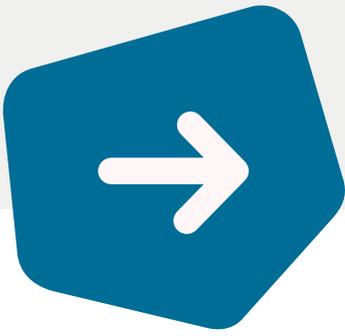
The background of the top half of the page is a dark, textured grid pattern. A large, light-colored arrow points from the bottom left towards the top right, overlaid on the grid.

White Paper

Five Ways to Improve Web Forms in the Education Sector

Providing you with:

- ✓ Tips to increase applications, bookings and more
- ✓ Best practice from the education sector and beyond
- ✓ References for further reading



Introduction

The importance of the web form as an online communication tool cannot be overstated. It turns a one-way flow of information on your website into a two-way dialogue with your end-users and enables them to complete tasks which are more often than not inextricably tied to the success of your organisation (such as requesting a prospectus, reserving accommodation or booking a place on an open day). However, it's rare that a visitor is going come to your site specifically to complete one of your forms - instead they likely view it as a barrier that must be overcome in order to achieve their desired goal(s) so making the process as easy as possible is imperative.

An effective web form is made up of lots of different elements, most of which vary according to the nature of the form and the type of device being used to access it. However, no matter what your form's purpose or context it's critically important they're optimised for maximum usability and accessibility, particularly as audiences come to expect all their interactions to be as seamless as the examples set by leading organisations in the education sector and beyond.

This white paper therefore looks at examples from both inside and outside the sector to identify what makes a great web form. We share five pieces of best practice advice with which you can start to improve the User Experience (UX) of your own forms; helping ensure you effectively serve the needs of students, parents, administrators and more as well as significantly boosting your downloads, applications, bookings and more general enquiries.



Justify the inclusion of each form field

One of the most important things to bear in mind when designing a form is length. Keep your forms as short as possible by only including input fields that are absolutely necessary and remember that for every form you include on your site your users have to: (1) read and understand what is required from them; (2) decide on a response; and (3) input that response. Regarding these considerations and the potential cognitive burden of each additional field Luke Wroblewski notes: “the best way to speed up that process is not to ask the question at all [if it is not of immediate relevance]”. Studies have confirmed a strong correlation too between fewer questions and higher form completion rates (see Brian Moloney, [“Further Reading”](#)); a pattern supported by our own experience of testing at Box UK.

This factor is especially important for education organisations, who are often dealing with a millennial audience that has grown up surrounded by technology - these individuals are used to getting what they want, exactly when they want it. It’s also worth considering that overseas students may be reading the form in their second language, meaning that the imperative to keep your forms simple, intuitive, and quick to complete is that much greater.

As an example, the ‘Contact Us’ form on Doncaster University’s website contains three contact information fields (postal address, mobile telephone number, and email) as well as a date of birth field - all of them mandatory. However, as only one form of contact information is needed to reply to the user this could be an optional choice, to ensure the user is only contacted through their preferred channels. As it is, while capturing all fields may deliver greater value to the university’s marketing and analytics teams, being asked for so much

information may be considered unnecessary or, even worse, invasive and overly personal by some end-users. Interestingly, the message field - the main point of this form - is optional.

Figure 1: Doncaster University's contact form, complete with unnecessary fields

General Course Enquiries: 0800 358 7575
Higher Education Enquiries: 0800 358 7474
Telephone Switchboard: 01302 553 553
Alternatively, please use the form below:

Looking for information about how to find us?

Visit our campuses page for maps

Forename*	<input type="text"/>
Surname*	<input type="text"/>
Address*	<input type="text"/>
Mobile Telephone*	<input type="text"/>
Email Address*	<input type="text"/>
Date of Birth*	<input type="text"/> DD/MM/YYYY
Current or previous student	<input type="checkbox"/> Are you currently a student with us, or have you been in the past?
Subject interested in	<input type="text"/>
Your message:	<input type="text"/>
<input type="button" value="Submit form"/>	

This is by no means an uncommon mistake to make and often a better approach is to try and capture this data at a different point in the user's journey (if it's actually required). For example, in a registration form we tested, some fields were moved to the confirmation page and others to the 'My Account' profile settings. This new strategy not only increased the form's conversion rate, but also provided the client with more (and better quality) marketing data - with users now in a positive frame of mind (rather than frustrated by what they perceived as 'unnecessary' questions) they were more inclined to tell us about how they found the site, etc.

