



# Brand Copy Guidelines v2.3

February 2023



# Contents

## Contents

## Messaging

## Our Values

## Language

## Tone of Voice

## Totara style & grammar guidelines

### General rules

- UK English is Totara's global default
- Sentence case preferred
- Full names when needed, but drop them if it's clear
- Active voice
- Gender neutral

### Style and grammar

- Acronyms and abbreviations
- Capitalisation
- Check-in
- Content
- Countries
- 'Designed to/for...'
- E-learning/eLearning
- etc., i.e., e.g.
- File extensions
- Multitenancy
- Numbers
- Onboarding
- Open source
- Plurals
- Preferred terms
- Quote marks

### Formatting

- Bullet points
- Date format
- Time
- Menu paths
- Hyphenation

### Totara terminology

- Product features
- Referring to Totara version
- Job titles and system roles
- Titles (of articles, courses, activities)
- Partners and subscribers
- Quick-access menu vs Site administration menu
- Roles vs relationships
- Legacy features



# Messaging

<b>Our purpose</b> (why we exist)	<b>Empowering people to do their best work.</b>
<b>Company description</b> (the most straightforward possible)	<b>Totara is a learning technology company</b> making software to better combine skills development and performance in the workplace.

# Our values

<b>Meaningful impact</b>	We're here to make a positive difference in the world.
<b>Grow together</b>	We foster the curious and encourage continuous learning.
<b>Trust and respect</b>	We lift each other to be better.
<b>World-beating quality</b>	We do things right, with exceptional delivery throughout all areas of our business.



# Language

**Learning technology** is our overall category

**Talent development software & solutions** is our particular space

**The Talent Experience Platform (TXP)** is the brand name of what we make

**Totara** is shorthand for the platform and the company ('On Totara, you can...')

Our distinct value pillars are Totara's incredible **flexibility** and deep **expertise**, which allow for solutions tailored to the unique needs of every customer

Because we're in the **solutions** business, we always work to connect learning & development to **measurable organizational / commercial outcomes** - 'learning for the sake of learning' is less valuable to our customers than actual results

By themselves:

Learn is a **Learning Management System (LMS)**

Engage is a **Learning Experience System (LXP)**

Perform is a **Performance Management System**

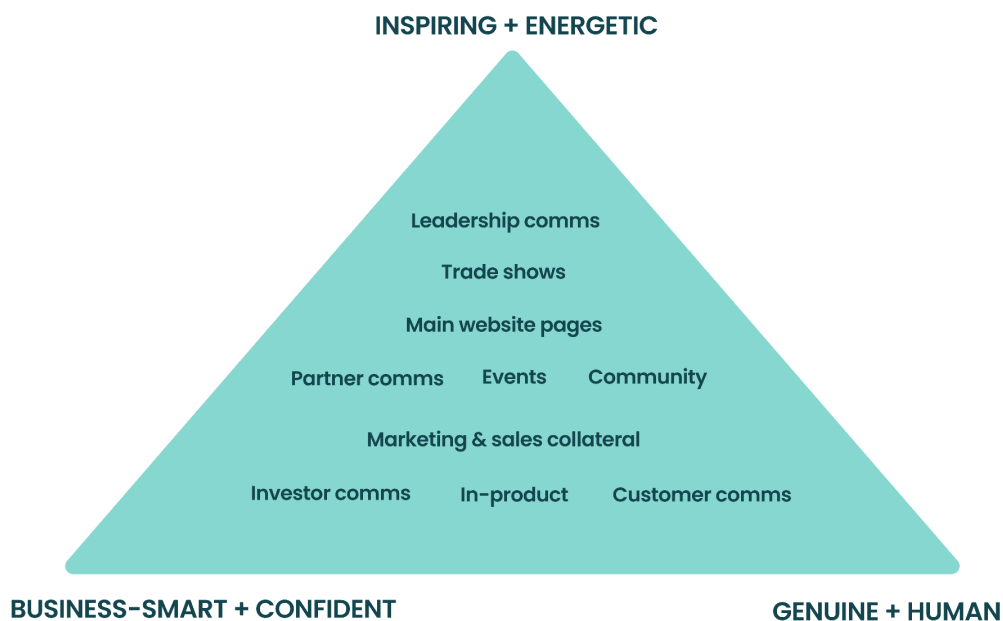
... but wherever possible we put them back within 'Totara'.



