EXL content and style guide

April 25, 2023

Contents

Introduction

This style guide is meant to help our creators produce content with consistent tone, quality, and voice. Parts of this are at a high level, covering what we say and how we say it. Parts of this are focused on details, covering specific guidelines for things such as what product names are trademarked or whether certain terms are capitalized. Following it will ensure content moves from production to publication with as few revisions as possible.

Voice

This section has been adapted and expanded from the EXL Brand Guidelines available on Planet EXL.

What is brand voice?

Brand voice dictates the character and style of our writing. It enables us to communicate in a unique and compelling way across all written and spoken communications. It brings our brand's personality traits to life through word choice, tone, and cadence. It creates relationship and connection with our audiences by making our brand more human and approachable.

Our brand voice can be summarized as:

We are an enthusiastic partner that is bold, intuitive, inspiring and progressive… And we

- Look for opportunities
- Raise altitude and think bigger
- Are agile and fast
- Make it real

When we speak, we make sense of data to drive your business forward.

We have adopted this voice because our customers seek a partner who:

- Clarifies technology and connects it to concrete, easy wins
- Listens well and promotes a collaborative, incremental approach
- Broadcasts flexibility and strategic thinking across the entire team
- Displays a culture of engagement, enthusiasm, and teamwork

Voice principles and tactics

These principles and tactics are for reference only and should be used to inspire communications that are tonally on brand. Later sections discuss how we dial in our tone for different situations and audiences.

These three voice principles can provide high-level guidance on how we build our messages.

Voice principle 01: Partner for success

Tactic 1

Immediately establish that we get it and can help, leading with strategic solutions or sharing progressive ideas.

- Our content looks ahead. We help businesses adapt for the future, so focus on what they can do today to prepare for tomorrow. Unless it's essential for the piece, don't include lengthy retrospectives or histories about what's already happened. The most interesting part of our content is what is happening or will happen, not what has already occurred.

Tactic 2

Don't bury the lead. Inspire leadership and build credibility by showcasing our expertise in AI, cloud, and technology— and the outcomes we can deliver.

- Think about the intended reader. They probably have a solid understanding of the foundational concepts for whatever piece you're writing. Focus on what will be new to them. If you're writing on analytics or AI, your audience is probably already familiar with what these terms are and the basics of how they can be applied – it's why they clicked on your content in the first place. What they'll find interesting is the new information you can share, not a 101 introductory course.

Tactic 3

Emphasize our enthusiasm and drive, striking a positive tone with active voice and bold, vibrant word choice to inspire the excitement our partnership promises.

- There's a time and a place for technical content. Technical doesn't have to mean boring, though. Don't lose sight of the fact there's a human reading your piece even when you're writing about dense subject matter. Try and take the same tone in your writing that you would take when speaking with someone at a conference: Professional, knowledgeable, friendly.

Other dos and don't

- **Do** get right to the point with the content that will most grab the reader's attention
- **Do** keep copy active and optimistic to display enthusiasm and engagement
- **Don't** come across as overly confident or cocky— we know tech but we're flexible listeners
- **Don't** make light of client challenges or characterize the work we do as "easy"
- **Don't** write overly informal copy that compromises perceptions of EXL as a credible professional services organization

Voice principle 02: Show the way

We make sense of the complexities of technology by keeping it simple, clear and concise

Tactic 1

Make sense of the data by explaining EXL solutions in simple, intuitive language that a non-technical person could understand.

- Avoid jargon unless it's necessary. Don't try and show readers we're experts at a subject because we know a bunch of terms related to the topic. Your ideas and command of the subject matter of a piece will do a far better job of demonstrating knowledge than your vocabulary.

Tactic 2

Highlight our flexibility and partnership, using the language of collaboration (let's, we, together) to emphasize that we'll work in the way that works for them.

- Don't feel compelled to shoehorn this tactic into every piece of content. Some assets, especially white papers, focus on educating readers rather than selling our solutions or services. For solution sheets, case studies, and articles explaining our solutions, emphasize that we work with clients, not just for them.

