

Web Form Checklists

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In previous sections, we've offered you examples and explanations of best practices for your business's web forms—its [email signup form](#), its [account creation form](#), its [contact form](#), and its [online scheduling forms](#).

But now that we've showered you with the details, it may help to step back for a minute with a simple checklist, and try your hand at your own. So below, we've got four checklists for you: one for each of the four web forms we considered.

As you design your own forms, keep in mind what's fundamentally happening when a user is confronted with a web form of any kind. Until that moment, much of the visitor's experience with the business has been passive. Sure, maybe they've been clicking through the site with a particular intent; but they've been taking the content *in*, rather than offering any content (read: data) of their own.

So, as inconsequential as it may seem, the moment your user decides to use a web form is also the moment they have to *move out of* a state of inertia, and into a state of action.

And if you've been human for any amount of time, you know how difficult this transition can be.

What this means for *you* is that *everything you can possibly do to make that form compelling... you should do*. That includes these best practices:

Email Signup Forms

? My signup form is prominently placed on my homepage

? If I decided on a popup signup form, I also have a separate signup baked into my homepage

? The language beside my signup form is short, powerful, to-the-point, and benefit-driven

? I have no more than one (or, at maximum, two) form fields in my signup form

? If I display an image that represents my offer, it's relevant, compelling, and doesn't distract users from the task at hand

? Users who subscribe via my signup form receive an immediate benefit (in the form of a lead magnet or a discount on their next purchase, for example)

? My signup form is mobile-friendly

Account Creation Forms

? My account creation form is positioned one click away from my homepage, on a dedicated page that describes the benefits of having an account with my company

? The fields in my form have been consolidated as much as possible; and I've eliminated any "optional" forms (rather than indicating required fields with an asterisk)

? If my form requires users input a lot of information, I've distributed my fields across multiple, well-organized forms

? If my account creation form is a multi-step form, I display a progress bar so users know how far along in the process they are

? I've enabled social sign-in on my account creation form

? The form includes links to my privacy policy and terms of use (and both of these open in new tabs or pop-ups, rather than sending users off the form)

? I display information buttons to offer explanations and tips about what goes into the fields

? My password field has a "password strength" visual

? I offer drop-down lists and auto-complete features, so that users have to type as little as possible

? I offer a current field highlight feature, so users know exactly what field they're on

? I offer on-screen validation, so users know that they're filling out the form correctly

? My account creation form is mobile-friendly

Contact Us Forms

? Users can access my contact form from any page on my website... but I also have a dedicated contact page that it sits on

? My contact form reflects my company's personality in tone and manner of speech, sounding

much the way my employees speak to each other and to our clients

? There's a photograph of my team near my contact form

? The copy on my contact form reads like a genuine invitation to get in touch

? My contact form offers reasons *why* a prospect would contact my business, along with the benefits of getting in touch ("to arrange a visit," "to set up a free consultation," "to learn how we can grow your business")

? I offer various methods of contact alongside my contact form, in case users would rather call or engage in a live chat

? I also link to social media, so that users have yet another way to engage with my business (and maybe to get their questions answered by loyal customers)

? I've included *only* as many fields as are necessary to determine how I can best serve my contacts

? I'm clear about how long it will take my company to respond to inquiries

? My contact form is mobile-friendly

? My contact form redirects to a thank-you page after users submit their queries

Online Scheduling Forms

? My scheduling pages are accessible from both my homepage and my services page (and—ideally—from every page on my website)

? The copy on my scheduling pages is benefit-driven and speaks to clients' pain points

? My booking journey is short, intuitive, and requires as few clicks (and fields!) as possible

? My scheduling forms are mobile-friendly

? I offer a current field highlight feature, so users know exactly what field they're on

? My business's phone number is perpetually visible on every page of the scheduling journey

? I've included a free-form text box so that clients can add any additional notes about their service

? I offer a range of online payment options—the logos of which are visible on every page of the scheduling journey

? If appropriate, I display a "soft upsell" option during the scheduling process

? Users are met with *virtually no* distractions throughout the whole of their scheduling process (aside from that soft upsell)

? My scheduling page redirects to a confirmation page after users hit the "Confirm" CTA

? My clients receive email confirmations and follow-up reminders as necessary

One final note: Remember that a web form is a threshold, an opening into a conversation. Hopefully it's the beginning of a *much longer* conversation between you and every contact who fills it out. This means being prepared, on the other end, for every kind of invited communication that comes your way.