



Optimizing Your Web site 101.4:

Creating Effective & Engaging Forms

Misty McLaughlin and Brandy Reppy



About Us



Misty McLaughlin

Manager, User Experience

- Expertise in Internet strategy & marketing, user experience consulting, information architecture
- Clients include: American Red Cross National, American Cancer Society, Easter Seals, Autism Society of America, Trisomy 18 Foundation, Defenders of Wildlife, Jewish National Fund, U.S. Fund for UNICEF
- M.S. in Information Architecture



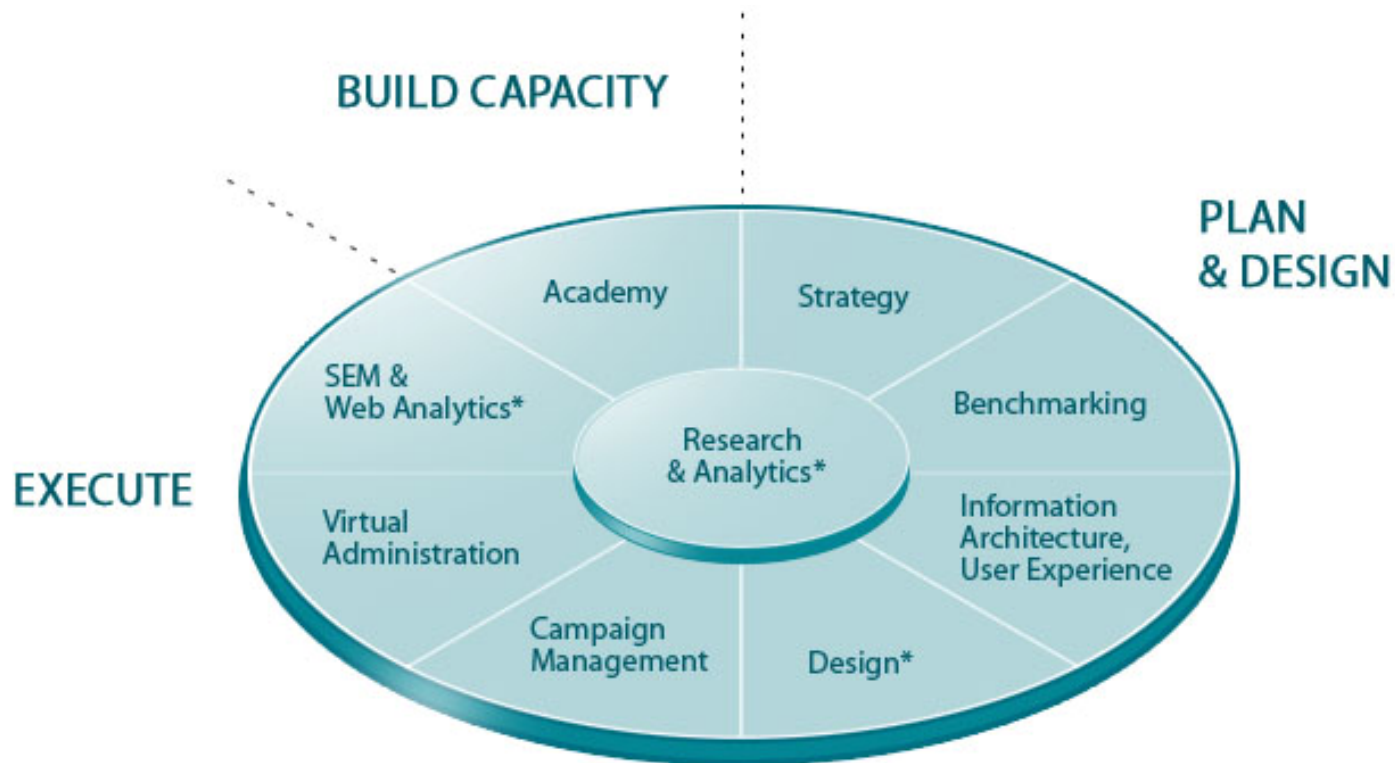
Brandy Reppy

Interactive Architect

- Expertise in interactive marketing, user experience, and technology support
- Clients include: American Heart Association, Zero to Three: National Center for Infants, Toddlers and Families, Consumers' Union
- Several awards from SXSW Interactive – Accessibility Internet Rally (AIR) 2006 & 2007

About Convio's Client Success Services

50+ person agency within Convio to provide clients with the strategy, interactive services and online marketing best practices to achieve ongoing success