Figure 2: example registration form, redesigned to include only those fields absolutely necessary

Your free monthly newsletter

All fields are optional unless stated otherwise.

Would you like a paper or electronic version?
We are happy to send you a paper newsletter by post or electronic copy via email.

Electronic Paper

Email address:

You will be able to unsubscribe at any time.

Tell us about yourself

Title: First name: Surname:

Mr

Contact number:

Allows us to report a problem with your order. [Add new number](#)

Remember

Your objective should be getting users through the form in as quick and pain-free a way as possible. If some fields are business-critical, but the reasons for this are unlikely to be immediately apparent, then be sure to explain to them why you need the information and how it will be used.

2

Tailor your forms with progressive disclosure

A second tip is to tailor your forms by hiding potentially unnecessary questions at the start of the user journey, instead revealing them through progressive disclosure only if and when needed. For example, when students are required to provide details of course modules, visual clutter could be reduced by initially presenting a list of degree subjects, then displaying only the relevant course modules once a particular subject is selected.

Progressive disclosure can also be used with reference to logged-in users (such as those following a particular online education programme, or using a professional development tool) who likely shouldn't have to answer the same questions as new users. In these cases form length should be kept to an absolute minimum by displaying details as static text and not including fields unlikely to need updating such as 'Date of birth' and 'Gender' (as in the following example).

Traditional approach

Figure 3: a traditional returning customer form with pre-populated fields

The screenshot shows a form titled 'Personal details' and 'Account details'. The 'Personal details' section includes fields for Title (Mr), Name (John Smith), Date of birth (27/03/1982), Sex (Male), Marital status (Married), Preferred contact number (01234 567891), House name / number (2), Street / road (Spring Lane), Town / city (Riverdale), and Postcode (AB1 2CD). The 'Account details' section includes fields for Email address (john@johnsmith.com), Confirm email address (john@johnsmith.com), Password (*****), and Confirm password (*****). A link 'Add another number' is visible below the preferred contact number field.

Progressive disclosure

Figure 4: a progressive disclosure returning user form with hidden fields (clicking 'edit' would revert to the traditional display)

Personal details [edit](#)

Name: John Smith

Address: 2 Spring Lane, Riverdale AB1 2CD

Marital status: Married

Preferred contact number: 01234 567891

Account details [edit](#)

Email address: john@johnsmith.com

Password: *****

Remember

When using progressive disclosure, the idea is to reduce visual clutter, focus the user, and reduce the cognitive load, so start by looking for sections that require the user to select from a large list or questions that might be irrelevant due to previous answers. It's also a good idea to use brief transition animations when changing any part of the form in order to show the user that something has changed on the screen (e.g. a short 'slide out' animation).



Consider default form selections

A key ingredient of good usability is efficiency; making your form as streamlined as possible should therefore be a top priority. Setting form defaults can help, and there are typically two types: Member and Smart.

Member defaults

Already-registered visitors, for example registered applicants and students, have usually already supplied their personal details, and in these cases most fields should be set by default based on this information.

Amazon, for example, have such an efficient purchase process for logged-in users that a product can be bought with a single click.

Smart defaults

Smart defaults are based on the preferences of the majority of users. For example, using research and web analytics you can identify:

- Commonly-related course modules
- Accommodation preferences
- Popular payment methods for student loans

Aligning your default selections with these findings should result in the majority of users having to make fewer clicks.

Users should of course be able override default selections, but attempting a 'best guess' about what they are likely to pick based on the choices of other users can help make the form easier to complete.

