

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

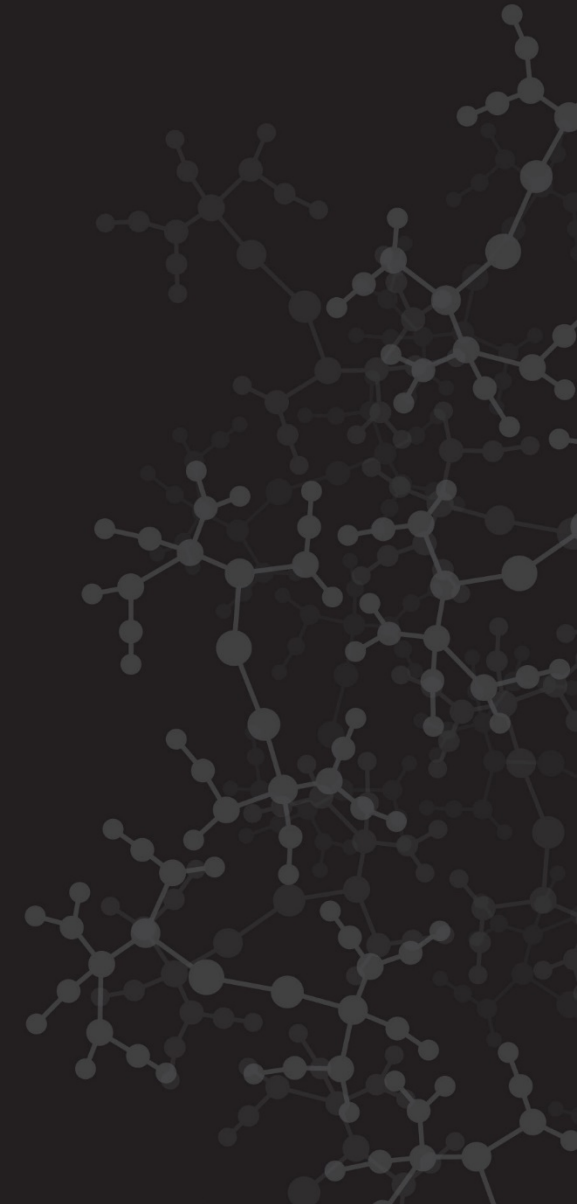
Dog's name

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 side-by-side screenshots of a web-based donation form for Dallas Theological Seminary (DTS). Both versions are titled 'Make a Gift Online' and feature a purple header with the DTS logo. The form includes fields for 'Donation Amount' (with a dropdown for currency set to USD), 'Payment Info' (Name on card, Card number, Expiration date, and Security code), and 'Billing Information' (Full name, Email, Phone, Address 1, Address 2, City, State, Zip/Postal Code, and Country). A green 'Submit Donation' button is at the bottom of the form. Version A (left) has a clean, direct layout. Version B (right) includes an additional introductory paragraph titled 'Your gift to Dallas Theological Seminary is a strategic ministry investment' before the form fields. This paragraph explains that a gift to DTS is an investment in a student, which supports the ministry's mission and helps build up the body of Christ. It also mentions that DTS is a 501(c)(3) non-profit organization and that the gift is tax-deductible. Below the form, both versions have a footer with the DTS logo, contact information, and social media links. The footer for Version A includes the text 'DALLAS THEOLOGICAL SEMINARY 1919 Southwestern Blvd., Suite 1000 Dallas, TX 75201-1000' and '© 2019 Dallas Theological Seminary'. The footer for Version B includes the text 'DALLAS THEOLOGICAL SEMINARY 1919 Southwestern Blvd., Suite 1000 Dallas, TX 75201-1000' and '© 2019 Dallas Theological Seminary'.

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.

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

* Denotes required fields

Patient Information

* First Name M.I. * Last Name

Address

* City * State * ZIP Code

* Phone

Example: 323.123.1234 x123

Ok to leave message?

☐ Yes ☐ No

* Contact Email

[Select one]

Next



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 preceded by 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 blue bar with the text 'Which ways are you interested in volunteering with the campaign?'. The first field has a small icon in its top right corner.