# Tone of voice

## We speak and act as a modern leader.

We're a purposeful B2B brand with a point of view. So we talk like it. Short and to the point, mostly. The right mix of energy, humanity, and business-savvy for every context.



### **Inspiring + energetic.**

Bring emotion and warmth, make it fun not dry. Creative and quite bold. This is about being future facing and different.

### **Business-smart + confident.**

The expected and mature version of us but done in a sharp, modern, business savvy way - never stale. This can be a bit more strong even sometimes, the competitive end of the language.

### **Genuine + human.**

Unexpected, fresh and honest, our roots. This has some empathy baked in but we don't lead with it. It is the softer side of our personality.



## This looks like....

### **Smart reframing with a commercial focus**

Skills are the #1 business performance problem.

We're here to help you shape learning development solutions that become your best investment.

L&D should be about more than training. Get in the driver's seat of improving business / organizational performance.

L&D that leads the business case.

### **(Partner email) Energy, confidence, and a human touch**

We've rebranded!

As Totara keeps investing in a thriving learning tech ecosystem, we felt it was time for fresh new clothes. Across Totara you'll find clearer messaging, vibrant colors, rich visual styling, and an updated website experience. The goal is to stand out from the crowd as smart, distinctive, and human.

(Put the biggest news / most relevant point up front. If someone only reads the first line, they'll get the gist.)

('Why' is important - try and give context)

(Always get quickly to what it means for the audience)

(Short, clear, active sentences that say one thing each.)

There's still work to do - more of the brand will roll out during 2023 - but we hope the message is clear: Totara is fully committed to shaping the most flexible workplace learning and engagement engine in the world, empowering people to do their best work. We want the Totara brand to help you achieve your commercial outcomes at every level. Thank you for being part of the journey with us.

(There's often a bigger 'key message' we're trying to communicate, in everything from marketing to technical guidance - if so, say it.)

(Connect the message to the audience)

### **Using evidence to back our case**

The world's biggest brands are using Totara to upskill staff, increase productivity, and show clear return on their L&D investment. To date, Charles River has saved a staggering \$11 million on the cost of training with Totara.



## **Passionate humans who aspire to real outcomes**

We're deep educationalists and learning technology pioneers, fanatical about connecting learning to measurable business outcomes. No one else has such a rich history of technological development in this space.

## **A bit of real talk: business-savvy, energetic & human**

Stop with the L&D buzzwords. People need skilful careers, and organizations need results. Totara shapes learning development solutions with real ROI.

No one wants pointless corporate training. Give your people the kit to learn and grow with the world's most flexible talent development solution. They'll stay longer and outperform, helping your organization smash its goals.

Why? Because they'll stay longer and help you win. Instead of constantly losing people to unwanted turnover, give them the power to upskill and do their best work with you. Totara shapes the world's most flexible talent development solutions.

## **We probably wouldn't say:**

Adapt and innovate with a hyperconnected business—give everyone the insights and freedom to thrive by connecting your data, processes, and teams with intelligent and robust business applications. (Too corporate-soulless)

Unlock your people's potential. (Too vague & soft)

Oi! Buy a bloody TXP, yeh pillock! (A little too human, maybe)



# Totara style & grammar guidelines

## General rules

(apply them sensibly rather than robotically)

### UK English is Totara's global default

We localise as appropriate into US English, Spanish, German and other languages.

UK English favours s and u, e.g. colour, realise, favourite.

US English tends towards z and o, e.g. color, realize, favorite.

Organization is fine across all English-speaking geographies.

### Sentence case preferred

Full document titles ('Totara 17 - Penetration Test Response') should have capitals.

Everything else is sentence case, meaning headings start with a capital then the rest is lower case except for proper names.

The 10 workplace trends for employee engagement

not

The 10 Workplace Trends For Employee Engagement

We do it this way because it's easier to read and a bit more human.

### Full names when needed, but drop them if it's clear

Use Totara Learn the first time if necessary, then just Learn is fine as long as the context works.