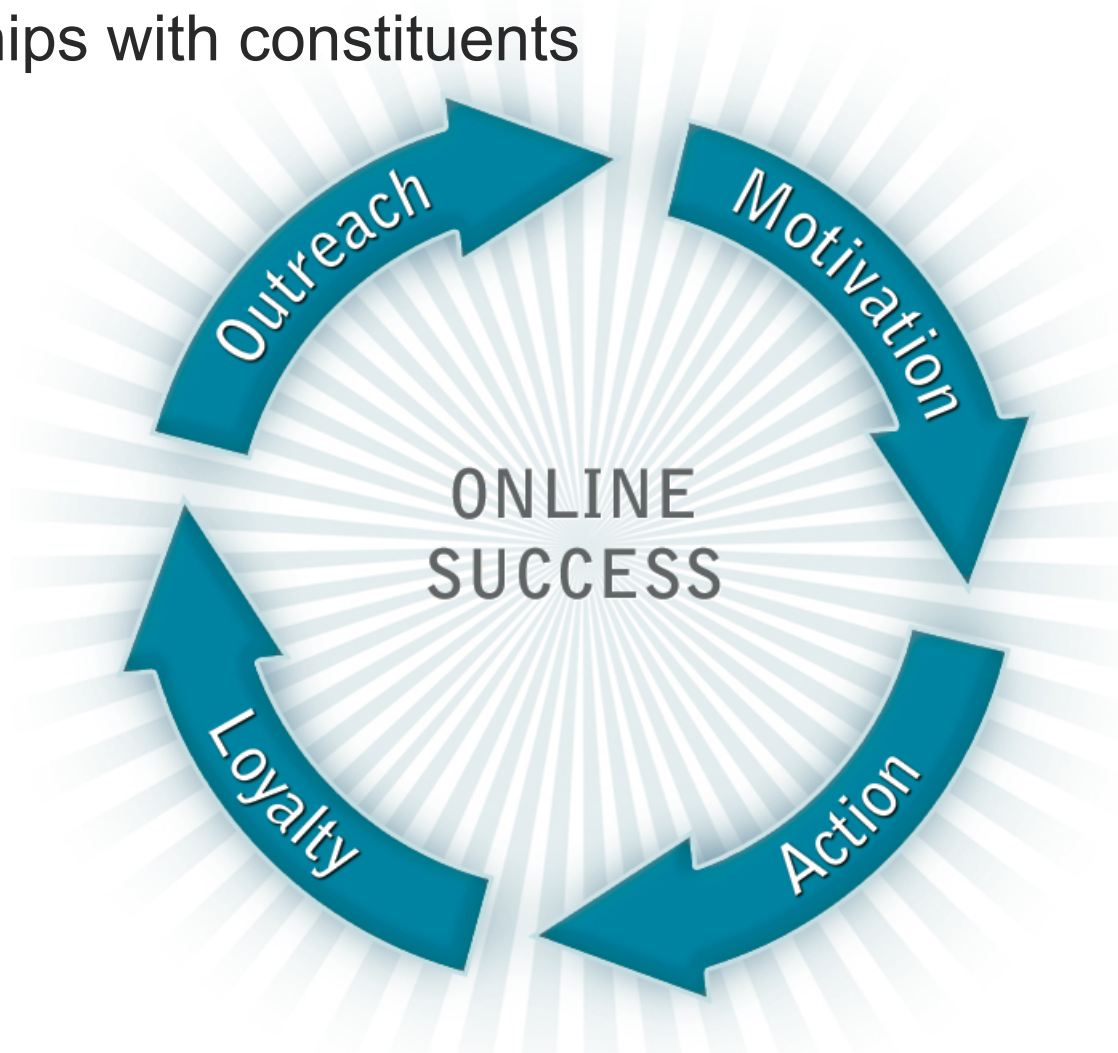
* Utilize specialized partners

Webinar 101 Two-Part Series

- *Optimizing Your Web site 101* is focused on design and techniques for your Web site – getting visitors in and getting them to stay
- *Effective Online Marketing 101* is focused on outbound marketing techniques and campaigns – drawing visitors in through targeted communications

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



Relationship Building Framework: eCRM

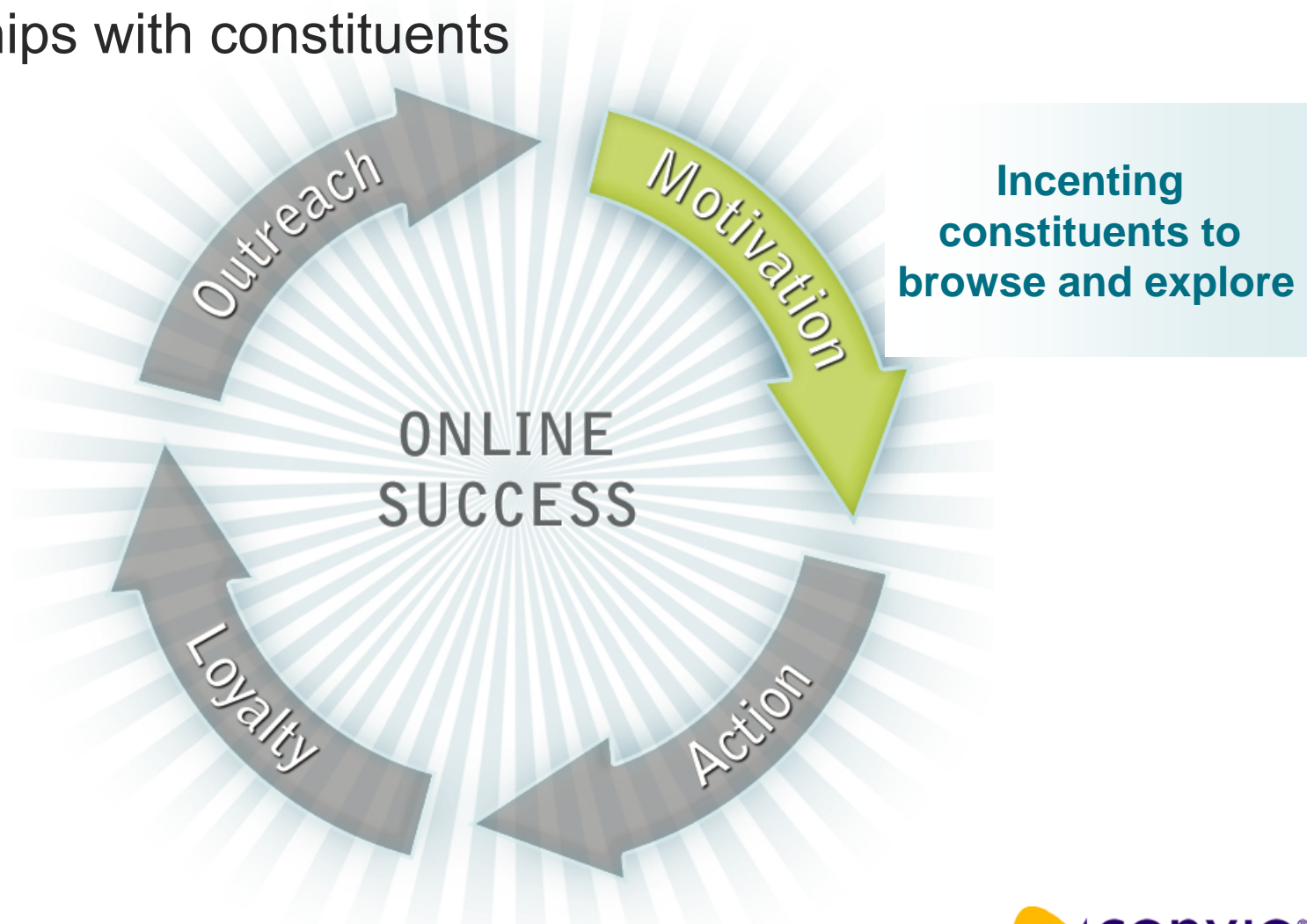
eCRM is the practice of using the Internet to build life-long relationships with constituents