EMAIL ADDRESS*
<input type="text"/>
FIRST NAME*
<input type="text"/>
LAST NAME*
<input type="text"/>
ZIP CODE*
<input type="text"/>
MOBILE PHONE*
<input type="text"/>
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 light blue rectangular area representing a form. It contains four horizontal input fields, each preceded by a short blue label bar. The fields are stacked vertically, one above the other. At the bottom right of the area is a blue rectangular button with a white horizontal line inside.

Don't

A light blue rectangular area representing a form. It contains four horizontal input fields arranged in two columns of two. Each field is preceded by a short blue label bar. At the bottom right of the area is a blue rectangular button with a white horizontal line inside.

<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](#)

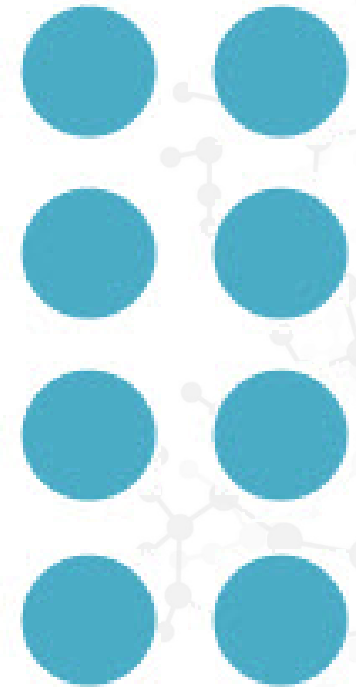
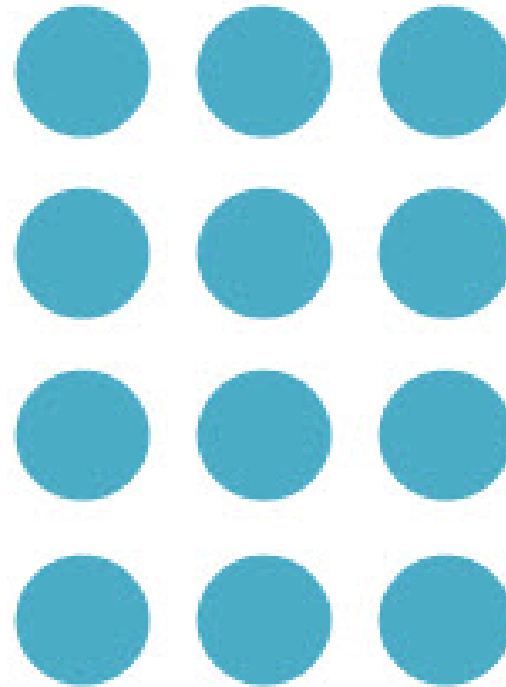


Best Practice #4:
Group similar information together.



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

SILVER CROSS
HOSPITAL

CAREERS |

CARE & TREATMENTCLASSES & EVENTSFIND A DOCTORFIND 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. Fields marked with an asterisk (*) are required. Or you may contact our Pre-Registration team at (708) 342-1234.

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 text field, indicating that the placeholder text is incorrect or discouraged.



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

ty, State


edar

IA

City

Ur

Business shipments are usually delivered Monday through Friday from 8:00 a.m. to 6:00 p.m. and residential shipments are usually delivered Monday through Saturday from 8:00 a.m. to 6:00 p.m.

☐ 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](#).



