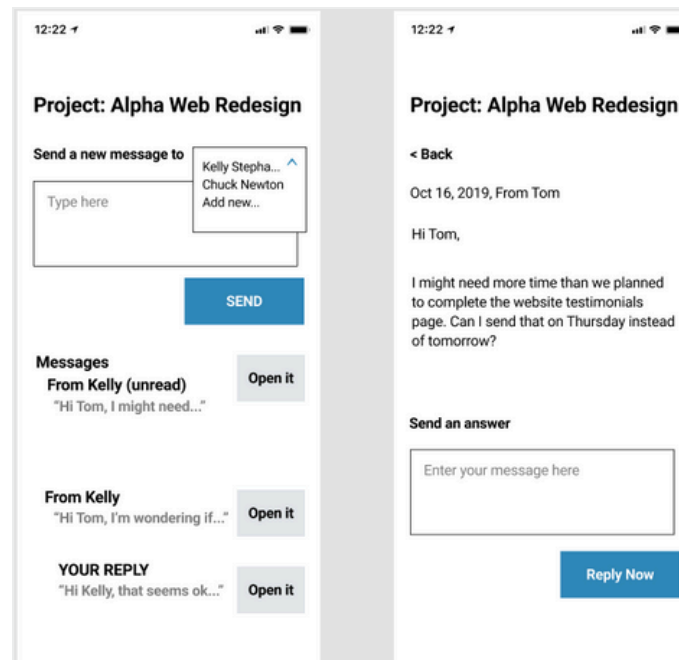


# Messages – Business Owner

After



Before



# Completion



## UX CONTENT COLLECTIVE

FINAL PROJECT SCORESHEET

### Handshake App UI Editing Exercise

STUDENT

**Rima Sharma**

OVERALL SCORE

**22.5 out of 20**

GRADING SCALE

17-20 **A**

13-16 **B**

0-12 **Try again**