

How to save money by fixing forms

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#WebExpo2023

Let's have a look at a form

Czech railways

Is this a form?

The image shows a screenshot of the Czech Railways (ČD) website. At the top left is the ČD logo and the text "České dráhy Národní doprava". To the right, it says "FOR CORPORATE CUSTOMERS" and includes a language dropdown menu (currently set to English), a search icon, and a "MENU" button. Below the header is a navigation bar with links for "Connection & Ticket", "Train", "Stations", and "My Travel". On the right side of the navigation bar, there are buttons for "Log in" or "Register" and a shopping cart icon showing "0 items" and "0 CZK".

The main content area features a large banner for "ČD Night" with the text: "The quickest journeys are those you can sleep through." Below this is a search form titled "Connections and tickets". The form includes:

- FROM: Station / Town (with a search icon)
- TO: Station / Town (with a search icon)
- A date selector showing "Wed 22. 2." with left and right navigation arrows.
- A time selector showing "11:49" with left and right navigation arrows.
- A passenger profile section showing "Adult 26–64 years" and "Without a discount card" with an edit icon.
- A "More options" link.

At the bottom of the form, there are buttons for "Search" and "Clear".

We know a form when we see it



Looks like a form and works like a form



Asks questions and expects answers



Allows someone to achieve a goal

A good form needs a lot of design

Interaction design



Looks like a form and works like a form

Content design



Asks questions and expects answers

Service design



Allows someone to achieve a goal

A good form works well across the layers

Interaction design



Easy to read
→
Easy to use

Content design



Easy to understand
→
Easy to answer

Service design



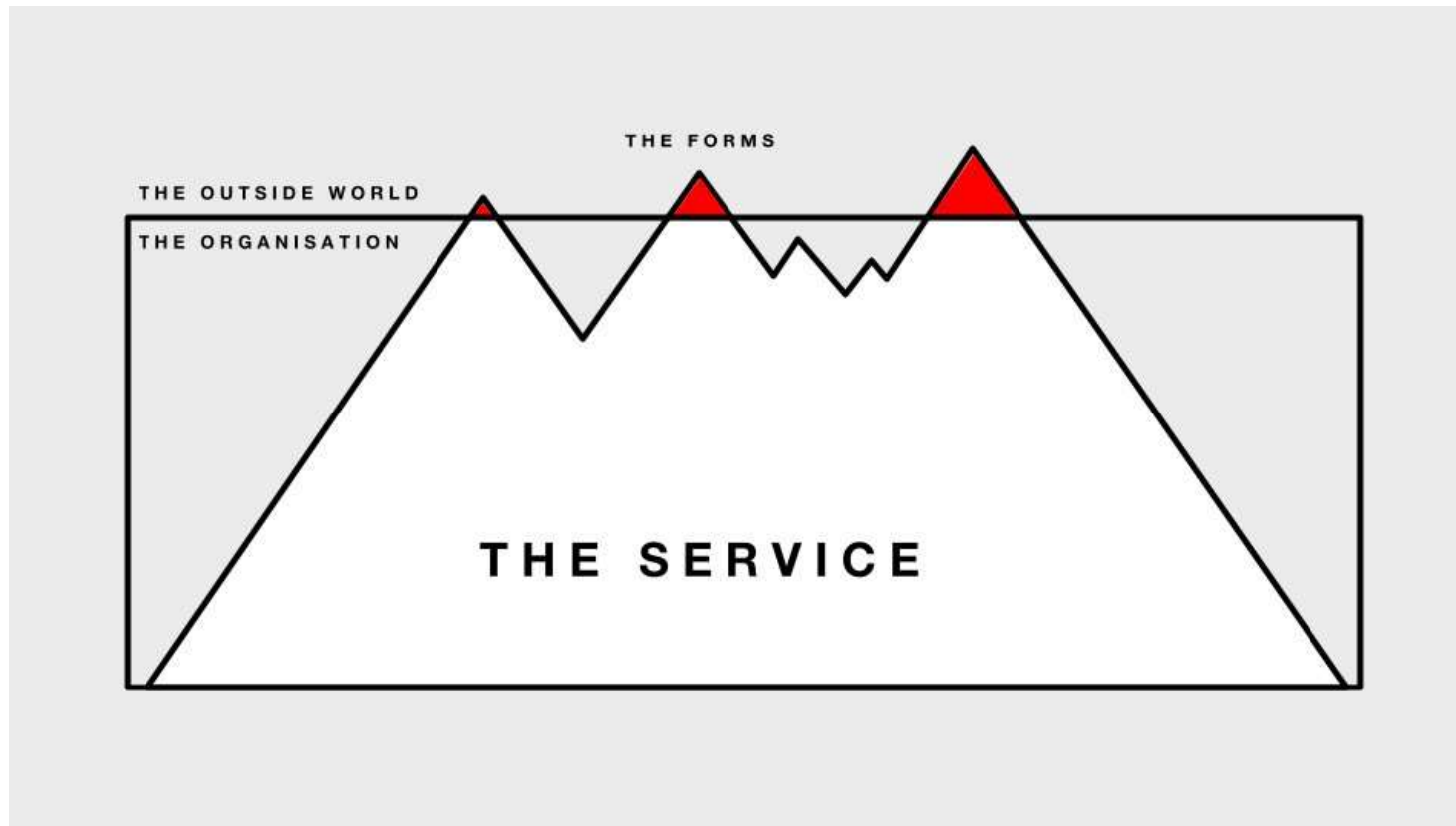
Easy to get it done
→
Easy to move on

Appearance

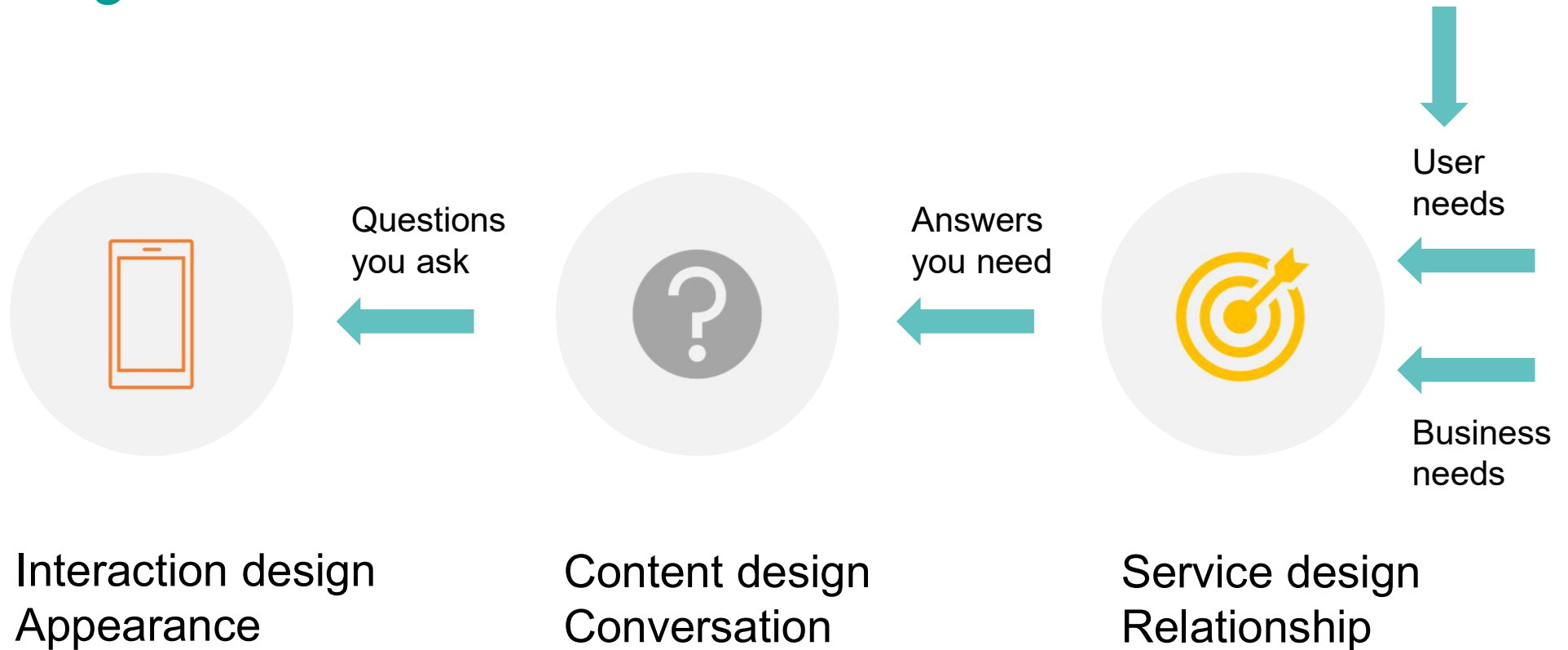
Conversation

Relationship

The outside world sees you through your forms



A good form starts with user and business needs



Failures get expensive



Drops out of the form



Gives a wrong answer
Calls helpline



Lost customer
Lost business

Takeaway

A good form is easy to:

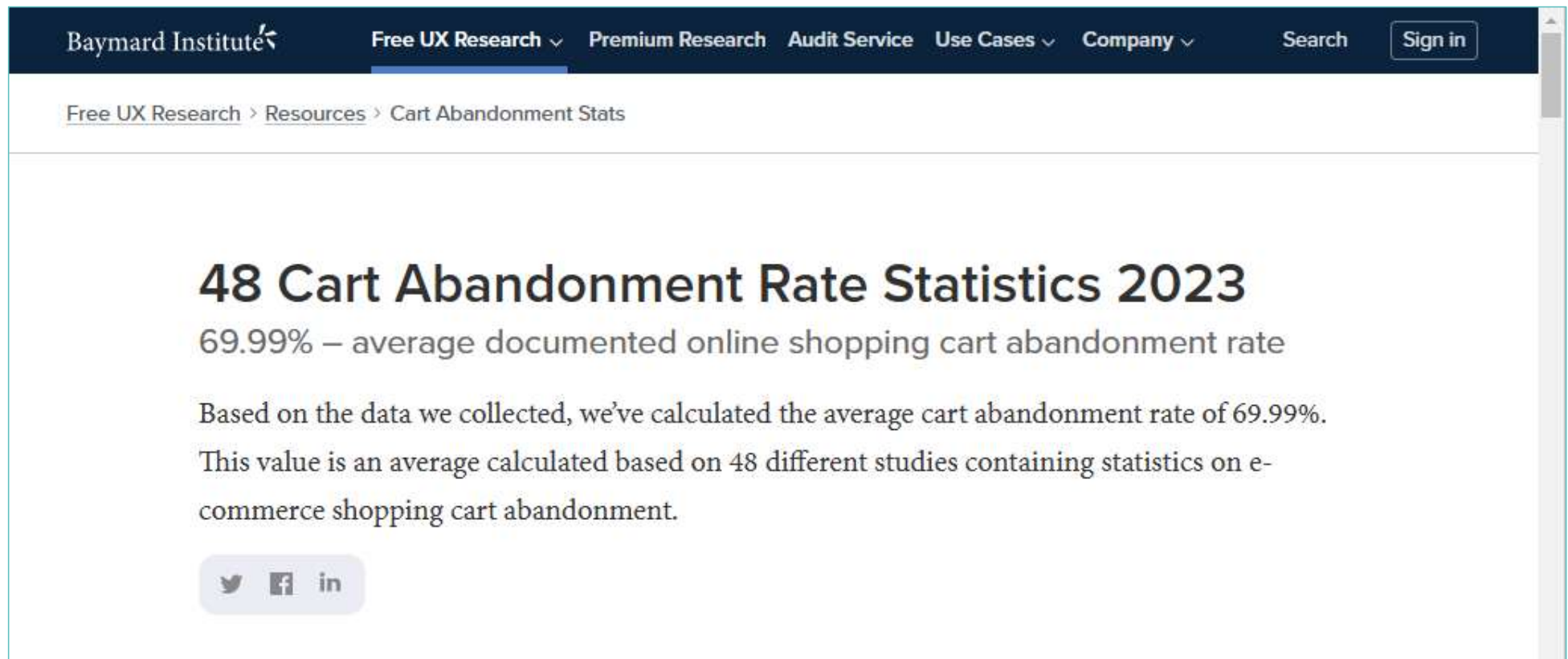
- read and use
- understand and answer
- get it done and move on

Have you ever abandoned a form?

“I don’t want to click the arrow 27 times to get to the right date”

The screenshot shows a mobile application interface with a blue header titled "Connections and tickets". Below the header is a form with two rows for "FROM" and "TO", each with a "Station / Town" input field and a search icon. A double-headed arrow icon is positioned between the two rows. Below the form are two date and time selectors: "Wed 22. 2." and "11:49", each with left and right navigation arrows. At the bottom, there is a dropdown menu for passenger selection, currently showing "Adult 26—64 years Without a discount card" and an edit icon. A "More options" link is visible at the bottom right.

Maybe 70% of shopping carts get abandoned



The screenshot shows the Baymard Institute website. The navigation bar includes links for 'Free UX Research', 'Premium Research', 'Audit Service', 'Use Cases', and 'Company', along with a 'Search' field and a 'Sign in' button. The breadcrumb trail reads 'Free UX Research > Resources > Cart Abandonment Stats'. The main content area features the title '48 Cart Abandonment Rate Statistics 2023' and a sub-headline '69.99% – average documented online shopping cart abandonment rate'. The text explains that this is an average calculated from 48 different studies on e-commerce shopping cart abandonment. Social media sharing icons for Twitter, Facebook, and LinkedIn are visible at the bottom of the article content.

Baymard Institute

Free UX Research ▾ Premium Research Audit Service Use Cases ▾ Company ▾ Search Sign in