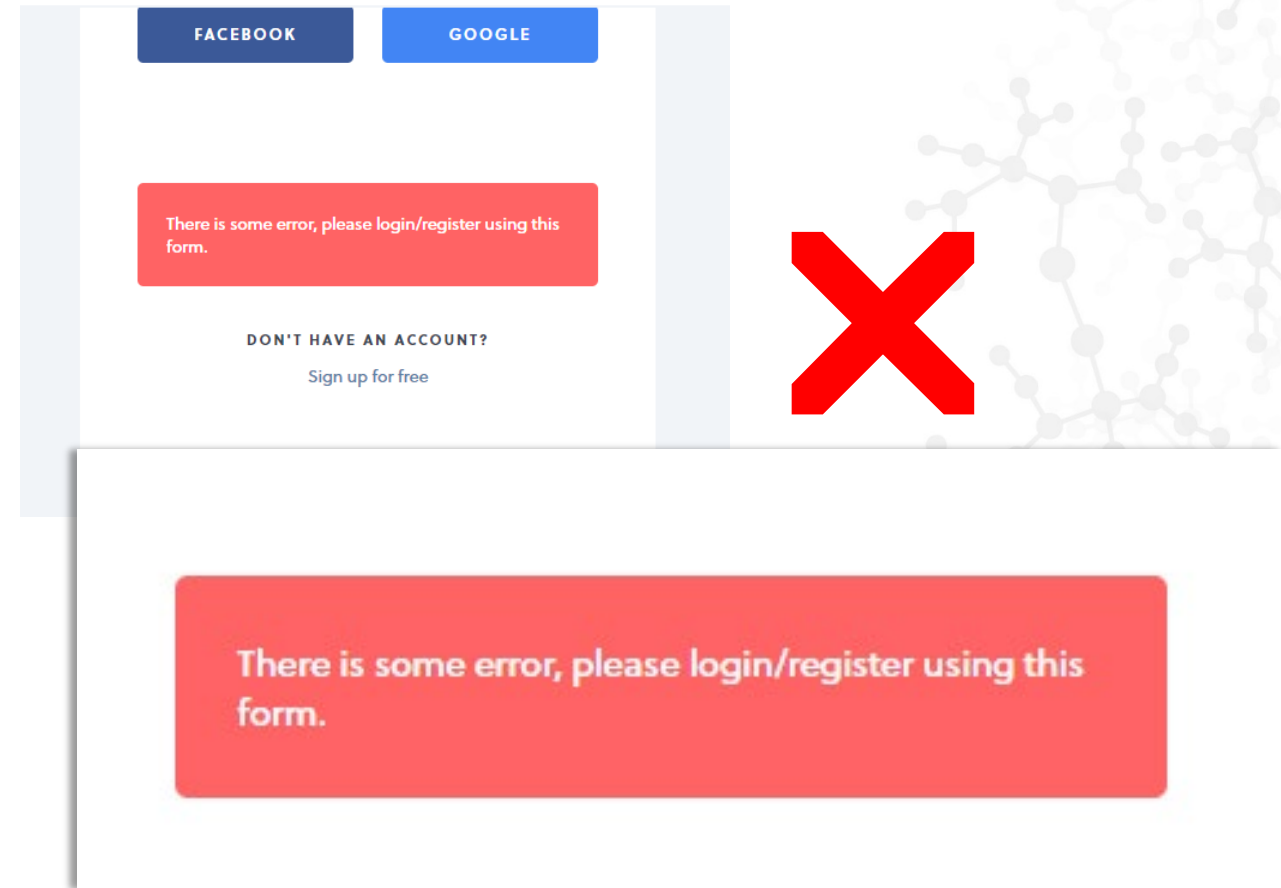


Best Practice #7:
Write clear, helpful error messages.



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

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

Change my password

Password Reset

Enter your new password for your Slack account.

New Password

.....

Great

Confirm New Password

Change my password





Best Practice #8:
Don't confirm shame.