Here are some other examples:

Insight	Form default
85% of applicants were UK- based	Country drop-down = 'United Kingdom'
95% of students selected a loan with 'annual' interest payments	Interest payments = 'annual'
80% of students selected the closest halls of residence to their course buildings	First choice of halls = closest to relevant course building

Remember

Attempting a 'best guess' about what users are likely to pick can help make forms easier to complete but you must provide the ability to easily override default selections too.

4

Support your users

To enable users to complete your form quickly you should support them throughout the entire user journey. However, it's important to strike the right balance between excessive instruction that is likely to frustrate and insufficient support which can negatively affect completion rates.

An example of this is Aberystwyth University's open day booking form. Here there is a mandatory "I am a..." form field that shows the user clearly, and without excessive instructions, that the open days are for prospective students, and their parents and teachers.

Figure 5: Aberystwyth University's open day booking form has a question, within the form itself, that helps to filter the applicants.

Open Day Booking

Fields marked with an asterisk must be completed.

The screenshot shows a multi-step booking form. At the top, a progress bar has five steps: 1. ABOUT YOU (highlighted in orange), 2. CONTACT DETAILS, 3. SUBJECT INFORMATION, 4. TRAVEL TO ABERYSTWYTH, and 5. FINISH. Below the progress bar is a form titled 'About You'. It contains five fields, each with a red asterisk indicating it is mandatory: a dropdown menu for 'Choose an Open Day' with the text 'Please select one'; a text input for 'First name'; a text input for 'Surname'; a dropdown menu for 'I am a' with the text 'I am a'; and a text input for 'Name of School/ College/ Institution last attended'. A blue 'Next' button is located at the bottom right of the form.

Similarly, educational institutions should consider how they present supporting information to make the corresponding form simpler. Both checklists and questionnaires can be used to achieve this; for example, listing qualification information will ensure they are eligible for their desired course before they provide further details, while asking for some personal information (such as dietary requirements or age) upfront might help to tailor the accommodation choices displayed.

Another obvious way to support your users is to make it easier for them to complete the required form fields. For example, Baymard Institute has developed a great ‘country selector’ tool that suggests countries based on real-time typing (see Baymard Institute, [“Further Reading”](#)). This is particularly useful for those in the United Kingdom given that ‘UK’, ‘Great Britain’, ‘Britain’, ‘Wales’, ‘Scotland’, ‘England’ and ‘Northern Ireland’ are all frequently searched for but often covered by a single selection in the form drop-down list.

Figure 6: Baymard Institute’s country selector

I live in

USA
United States

Remember

To comply with best practice, always look to include the following information alongside your form:

- Your contact/support details in case the user has a question
- Information on how long the form will take to complete and what details will be required
- Security and data protection policies
- A summary of previous selections if using a multi-step form

5

Enhance your forms with great visual design

While good visual design is important for your whole site, it's especially important when it comes to web forms. Psychologically-speaking, the better your forms look, the more forgiving the user will be of any minor inconveniences. In some cases, good visual design can even inject a small amount of joy into the form, endearing your users to it and increasing conversions.

Figure 7: Strava's sign-up form is a great example of visual design; visually pleasing with good usability and clear calls to action

The Social Network for Athletes

Connect with friends and make the most of every run and ride.

Sign up with Facebook

Sign up with Google

or sign up with your email address

First Name Last Name

Email

Password

Sign Up

By signing up for Strava, you agree to the [Terms of Service](#).
View our [Privacy Policy](#).

By following the tips already mentioned you should have a tighter, less intrusive form, but there is more that can be done. Contrast and readability, for example, are also incredibly important to the user - and both are affected by the aesthetic choices you make in your web design and branding. By optimising these to ensure your form is easy to scan by eye, you'll reduce cognitive-load on the user, helping decrease drop-off.

Ensure, too, that your labels are clear and bold so the the user's eye is able to easily scan the form. The label and the field should always be clearly associated with one another, using proximity to show association. There have been many studies, using eye-tracking and other methods, to try and determine the best way to present labels and fields to allow the user to work through a form as quickly as possible.