Tactic 3

Speed forward with agility, using short, punchy sentences to communicate concepts clearly and concisely.

- It's true that shorter is better in general. Long, flowery sentences can lose readers. With longer pieces, reading short sentence after short sentence can feel exhausting. Don't feel like you must make every sentence brief and snappy. Again, try and maintain a conversational flow in your writing.
- Again, avoid jargon. Your audience might be technical, but your writing doesn't have to be. This will make your content more accessible and easier to understand. However, if

you're writing for an extremely technical audience then it's okay to include jargon if that's part of the way they commonly speak. If you're targeting both a technical and non-technical audience, though, focus more on making your writing accessible to the non-technical readers.

Other dos and don'ts

- **Do** simply and clearly articulate necessary information about EXL's solutions
- **Do** keep the conversation moving forward with punchy phrases for cadence when appropriate
- **Don't** oversimplify or fail to associate relevant technologies with the outcomes we promise
- **Don't** craft frenetic, racy copy that undermines the sense and comfort we bring to transformation
- **Don't** use jargon or overly technical language when it isn't necessary to communicate the core idea

Voice Principle 03: Make it real

We illustrate outcomes – big and small – and support them with facts.

Tactic 1

Clarify the benefit by describing how the business outcomes of implementation will positively impact the client in practical, tangible ways.

- Include a mix of qualitative and quantitative outcomes when describing how we benefit our clients. Whenever possible, include statistics or data showing the results we've achieved.

Tactic 2

Solidify the promise of success using proof points, case studies and examples to demonstrate the benefits of our methodologies and solutions.

- Weaving case studies into white papers, articles, and solution sheets amplifies their impact. Refer to EXL's previously published content to see if there are any case studies on the subject, then find ways to include those results within new pieces of content.

Tactic 3

Celebrate small wins by highlighting the value of incremental successes to balance the big picture outlook with day-to-day progress and achievements.

- Don't just focus on the topline wins. Consider the impact on the end user and the way we've benefitted the people we worked with. For instance, streamlined processes can often cut down on employee frustration – that's something worth highlighting along with the amount of dollars saved or revenue realized.

Brand voice checklist

Use this easy checklist to make sure your work is on-voice. Ask yourself the questions below.

- Will the reader feel inspired and confident?
- Do we come off as a flexible, collaborative partner?
- Would a non-technical person understand?
- Did we clarify or illustrate the end benefit?

Content best practices

Keep these best practices in mind when creating all pieces of content.

Determining your audience

This is the most important step of the entire process. Successful content is written for a specific group of readers rather than trying to be all things to all people. Everything else – the type of language you use, the tone you take, the subject matter you discuss – comes from understanding who you're writing for.

When thinking about your audience:

- **Get specific:** Having a specific readership in mind lets you tailor a piece to their interests. That makes it easier to craft relevant messages that engage your readers. Avoid overly broad audiences, such as pieces that target C-suite executives in general. Try and have a handful of specific titles or groups in mind.
- **Consider what they know and don't know:** Content that contains new information will grab your audience, while content that summarizes what they already know will not. Before you begin writing, think about what that new information will be for the titles you've selected. For instance, a VP in charge of customer experience may be aware that analytics could enable them to determine which customers are likely to experience an issue, but they may be unaware that these customers could be proactively contacted using a conversational AI. Focus on the latter part.

EXL

Headlines and titles

The title of a piece should be impactful, calls out the specific audience that will find the content interesting, as well as the problem it solves or solution it explains. For instance, calling a piece “Data drives growth” is very vague. A title like “How insurance F&A leaders drive growth with data” tells who a piece is for and what they will learn.

- **Length:** When possible, keep your titles under 60 characters long. Anything over that is likely to get cut off in the Google search engine results.
- **Capitalization:** Titles should use sentence case capitalization.

Sources

Outside sources are great. Including relevant research and studies shows that our ideas are backed by real-world data.

