box UK

Five Ways to Improve Web Forms in the Membership Sector

Providing you with:

- ✔ Recommendations to increase sign-ups and enquiries
- ✔ Examples of cross-industry best practice
- ✔ 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 applying for membership, renewing subscriptions or downloading exclusive member-only content). However, it's rare that a visitor is going to 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 each is 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 membership 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 prospective and current members alike as well as significantly boosting your downloads, applications, renewals and more general enquiries.

1

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 membership organisations, who today often have to compete for prospective members' attention with a range of alternative communities - many of which have originated online and so are likely better tailored to address the demands and constraints of the digital world.

As an example, the 'Join Us' form on NACE's website contains four mandatory contact information fields (postal address, telephone number, lead email and financial email) as well as two "additional" email fields which are voluntary. 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 your membership 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.

Figure 1: NACE's joining form, complete with unnecessary fields

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.

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:

[   ]   [mobile ⇕]

Allows us to report a problem with your order.   **Add new number**

                                          [Register]

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, if members are required to select a local branch, visual clutter could be reduced by initially presenting a list of regions, then displaying only the relevant branches once a particular area is selected.

Progressive disclosure can also be used with reference to logged-in members 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 user form with pre-populated fields ❯

Personal details

Title:	Mr
Name:	John	Smith
Date of birth:	27 03 1982
Sex:	⦿ Male ◯ Female
Marital status	Married
Preferred contact number:	01234 567891
	Add another number
House name / number:	2
Street / road:	Spring Lane
Town / city:	Riverdale
Postcode:	AB1 2CD

Account details

Email address:	john@johnsmith.com	Confirm email address:	john@johnsmith.com
Password:	**********	Confirm password:	**********

Progressive disclosure

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).

3

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 existing members or individuals who have already begun the application process - have usually already supplied their personal details, and in these cases most fields should be set by default based on this information.

Smart defaults

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

- Popular membership options
- Communication preferences
- Common payment methods

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 prospective members were UK- based	Country drop-down = 'United Kingdom'
80% of members selected an annual subscription	Membership subscription = 'annual'
95% of members selected the branch closest to their home address as their 'local' branch	First choice of branch = closest to home address

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 the Royal Pharmaceutical Society's member application form, which includes a section at the top prompting applicants to choose their desired membership option. Once selected, the form is tailored to display the necessary joining requirements for that particular option, along with any relevant fields.

Figure 5: the Royal Pharmaceutical Society's member application booking form has an opening question that helps to filter the applicants

Similarly, membership 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 the features and benefits of different membership levels will help ensure applicants choose the right option for their needs before they provide further details, while asking for some personal information (such as location, interests) upfront might help tailor the services and offers 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 ›

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 particularly important as more and more millennials come of age and join professional and personal member networks; this group is 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 member reference numbers on subscription renewal forms, or card details when processing payment for events and resources). 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 from the National Day Nurseries Association, that the left-aligned labels make it difficult for user to associate the them with the corresponding fields, slowing down completion time and increasing frustration

myNDNA Community Joining Form

You're just a few simple steps away from having access to all of the benefits of the myNDNA community!

1. Complete and submit this form
2. You'll then receive an email from us asking you to activate your email address
3. Once you have activated your account, log in to the website and visit 'Groups' to access myNDNA and your free factsheets, mini-guides, online training, tip and activities to support and inspire you.

If you are already a paid nursery member of NDNA, you can still join myNDNA, but these are two different kinds of accounts and you'll need to log in to each one separately. Your nursery membership login gives you access to prices in the online shop, from policy and procedure templates, to membership discounts with our partner companies and you can view back copies of our Nursery news magazine.