Free UX Research > Resources > Cart Abandonment Stats

48 Cart Abandonment Rate Statistics 2023

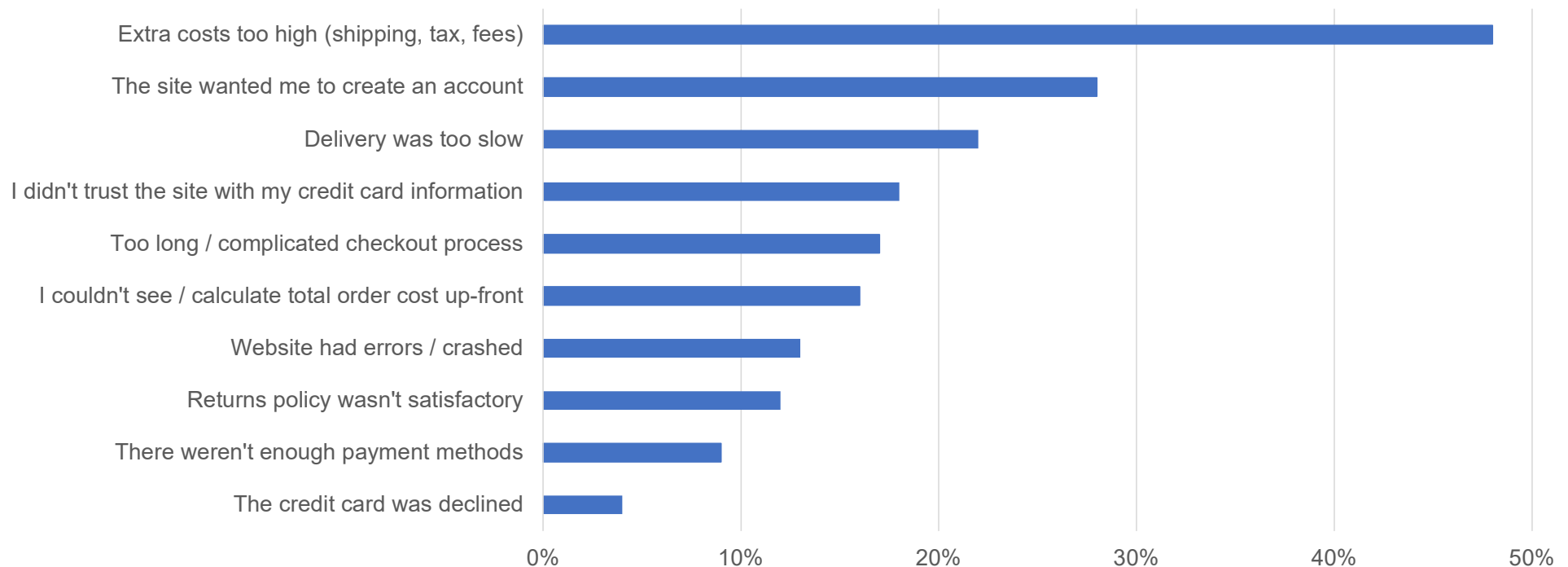
69.99% – average documented online shopping cart abandonment rate

Based on the data we collected, we've calculated the average cart abandonment rate of 69.99%. This value is an average calculated based on 48 different studies containing statistics on e-commerce shopping cart abandonment.

[Twitter](#) [Facebook](#) [LinkedIn](#)

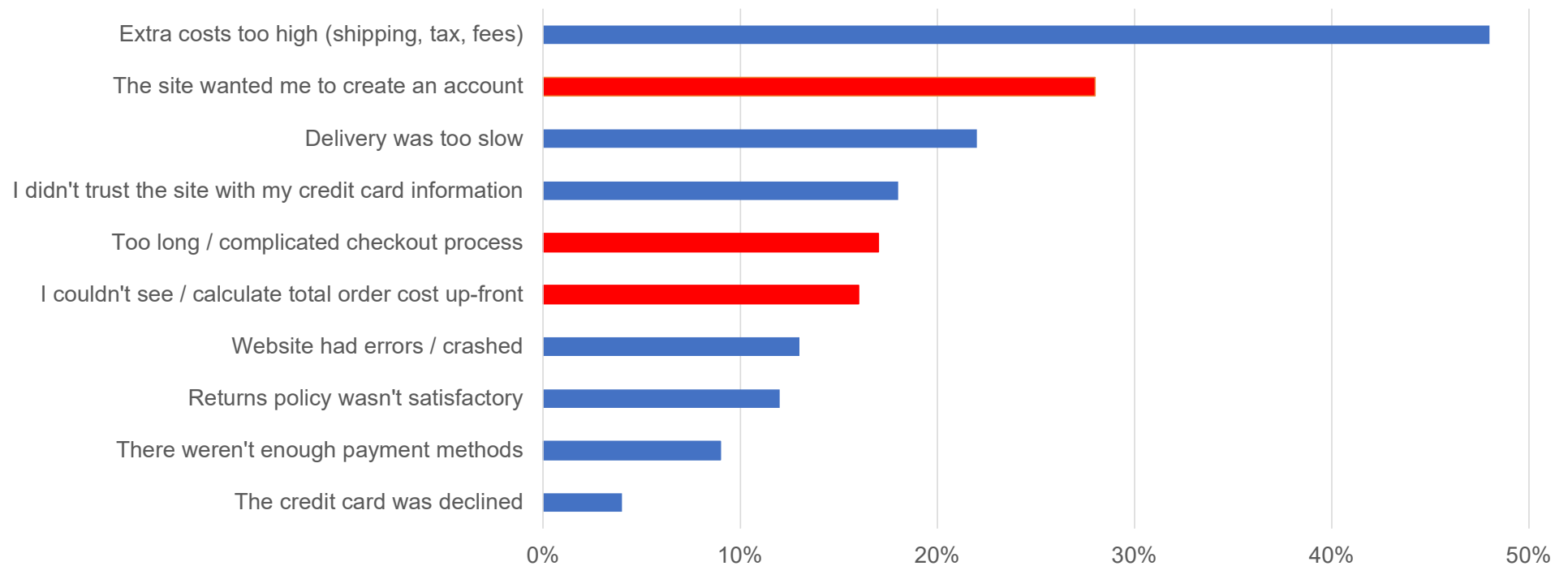
Baymard researched why people abandon carts