### Active voice

Always use active voice, write in terms of 'you'.

For example, 'You can use HR Import to create multiple users' not 'HR Import can be used to create multiple users'.





## **Gender neutral**

Use gender neutral terms as a rule.

There was a call for you today. They didn't leave their name.

Learners need a lot of support. They need to be guided through the Academy. Think about their requirements when designing learning.

When including characters or scenarios in learning, use a range of both male and female names. Avoid stereotyping (by having managers with male names and administrators with female names for example).

## **Style and grammar**

### **Acronyms and abbreviations**

Where you wish to use an acronym or abbreviation, use the full version on first mention in a document or activity, with the acronym or shortened version immediately after in brackets. Subsequent references can use just the acronym or abbreviation.

They needed to answer to the International Atomic Energy Agency (IAEA). When they reported to the IAEA they were happy with their progress.

The exception is where the acronym is more well-known than the full version (such as BBC) in which case go straight to using the acronym.

### **Capitalisation**

If in doubt, don't capitalise.

Learning management system, learning experience platform and performance management system should not be capitalised.

All products (Totara, TXP, Talent Experience Platform, Learn, Engage, Perform, etc) keep their capitals. Other names, such as the Subscription Portal or Totara Help, should also be capitalised.



## **Check-in**

When used as a noun, 'check-in' should be hyphenated. When used as a verb, don't hyphenate.

Courtney is preparing for her next check-in.

Ilona was hoping to check in with you before your annual leave.

## **Content**

Be careful not to imply that we have anything to do with the content on the system. For example:

Totara Learn hosts beautifully branded e-learning.

Customers won't always have 'beautifully branded e-learning', but that's nothing to do with us!

## **Countries**

UK (not U.K.)

The US (not USA or America)

## **'Designed to/for...'**

Avoid 'designed to/designed for...', e.g. 'Totara Perform is designed to support continuous performance management'. It implies that the product may not actually do that.

Instead, impart confidence with phrases like 'Totara Perform supports continuous performance management'.

## **E-learning/eLearning**

The word e-learning is normally lower case (both the e and the l). This is the most common form used globally with the exception of the US who capitalise the L.

If the word appears at the start of a sentence, the E is always capitalised.

Standard spelling = E-learning is a great industry to work in; if you like e-learning, that is.

US = Elearning is a great industry to work in; if you like eLearning, that is.

The exception is where the word appears in a brand name (such as e.learning age) where it should be formatted in the style adopted by that brand.



### **etc., i.e., e.g.**

These terms always end in a full stop. Etc. always comes after a comma in a list, e.g. The whole team went to the pub; Kayleigh, Rachel, Iris, etc.

### **File extensions**

File extensions should be capitalised e.g. When using a PDF file

When talking about ZIP files you should capitalise when using it as a noun and use sentence case when using it as a verb e.g. First you will need to zip up the files, you can then upload the ZIP file to the site.

### **Multitenancy**

Use 'multitenancy', not 'multi-tenancy'.

### **Numbers**

Write out the numbers from zero to ten, and use figures for 11 upwards.

Over the last three years we have hired 42 new employees.

At the start of a sentence spell out numbers above 11, and hyphenate for numbers over 20.

Seventeen years ago the company did not use elearning.

Thirty-seven organisations have achieved this certification.

When a number is part of a modifier you should hyphenate the modifier.

In this three-hour seminar we will cover the basic principles of leadership.

### **Onboarding**

Onboarding doesn't need to be hyphenated. Don't write On-boarding or On-Boarding.

### **Open source**

Avoid 'open source' where possible, as it has negative connotations to some people. We prefer 'open', as in 'open technology' or 'open software'.

### **Plurals**

Don't use 'LMSs'. Instead, write out 'learning management systems' or use 'learning platforms', or find a way to use the singular 'LMS' instead.



## Preferred terms

We prefer 'extendable' to 'extensible'.

We prefer 'customisable' to 'customised'.

## Quote marks

Use single rather than double-quotes. But it's okay to use double quotes when you've got a nice quote in a large font size, like in a PowerPoint presentation or a proposal title.

Because they look prettier.

