

Brand Voice & Messaging — Workbook

This workbook turns the course into a finished voice and messaging system you can hand to your team. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you run against real copy. Pick one brand of your own, a business, a product, or your personal brand, and carry it through every section. You will finish with an audited starting point, a defined three-trait voice, a one-page messaging hierarchy, a tone matrix, and a complete voice and tone guide.

Why Voice Is a Strategic Asset

Separate voice from tone, prove the business case to yourself, and audit how your brand actually sounds today before defining anything.

Exercise: Read Your Voice Out Loud

Gather the sample described in the course (homepage hero, two emails, three social posts, three error messages, one support reply, your About page, two competitor homepages). Read the whole thing out loud in one sitting and highlight as you go: green for lines that sound like the brand at its best, yellow for flat or generic, red for off-brand. Then answer the prompts.

- Which three green lines are your favorites, and what specific thing makes each one work?

- What is the single most common failure mode across the yellow and red lines?

- Which words and phrases show up everywhere as filler (for example seamless, robust, world-class)?

- In one sentence, describe the accidental voice you actually have today, separate from the one you want.

Worksheet: Voice vs Tone Sorting

For each item below, decide whether it belongs to your fixed VOICE (never changes) or your flexible TONE (changes by situation). Getting this split right is the foundation for everything that follows.

Personality traits — voice or tone, and why

Humor level in a refund denial — voice or tone, and why

Banned and preferred words — voice or tone, and why

Enthusiasm in a launch email vs a billing email — voice or tone, and why

Point of view (we and you, brand name, impersonal) — voice or tone, and why

Worksheet: Make the Business Case to a Skeptic

Imagine a manager who thinks voice work is fluff. Fill in each field with a concrete, brand-specific argument using the numbers and mechanisms from the course.

The consistency-to-revenue figure I will cite and why it applies to us

Where our customers touch our words most often (list the top 3 surfaces)

The processing-fluency or trust argument in one plain sentence

A named brand with an unmistakable voice that my manager already respects

The operational payoff: how a written voice speeds up new writers and freelancers

Checklist: Audit-Complete Gut Check

- I pulled a representative sample across marketing, transactional, social, product, and support copy.
- I read the entire sample out loud, not silently.
- I highlighted in three colors and named what made the green lines work.
- I identified my most over-used filler words.
- I wrote one honest sentence describing my accidental voice today.

Define a Distinct Voice

Move from audit to a deliberate voice: anchor the four tone dimensions, choose three ownable traits, and draw the line with a this-not-that chart.

Worksheet: Anchor the Four Tone Dimensions

Place your brand's baseline (anchor) position on each Nielsen Norman dimension using a number from 1 to 5, then justify it in a few words. This is your default, before any situational flex.

Funny (5) vs serious (1): score and reason

Formal (1) vs casual (5): score and reason

Respectful (1) vs irreverent (5): score and reason

Enthusiastic (5) vs matter-of-fact (1): score and reason

One example sentence written at exactly these anchor settings

Exercise: Choose Three Traits and Run the Opposite Test

Brainstorm 8 to 10 candidate personality traits, then ruthlessly cut. A trait only survives if a credible brand could deliberately choose its opposite (so trustworthy is out, irreverent is in). Land on exactly three to four.

- List your 8 to 10 candidate traits.

- For each, name the opposite and decide: would any real brand choose it? Cut the ones whose opposite is absurd.
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- State your final three to four traits.
- For your weakest surviving trait, defend why it is true to your brand and not just aspirational.

Worksheet: Build a This-Not-That Chart Row Per Trait

Complete one full row for each of your final traits. Spend the most effort on the We are not column — that is the boundary that actually protects the voice.

Trait 1: We are / We are not / Do write / Don't write

Trait 2: We are / We are not / Do write / Don't write

Trait 3: We are / We are not / Do write / Don't write

Trait 4 (optional): We are / We are not / Do write / Don't write

Checklist: Voice-Defined Gut Check

- I committed to a number on all four tone dimensions, not a vague feeling.
- Every trait passed the opposite test — its opposite is something a real brand would choose.
- I have no more than four traits so a writer can hold them in mind.
- Each trait has do's, don'ts, and a before-and-after example.
- My We are not columns name the specific ditch beside each trait.

Build the Messaging Hierarchy

Construct the what-you-say layer: a sharp value proposition, three distinct pillars with real proof, and a tagline plus boilerplate the team can reuse.

Worksheet: Write Your Value Proposition Two Ways

Complete the Geoffrey Moore template and the Steve Blank XYZ line. The rigidity is the point: if you cannot name the alternative or the mechanism, you have found your gap.