Reasons why people abandon shopping carts



Many people abandon because of forms problems

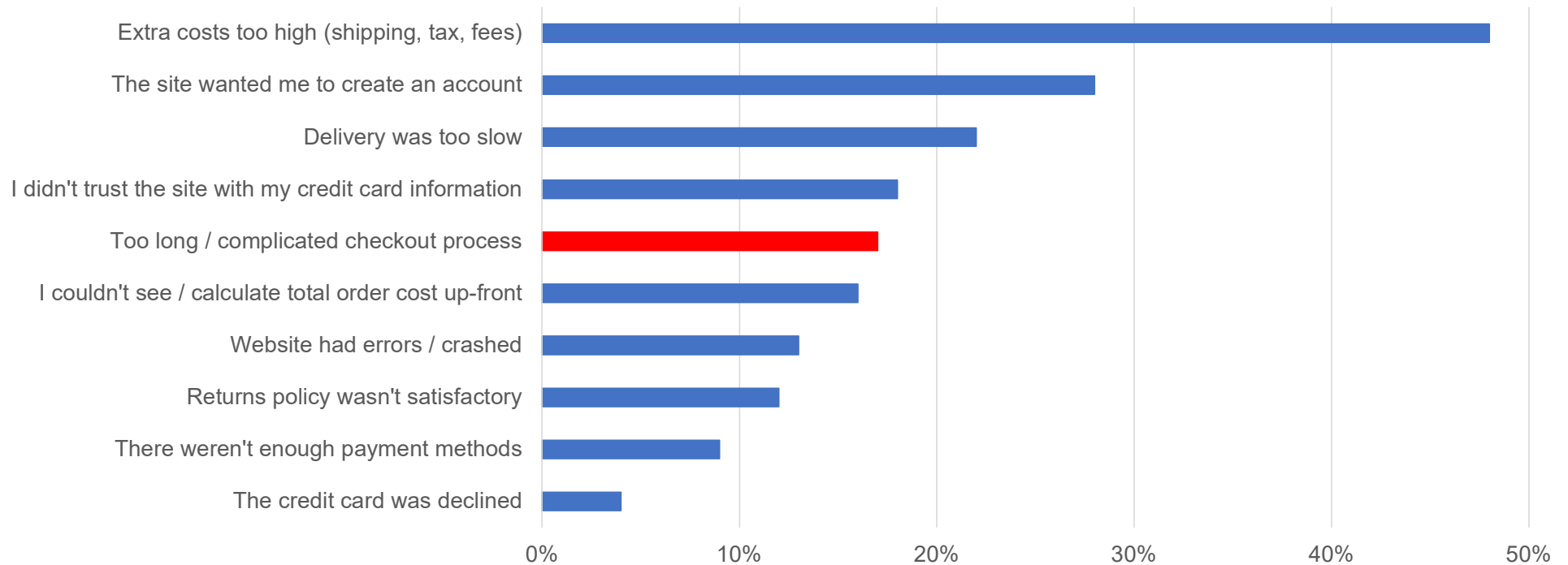
Reasons why people abandon shopping carts



Save money by improving service design

Let's think about “too long / complicated”

Reasons why people abandon shopping carts



Government forms can also be far too long

*“By doing user research, and diving into the detail of the application process, the team has been able to remove 170 questions from the application process – that's **49% of the questions**”*

Pete Desmond, Service Manager Carer's Allowance Digital Service,
UK Department for Work and Pensions

When you ask a question, know why

Create a **question protocol** to make sure that you:

- Ask for what you need
- Can justify why you are asking every question
- Know what you will do with every answer