Make sure to follow a few simple rules when including sources in your work:

- **Use our data first:** EXL has commissioned several research reports from firms and publications including HBR, Forrester, and HfS. When possible, use our research to support your ideas.
- **Avoid competitors:** Don’t link to research conducted by competitors such as Accenture, WNS, Genpact, or companies offering services that directly compete with EXL.
- **Keep it recent:** Avoid data from research published before 2020. Citing older data sources will make your content seem dated.

Citations

If you reference a source, you need to cite it. Follow these guidelines:

- For PDFs use endnotes: Don’t use footnotes, parenthetical citations, or in hyperlinks in the body copy to cite sources if you’re writing a white paper, infographic, case study, or solution sheet. For these endnotes, include the title of the page, study, or article hyperlinked to the source, as well as the name of the publication or company responsible for the piece. If you cited Gartner’s research on the top cybersecurity trends of 2023, your endnote would look like this: The Top Cybersecurity Trends of 2023, Gartner
- For web-only articles use hyperlinks: If you’re creating a blog or other article that won’t be published as a PDF then don’t use endnotes. Hyperlink your sources directly within the text. Don’t hyperlink the whole sentence, just the relevant portion of the text. If you were writing about how EXL was included in Newsweek’s America’s Most

Responsible Companies list, you would hyperlink the name of the list but not the rest of the sentence.

- Link to the original source: If you're citing a research report or study, link directly to that research report or study. Don't link to a press release, news article, or other content that has the data you're citing. For example, if you were citing data from the Bureau of Labor Statistics on unemployment rates, you'd cite the original BLS report rather than a news article about the report.

Images and graphics

Pictures and bring you story to life. Here's how you can make sure they're included in the best way possible:

- **Provide any decks for images:** Images, charts, and graphs are often drawn from PPT presentations. When this is the case, indicate where the image is supposed to go in the text by including a screenshot or copying and pasting the relevant picture. However, also provide the content team with the original PPT so that it can be copyedited for any errors. Design will also require the PPT for when they create the PDF of the asset. If the deck is not provided that may result in errors showing up in the final publication or delays due to our designers having to recreate the image from scratch.
- **Watch text references to images:** Avoid referring to where images are located in the text. Where these pictures are placed in the final version may be different than where they are in the word draft. That means saying things such as, "the below graph," or, "as the chart to the left displays," may not be accurate in the published piece.
- **Ask for specific images if needed:** The design team will place stock images throughout an asset as needed and where appropriate. If you have any specific requests for a picture, though, feel free to include a bracketed, highlighted note to the team with the type of image you'd like included. It should look like this: [FOR DESIGN TEAM: Please include a picture of an insurance adjuster standing by a car wreck]. While the design team may not be able to fulfill all requests, they'll do what they can.

Perspective

Some of our content is written in first person. That means it's okay for you to say things like "we think" or "our solution." Third person is also accepted. The important thing is to pick one and stick to it.

Second person – addressing the reader directly through phrases like "your company" or "as our client, you come first" – is acceptable, but shouldn't be overused. If you're writing for a narrow audience that have shared priorities, such as is usually the case for sales sheets or articles targeting a few titles, then writing in the second person can add a personal touch that engages the reader. Content focused on a broader range of readers, such as white papers, aren't usually a good fit for second person.

Very little of our content is written from the author's direct perspective. Don't say "I think" or "my view" in our content unless the piece specifically calls for it. This could include cases such as a byline offering the opinion of the author, or a recap of an event the author attended.

Use active tense

Write in active tense, not passive tense. Instead of saying something like, "the data was accessed by EXL's team," say, "EXL's team accessed the data."

Text emphasis

Generally, avoid formatting your text for emphasis. That means avoiding **bolding**, *italicizing*, or underlining words. If something is important clarify emphasize that with the language you use, rather than how you style your text.

Text that must be emphasized through formatting gets bolded. This should be rare. Too much text formatting will make a piece look busy and unreadable.

Don't use quotation marks for emphasis. Only use quotation marks when you're using a direct quote.

Sentence spacing

Use a single space between sentences.