In reality though, the way you should use labels will also depend on other factors, such as brand guidelines, the amount of horizontal space available, and the device you're targeting. The question of devices is one of particular importance for educational institutions; millennials are typically highly comfortable with using mobile devices to complete tasks online, to the extent that one in five millennials exclusively use these channels to access the internet (see Adam Lella, [“Further Reading”](#)).

Generally speaking, right-aligned labels are easy to parse, while top-aligned labels are easier again and will be more suitable for mobile devices. However, there may be times you would need to slow the user down so that they pay more attention to some fields (such as long personal ID numbers on university applications). Infield labels, while readable and space-efficient, disappear when the user types into the field, which is not ideal.

Figure 8: it's clear from this example that left-aligned labels make it difficult for user to associate the labels with the corresponding fields, slowing down completion time and increasing frustration



Postgraduate Prospectus Request

If you are currently living in the UK or European Union we can post a copy of our prospectus to you.
If you are living outside Europe please [click here](#)
All fields marked * must be completed.

Go back

Request a Welsh prospectus

About your study plans

What type of postgraduate degree are you interested in?

Please select

What subjects are you interested in studying?

1st subject

Please select

2nd subject

Please select

Your details

Country of residence
(If you are living outside Europe please [click here](#))

please select a country

Title

Please select

First name

Surname

House name/House Number

Street Name

Town

City

Mobile number

e-mail Address

Your age group

Please select

Please let us know if you happy to receive further information about Cardiff University and our open days via:

e-mail

Yes

Submit

Figure 9: in this example, the fields are top-aligned. This produces a form that can be quickly read by the user; the downside, however, is that it uses a lot of vertical space

Order a 2017 undergraduate prospectus

Delivery Method*

Download
 Post
 Download & Post

Title*

Please select

First Name*

First name

Last Name*

Last name

Email Address*

Email address

Mobile Number

Mobile number

Nationality*

Please select

I would like further information about disability and/or accessibility assistance

Yes
 No

Level of Study*

Undergraduate

Year of Entry*

Please select

Subject*

Please select

Add

How did you hear about us?*

Please select

Submit

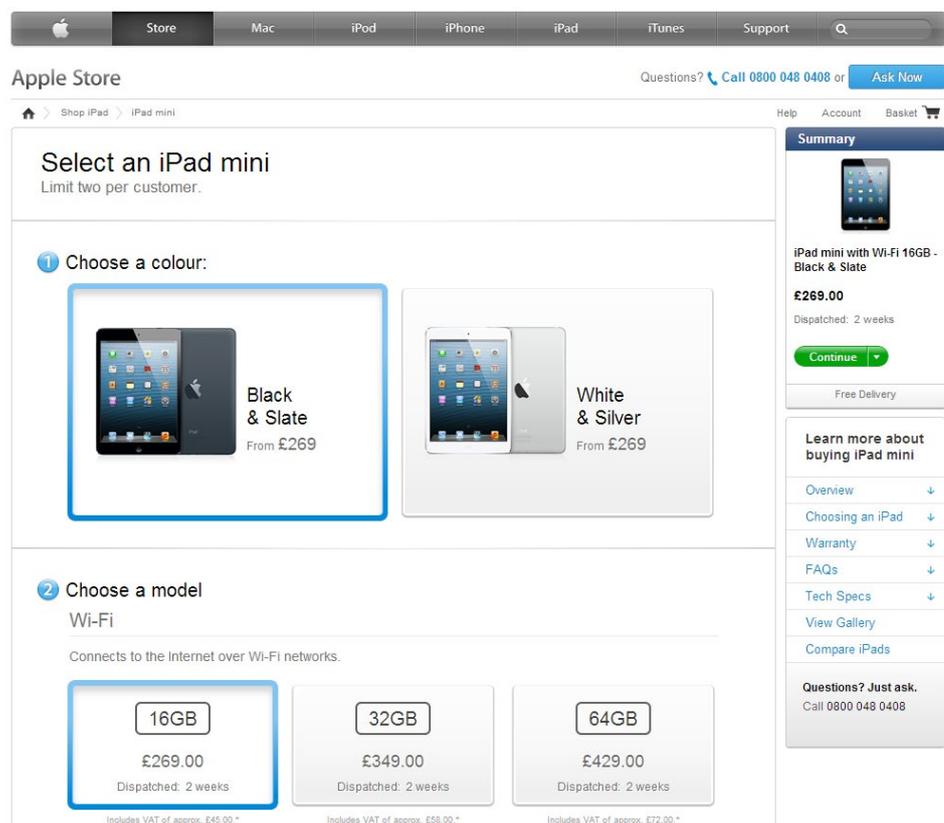
The case used on your labels can also have a small but measurable effect on the speed of completion. Sentence case is the easiest to read, while all-caps should be avoided to make the forms as easy to read as possible.