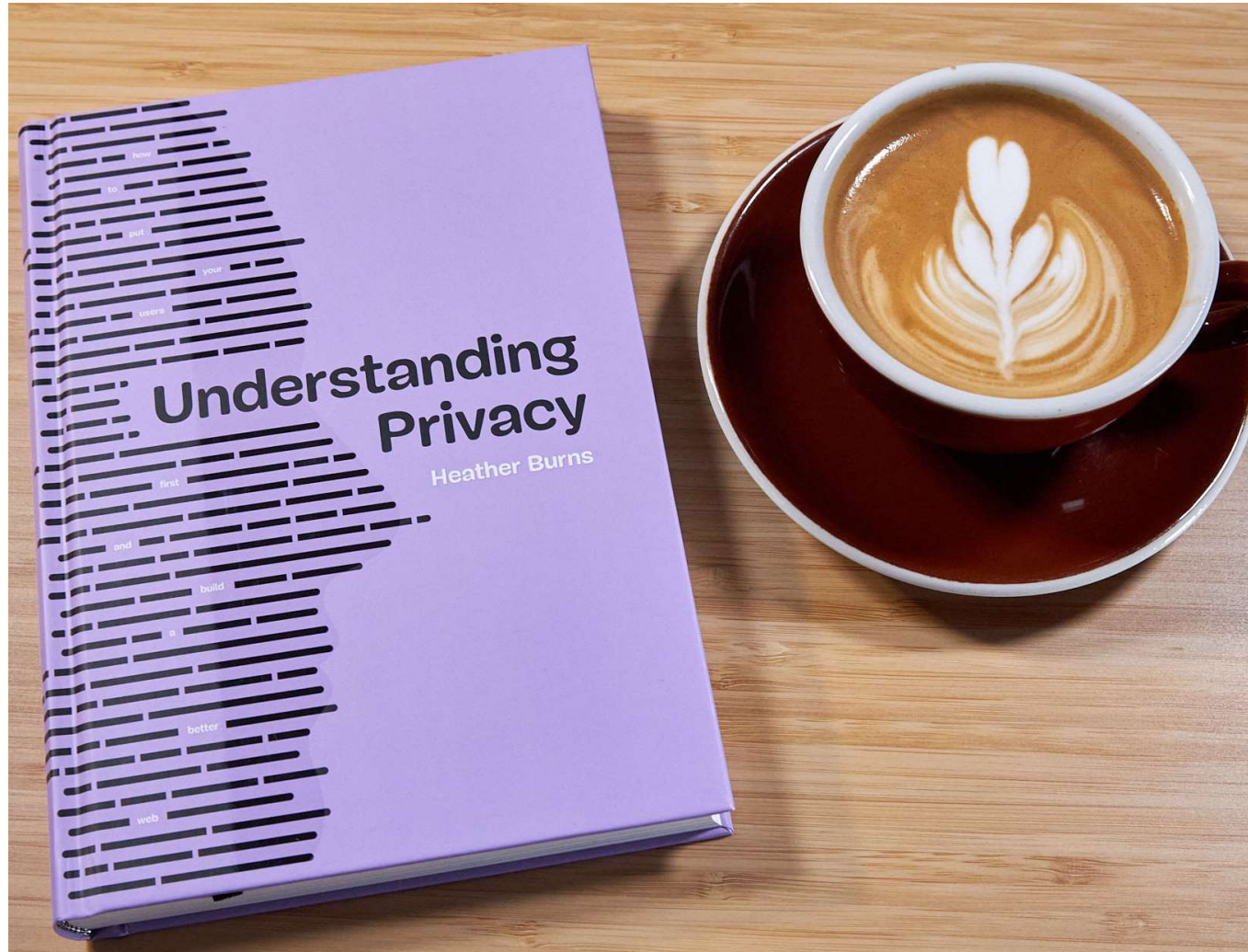
Look after the answers, carefully (also known as privacy policy)

Keep reviewing the question protocol, minimum once a year

Privacy is important

Read “Understanding Privacy” by Heather Burns

Do what she says

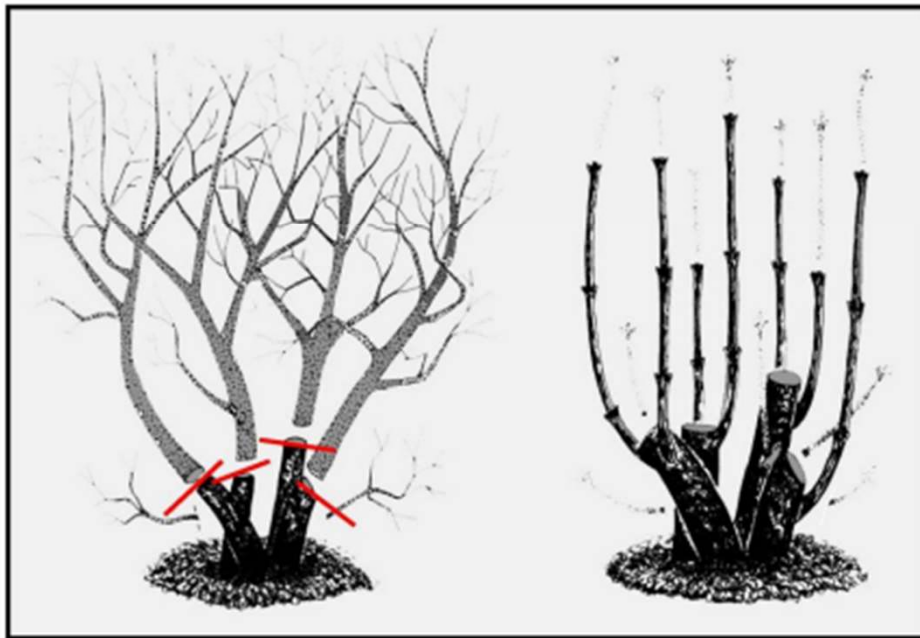


Every extra question costs you money

- A longer form to implement and maintain
- More opportunities for people to struggle
 - If they drop out, you may lose them
 - If they contact you, you have the cost of helping them
- More data to store
- Greater possibility for inaccurate data