Writing different types of content

The preceding guidelines are applicable to every piece of content we produce. This section focuses on the best practices for creating different types of content.

White papers

Length: 1.5K-2.5K words

Our white papers aim to educate and inform readers. They demonstrate our expertise, knowledge, and authority on different subject matter, often by providing high-level guides on trends shaping the market or solutions for challenges companies face.

White papers are typically not sales documents. Don't use them as an opportunity to trumpet EXL's solutions. These are often pieces used to introduce EXL to new audiences, so we want to show them we're experts before pitching them on how we can help.

With that said, it's completely appropriate to weave in EXL case studies to support claims within a paper. These can be included either within the text, as sidebars, or as callouts.

Our white papers are based in facts. Arguments made within a paper must be backed up by data, citing either EXL's research or outside sources.

Clearly delineate the different sections and subsections of your paper. Use the Word Heading 1 formatting for section headers and Heading 2 for subsection headers. This will help the design and web teams when they create the final version of your asset.

Template

Not every white paper needs to follow this template. In general, though, most papers tend to follow along these lines.

- **Section 1: Introduction.** Keep this short. Aim for three or less paragraphs that state the problem or opportunity the paper focuses on, the solution or way to capitalize on the opportunity, and benefits of doing so.
- **Section 2: Define the problem or opportunity.** Remember to think about this from the perspective of your audience. Your readers are probably aware that there is an issue to solve or benefit they can realize, so you may not need to provide a detailed description as if you were educating a layperson. Instead, use these paragraphs to define what aspects of the challenge or opportunity you will be discussing in the next sections.
    - Don't spend too much time here. You most likely only need a couple paragraphs. The exception is if you're writing about a trend or change that most people aren't aware of, in which case focus as much on this section as needed.
- **Section 3: Define the solution.** This is going to be the most interesting part of your paper and should be the longest section. Make sure these points are connected to the previous section – if you raised a problem or opportunity, tell the reader how to solve that problem or capitalize on that opportunity.
- **Section 4: Conclusion.** Tie it all together. Restate to the reader that the problem is solvable or opportunity attainable, and how to do so.
- **Section 5: CTA.** If the piece is part of a campaign include a link to its follow-up content. If not, invite the reader to contact EXL for more information.

Article

Length: 500-1K words

Where white papers provide an overview of a topic, articles get specific. These are basically white papers in miniature. You can use the same template as a white paper, but just adjust it so it focuses on a single problem or opportunity.

Case studies

Length: 500-1K words

Case studies are some of the most important pieces of content EXL produces. They highlight the real results EXL has produced for its clients.

Because of that, the first step before producing a case study should be to consider what results it's highlighting. The case studies that perform best are the ones with real data, such as showing how much revenue we helped a client realize, the dollar amount of costs cut, or the percentage growth they attained. Avoid case studies highlighting the potential growth or expected results that may be achieved after a certain time – we want to keep things real.

Template

- **Section 1: Introduction.** This typically only needs a paragraph. Treat it almost like an executive summary. Introduce the client, state their problem, and say how EXL helped solve it.
    - Unless the client gives us specific permission, all case studies are masked. Make sure the details you give about the client don't reveal who that client is. If you were writing a case study about McDonald's, you wouldn't say, "A multinational fast-food chain with a distinctive M-shaped logo."
- **Section 2: Challenge. Define the client's challenge.** Include stats where possible to make it real. Don't portray the challenge as being due to ineptitude, inexperience, or lack of knowledge – remember, we want to make the client look good as well as EXL.
- **Section 3: Solution/Human Ingenuity.** For healthcare case studies use Human Ingenuity as the title for this section, for all others title this section Solution. Provide a step-by-step narrative of how EXL solved this challenge. Unless appropriate, don't get too technical. Readers will care more about how our experts used tools, programs, or algorithms to solve an issue more than the specific tools, programs, or algorithms they used.
- **Section 4: Results.** This is the most important part of the case study. You typically don't want to spend more than a paragraph closing out a case study. Let the results speak for themselves, listing out what EXL achieved in three-to-five bullet points.

