

Best Practices in Form Design & User Experience



74%

of companies use web forms for lead generation.

<https://wpforms.com/online-form-statistics-facts/>



50%

of companies surveyed consider online forms their highest converting tools

<https://wpforms.com/online-form-statistics-facts/>



Form abandonment statistics

81%

abandon a form after beginning to fill it out

67%

abandon the form forever if they encounter any obstacles

29%

cite security concerns as a reason to not complete a form

Sources:

[WP Forms Blog: 101 Unbelievable Online Form Statistics for 2019](#)

[The Manifest: 6 Steps for Avoiding Online Form Abandonment](#)

When you think of forms ...

- Complicated
- Annoying
- Frustrating
- Impossible
- Time-consuming





“Users spend most of their time on other sites. This means that users prefer your site to work the same way as all the other sites they already know.”

Jakob Nielsen

Usability expert and co-founder of Nielsen Norman Group





Tell us about your dog

Answer some basic questions about your dog and we'll get the box that's just right for them.

What's their name?

His name is

Her name is

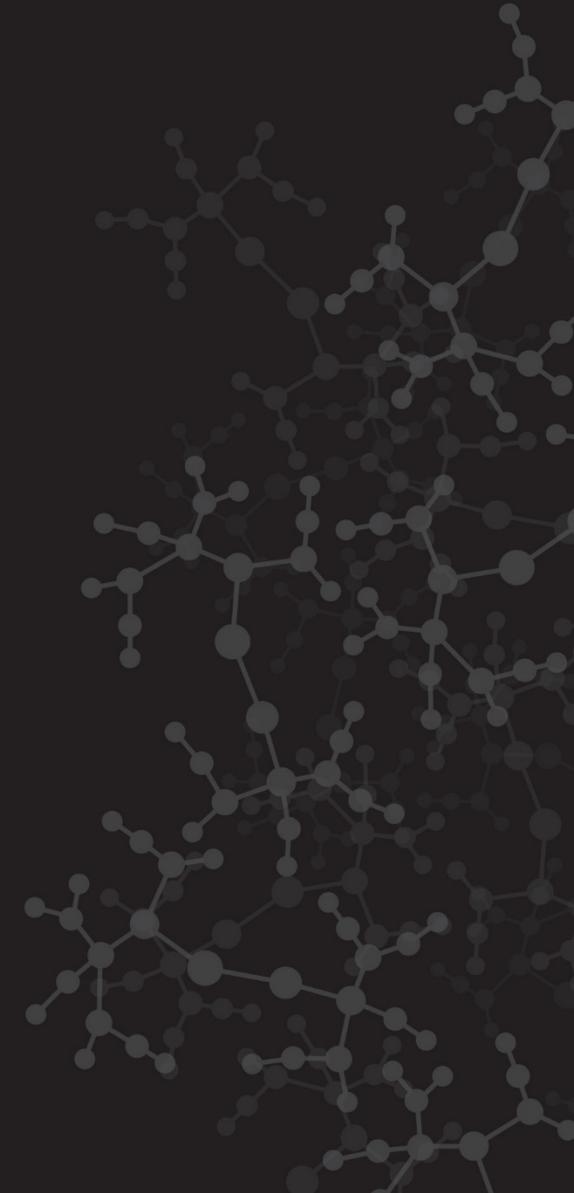
Dog's name

Continue



14 Best Practices in Form User Experience (UX)

Make the most of your online forms!





Best Practice #1:
Ask the least amount of information
possible.



Form length impacts conversion rates

- Design guidelines tell us to stick to 5 fields or fewer
 - Reduces friction
 - Reduces cognitive load and frustration
 - Increases efficiency
- Certain scenarios require more information from the user
 - More on this later!





Example: Eliminating unnecessary fields

This experiment took a form with 9 fields to 7, and eventually to 5

With each iteration, conversions increased

First Name: *
Last Name: *
Work Email: *
Job Function: * Choose One
Company: *

Short Form (5 fields)

Conversion: **13.4%**

Cost per: **\$31.24**

First Name: *
Last Name: *
Work Email: *
Company: *
Job Function: * Select
Employees: * Select
Industry: * Advertising & Media

Medium Form (7 fields)

Conversion: **12.0%**

Cost per: **\$34.94**

First Name: *
Last Name: *
Work Email: *
Work Phone: *
Company: *
Job Function: * Select
Employees: * Select
CRM System: * Select
Industry: * Advertising & Media

Long Form (9 fields)

Conversion: **10.0%**

Cost per: **\$41.90**



Example: A/B test

A/B test: Form length not changed, but intro added to Version B

Results: A longer intro to the form decreased conversions for DTS by 28%

The image displays two versions of the Dallas Theological Seminary (DTS) online donation form. Version A is the control, featuring a direct 'Make a Gift Online' heading and a form with fields for name, address, and payment information. Version B includes an introductory text block titled 'Your gift to Dallas Theological Seminary is a strategic ministry investment' before the form fields. Both versions include a 'Submit Donation' button and a footer with contact information and social media links.

Version A

Version B



Example: Patient Registration

In healthcare, you'll likely have to ask for more detailed information from patients and prospects.

But remember: Ask only the essential to help people complete the task more efficiently.