X — target customer (specific enough to exclude people)

Y — the outcome they want, in their words

Z — the mechanism, the part competitors cannot easily copy

Primary alternative they use today (including doing nothing)

Full Geoffrey Moore line: For [X] who [need], the [product] is a [category] that [benefit]. Unlike [alternative], we [differentiator].

Short XYZ line: We help X do Y by doing Z.

Exercise: Stress-Test Your Pillars and Proof

Draft three to four message pillars under your value proposition, then put at least two concrete proof points under each. Run the swap test to make sure pillars are truly distinct.

- Name your three to four pillars as benefit areas, not feature lists.

- Under each pillar, write at least two proof points (a number, a named feature, a customer quote, a third-party validation).

- Swap test: could any proof point move to a different pillar and still fit? If yes, merge or redraw those pillars.

- Which pillar has the weakest proof, and what specific evidence do you need to go find?

Worksheet: Tagline and Boilerplate

Distill the hierarchy into reusable assets. Write the boilerplate so a journalist could paste it into a story unchanged — if they would rewrite it, so should you.

Tagline (under 7 words, evocative not explanatory)

Boilerplate paragraph (50 to 100 words, leads with a clear value proposition and one credible proof point)

The one proof point I led the boilerplate with and why it survives editing

Checklist: Hierarchy-Complete Gut Check

- My value proposition names a specific customer, benefit, and mechanism — it could not sit unchanged on a competitor's site.
- I have three to four pillars, no more, and they passed the swap test.
- Every pillar has at least two concrete proof points, not just slogans.
- My tagline is evocative and my value proposition is explanatory — they are different lines.
- My boilerplate could drop into a news article without rewriting.

Apply, Codify, and Govern the Voice

Turn the voice and message into a working system: a tone matrix, a usable guide with a cheat sheet, a real rollout, and metrics that catch drift.

Worksheet: Fill In Your Tone Matrix

For each situation, record the reader's emotional state and your tone guidance (which dimensions dial up or down). Same voice traits throughout, different dial settings. Give the crisis row the most care.

Onboarding / welcome — reader state and tone guidance

Errors / empty states — reader state and tone guidance

Sales / upgrade prompts — reader state and tone guidance

Success / celebration — reader state and tone guidance

Crisis / outage / apology — reader state and tone guidance, plus a sample on-brand line

Exercise: Rewrite a Real Message in the Right Tone

Pick three real messages your brand sends and rewrite each in its correct matrix tone while keeping your three voice traits intact. The error and crisis rewrites are where most brands slip into generic corporate-speak.

- Rewrite an error or empty-state message: calm, plain, zero humor, lead with the next step.
- Rewrite an outage or apology message accountably (This one is on us...), not defensively (We apologize for any inconvenience...).
- Rewrite a success or celebration message and let your wit and enthusiasm show.
- For each rewrite, name which voice traits you kept and which tone dials you changed.

Worksheet: Word List: Preferred and Banned

Build the highest-leverage page in your guide. List the words you always use, the words you ban, and the tricky calls writers face daily.

Words we always use (e.g. customers not users, sign up not register)

Words we ban (e.g. leverage, synergy, world-class, revolutionary)

Tricky terminology calls and our ruling on each

Formatting conventions (capitalization, numbers, oxford comma, emoji policy)

Checklist: Rollout and Governance Gut Check

- My guide is short, scannable, and front-loaded — absorbable in 20 minutes, spot-checkable in 20 seconds.
- A one-page cheat sheet (traits, tone matrix, word list) sits at the very front.
- I ran a live walkthrough and rewrote real examples with everyone who writes.
- The cheat sheet is embedded in the tools writers already use.
- One named voice owner protects the standard and answers edge cases.
- A voice check is part of the normal review or QA step.
- A quarterly voice audit and an on-brand pass-rate metric are scheduled.

Your Action Plan

1. Choose one brand, product, or personal brand to carry through the whole plan.
2. Run the voice audit: pull a representative sample, read it aloud, highlight in three colors, and name your accidental voice.
3. Anchor your brand on all four Nielsen Norman tone dimensions with a number from 1 to 5 each.
4. Choose three to four voice traits and cut any whose opposite no real brand would choose.
5. Build a this-not-that chart row for every trait, focusing on the We are not column.
6. Write your value proposition both ways — the full Geoffrey Moore template and the short XYZ line.
7. Construct the messaging hierarchy: value proposition, three to four pillars, and at least two proof points each.
8. Distill a tagline and a journalist-proof boilerplate from the hierarchy.
9. Fill in a tone matrix for every situation you write for, giving the crisis row the most care.
10. Assemble the voice and tone guide with a one-page cheat sheet, run a live rollout, name an owner, and schedule a quarterly audit with an on-brand pass-rate metric.