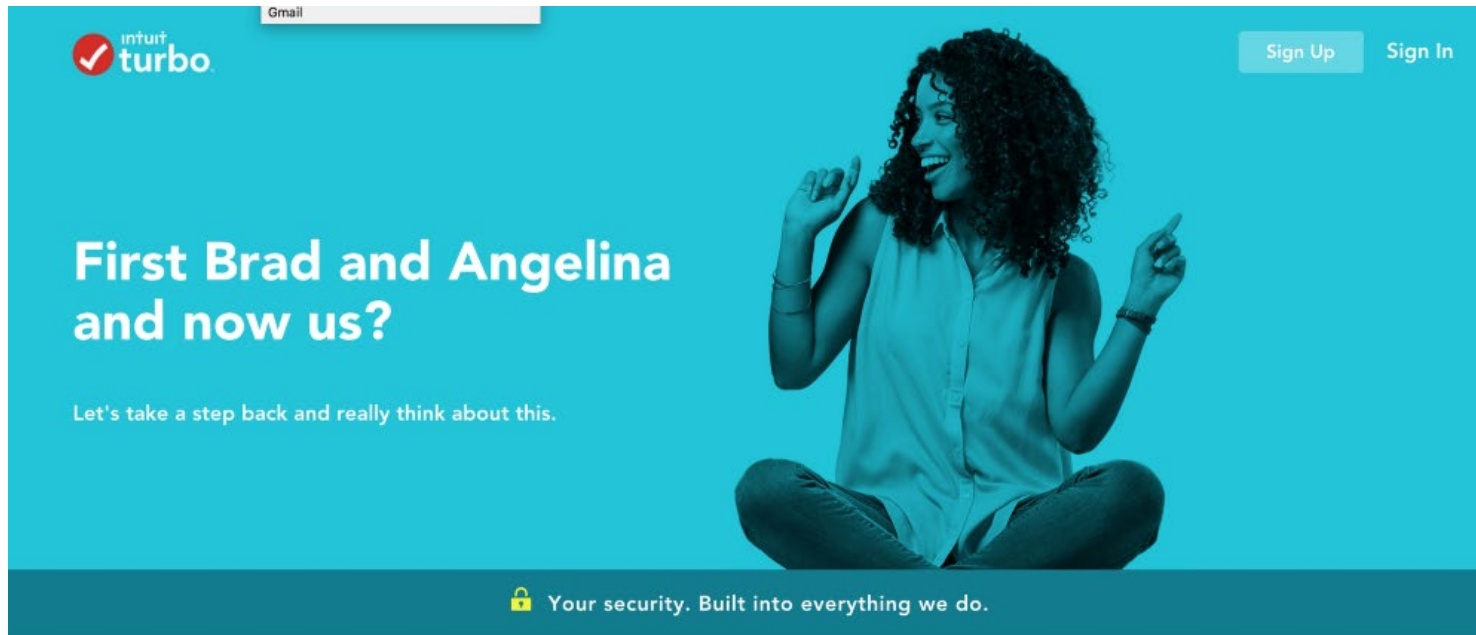


What is confirmshaming?

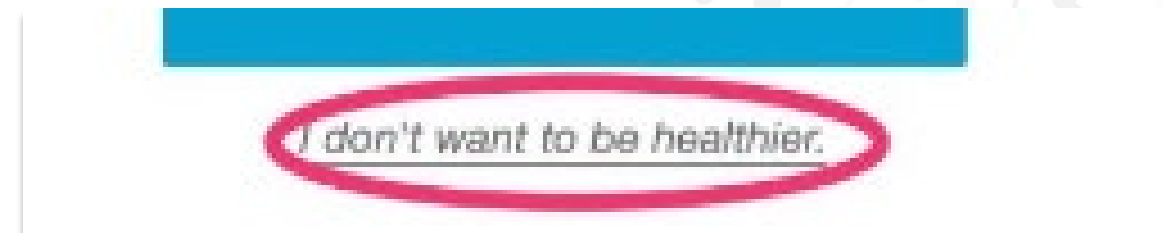
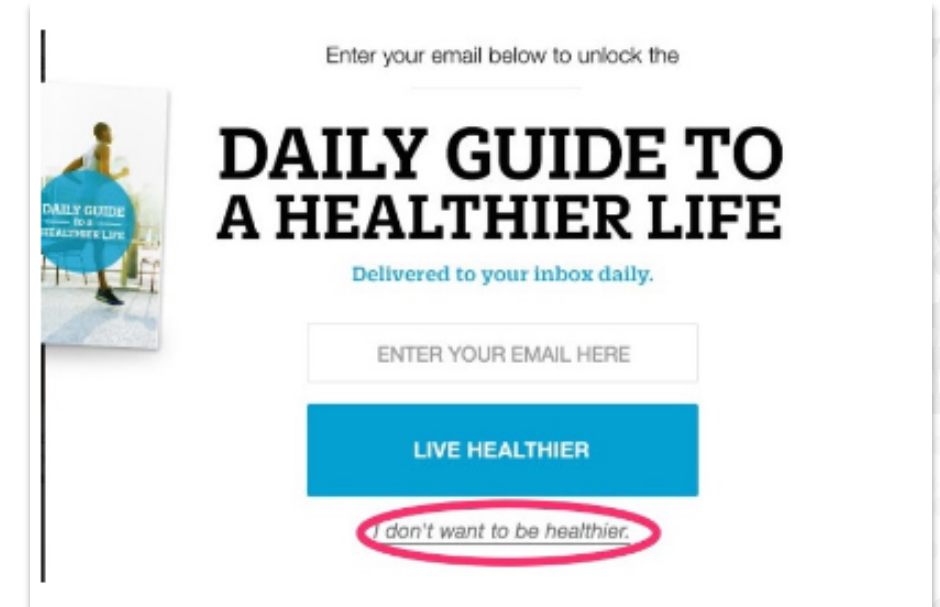
- Confirmshaming is the act of “guilting” people into opting into something
- Often worded with the intention to drive an emotional response from the user
- Seen with online offers, mailing lists, exit modals and other pop-ups
- Results from lack of testing, unclear voice and tone guidelines, or rogue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