The image shows a screenshot of a web form titled "Birthplace Pre-Registration Form". The form is light blue and contains the following elements:

- Title:** Birthplace Pre-Registration Form
- Introductory text:** You will need the following to complete this form:
- Required information list:**
 - Your Social Security Number (SSN)
 - Your OB's office contact information
 - Your insurance information
- Legend:** * Denotes required fields
- Section Header:** Patient Information
- Form Fields:**
 - * First Name, M.I., * Last Name (with a dropdown arrow next to M.I.)
 - Address (two stacked input fields)
 - * City, * State (with example: NY), * ZIP Code (with example: 12345)
 - * Phone (with example: 323.123.1234 x123)
 - Ok to leave message?** (radio buttons for Yes and No)
 - * Contact Email
- Footer:** [Select one] dropdown, Next button, and geometric.com logo.

A semi-transparent light blue box is overlaid on the bottom half of the form, containing a larger version of the form's title and introductory text, and a list of the required information items.

Birthplace Pre-Registration Form

You will need the following to complete this form:

- Your Social Security Number (SSN)
- Your OB's office contact information
- Your insurance information



Best Practice #2:
Clearly mark required and optional fields.



Optional vs. required fields

- It's best practice to use an asterisk to mark required fields
 - Users might forget or ignore instructional or small text at the top of the form
- Field markings impact how a user completes the form, and their ease of use

A vertical form with five input fields, each with a blue header bar containing the field name followed by an asterisk. The fields are: EMAIL ADDRESS*, FIRST NAME*, LAST NAME*, ZIP CODE*, and MOBILE PHONE*. Below the last field is a question: "Which ways are you interested in volunteering with the campaign?".

EMAIL ADDRESS*

FIRST NAME*

LAST NAME*

ZIP CODE*

MOBILE PHONE*

Which ways are you interested in volunteering with the campaign?



Optional vs. required fields

- Group all required – and all optional – together
- Use clear language
 - Optional fields work better when marked “Optional”
 - Avoid using phrases like “Not required” to keep negative words away from your microcopy whenever possible
- A/B testing – Use data to decide what’s best for your organization and users
- Remember tip 1: Don’t ask things you don’t need!



Accessibility and asterisks

- In HTML 5, add markup to the form field that instructs screen readers to say the word “Required” when an asterisk appears
 - Eliminate confusion for all users – make your forms inclusive for everyone!
 - Don’t leave people behind with vagueness between required and optional fields

<https://www.nngroup.com/articles/required-fields/>



Best Practice #3:
Represent fields in one column.



Represent fields in one column

Do

A vertical form layout with four input fields stacked on top of each other, each with a blue label above it. A blue submit button is centered at the bottom.

Don't

A horizontal form layout with two columns of input fields. Each column has two input fields with blue labels above them. A blue submit button is positioned at the bottom right of the second column.

<https://uxdesign.cc/form-best-practices-8e560e9f8bd0>



Represent fields in one column

- Improves accessibility
- Reduces cognitive load
- Performs better on mobile and responsive environments
- Aligns with people's reading patterns
- Leaves room for better design



Create account

Your name

Email

Password

[i](#) Passwords must be at least 6 characters.

Re-enter password

[Create your Amazon account](#)

By creating an account, you agree to Amazon's [Conditions of Use and Privacy Notice](#).

Already have an account? [Sign-In](#)

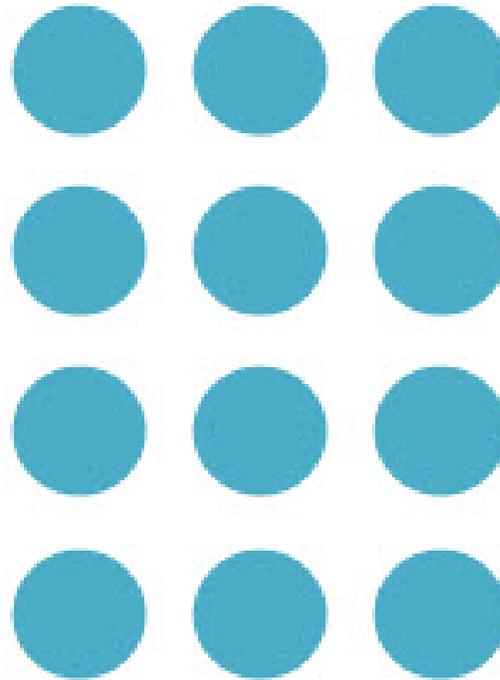


Best Practice #4:
Group similar information together.



Grouping similar information together

- Improves layout of the form
- Reduces cognitive load
- Gives more power to users
- Makes it easy to scan



Example: Walgreens



First Name:

Last Name:

Email:
(Your email address will be your username)

Re-type Email:

Password:
(Min. 8 characters, 1 number, case-sensitive)

Re-type Password:

Address:

City:

State:

Zip Code:

Phone:
No spaces or dashes

Date of Birth:

Gender:

Security Question:

Security Answer:
(Not case-sensitive)

Personal Information

First Name:

Last Name:

Date of Birth:

Gender:

Account Information

Email:
(Your email address will be your username)

Re-type Email:

Password:
(Min. 8 characters, 1 number, case-sensitive)

Re-type Password:

Security Question:

Security Answer:
(Not case-sensitive)

Contact Information

Address:

City:

State:

Zip Code:

Phone:
No spaces or dashes

Personal information

Account information

Contact information

Example: Patient registration grouped info

- Helps users feel less overwhelmed
- Allows users to see the type of information they have to provide before they start
- Organizes content logically, decreasing cognitive load

The screenshot shows the Silver Cross Hospital website's Maternity Pre-Registration page. The header includes the hospital logo and navigation links for CARE & TREATMENT, CLASSES & EVENTS, FIND A DOCTOR, and FIND A LOCATION. The breadcrumb trail is Home / Care & Treatment / Pregnancy & Birth / Maternity Pre-Registration. A sidebar titled 'In this Section' lists various pregnancy-related topics, with 'Maternity Pre-Registration' highlighted. The main content area is titled 'Maternity Pre-Registration' and includes a note about required fields. The form is divided into sections: Patient (Name, Suffix, Maiden Name, Sex), Guarantor (Guarantor status, address), Emergency Contact (address), Employer (status, name, address, city, state, zip, phone), and Maternity (Due Date).