Contact Info

Submission No   023919

Sign Up

Your contact details

* First name	
Middle name	
* Surname	
* Postcode	
* Email	
* Confirm Email	
Position	
Address	
Address 2	
Address 3	
Town/City	
County	
Telephone	
Country	United Kingdom ▾
Website	
Fax	
Mobile Number	

Your New User Account

Choose a username and password which you will use to log in to the website

* Username	
* Password (must be at least 6 characters)	
* Confirm Password	

Declaration

NDNA would like to send you the latest news, information and promotions via the following channels. Please tick if you would rather NOT be contacted via:

Email (By opting out of email communication you will miss out on your fortnightly newsletter and special promotions)	☐
Post (By opting out of postal communication you will miss out on special promotions)	☐
Telephone	☐
How did you hear about NDNA?	(None) ▾
* I have read and agreed to the NDNA Community Membership terms and conditions.	☐

Click submit to submit your application   **Submit**

Click save button to save your answers, and you can continue next time   **Save**

Website registration form

To book events and perform other actions on the RCOG website, you need to be registered with us. Please complete the registration form below. Upon successful registration, you'll be automatically redirected to the 'My account' area of the website.

Login details

Email:*

Confirm Email:*

Email Type:

Home

Password:*

Your password must be between 7 and 12 characters long, and must contain at least one number and one capital letter

Confirm password:*

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 legible 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.
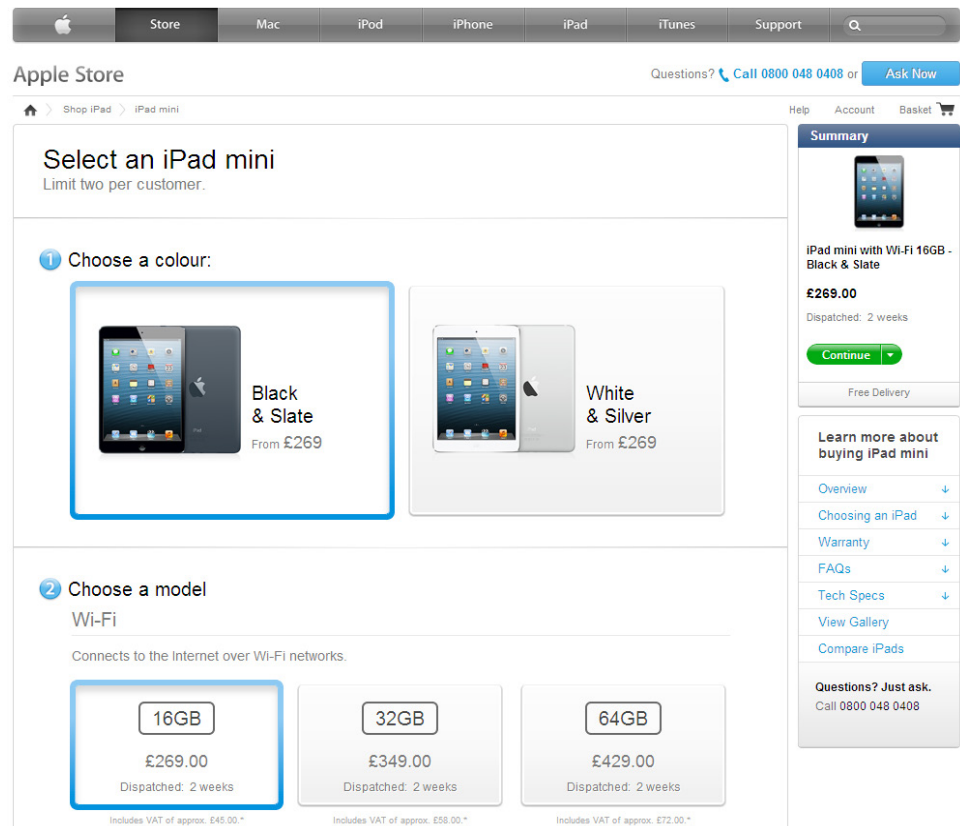
Remember

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 prospective and current members 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 accessing valuable information and resources. 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 membership sector - including BCS, The Chartered Institute for IT, UNISON, the National Childbirth Trust, the Royal Photographic Society and the Royal College of Nursing - 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

12 ways to improve sign up conversion
UX for the Masses

8 Reasons Users Don't Fill Out Sign Up Forms
UX Movement

Web Form Design – Filling in the blanks
Luke Wroblewski

Which Types of Form Fields Lower Landing Page Conversions?
Dan Zarrella

box UK

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.

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