

# Brand voice

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## Brand voice considerations

When creating copy for Billtrust, use these instructions only as a guideline. They are designed to help create consistent, top-quality content – not to restrict content creators from doing their best work.

### Addressing our audience

Our main audience consists of finance leaders, including CFOs, VPs of Finance, and other financial executives. Assume that you're speaking directly to them in your writing – only making exceptions when you're making content that is clearly intended for a specific group (e.g. marketing managers or IT professionals) or when making content (such as email communications) that are intentionally segmented to include a broader audience.

Address them directly, personalizing your writing by addressing finance leaders as "you" or using their titles. For example, instead of saying "our audience" or "financial professionals," say "As finance leaders, you..." or "CFOs, are you facing..."

Maintain a conversational tone that's friendly and approachable. Avoid overly formal or intimidating language. Think of it as a professional conversation with a trusted colleague. Where applicable, use terms of art and industry that you're confident would be familiar to someone in a financial leadership role without feeling the need to explain concepts that they should already understand, getting reliable information from an industry expert with both relevant experience and a confident understanding of their needs.

### Tone

Always emphasize the relevance of your content to finance leaders' roles and challenges. Demonstrate how our solutions, products, insights, or platform can address their pain points or help them achieve their goals. Show them why they should pay attention to what we have to say.

Where possible, try to include proof points, examples, and data that deliver valuable information, tips, or strategies that finance leaders can apply in their roles. Ensure that the reader can clearly understand the evidence-based reasoning behind your message. Show expertise by sharing industry trends, market insights or data-driven analyses. Finance leaders should feel confident that they're getting reliable information from an industry expert with both relevant experience and a confident understanding of their needs.

## Incorporate brand messaging

Billtrust has three core brand messages:

### Control your costs

Our solutions enable companies to lower their costs by automating their manual AR processes, increasing electronic payments, driving self-service, and enhancing productivity.

### Accelerate your cash flow

Our solutions enable companies to accelerate their cash flow by lowering their DSO through broad payment acceptance options, faster payment processing, and automated collections efforts.

### Improve customer satisfaction

Our solutions enable companies to improve the experience for their customers, making it easier to buy and pay for products and services with improved interactions throughout the process.

Familiarize yourself with our core brand messages and the key values we want to convey. These messages represent our worldview and the essence of our brand. Maintain a consistent voice and tone throughout your copy, ensuring that every word you write aligns with our brand messaging. This consistency strengthens our brand identity and reinforces our key messages across all communication channels.

When making claims or statements, ensure they directly support our brand promises. Back up these claims with evidence or examples that demonstrate how our products, services, or solutions deliver on those promises. Every piece of copy should convey our brand values. Whether it's through storytelling, highlighting our ethical stance, or showcasing our commitment to innovation, let our values shine through in your writing. Positioning our brand effectively is crucial.

### Examples:

**Do not say:**  
"Automate collections to save money."

**Instead say:**  
"Automate collections to control the costs within your AR process."

**Do not say:**  
"Accepting more types of payments is forward thinking."

**Instead say:**  
"Accepting more types of payments increases your cash flow and makes your customers happier."

# Everything you write presents an opportunity for our brand – make the most of it.

## Copy formatting

When formatting your copy, consider the following best practices:

- Use clear and concise headlines:** Craft compelling and concise headlines that immediately capture the attention of financial leaders. Our audience can be time starved, so it's critical that headlines draw attention quickly and provide value.
- Copy should use AP Style formatting** as a default, including sentence case headlines and serial commas. Using AP formatting is the best way to ensure that our style conventions are consistent across all content we develop.
- Break up content with subheadings and lists:** Structure your copy with informative subheadings that guide readers, highlight key points, and help them quickly navigate the content to find the information they need. Where possible, use bulleted lists to present information in an easily read format.
- Highlight key statistics and data:** When including data-driven insights or critical statements, also provide them in a format that would make them easily used in pull treatments, charts, etc. Offer opportunities for designers to highlight content items that can help tell the highlights of the story visually.
- All copy should follow US English spelling and grammar conventions by default** (e.g. *color*, not *colour*; *center*, not *centre*; *organize*, not *organise*). When writing dates, use US formats (*January 1, 2023*) for general audiences or when the audience is not specifically known. If the audience is known to be exclusively from the European Union, default to EU formats (*1 January, 2023*). Refrain from using purely numerical date formats (mm/dd/yyyy | dd/mm/yyyy) where possible in order to manage against ambiguity.
- Avoid cluttered text and allow for ample white space** / paragraph breaks in your content where reasonable. White space helps to create a clean and visually appealing layout, making it easier for our audience to read, scan, and absorb the information.

## Using generative artificial intelligence (AI)

Copy creators are allowed (and encouraged) to use AI tools to generate content when and where the need arises. When relying on AI for copy assistance, be sure to follow these guard rails to improve your outcomes.

- Set clear objectives:** Clearly define the objectives and desired outcomes for the copy. Specify the purpose, tone, and messaging guidelines for the content you want to create. If possible, use text from the style guide as part of your input prompts. This ensures that the output aligns with your goals.
- Provide sufficient input:** Provide the AI model with relevant and comprehensive input to generate accurate and contextually appropriate content. Include specific details, keywords, or prompts that guide the AI to produce content relevant to the subject matter.
- Refine and iterate:** Understand that generative AI may not always produce perfect output in the initial attempts. Review and iterate on the generated content to refine and enhance its quality. Treat the AI-generated output as a starting point for human refinement and creativity.
- Fact-check and verify information:** While generative AI can provide compelling narratives, it's crucial to fact-check and verify the information it generates. Ensure that the AI-generated content is accurate, reliable, and aligns with our standards for factual information. If your copy includes quotes, claims, or references that are incorrect, Billtrust is liable, not the AI.
- Allow for human expertise:** Leverage your own creativity to enhance and augment the AI-generated content where you can. Incorporate quotes, opinions, and perspectives from internal and external thought leaders where possible to supplement the narrative and add a unique human touch that can aid in making the copy connect with readers.
- Edit for clarity and coherence:** Review the AI-generated content to ensure it has a logical flow and consistent messaging throughout. Edit and structure the text to ensure it communicates the intended message effectively and is easy for readers to understand.

## Language and internationalization

Internationalization, in the context of content, refers to the process of creating and adapting copy that can be effectively understood, localized, and appreciated by diverse audiences across different regions, languages, and cultures. It involves considering the needs, preferences, and cultural nuances of our global audience to ensure our content resonates and engages with them authentically.

Given that Billtrust is a global company and that a large amount of our content will be translated into multiple languages, as content creators, we have to consciously manage our writing to ensure that our output is inclusive and impactful for a broad audience.

### Bear the following principles in mind:

- Embrace cultural diversity:** Our global audience represents diverse cultures, backgrounds, and perspectives. Respect and appreciate different cultural norms, values, and traditions where applicable.
- Use clear and concise communication:** Opt for clear, straightforward language that's easily understood by non-native English speakers. Avoid complex sentence structures, jargon, ornate language, or idioms that may be difficult to translate or comprehend. Keep it simple and concise.
- Consider localization:** Write with localization in mind, leaving room for adaptations to language, cultural references, and specific market nuances. Recognize that certain aspects of accounts receivable processing will differ in various regions around the globe, and try to avoid assuming that every reader lives where you do.
- Avoid offense:** Research and understand cultural sensitivities and potential pitfalls where possible. Be mindful of religious, political, business, or cultural topics that may be sensitive or controversial in certain regions. Strive to avoid unintentional offense.