Prune: remove questions you don't need

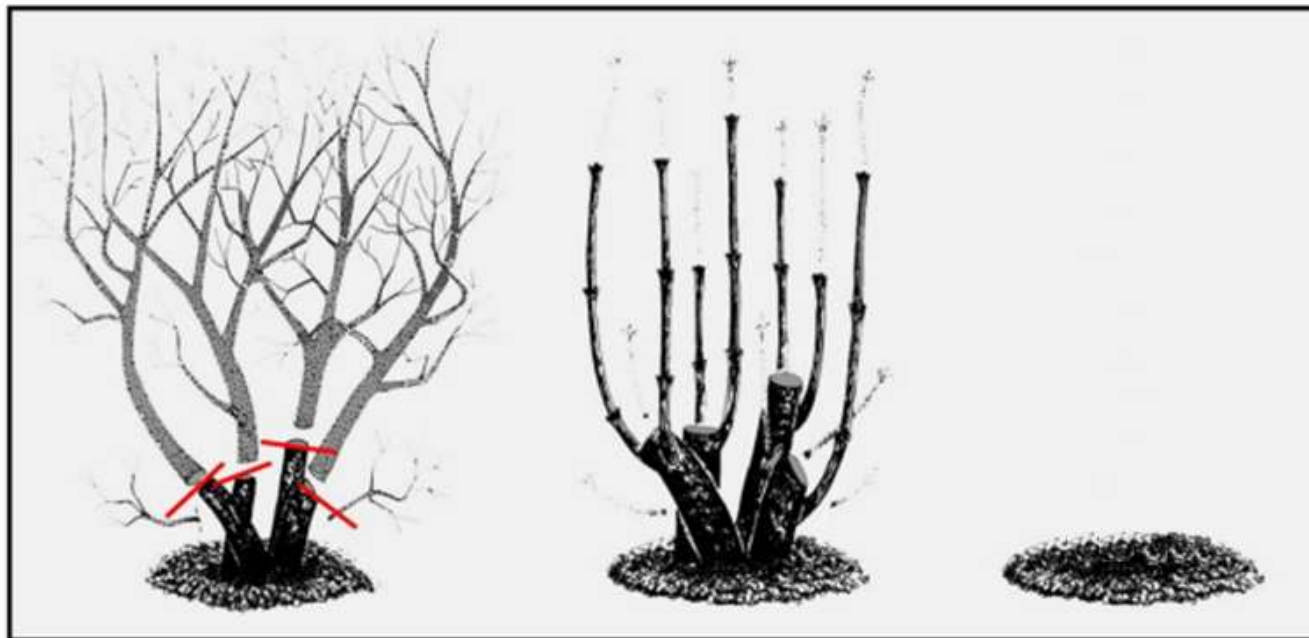
Figure 11.
REJUVENATION PRUNING: DRASTIC



Keep it realistic. Extremely short fails, too.

Figure 11.

REJUVENATION PRUNING: UNTRUSTWORTHY



“I removed all the fields that people actually want to interact with and only left the crappy ones they don’t want to interact with. Kinda stupid.”

Michael Aagard

Do usability testing on your form

Get someone to fill in your form while you watch

Extra tip:
Before they start the form, ask them what questions they expect to answer



Takeaway

Every question that you ask costs you money.

Be thoughtful and careful about what you choose to ask.

Save money with better content

Please tell me your answers for this form

The form contains the following elements from top to bottom:

- A blurred header bar.
- A list of four radio button options.
- A blurred header bar.
- The text "Select all that apply." followed by a list of three checkbox options.
- A blurred header bar.
- A long, empty rectangular text input field.
- A green rectangular submit button.
- A small mouse cursor icon in the bottom right corner.

Let's start with the button

Also known as
"Call To Action"
(CTA)

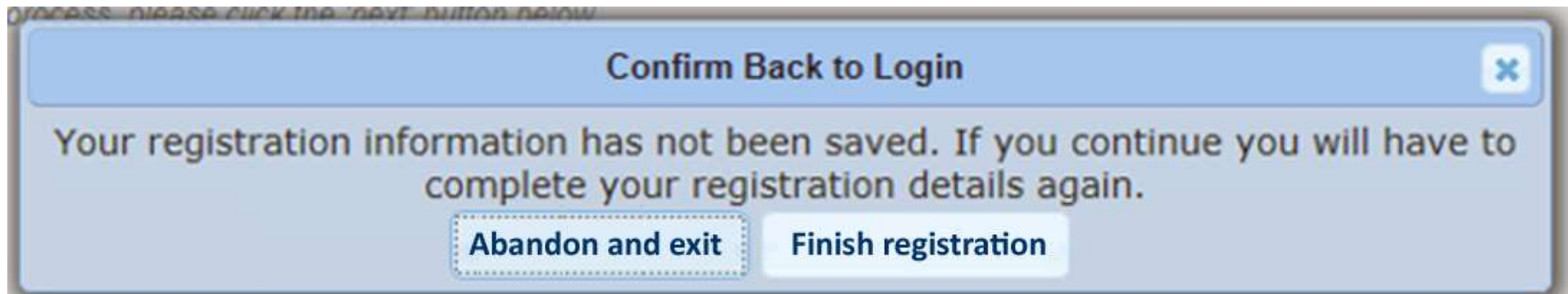
A blurred screenshot of a web form. At the top is a grey header bar. Below it are four radio button options. A second grey header bar is below that. Then, the text "Select all that apply." is followed by three square checkbox options. Below these is a long white input field. At the bottom of the form is a prominent green button with a dark green border. A mouse cursor is visible in the bottom right corner of the form area.