Strategically
drawing traffic
into your site



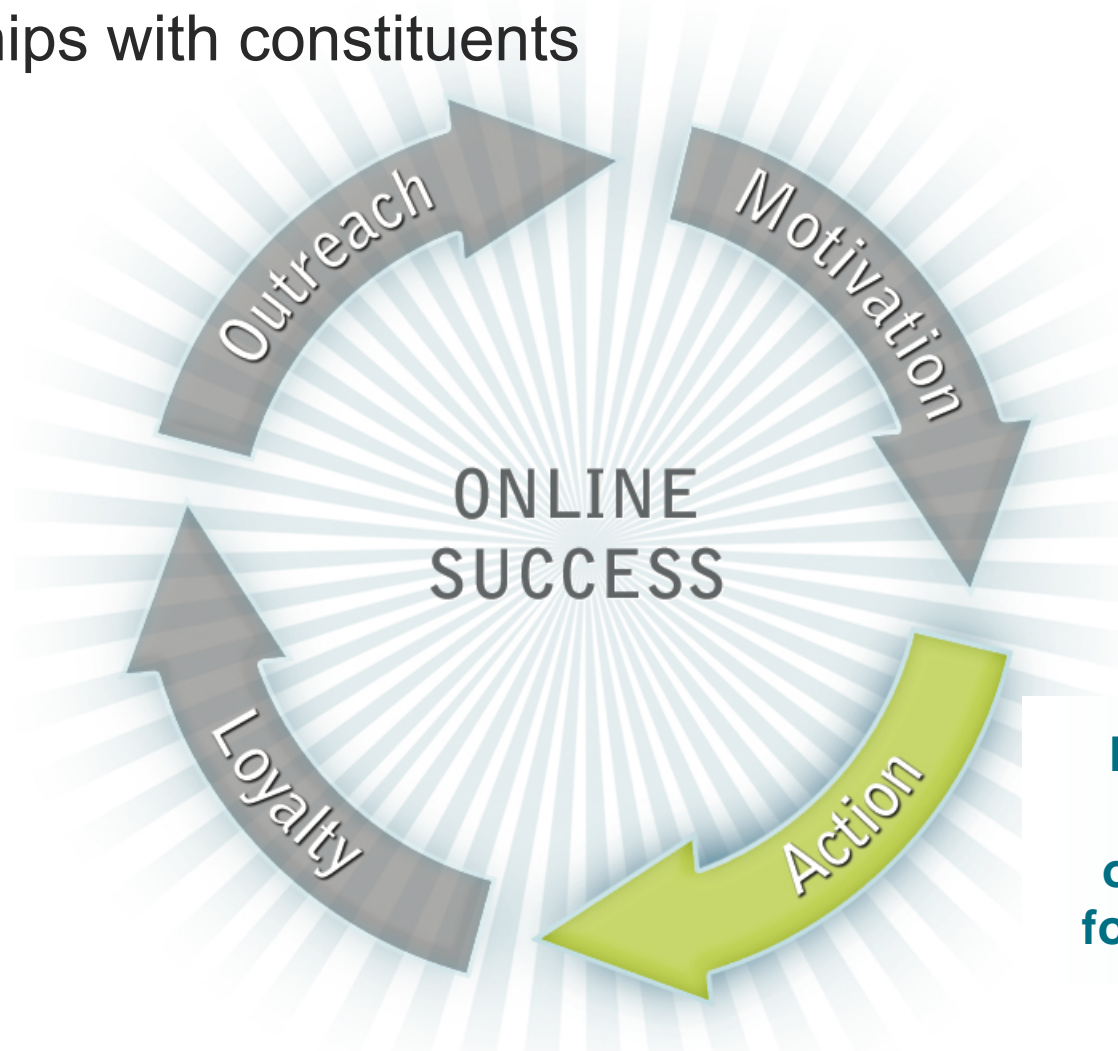
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Relationship Building Framework: eCRM

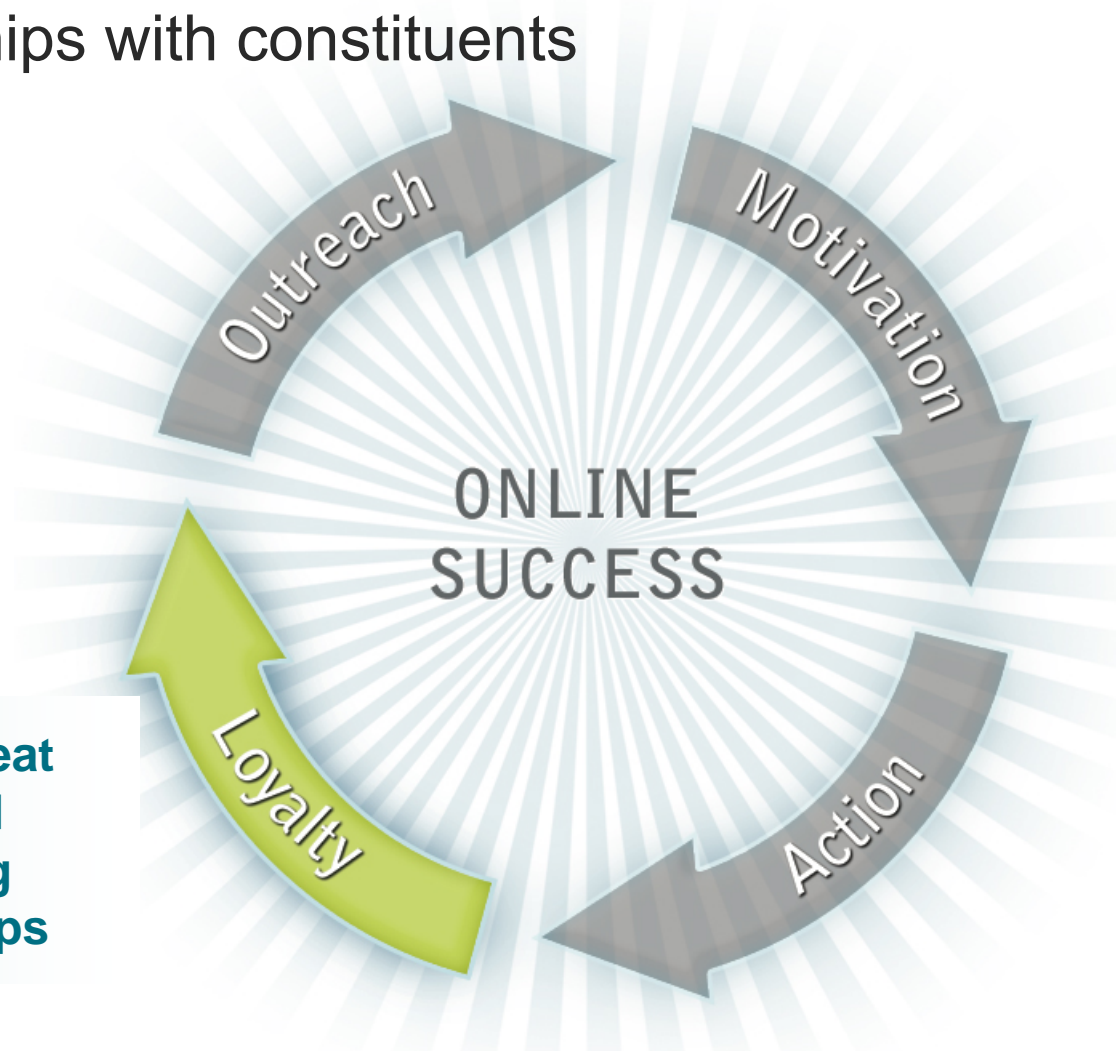
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Encouraging
interactive
opportunities
for engagement