Where possible, use quantitative rather than qualitative outcomes and let the stats tell the story.

- **Section 5: CTA.** Close by inviting the reader to contact EXL for more information or including a link to follow-up content if part of a campaign.

Infographics

Length: <500 words

Infographics provide quick, digestible overviews of EXL's views on different topics. Unlike case studies or white papers, infographics are often bespoke creations and don't follow a template. These best practices can help ensure a high-quality infographic.

- **Less is more.** Too many graphics or too much text makes an infographic look busy and incomprehensible. Try to take a minimalist approach for both copy and pictures
- **Stats work best.** Infographics are data-driven narratives. When possible, let the stats tell the story. It's also much easier for our designers to create compelling visuals based on stats than text.
- **Don't just use a sales deck.** Sales decks are a good jumping off point for infographics. They also make for terrible infographics without a lot of edits. Remember, a deck is usually just the illustrations that accompany a talk track during a presentation. Without that talk track, the visuals lose their context and don't work on their own.

Solution sheets

Length: 500-750 words

Sales sheets describe a specific solution or service EXL offers. These often have more in common with infographics than articles in that they feature prominent visuals, but still rely mainly on text to tell the story. They tend to use bullet points and snappy summaries than paragraphs.

Template

- **Section 1: Introduction.** Typically a paragraph. Tell the reader about the product or service being offered. Make sure to state exactly what the product or service is – a program, a suite of solutions, a platform, or something else. Your audience may not be familiar with this offering and needs this defined.
- **Section 2: Features and benefits.** Typically written in bullet points. Give a rundown of what the solution can do for the reader. This should include its features, or things like intelligent voice recognition, optical character recognition, or AI-based call routing. Also includes its benefits, or what those features can do for the reader such as deflect

calls, automatically classify different documents, or transfer the call to the representative with the skillset most suited for the caller's problem.

- **Section 3: Proof points.** Typically written in bullet points. Provide summaries of case studies where the offering was used to help a client, as well as the statistics showing what it achieved.
- **Section 4: CTA.** Invite the reader to contact EXL, schedule a demo, or whatever the appropriate next action is based on the solution.

Web pages

Length: Varies

EXL's digital team has developed specific templates for various web pages. These can be found here. Each template contains instructions on the sections, length, and other necessary information for creating a web page.

Word list, EXL terms, and Grammar

EXL uses a lot of phrases, words, and terms as part of its branded voice. Here's how to make sure they're written correctly, spell out our products the right way, and avoid some common errors. For non-branded terms that aren't on this list, refer to the AP Style Guide.

Word list

- Advanced automation: Don't capitalize unless it begins a sentence
- Advanced analytics: Don't capitalize unless it begins a sentence
- Artificial intelligence: Don't capitalize unless it begins a sentence.
- Back office: Back office when used as a noun, back-office when used as an adjective.
- C-level
- C-suite
- CEO, CFO, COO: CEO is acceptable in all references for chief executive officer. Use chief financial officer on first reference and CFO thereafter. Use chief operating officer on first reference and then COO thereafter. Spell out other C-level positions, such as chief claims officer, chief information officer, or chief information officer.
- Coronavirus: Don't capitalize, don't refer to it without using the word the. Not: Businesses saw coronavirus change everything. Correct: Businesses saw the coronavirus change everything.

- Covid-19
- Data and analytics: Don’t use ampersand, data & analytics is incorrect
- Front office: Front office when used as a noun, front-office when used as an adjective
- Human ingenuity: Don’t capitalize
- Health care/healthcare: Health care when referring to the act of delivering care, one word when referring to the healthcare industry. Doctors provide health care at healthcare companies.
- Intelligent automation: Don’t capitalize unless it begins a sentence
- Machine learning: Don’t capitalize unless it begins a sentence
- Omnichannel
- Robotics process automation: This term has fallen out of favor. Just say automation.
- Third party: Third party when used as a noun, third-party when used as an adjective