SILVER CROSS HOSPITAL CAREERS |

CARE & TREATMENT CLASSES & EVENTS FIND A DOCTOR FIND A LOCATION

Home / [Care & Treatment](#) / [Pregnancy & Birth](#) / Maternity Pre-Registration

In this Section

- Pregnancy & Birth
- Maternity Pre-Registration
- Ultrasound
- Labor & Delivery
- Breastfeeding
- Nursery
- Baby Bereavement
- Follow-Up Care

Maternity Pre-Registration

Required fields are marked with *

In order to expedite the registration process, please complete the registration information below. Required fields are marked with an asterisk (*). Or you may contact our Pre-Registration team at (708) 342-2222.

Patient

Name

First Name

Last Name

Suffix

Ms. ▼

Maiden Name

Sex

Female

Male

Guarantor

Is this patient the guarantor?*

Yes

No

If not, shall we use this same address for the guarantor?*

Yes

No

Emergency Contact

Shall we use this same address for your emergency contact?*

Yes

No

Employer

Employment Status

(Please Select) ▼

Name of Employer

Address (Line 1)

Address (Line 2)

City

State*

IL

Zip Code

Employer Phone

000.000.0000

Maternity

Due Date*

MM/DD/YYYY



Best Practice #5:
Keep your form fields clear.



Anatomy of a form field

Contact information

Field label

Email or mobile phone number

Placeholder text

Text box



Avoid putting placeholder text in the field

- Placeholder text disappears when typing, confusing users
- Most placeholder text is light-gray text on a white or light background, breaking color contrast needs for accessible design
- Not all screen readers read placeholder text aloud
- Instead, use tooltips, or place instructions or examples outside of the text field

Contact information

Email or mobile phone number

A large, bold red 'X' is placed over the placeholder text 'Email or mobile phone number' in the input field, indicating that this practice is incorrect.



Keep field labels on the outside of the text box

- Clearly label each field on your form
- Add tooltips or instructional copy for additional information, such as requirements
- If the field label is inside the text box – and disappears when typing – it could confuse users

Password

 Show

- One lowercase character
- One uppercase character
- One number

- One special character
- 8 characters minimum





Example: Burt's Bees & Apple

CREATE AN ACCOUNT

 ERIN  

 S 

 Invalid email address  

 CONFIRM EMAIL

 PASSWORD 
 Passwords must be at least 8 characters, contain one upper case and one lower case character, one number or Special character. Passwords do not contain any part of the username, the word "password" or "qwerty", and the same character 3 or more times in succession. Passwords are case sensitive.

 CONFIRM PASSWORD 
 Passwords must be at least 8 characters, contain one upper case and one lower case character, one number or Special character. Passwords do not contain any part of the username, the word "password" or "qwerty", and the same character 3 or more times in succession. Passwords are case sensitive.

Where should we send your order?

Enter your name and address:

First Name
Erin

Last Name
Schroeder

Street Address

Please enter a maximum of 35 characters.

Apt, Suite, Building (Optional)

Zip
52 

City, State
cedar ... IA

Country
Ur

This is a business address. 



Best Practice #6:
Highlight active fields one at time.



Highlight active fields one a time

- Aids accessibility
- Keeps all users focused on what's next
- Decreases cognitive load or stress
- Improves accuracy
- Inspires form completion
- Helps tab-through on desktop and with accessibility

Example: Mailchimp



Get started with your account

Find your people. Engage your customers. Build your brand. Do it all with Mailchimp's Marketing Platform. Already have an account? [Log in](#)

Email



Username

Password

 Show



- One lowercase character
- One uppercase character
- One number
- One special character
- 8 characters minimum

Get Started!

By clicking the "Get Started!" button, you are creating a Mailchimp account, and you agree to Mailchimp's [Terms of Use](#) and [Privacy Policy](#).