Relationship Building Framework: eCRM

eCRM is the practice of using the Internet to build life-long relationships with constituents



**Driving repeat
visits and
advancing
relationships**

Today's Objectives: Action

At the end of today's session, you will feel empowered to:

1. Create forms that capture important constituent information
2. Develop engaging pathways for constituents
3. Set basic metrics to monitor form success



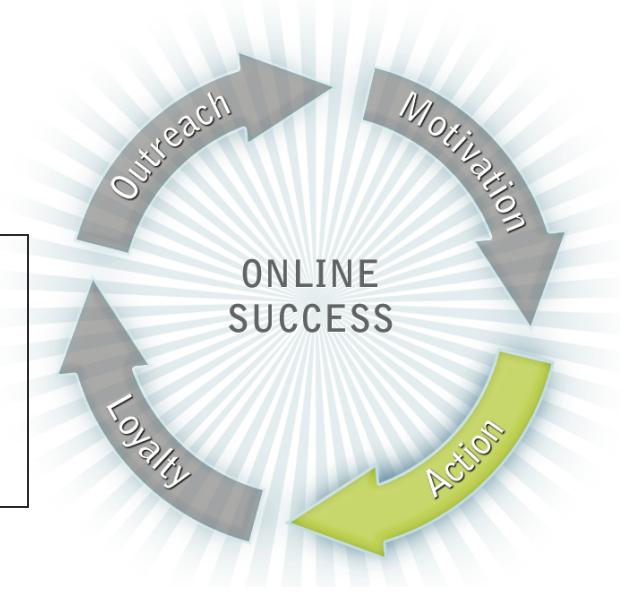
Your Homework...

- ▶ Watch this space for ideas on what you can start doing **now...**

Today's Objectives: Action

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Your Homework...

- ▶ Watch this space for ideas on what you can start doing **now...**

What Are Forms?

What Are Forms?

- Ways to Collect Information
 - ▶ Entry fields
- Barriers
 - ▶ Standing between users and what they want
- Unidirectional communication
 - ▶ Constituents giving organizations information
- Conversations
 - ▶ *Sharing* Information

Types of Forms

- Advocacy
- Donation
- Email Signup
- Event Registration
- eCommerce Checkout
- Tell a Friend
- Contact Us
- Search



Anatomy of a Form

Form Fundamentals

- Title
- Field Labels
- Input Fields
- Error and Success Messages
- Process Indicator & Pagination

Title

- Serve to orient users
 - ▶ Let users know that they are performing the appropriate action
- Serve to get your organization the information you seek
- Remove confusion



Bad Example

Sign in below or register. Step 1 of 2

E-mail address:

Password: [Forgot password?](#)

Remember my e-mail address on this computer.

CNN.com values and maintains your privacy. The information you submit is subject to our [privacy policy](#).

Good Example

washingtonpost.com

FREE access to this article and other exclusive content!

Sign in Now

E-mail address:

Password:

[Forgot your password?](#)

Remember me on this computer.

Sign In Now

Free Membership
Join Now for Free Access

E-mail address:

Password:

Confirm Password:

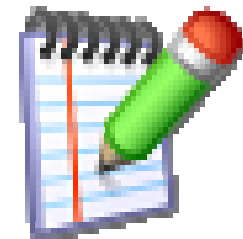
Become a Free Member Now

Home | [Contact Us](#) | [User Agreement](#) | [Privacy Policy](#) | [Help](#)

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Field Labels

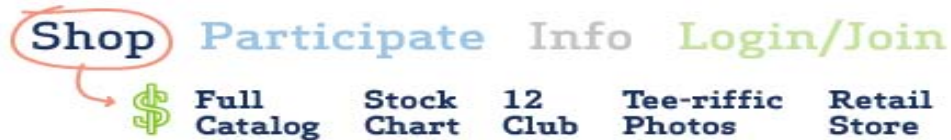
- Be clear and concise
 - ▶ Don't assume your users know what information you want
- Labels should match the tone of the website
 - ▶ Conversational? Formal?
- Be transparent
 - ▶ If you are asking for personal information, say why



Bad Example

Full name:	<input type="text"/>	(Required)
Email address:	<input type="text"/>	(Required)
Company:	<input type="text"/>	
Job title:	<input type="text"/>	
URL:	<input type="text"/>	(if known)
Phone number:	Country/region <input type="text" value="676"/>	Number (with area/city code) <input type="text"/>
Phone number for mobile device:	Country/region <input type="text" value="1"/>	Number (with area/city code) <input type="text"/>
Fax number:	Country/region <input type="text" value="1"/>	Number (with area/city code) <input type="text"/>
Address1:	<input type="text"/>	
Address2:	<input type="text"/>	
City:	<input type="text"/>	
State/Province:	<input type="text"/>	
ZIP/Postal code:	<input type="text"/>	
Country/region:	<input type="text"/>	
User name:	<input type="text"/>	(if known)
Notes:	<input type="text"/>	

Good Example



Not signed up? Want to participate !?

Desired username:

Real name:

Email address:

Password:

Verify password:

Birthdate: (Who wants to know?)
January 1st

Country:

Join our newsletter to be notified about newly printed shirts and mega-sales?

Join Threadless !!

That's it!?

Yep, this is all the info we need to set you up. Once you're done activating your account it's a good idea to go in and edit your profile with some stuff about yourself for other Threadless members to get to know you.

From there, you'll even be able to tell us stuff like your username on Flickr and we'll grab your photos and put them on your Threadless profile!

* Your email address is safe with us! We keep it completely private.

Input Fields

- Field types
 - ▶ Text Boxes
 - ▶ Radio Buttons
 - ▶ Drop Down Menus
 - ▶ List Boxes
 - ▶ Checkboxes
 - ▶ Buttons

Text Box

Radio Buttons

Drop-down Menu

List Box

Checkbox

Button

First name

Gender
 Male
 Female

Country

Interests

Jazz Guitar
Mountain Biking
Water Polo

Include me in your survey.

- Choose the right type to avoid confusion

Bad Example

MIDDLE NAME:

* Last Name:

Company Name:

Signup:

* Enter email address and select Contact Method:

* Email Address:

(example: you@domain.com)

* Confirm Email Address:

Enter 10 digit cellular number; then Select Cellular Company:

(example: phonenumber@phonecodomain.com)

Contact Phone: - -

Email Reminder (days):


* User Name: (minimum 6 characters)

* Password: (minimum 4 characters)

* Phone: - -

Mobile: - -

Good Example



Mercedes-Benz of San Francisco
500 8th Street, San Francisco, CA 94103
Sales: 1-888-864-7719 | Service: 1-415-673-1700

Vehicles Dealer Services

Request a Service Appointment - Step 1 of 3 - Enter Your Information Close Form

1. Your Vehicle

Year:

Model:

Vehicle Identification Number:

Current Mileage:

2. Schedule your preferred appointment time.

Please enter your preferred date and time.
Your preferred dealer will do their best to schedule an appointment on this date.