If you've got a quote within a quote it should go like this:

Ify said, 'Is it true that Padders asked "If you're a Catholic, does that make you a Christian?" the other day?'

When the quote you use is part of a longer sentence, the full stop (or any other punctuation) goes on the outside:

Harry said it was 'beautifully written'.

If the quote is the full sentence, the punctuation goes inside:

'I have a dream.'

# Formatting

## Bullet points

When writing bullet points:

- Each bullet starts with a capital letter
- Bullets do not end with any punctuation (unless a question mark is needed)

There is an alternative bullet style:

- On rare occasions, you may write bullet points that are more than a single sentence. If that is the case, bullet points should take full-sentence punctuation, and end with a full stop.
- This style is not preferred, as bullet points should be used for quick points.



## **Date format**

Dates should always be written in full, such as:

- 3rd March 2017 / March 3, 2017

The exception to this is where referring to a date directly on screen (for example in a screen demo) where the format used in the system should be used.

Remember that the US and UK have different date formats and this can be confusing. Be clear about which one you are using if a shorter date format is required, and avoid using shorthand e.g. 1/10 (or is that 10/1?).

Grouped years should be 2001–2002 (not 2001–02). And remember to use an en dash, not a hyphen.

## **Time**

Use the 12-hour clock with a full stop, not a colon. Also use figures and 'am' and 'pm' (without full stops) – 2.30pm. No space between the number and the letters. If the time is precisely on the hour, you can use 2pm.

Don't say 0.5 days when talking about periods of time. Say half a day. Or, if you're writing a quote, it's ½ a day (and make sure Word turns it into a pretty fraction and doesn't leave it as 1/2).

If you're talking about a decade, don't put an apostrophe in it (1960s).

When referring to things like event timings, indicate the timezone rather than the country that the time/date refers to e.g. use GMT, not London.

## **Menu paths**

When presenting a pathway to part of the system which includes a number of steps, use arrows in between and italics, like this:

*Site administration > Plugins > Enrolments > Manage enrolment plugins*



## Hyphenation

Two-part modifiers should be hyphenated, unless they include an adverb.  
For example, the following should be hyphenated:

As part of this **two-step** process

Totara's **reverse-colour** logo

**Quick-witted** learners

However, the following should not be hyphenated, as they use adverbs:

Learners' **freely given** consent

The **quickly drawn** plans

## Totara terminology

### Product features

Totara product features are lower case, such as:

program, course, learning plans

Exceptions include HR import (where the feature name begins with an acronym).

### Referring to Totara version

Products should be referred to using their full name and version number the first time they are mentioned, e.g. Totara Learn 12. If you have already mentioned the product name in the same text, you can then use v12 in the text to refer to it.

### Job titles and system roles

Job titles and system roles (including those in Totara products) are capitalised, such as:

Iris Vermeren is the Senior Partner Marketing Manager at Totara..



## **Titles (of articles, courses, activities)**

Titles start with a capital but then follow sentence case, for example:

An introduction to blended learning

Top tips from the Totara team

The exception is where the title includes a colon, in which case the word after the colon will also be capitalised, for example:

Blended learning: An introduction

## **Partners and subscribers**

Totara Partners carries a capital P, but referring to partners in general should be lowercase. We always refer to subscribers with a lowercase 's' unless it's the start of a sentence or title.

Subscribers are always that, never subs.

## **Quick-access menu vs Site administration menu**

From Totara 12 the menu accessed via the cog icon in the top navigation bar is considered the **Quick-access menu**. This is because the menu is available for both Site Administrators and other roles.

From Totara 13 the **Quick-access menu** has a link to access the full **Site administration menu** for Site Administrators.

## **Roles vs relationships**

In Totara Perform there is the ability to select relationships between different participant types. You should avoid referring to these as roles, such as the Subject role as these are not system roles in Totara but terminology used in the system to describe a relationship between users.

## **Legacy features**

When an old feature is replaced by a new and improved one, it's sometimes required to keep the old feature switched off over several releases before it is safe to remove it completely. To differentiate old features from their successors we add 'Legacy' to their names. For example: Legacy notifications; Legacy appraisals & Legacy dynamic appraisals; Legacy program assignment interface.