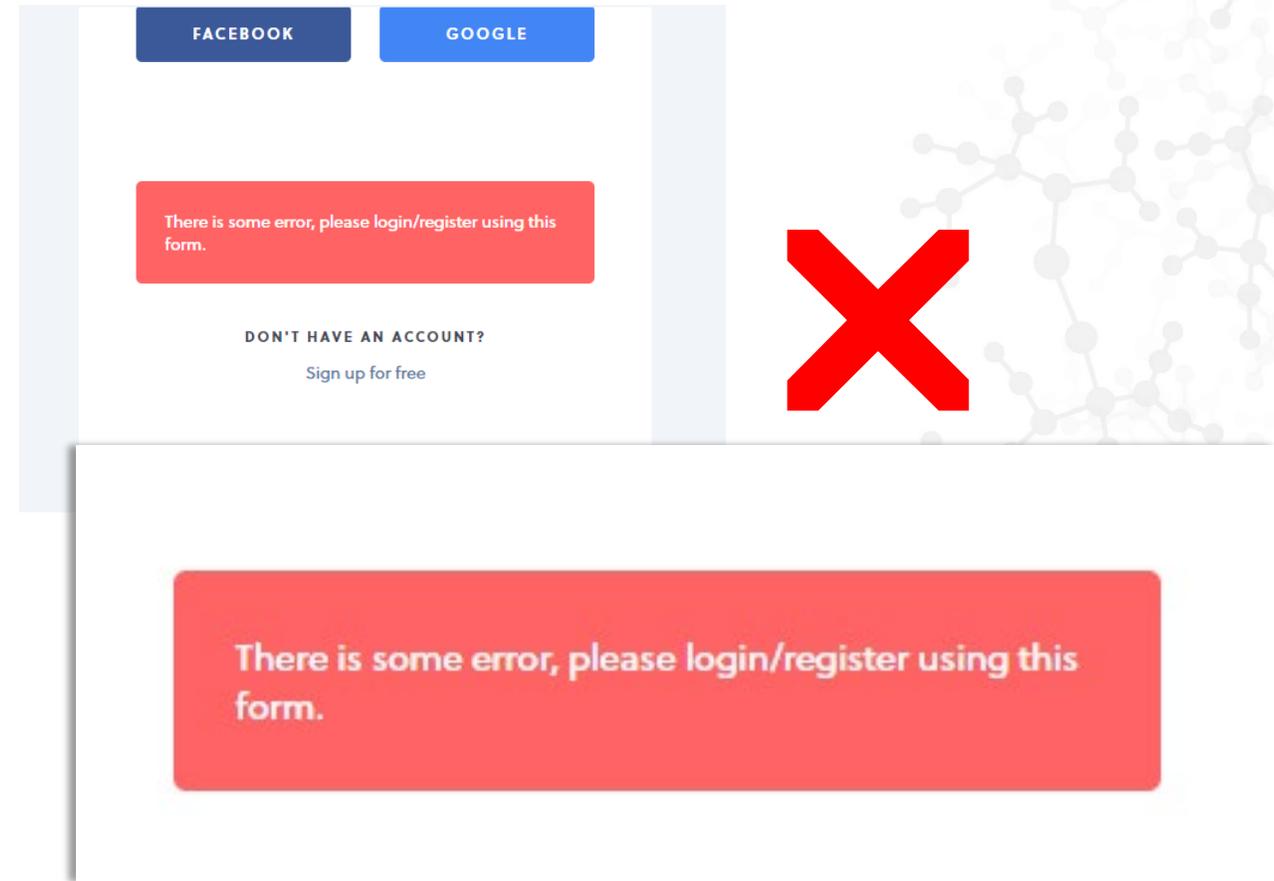


Best Practice #7:
Write clear, helpful error messages.



Error messages help people complete forms

- Avoid jargon
 - Think about your audience's preferred language and literacy
 - Plain language is best
- Be clear and transparent about the error
- Placement of the error messages can make or break form UX





Help users with clear microcopy and error messages

- Keep error messages next to fields
- Use color to differentiate errors from normal field states
- Add iconography for easy scanning
- Don't validate (or invalidate) before the form is complete

Enter your contact information

Email Address

test@email|

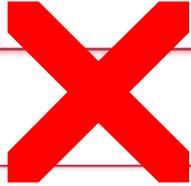
⚠ Please enter a valid email address.

Phone Number

⚠ Please enter a phone number.

Send me text notifications regarding order updates. (Mobile phone only)

Continue to Payment Information

A large, thick red 'X' is drawn over the right side of the form, indicating that the form is invalid or contains errors.

Last name

Last name

⚠ Last name is required



Help users with clear microcopy and error messages

- Aim for inline validation whenever possible
- Encourage users by indicating successful entry for complex fields

Password Reset

Enter your new password for your Slack account.

New Password

So-so

Confirm New Password

Password Reset

Enter your new password for your Slack account.

New Password

Great

Confirm New Password





Best Practice #8:
Don't confirm shame.



What is confirmshaming?

- Confirmshaming is the act of “guilting” people into opting into something
- Often worded with the intention to drive an emotional response from the user
- Seen with online offers, mailing lists, exit modals and other pop-ups
- Results from lack of testing, unclear voice and tone guidelines, or rogue designers and writers



Confirmshaming in action

Gmail



Sign Up Sign In

First Brad and Angelina and now us?

Let's take a step back and really think about this.



 Your security. Built into everything we do.

Enter your email below to unlock the



DAILY GUIDE TO A HEALTHIER LIFE

Delivered to your inbox daily.

ENTER YOUR EMAIL HERE

LIVE HEALTHIER

I don't want to be healthier.

You have successfully unsubscribed from receiving Turbo emails.



I don't want to be healthier.



How to avoid confirmshaming

- Have a documented voice, tone, and style with examples of how opt-outs and email unsubscribes should be messaged
- If you're considering a certain language, test it out with A/B testing or user research
 - Check your competitors, while you're at it
- Keep your brand messaging points top-of-mind, even if people want to be provocative and funny
 - Does it fit your brand?

delish
In a dinner rut? Get tons of recipes that take 25 minutes or less.

Enter your email to banish boring dinners.

YUM! NEED NOW.