AM PM

3. Please fill in the following fields. Fields marked with an asterisk (*) are required.

*Prefix <input type="text" value="-- Select --"/>	*Address <input type="text"/>	*Primary Phone <input type="text" value="-- Select --"/>	Best time to call <input checked="" type="radio"/> AM <input type="radio"/> PM
*First Name <input type="text"/> M.I. <input type="text"/>	*City <input type="text"/>	<input type="text"/> - <input type="text"/> - <input type="text"/>	
*Last Name <input type="text"/>	*State <input type="text" value="-- Select --"/>	*Zip Code <input type="text"/>	Secondary Phone <input type="text" value="-- Select --"/>
Suffix <input type="text" value="-- Select --"/>	*Email <input type="text"/>	<input type="text"/> - <input type="text"/> - <input type="text"/>	Best time to call <input checked="" type="radio"/> AM <input type="radio"/> PM

Send me Mercedes-Benz updates and special offers via Email. [Why sign up?](#)

Next


Progress Indicators & Pagination



- Single Page versus Multiple Pages
- Progress Indicators are only helpful if they are accurate.
- You may choose to use visual cues to delineate between different areas on a form.



Bad Example

The following information is recorded for security reasons: Your IP address is: 209.163.168.194

Quick 1- Minute Registration Secure Registration 

First Name Brandy	Last Name Reppy	
Address: <input type="text"/>		
City: <input type="text"/>	State/province: * required State Not Specified Yet 	Zip: <input type="text"/>
Country: United States 		
Primary Phone #: <input type="text"/>	Secondary Phone #: (optional) <input type="text"/>	
Choose Your ePier User Name <input type="text"/> <small>(5 characters minimum) This is how you'll be known to other ePier users. You will not be able to change your user name once you have selected it.</small>		
Choose a Password <input type="text"/>	Confirm Your Password <input type="text"/>	
Is your email HTML enabled? Yes <input checked="" type="radio"/> No <input type="radio"/>	Confirm Your Email Address <input type="text"/>	
<small>Be sure to use an active account and make sure your spam blocker is set to accept email from ePier.com, since we will email you to complete registration, and you will be emailed important information whenever you transact business on ePier.</small>		
How Did You Hear About ePier? <input type="text"/>	Username or email address of the person who referred you to ePier (optional): <input type="text"/>	
<input type="checkbox"/> Yes, I would like to receive ePier's bi-weekly newsletter and announcements from ePier. <input type="checkbox"/> Click here to indicate you have read and agree to the terms of use .		
<input type="button" value="Continue >>"/>		

Bad Example (cont.)

Make ePier.com your home page | Add to Favorites [pay](#) | [browse](#) | [classifieds](#) | [register](#) | | [my pier](#) | [site map](#)

ePier [Register](#) | [Sell Item](#) | [Search](#) | [Categories](#) | [Seller](#) | [Buyer](#) | [Help](#) | [Free Listings](#)

Keyword

Upload Your Photo!

The next step in creating your profile is to add your photo to participate in the social marketplace networking. Photos may be in these formats: JPG, GIF, TIFF or BMP

Photos may not contain sexually explicit, offensive material, or copyrighted images.

Upload Photo

[Skip for now](#)

Bad Example

Register | Sell Item | Search | Seller | Buyer | Help

Feedback | FAQ | Categories | Listing | Site Map

ePier™

Search Epier

Search

Smart Choice for Smart People

Announcements **NEW!** - Login

1 Be Reminded Of 2 Enter your information 3 Choose the service

New Member Only Special Offer!

Get your Advanced Storefront now for **\$21.95/yr!**
Just take a look at what you will receive simply by selecting this option.

- Free Popular Search Engine Submission
- Powerful, Centralized Management Console
- No Per Item Listing Fees
- Build Your Own Customer List
- Includes BuyNow Feature

Get My Advanced Storefront!

Turtlagaly's TROPICAL GEMS

Home | Locations | Contact Us | Register

Welcome to Nina's Store!

Featured Items

	Diamonds Price: \$29.95		Diamond Jewelry Price: \$12.95
	Cubic Zirconium Jewelry Price: \$19.95		Ruby & Sapphire Ring Price: \$109.95

Powered by ePier Inc. Copyright © 1999-2006. About | Feedback | Contact Us

No Thanks

Continue >>

Good Example



Hi! Ready to register with eBay?

It's your typical registration - it's free and fairly simple to complete.

Already registered or want to make changes to your account? [Sign in.](#)
[Want to open an account for your company?](#)

Tell us about yourself - All fields are required

First name Last name

Street address

City

State / Province ZIP / Postal code Country or region

Primary telephone number - - ext.:

Email address

Re-enter email address

We're not big on spam. You can always change your email preferences after registration.

Choose your user ID and password - All fields are required

Create your eBay user ID

Use letters or numbers, but not () < > & @. [How to pick a great user ID.](#)

Create your password

Re-enter your password

Use 6 or more characters or numbers. [How to choose a secure password.](#)

Pick a secret question

Your secret answer


If you forget your password, we'll verify your identity with your secret question

Date of birth Year

You must be at least 18 years old to use eBay.

The not-so-fine print

For **added security**, please enter the verification code hidden in the image.



[Refresh the image](#) | [Listen to the verification code](#)

I agree that:

- I accept the [User Agreement](#) and [Privacy Policy](#).
- I may receive communications from eBay and can change my notification preferences in My eBay.
- I'm at least 18 years old.

Error and Success Messages

- People will make mistakes
- Clearly indicate what is preventing the form from submitting
- Informing users of successes is just as important
- Success indicators are just as important as error indicators
- Tells users that they are done – and more.



Bad Example

Home > Dividend Miles > My account > **Enter profile information**

My Information

My Information | Log-In Info | Subscriptions | Verify | Confirmation

Please complete the information below and click **Continue**. Red fields are required

Title	Please select <input type="button" value="v"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	<input type="text"/>
Suffix	Please select <input type="button" value="v"/>
Country Of Residence 	United States <input type="button" value="v"/>
Mailing Address	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State/Province	Select State --- <input type="button" value="v"/>
Zip/Postal Code	<input type="text"/> - <input type="text"/>
Primary Phone Number	(<input type="text"/>) <input type="text"/> - <input type="text"/>
Location	Please select --- <input type="button" value="v"/>
Email address:	<input type="text"/>
Confirm address:	<input type="text"/>
Dividend Miles Number	<input type="text"/>
	Enter your Dividend Miles number here if you have one. If not, leave this field blank and one will be created for you.
Promo	<input type="text"/>

Continue

Bad Example (cont.)