EXL terms

- CareRadius™
- EXLCLARITY™
- EXL Express Survey™
- EXL EXELIA.AI™
- EXLMINE™
- EXL Nervehub™
- EXLerator™
- EXL Paymentor™
- EXLVANTAGE™
- EXL XTRAKTO.AI™
- LDS™: Used to refer to LifePRO Digital Suite
- LifePRO™
- Liss™
- MedConnection™
- Rev-Lift™
- Subrosource™

Grammar

- Abbreviations: If a term is widely known by a layperson, such as AI, then it's okay not to spell it out before using the abbreviation. For every other term fully spell it out the first time followed by the abbreviation in parentheses. Use the abbreviation thereafter. For example, say intelligent character recognition (ICR) the first time, then ICR every time after that.
- Ampersand (&): Don't use in place of the word and. Use when the ampersand is part of a company's formal name, such as Procter & Gamble, or a generally accepted term, such as R&D.
- Colon (:): Capitalize the first word after a colon only if it's a proper noun or the start of a complete sentence.
- Company names and terms: Capitalize company names, such as General Motors. Lowercase internal business units within a company, such as General Motors business development division.
- Dates: Fully spell out dates. Use the format appropriate to the location of the audience, such a January 26, 2023 for American and 26 January 2023 for Europe.
- e.g.: Use only when giving an example and always follow it with a comma – The advancements this technology made possible, e.g., straight-through processing, propelled the industry forward. In general, though, try to avoid using it. It makes your writing feel less conversational, so use terms like for example instead.
- Exclamation mark (!): Use rarely, if at all, in most pieces.
- i.e.: Used to restate something in other words – "The interventions saved the company $3.2 million dollars, i.e., the cost cutting goal was met." Always follow i.e. with a comma. Just like with e.g., though, this makes your writing feel less conversational. If you're trying to say something in other words, use those other words.
- Numbers: Spell out numbers between one and ten. Spell out numbers that begin a sentence. Use figures for numbers between 11 and 999,999. Numbers over three digits use a comma – 1,000, 22,000, etc. For abbreviated numbers use uppercase letters – 1K, 1M, 1B, etc. Use abbreviated numbers in headlines. For numbers over a million, use figures with up to two decimal places but spell out million, billion, or trillion – 1 million, $2.2 billion, 3.33 trillion, etc.
- Oxford comma: Use it.
- Professional titles: Capitalize titles when they precede a person's name, such as Chief Marketing Officer Jane Doe. Don't capitalize titles following someone's name, such as Jane Doe, chief marketing officer. Don't capitalize titles that appear on their own, such as chief marketing officer.

- Percentages: Use the % sign, don't spell out the word – 67%, not 67 percent. The exception is if percent is being used in an informal context, such as, "there is a zero percent chance of success if you don't incorporate analytics into your workflows."
- Quotation marks (""): Use only for indicating when something is a direct quote. Don't use for text emphasis – no scare quotes.
- Semicolon (;): Other than its standard usage, use to separate items when a list or series has elements containing commas. "Attendees include Bob Chalkster, vice president of research; Caroline Gumby, chief claims officer; and David Ulna, CEO."
- Titles: Capitalize titles when they precede someone's name, such as Vice President of Operations John Doe. Don't capitalize titles that come after someone's name, such as John Doe, vice president of operations. Don't capitalize titles on their own, such as vice president of operations.

Appendix: Social Media best practices

When creating content for social media, keep the following best practices in mind:

- Make sure the title and body copy for every post is unique. Don't use duplicate content.
- When creating posts based on an event, webinar, or panel, posts incorporating quotes from a speaker work best.
- Keep social post lengths to roughly 207 characters. This will give the digital team room to create hashtags or insert links.
- If a post is linking to a website, provide the address separately from the copy. The digital team will create specialized tracking links for different posts.
- Don't include hashtags – let the digital team handle that.
- Don't begin a post with a call to action. Start with an attention-grabbing piece of information, then follow that with instructions for what the reader should do next.
- Use social handles instead of hashtags for people and organizations. For example, tag @exl_service instead of using the hashtag #EXLService on Twitter.