Confirmshaming in action



You have successfully unsubscribed from receiving Turbo emails.





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



BE THE FIRST

Hear about special offers, unique experiences, and exclusive products tailored just for you.

EMAIL

BIRTHDAY

MO DD YEAR

SIGN UP

By signing up you agree to receive email from Zumiez with news, special offers, promotions, and future messages tailored to your interests. You can unsubscribe at any time. See our [Privacy Policy](#) or [Contact Us](#) for more information.

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.**



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

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](#)

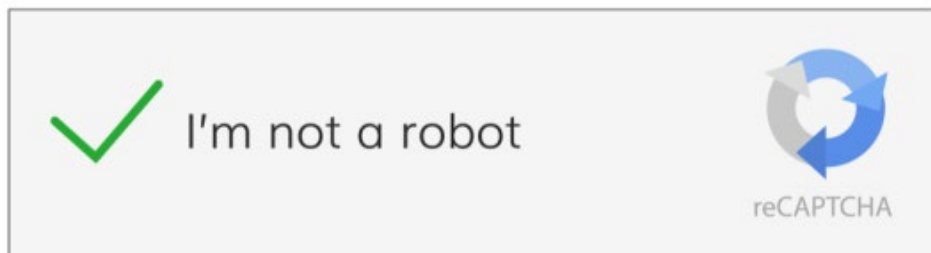
 [Contact Us](#)

 [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





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

A screenshot of a mobile application interface for creating a free account. The form is displayed on a Samsung smartphone. It features a hamburger menu icon in the top left, a green logo at the top center, and the title "Create a FREE account". Below the title is a link "Already have an account? Log In »". The "Sign up with" section includes icons for Google, Facebook, and LinkedIn. Below this is the text "or create an account". The form fields are: "Username" with a red error message "Please enter a username.", "Password" with a red error message "Please enter a password.", and "Email" with a red error message "Please enter an email address.". Below these are fields for "First name" and "Last name". A prominent green "Create account" button is centered below the form fields. At the bottom, there is a disclaimer: "By clicking 'Create account' or signing up, you agree to the Terms of Use and Privacy Policy. You also agree to receive information and offers relevant to our services via email. You can opt-out of these emails in your My Account page anytime." Below the disclaimer are logos for "ACCREDITED BUSINESS" and "McAfee SECURE". The footer includes "Copyright © 1999-2019 SurveyMonkey" and a small icon in the bottom right corner.