Home > Dividend Miles > My account > **Enter profile information**

My Information My Information Log-In Info Subscriptions Verify Confirmation

Please complete the information below and click **Continue**. Red fields are required

- First name is a required field
- Mailing Address is a required field
- City is a required field
- State/Province is a required field.
- The postal code is a required field
- Primary Phone Number is a required field
- Phone Location is a required field
- Email address is required.
- Confirm email address is required.

Title

First Name

Middle Initial

Last Name

Suffix

Country Of Residence

Mailing Address

Address Line 2

City

State/Province

Zip/Postal Code -

Primary Phone Number () -

Location

Email address:

Confirm address:

Dividend Miles Number

Enter your Dividend Miles number here if you have one.
If not, leave this field blank and one will be created for you.

Promo

[Continue](#)

Good Example



Welcome to Dopplr

Set up your profile

Here you can tell us how you want to be addressed, how you want to be contacted, your home city and how you want to present yourself to your fellow travellers.

First name:

Last name:

Home city:

Screen name:

Email address:

Website:

Password:

Repeat password:

Good Example (cont.)



Welcome to Dopplr

Set up your profile

Here you can tell us how you want to be addressed, how you want to be contacted, your home city and how you want to present yourself to your fellow travellers.

First name:
Please give us a name, we'd like something to call you.

Last name:

Home city:
A home city is required.

Screen name:
Your screen name forms part of your home URL and needs to be unique to you.

Email address:
We need an email address so we can contact you.

Website:

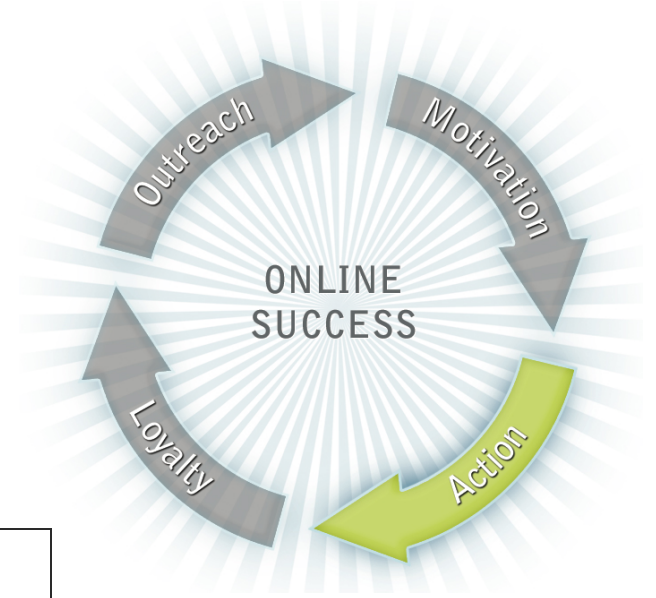
Password:
A password is required.

Repeat password:

Today's Objectives: Action

At the end of today's session, you will feel empowered to:

1. Create forms that capture important constituent information
2. Develop engaging pathways for constituents
3. Set basic metrics to monitor form success



What Makes Good Forms?

Good conversations are...

- Ongoing dialogue
- Responsiveness to each interlocutor's needs and interests
- Mutual participation
- Inviting other (appropriate) interlocutors to join
- ...and they involve turn-taking.

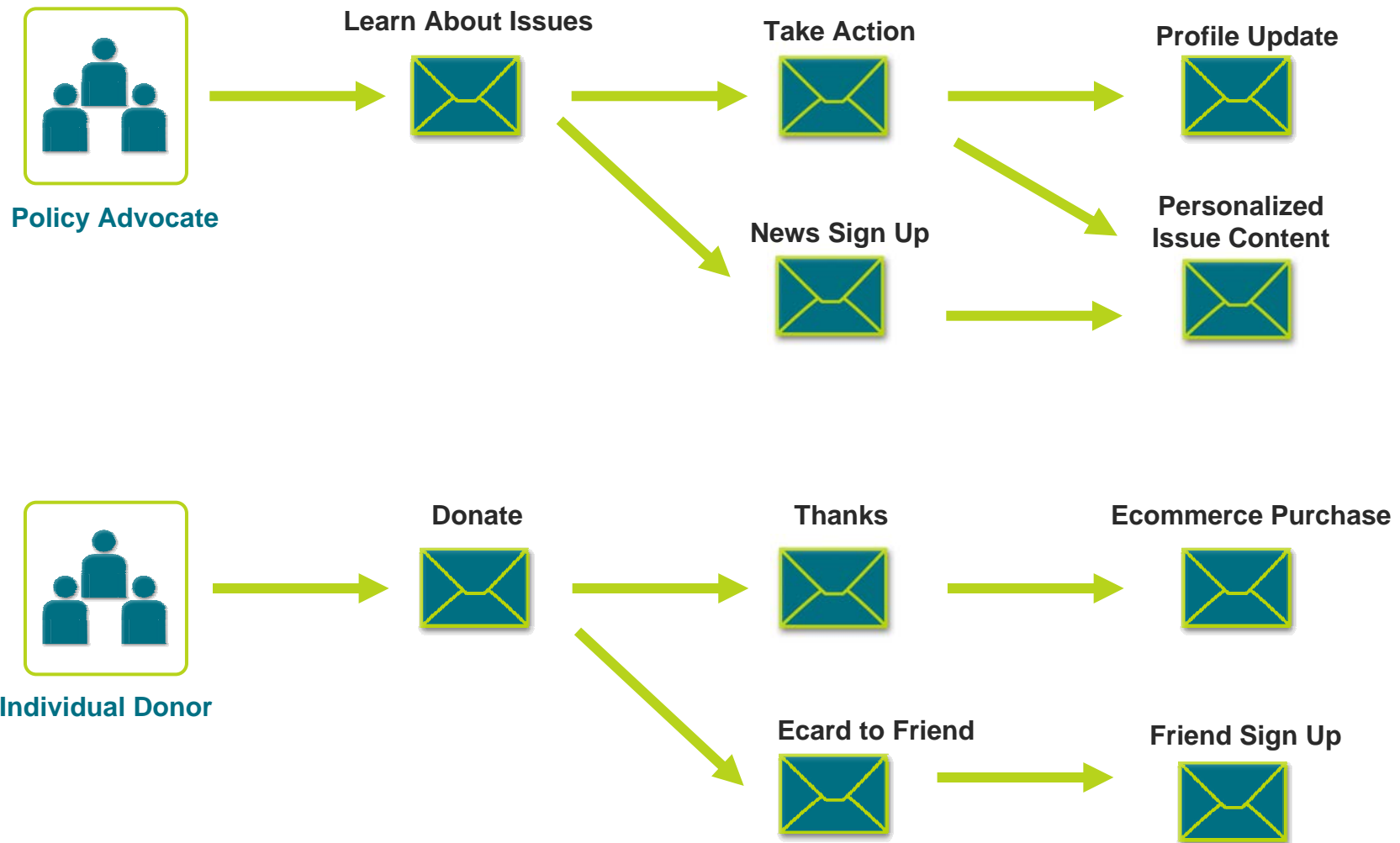
What Makes Good Forms?