The length of your input fields can be used to subtly inform the user of the expected length of the required information. While this might not look as neat as a column of uniform input fields, it will make it easier for the user to complete. A great example of this is the postcode field on addresses - the length of the input is known and so the input field can be reduced. This subtly communicates what is expected of the user, helping decrease completion time.

Clear calls to action and progress bars (on multi-page forms) help guide and inform the user as they work towards completion. Ensure that the form's 'Submit' button stands out clearly from the page so that the user doesn't have to search for it, even for a second, and always clearly signal to the user where the primary next step is. In the same vein, avoid presenting too many options which may confuse the user.

Apple famously provides a great example of clear signalling, with progressive primary call to action buttons that are consistently formatted in green to help inform the user of their next step.

Figure 10: Apple clearly signposts its call to action



Remember

Good aesthetics (along with a knowledge of best practice) can take a good form and make it better. While you'd be hard-pressed to find a user that enjoys the act of filling out a form, that doesn't mean you shouldn't try to make the experience a better one. Even small improvements can have a cumulative effect on the usability and user experience.

Conclusion

Web forms are comprised of many different elements, making it important to ensure that each is given due consideration and designed well to avoid a confusing user experience and deliver value to students, parents, and administrators alike.

The motivations behind incorporating a form into your site or app will be numerous and require that, first and foremost, you consider the purpose of your form - this could be anything from increasing applications to streamlining the process of requesting a prospectus. All subsequent decisions should then be based on the specific needs of your users and business, while remembering to make every effort to keep the user journey lean and informative.

At Box UK we've helped organisations from across the education sector - including Middlesex University, Careers Wales and Cardiff University - improve the user experience of their websites and applications. To find out more about our expertise and approach, visit the [UX section](#) of our site or [get in touch](#) with one of our expert consultants to see how we could help you improve conversion rate, user satisfaction, interactions and engagement.

Further Reading

[Redesigning the Country Selector](#)

Baymard Institute

[In Search Of The Perfect CAPTCHA](#)

David Bushell

[Expedia on how one extra data field can cost \\$12m](#)

Nick Heath

[Why Are Millennials So Mobile?](#)

Adam Lella

[Fewer fields in a contact form sharply increases conversions](#)

Brian Moloney

[Meet the Obama campaign's \\$250 million fundraising platform](#)

Kyle Rush

[The \\$300 Million Button](#)

Jared M. Spool

[Web Form Design - Filling in the blanks](#)

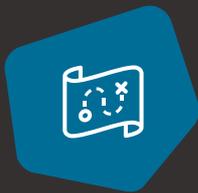
Luke Wroblewski:

[Which Types of Form Fields Lower Landing Page Conversions?](#)

Dan Zarrella:



Simply brilliant thinkers making software brilliantly simple



**Strategy &
Planning**



**User Experience
& Design**



**Software
Consultancy**



**Software
Development**

At Box UK our team of simply brilliant thinkers, consultants and application developers mastermind simply brilliant solutions to the world's toughest web and software projects.

It's why blue chip organisations around the world, from airlines to car manufacturers, international banks to global charities, choose to trust us with the execution of their digital strategies, from the development of enterprise-level custom software platforms to the delivery of award-winning multi-channel experiences.

So if you want an effective, compelling software solution, talk to us.

ux@boxuk.com • +44 (0)20 7439 1900