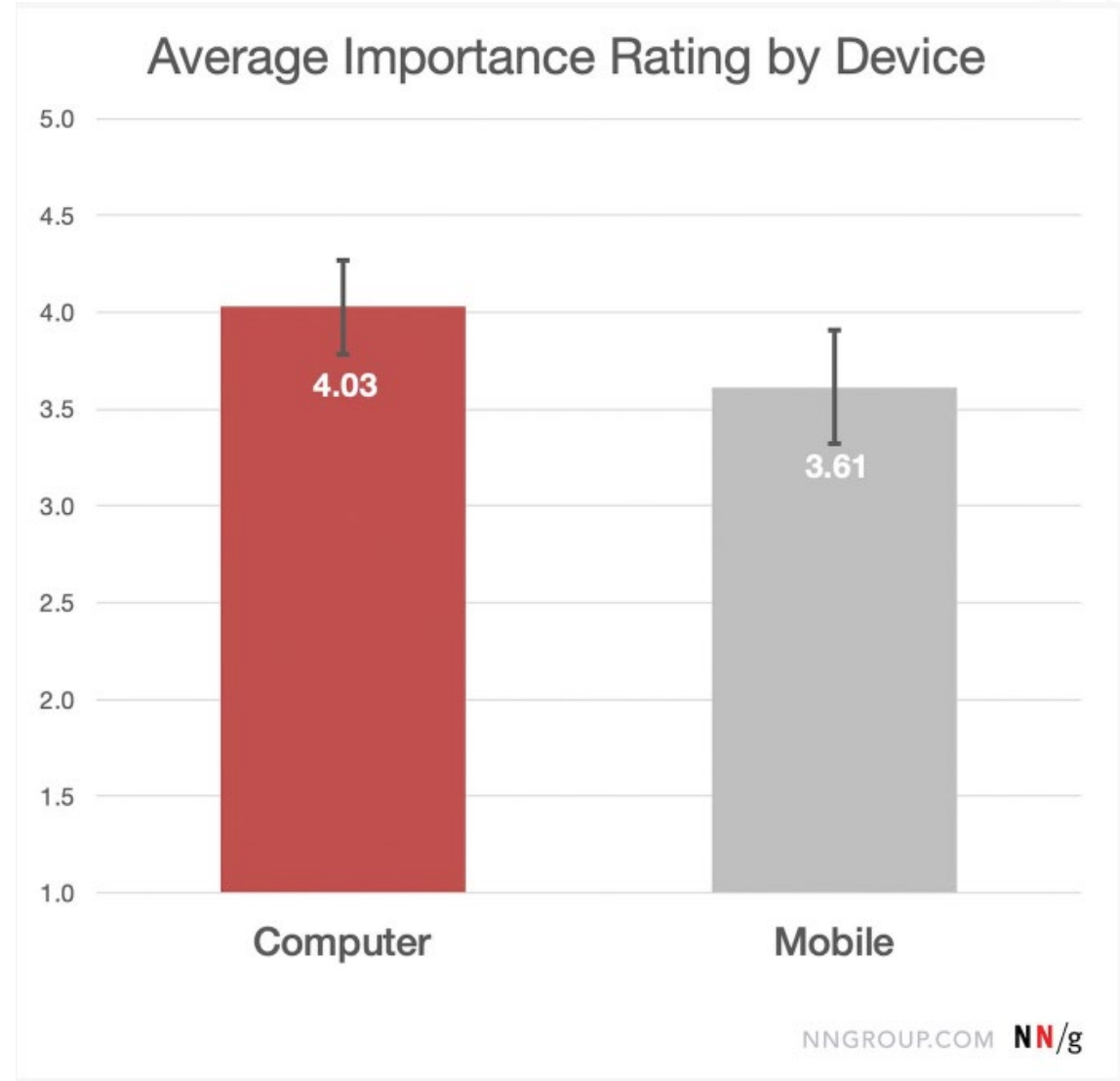


Mobile vs. desktop for complex tasks

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/>



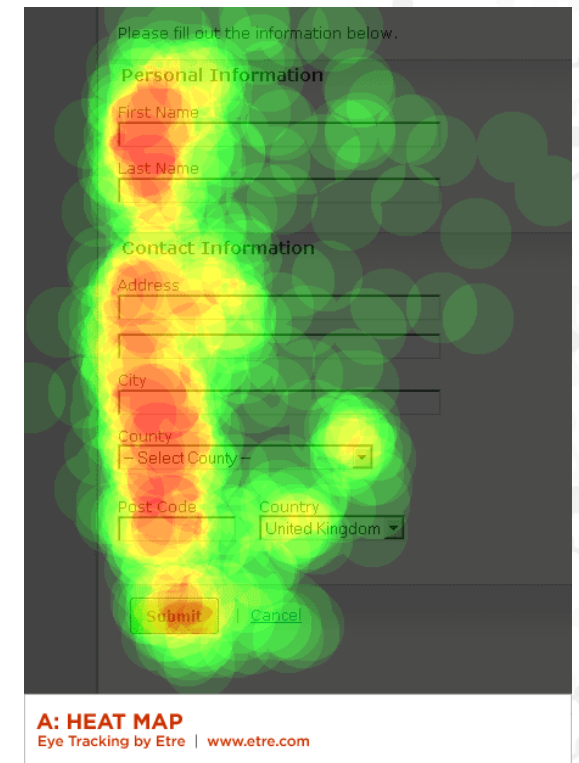


Best Practice #13:
Measure your efforts across devices.



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!

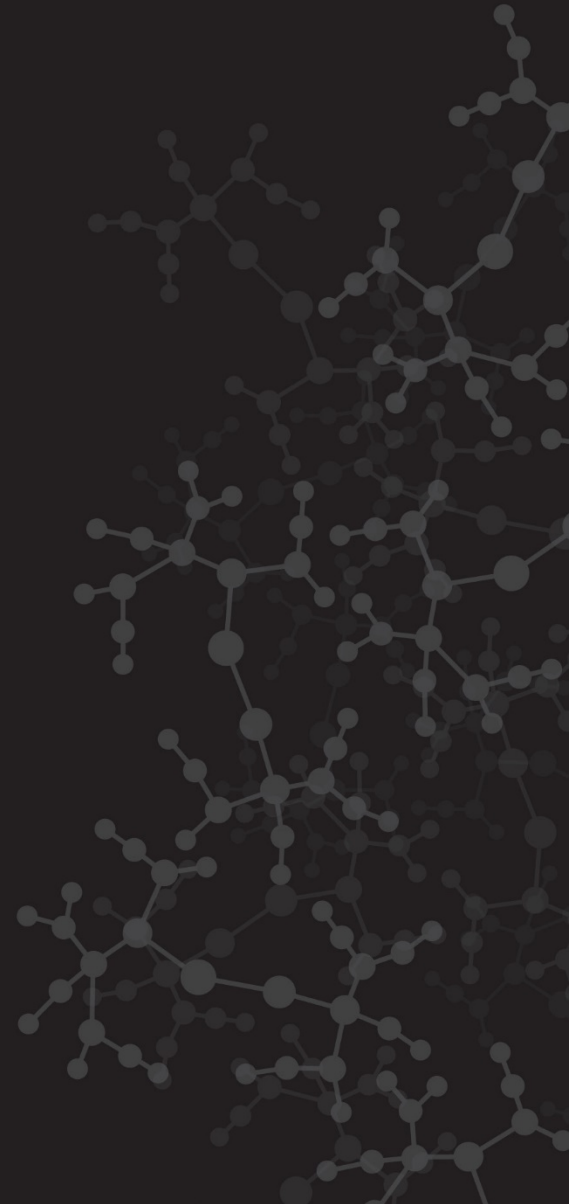
- Workflow
 - Where does the form go next?
 - Who's in charge of approving?
- Team's strengths and weaknesses
 - Writers, designers, and data wizards
 - Can it be built without coding knowledge?
- Ease of use across systems
 - Can you access form data via email?
 - Embed in multiple systems?
- HIPAA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