Good conversations involve...

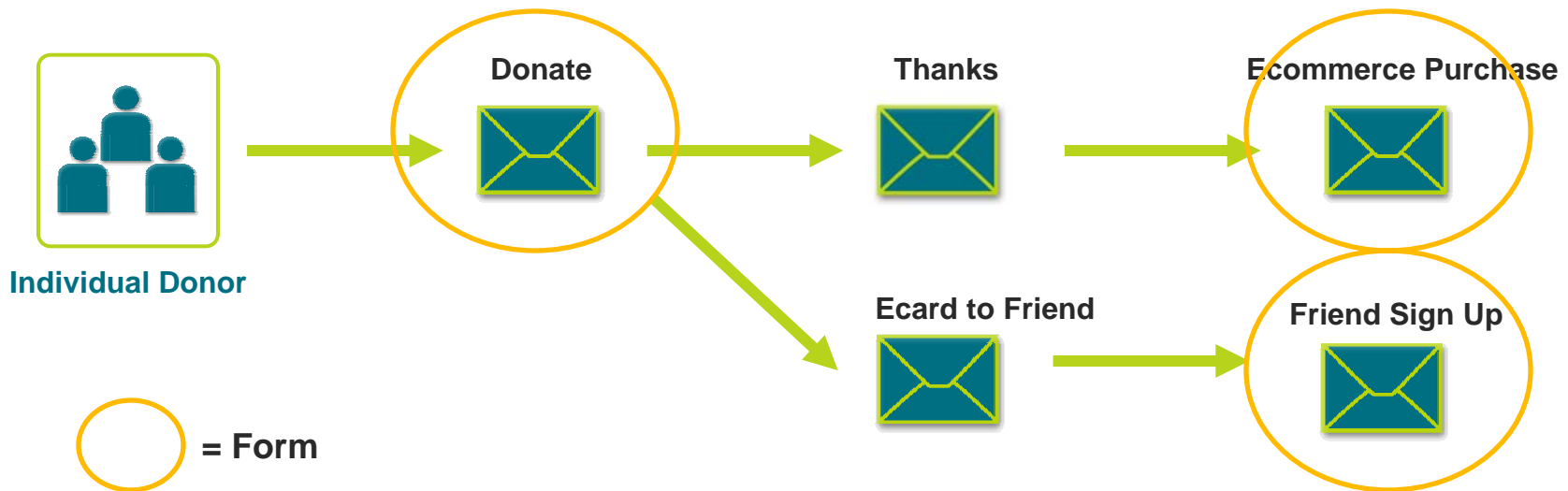
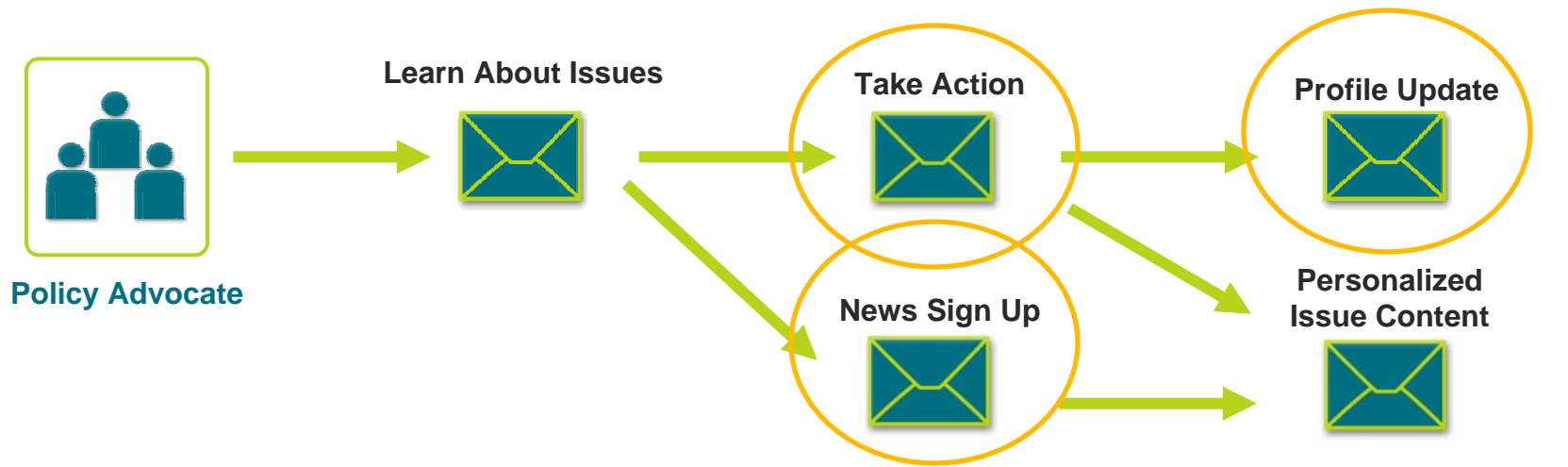
- Ongoing dialogue
- Responsiveness to each interlocutor's needs and interests
- Mutual participation
- Inviting other (appropriate) interlocutors to join
- ...and they involve turn-taking.

Good forms are those that are understood as one turn in a longer conversation between your org and your audience.

Relationship Pathways



Relationship Pathway Examples



 = Form

Structuring the Conversation: Deciding What to Ask When

#1 Myth About Form Design

*I should ask for everything I can
while I've got someone's attention.
What if it's the only chance I get with them?*

Structuring the Conversation: Deciding What to Ask When

#1 Myth About Form Design

I should ask for everything I can while I've got someone's attention. What if it's the only chance I get with them?

Fact

A well-designed conversation means that you'll have ample opportunities to collect the info you need over time.

Structuring the Conversation: Deciding What to Ask When

4 Rules of Thumb for Engaging Forms

1. Keep
2. Cut
3. Postpone
4. Explain

Structuring the Conversation: Deciding What to Ask When

1. Keep

- If you need to know the information now, keep it.
- Consider whether or not each item can be optional (versus required).