[Nah, I'm good.](#)

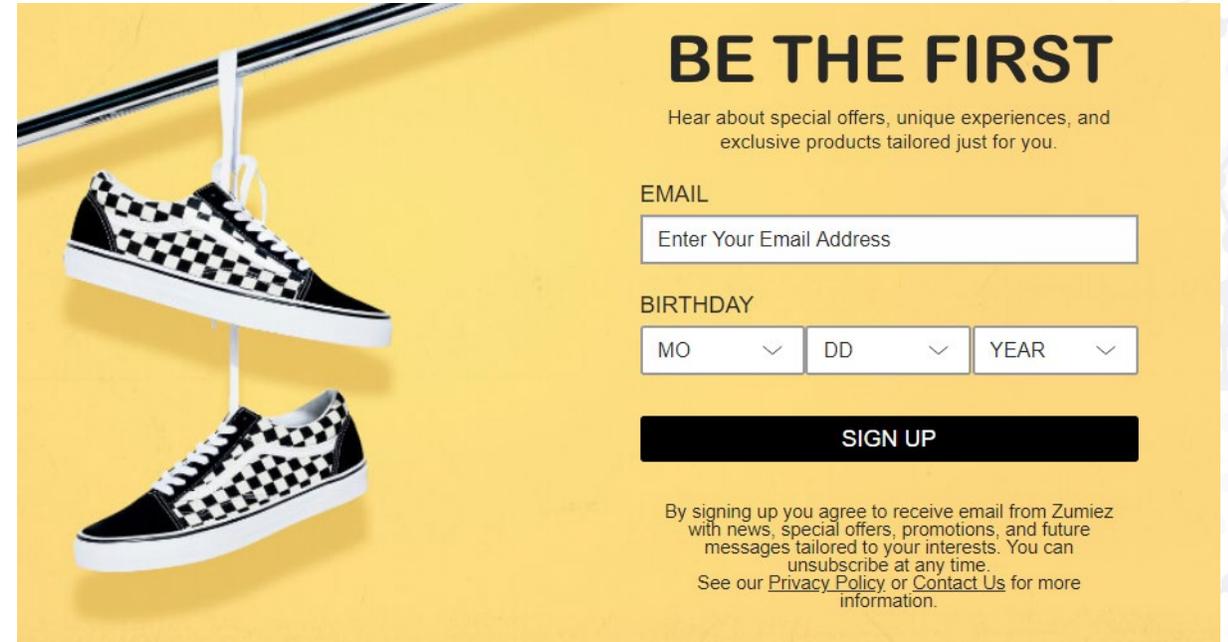


Best Practice #9:
Explain why you're asking for some
information.



Be transparent about why you need information

- The user deserves to know:
 - Why you're asking for information
 - How you're going to use that information
- Improves
 - User control and satisfaction
 - Conversion and completion rates
 - Trust between the customer and your brand



Example: Transparency in requesting information

Ulta email signup

Don't miss a thing!

Sign up for emails and get in on our latest sales, new arrivals and special offers.

Plus, sign up for text message alerts to get special offers sent straight to your mobile phone!

Mobile Phone Number:

Sephora rewards registration



BeautyINSIDER

Join the Beauty Insider loyalty program. Earn points, redeem rewards, and more.