<i>Interaction</i>	<i>What to Ask</i>
Enewsletter Sign Up	Email Address
Action Alert	Name, email, zip code or state
Ecommerce Purchase	Personal info, billing, shipping, tribute notification

*Caroline Jarrett, Usability Consultant, Effortmark, LTD

Structuring the Conversation: Deciding What to Ask When

2. Cut

- If no one can say how you will use the information, or it's not tied to an immediate use, cut it.

<i>Interaction</i>	<i>What to Cut</i>
Enewsletter Sign Up	Name, Zip code, State
Donation Form	Shipping Address, Gender, Birthday, Username, Password
Event Registration	Birthday, Telephone

*Caroline Jarrett, Usability Consultant, Effortmark, LTD

Structuring the Conversation: Deciding What to Ask When

3. Postpone

- Is there a better time to ask for the information?
- Should the outcome of one form set up the next?

<i>Interaction</i>	<i>Follow Up Interaction</i>
Enewsletter Sign Up	Profile Update
Profile Update	Email Interests & Preferences
Search	Contact Us

Structuring the Conversation: Deciding What to Ask When

4. Explain

- If you are collecting personal information, is it clear how you will use that information?
- Are you providing compelling reasons for constituents to give extra info?

<i>Inter-action</i>	<i>Info</i>	<i>Use</i>
Enews- letter Sign Up	Zip Code	Region- specific Newsletter Content
Event Sign Up	Phone Number	Important Event Updates, Text Messages

Bad Example

You can send a message to us using the form below.

Contact us

Username		<input type="text"/>
Title		Mr. <input type="button" value="v"/>
First Name	*	<input type="text"/>
Last Name	*	<input type="text"/>
Company		<input type="text"/>
Address	*	<input type="text"/>
Address (line 2)		<input type="text"/>
City	*	<input type="text"/>
State	*	Alabama <input type="button" value="v"/>
Country	*	United States <input type="button" value="v"/>
Zip/Postal code	*	<input type="text"/>
Phone	*	<input type="text"/>
E-Mail	*	<input type="text"/>
Fax		<input type="text"/>
Department	*	All <input type="button" value="v"/>
Subject	*	<input type="text"/>
Message	*	<input type="text"/>

Good Example

Create Your Etsy Account

User Name:

Your username must be a single word, no spaces and only alpha-numeric characters (abc123).

- Your username is your unique identity on Etsy.
- Choose wisely; this cannot be changed later.
- All users get a subdomain at Etsy, like this: <http://youname.etsy.com> (if you become a seller, this will be your shop's web address).
- Your username should not contain the word "Etsy" (when in doubt, [ask permission](#) first).
- Your username may not contain profane or racist language.

Password:

Retype your password:

- Your password must be at least 6 characters long.
- We'll never ask you for your password in an email
- Passwords are case sensitive.

Email:

Retype your email:

- We'll send you a confirmation email here, which you'll have to read to activate your account.
- Please add registration@etsy.com to your safe list, and check your spam folders for the email.
- Your email address will be kept private. We dislike spam as much as you do. Read our [privacy policy](#).

How did you hear about Etsy?

(optional)

Referrer username:

Enter the username of the Etsy member who referred you (optional).

- We will never ask for your password or credit card information in an email.

I agree with the [terms of use](#)

SUBMIT

Structuring the Conversation: Deciding What to Ask When

Remember...

1. Keep
2. Cut
3. Postpone
4. Explain

Your Homework...

- ▶ Pick your top 3 most important **online interactions**.
- ▶ Evaluate what you're **telling**, and what you're **asking**.
- ▶ Identify opportunities to **keep, cut, postpone, explain**.

Today's Objectives: Action

At the end of today's session, you will feel empowered to:

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Measuring Form Effectiveness

What do we want to know?

- Q: How did people move through the process?
- Q: What did people do inside of it?
- Q: What people think of it?

Measuring Form Effectiveness

How do we find out?

- Q: How did people move through the process?
 - ▶ *A: Analyze traffic data.*
- Q: What did people do inside of it?
 - ▶ *A: Review form results reports.*
- Q: What people think of it?
 - ▶ *A: Ask them.*

Measuring Form Effectiveness

Q: How did people move through the process

A: Analyze traffic data.

Metrics to track:

- How people accessed the form
- Completion info
 - ▶ Rate of completions
 - ▶ Time spent to complete
 - ▶ Where people dropped off the form if they did not complete it

Your Homework...

- Recall your top 3 most important **online interactions**.
- Set up **goals** in your analytics program to easily track how people complete these.

Measuring Form Effectiveness

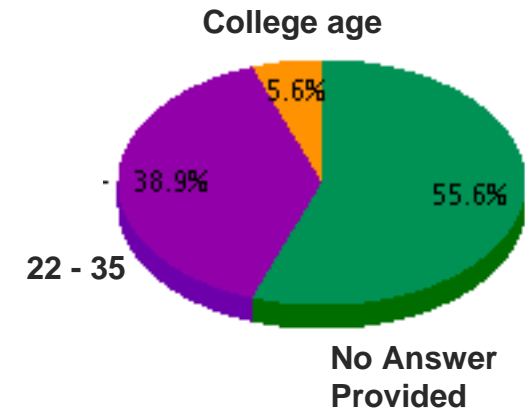
Q: What did people do inside of the process?

A: Review form results reports.

Metrics to track:

- Which form elements were used
- % of completions on optional questions
- Actions resulting from follow-up processes

How old are you?



Your Homework...

- Recall your top 3 most important **online interactions**.
- Run **results reports** to assess form performance over time.

Measuring Form Effectiveness

Q: What did people think of the process?

A: Ask them through a survey.

* Please rate your overall experience making a purchase?



Next >>

Metrics to track:

- Satisfaction scores
- Subjective comments about tasks
- Preference for options/alternatives

Your Homework...

- Select your most complex **online interaction**.
- Consider running a **satisfaction survey** or adding a **comments question** to the process.

Summary of Your Homework and Next Steps

- Identify and prioritize your conversations with constituents.
 - ▶ Pick top 3 **most important** interactive opportunities.
 - ▶ Identify **most complex** interaction.
- Evaluate what you're **asking** and **offering**.
 - ▶ Keep, Cut, Postpone, Explain.
- Set up **goals** in your analytics program.
- Run **results reports** to track form performance.
- Consider running a **satisfaction survey** or adding a **comments question**.



Q & A

Submit questions by typing them into the question text box and then hitting the “Ask” button





Thank you!

You can access these slides and recording in our online
Community at:

<http://community.customer.convio.com/community/webinars>

And register for our next Webinar on Sept. 23:
Effective Online Marketing 101.4:
Fundamentals for Effective Online Fundraising