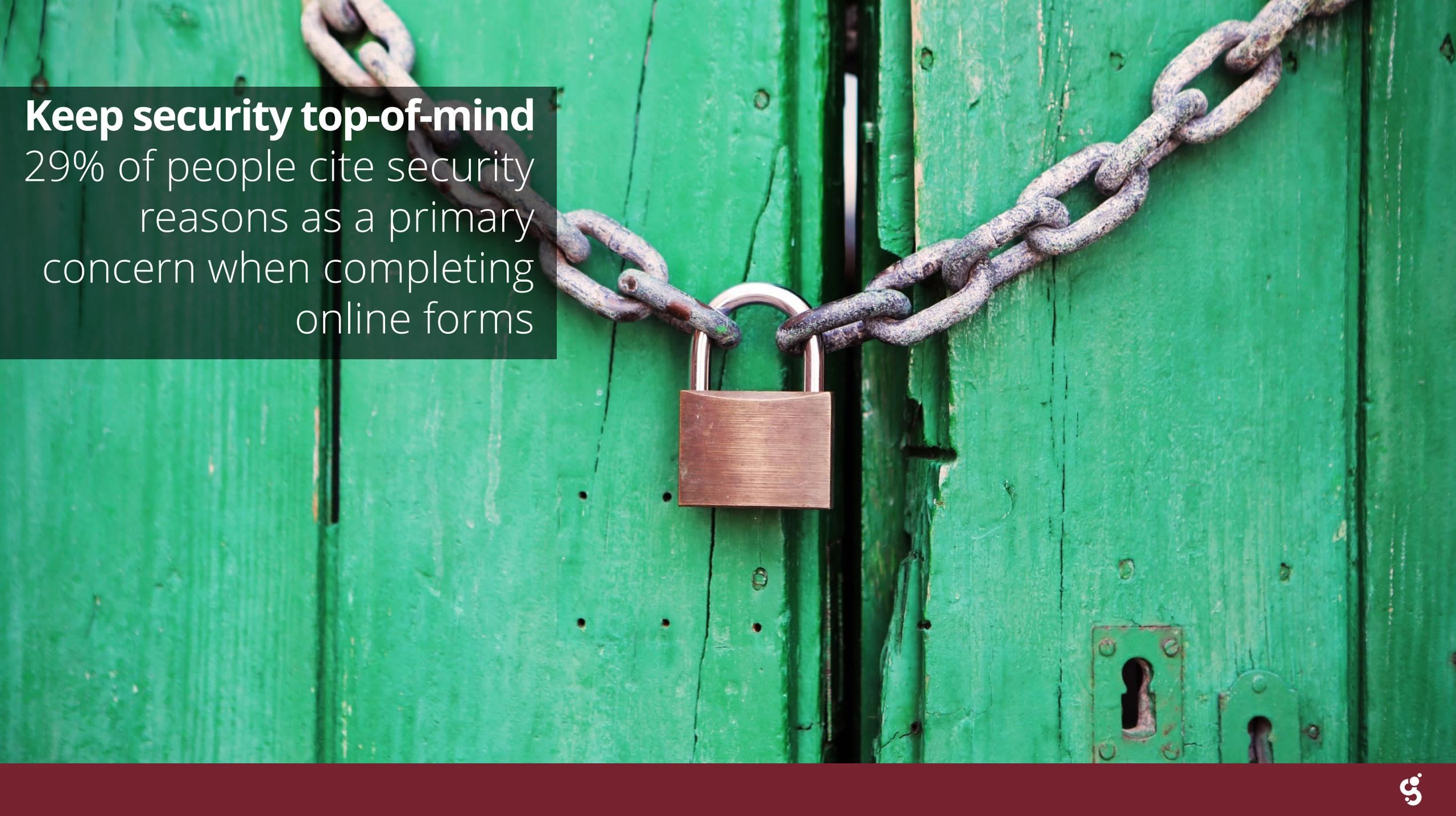


Enter your birthdate to receive a free gift every year.

JOIN NOW



Best Practice #10:
Keep security concerns top-of-mind.

A close-up photograph of a green-painted wooden door. A thick, weathered metal chain is wrapped around the door and secured with a brass padlock. The door shows signs of wear, with some paint chipping and small holes. A keyhole is visible in the lower right corner of the door.

Keep security top-of-mind

29% of people cite security reasons as a primary concern when completing online forms



Ways to make your security and trust more clear

- Keep your domain secure (use HTTPS)
- Use only HIPAA- and PCI-compliant providers
- Use your brand consistently, online and off, from your website to your online forms
- Make contact information easy to access

NEED HELP?

 [Track My Order](#)

 [Returns & Exchanges](#)

 [Customer Service](#)

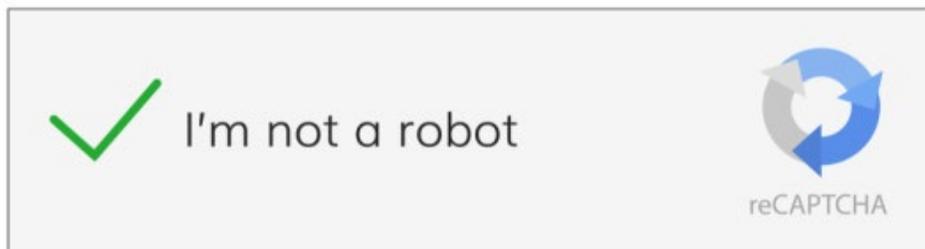
 [Contact Us](#)

 [Find a Store](#)



Ways to make your security and trust more clear

- Be transparent about your privacy policy, data use and storage, and reasons for asking specific information
- Customize and validate input fields
- Enable CAPTCHA and bot-defenders



By clicking the "Get Started!" button, you are creating a Mailchimp account, and you agree to Mailchimp's [Terms of Use](#) and [Privacy Policy](#).



Best Practice #11:
Be inclusive.



Accessibility in web user experience (UX)

- American's with Disabilities Act (ada.gov)
- Section 508 & 501 of Rehabilitation Act of 1973
 - Requires technology, online training, and websites be accessible for all
- Section 1557 of the Affordable Care Act
 - Clarifies processes to improve communication for all users

The screenshot shows the homepage of Section508.gov. At the top left is the GSA logo and the text 'Section508.gov GSA Government-wide IT Accessibility Program'. A search bar is located at the top right. Below the header is a navigation menu with tabs for 'Create', 'Test', 'Manage', 'Buy', 'Sell', 'Training', and 'Blog'. The main content area features four large icons on a background of a keyboard: 'Create Accessible Products' (pencil icon), 'Manage a 508 Program' (people icon), 'Test for Accessibility' (checklist icon), and 'View Policy' (scales icon). Below this are three dark blue boxes labeled 'Buy & Sell', 'Tools & Training', and 'News'. Each box contains a list of links and a 'View all' link.

Buy & Sell

- [Buy Accessible IT](#)
- [Sell Accessible IT/VPAT™](#)
- [Accessibility Requirements Tool \(ART\)](#)

[View all](#)

Tools & Training

- [Universal Design](#)
- [Technology Accessibility Playbooks](#)
- [Find Your 508 Program Manager](#)

[View all](#)

News

- [2019 IAAF Agenda and Keynote Speakers](#)
- [2019 Interagency Accessibility Forum](#)
- [Supporting Empowerment through Accessibility](#)

[View all](#)



Form accessibility (inclusivity) best practices

- Use single-column design
- Group like-content for easy scanning and cognition
- Optimize form controls for screen readers
- Create high-contrast user interface designs
 - Use autofocus for field-by-field highlights, if possible
- Enable keyboard functionality for all devices
- Support voice input for all form fields, as well as text-to-speech capabilities



“The power of the web is in its universality. Access by everyone regardless of disability is an essential aspect.”

Tim Berners-Lee
computer scientist



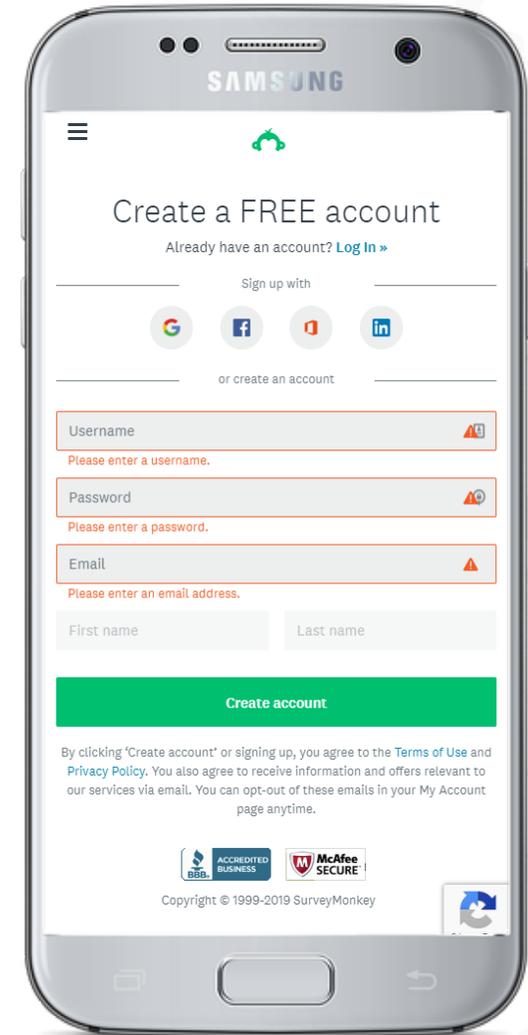


Best Practice #12:
Design for mobile, but not only mobile.



Mobile form best practices

- Perception of complexity
 - Keep forms short and easy to use
 - Inform users of how time commitment
- Keeping track of emerging mobile technology
 - Autofill options
 - Voice control and input
 - Camera use
- Call-to-action placement and copy (microcopy)
 - Make it easy to see, clear, and actionable



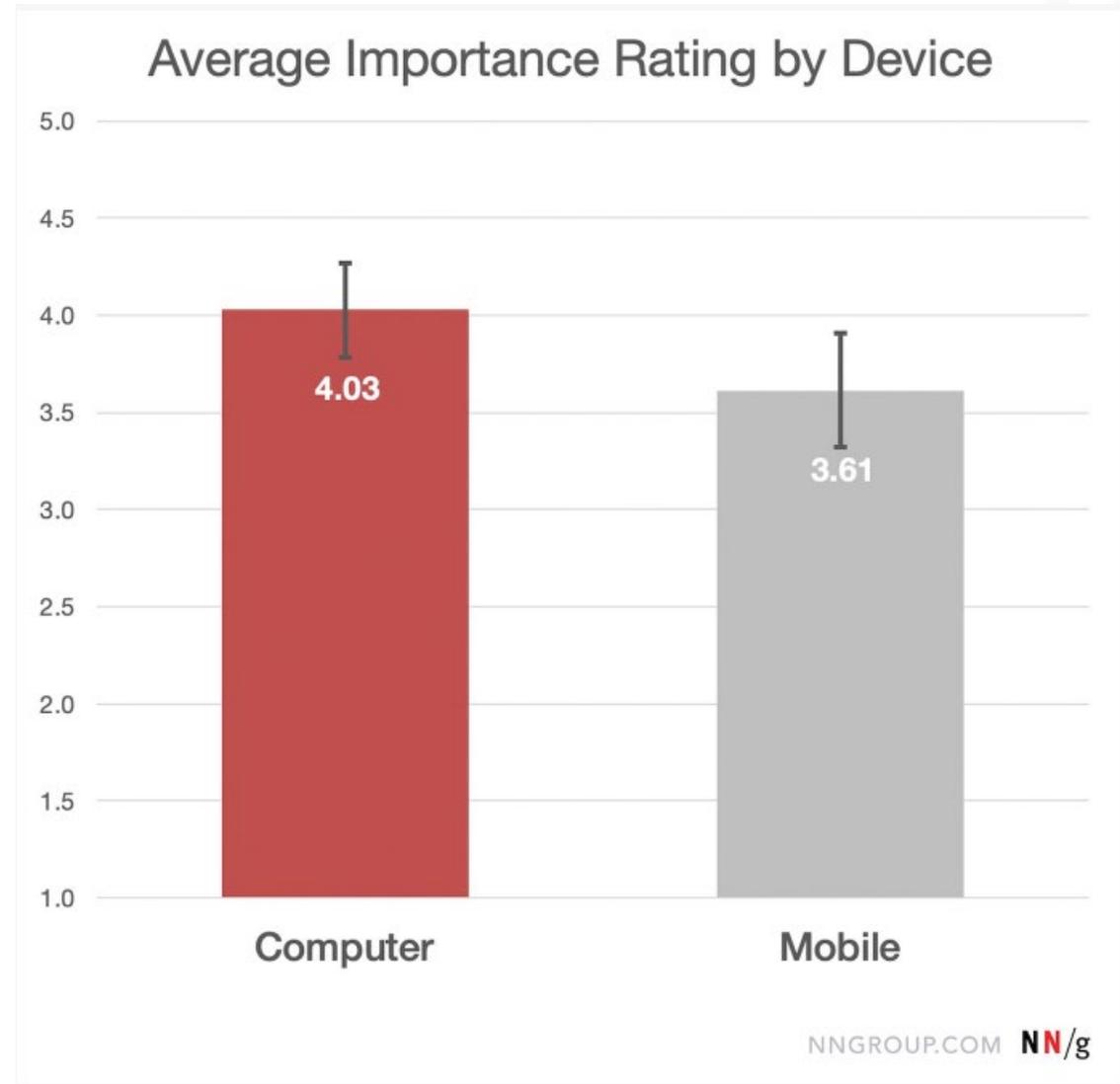


Mobile vs. desktop for complex tasks

Despite substantial improvements in mobile UX over the past decade, people still tend to do their most important online activities on larger screens

- Nielsen Norman Group

<https://www.nngroup.com/articles/large-devices-important-tasks/>



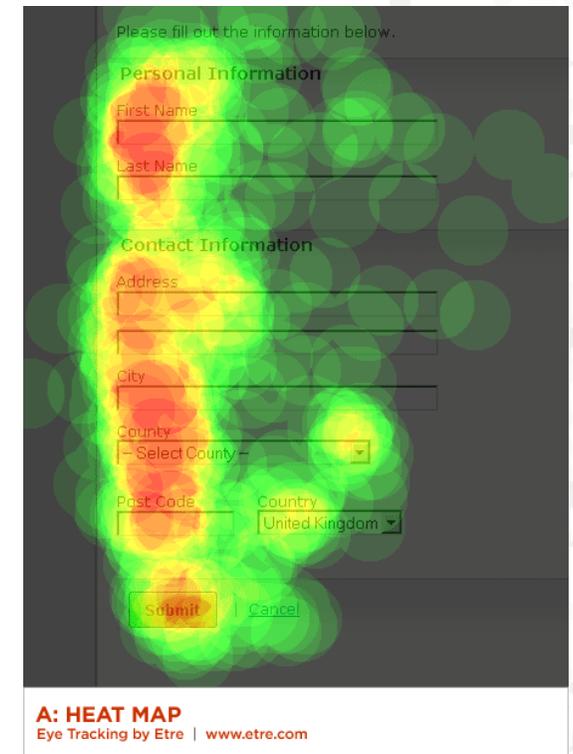


Best Practice #13:
Measure your efforts across devices.



Measure your efforts across devices

- Views of the form(s)
- User paths – pages before and after form visit
- Heatmaps – great for long form and scrollmaps
- Conversion rates
 - Desktop vs. mobile
 - Click-throughs and completion
- Abandonment rates
 - Watch your partial entries
 - Which fields are being abandoned most – and why?





Best Practice #14:
Don't forget your form administrators.



Don't forget your form administrators!

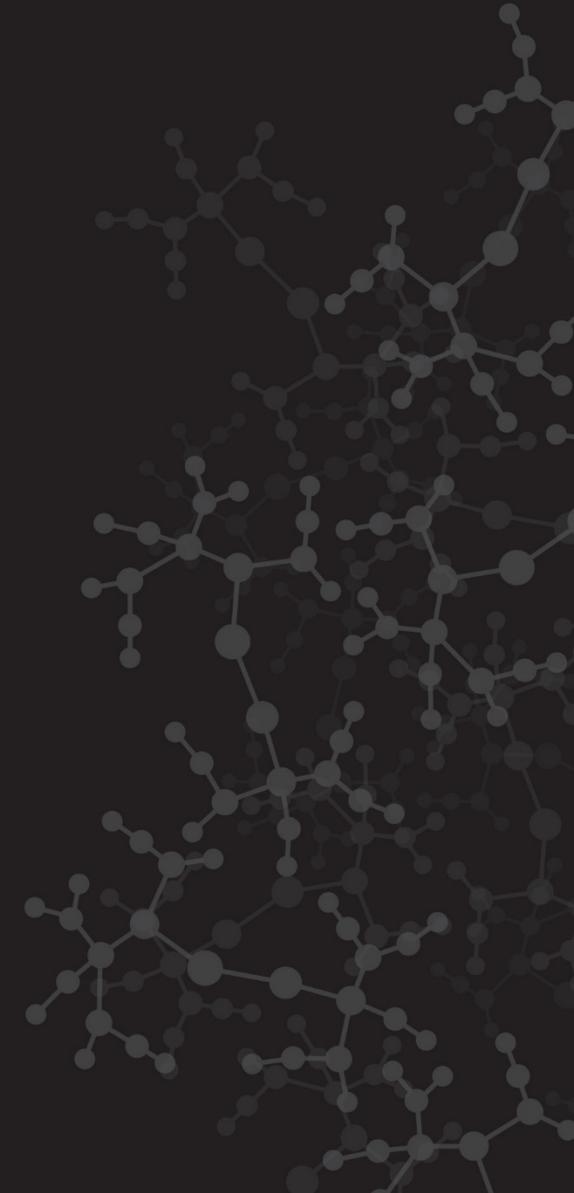
- Workflow
 - Where does the form go next?
 - Who's in charge of approving?
- Team's strengths and weaknesses
 - Writers, designers, and data wizards
 - Can it be built without coding knowledge?
- Ease of use across systems
 - Can you access form data via email?
 - Embed in multiple systems?
- HIPAA and PCI compliance





Summary

What have we learned?





What have we learned?

- Ask the least information possible from your users
- Mark required and optional fields clearly
- Represent forms in a single column for best accessibility across all devices
- Group similar information together – Law of proximity!
- Keep your form fields clearly labeled and free of placeholder text
- Highlight active fields one at a time



What have we learned?

- Write clear, helpful error messages in plain language
- Don't confirm-shame!
- Be transparent about why you're asking for information
- Check your security boxes
- Be accessible and inclusive to all
- Choose tools that work well with your team

“UI is the saddle, the stirrups, and the reins. UX is the feeling you get being able to ride the horse.”

- Dain Miller, web developer