I'm often confused by 'OK' and 'Cancel'



Label the button with what it does*

*I think this is what these buttons do



The best CTAs are strong verbs

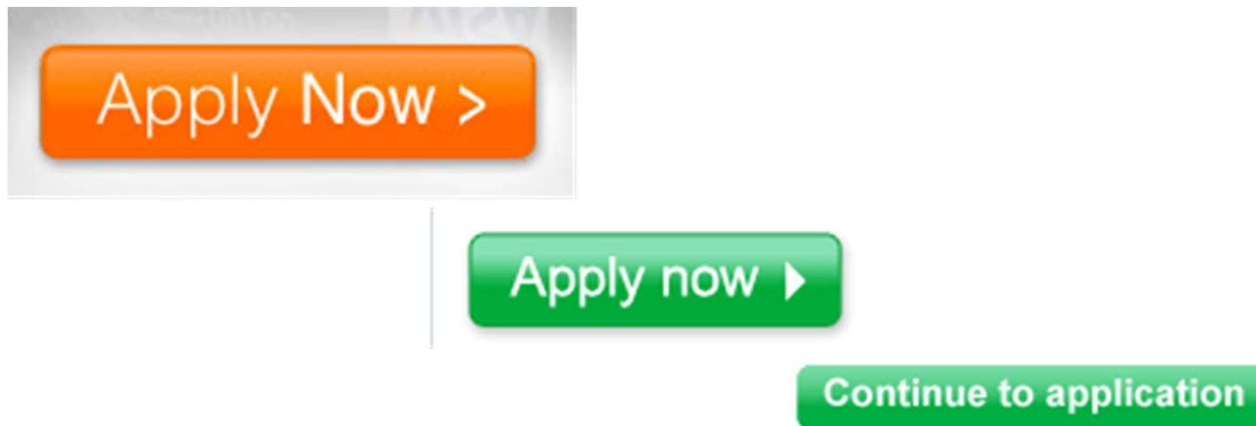
- Sign up
- Start
- Download
- Apply

You can add some extra encouragement

- Sign up now
- Start your site
- Download free guide
- Apply for card

But look across all the buttons

- I was applying for a credit card



Takeaway

Label the button with what it does

Extra tip:

When you have a meeting to decide the correct action when someone clicks a button, you have not yet labelled the button with what it does



Yes/no questions are problematic

They can be hard to answer

If none of the options is right, then:

- People drop out of the form OR
- You get bad data from them

1. Are you 16 – 65 years old?

Find out more about [why your age is important](#).

Yes No

Are you adding a UK mobile number?

Yes No

Do you live alone?*

Yes No

Problem 1: The answer isn't YES or NO

1. Are you 16 – 65 years old?

Find out more about [why your age is important](#).

Yes

No

Idea 1: Re-design the conversation

1. Are you 16 – 65 years old?
Find out more about [why your age is important](#).

Yes No

How old are you?

Validation:

If 16 to 65, continue to next question

Anything else, explain

Problem 2: The answer is “I’m confused”

Are you adding a UK mobile number?

Yes No

“I didn’t know I was adding anything.

What does Yes mean here?”

Idea 2a: Explain the options in the text

Are you adding a UK mobile number?

Yes No

“I didn’t know I was adding anything.

What does Yes mean here?”

Are you adding a UK mobile number?

Yes, the mobile has a UK number

No, the mobile is from outside the UK

Idea 2b: Sometimes you can scrap the Yes and No

Are you adding a UK mobile number?

Yes No

“I didn’t know I was adding anything.

What does Yes mean here?”

Are you adding a UK mobile number?

The mobile has a UK number

The mobile is from outside the UK

Problem 3: Real life is analogue, not binary

Do you live alone? *

Yes No

- *“There is a lodger / paying guest but we do not talk to each other”*
- *“We are separated but live in the same place because we can’t afford to move”*
- *“At the moment because my partner is working in a city a long way away”*
- *“I live with on my own with my new baby”*

Idea 3: Add extra response options

Do you live alone? *

Yes No

- *“There is a lodger / paying guest but we do not talk to each other”*
- *“We are separated but live in the same place because we can’t afford to move”*
- *“At the moment because my partner is working in a city a long way away”*
- *“I live with on my own with my baby”*

Add at least one of these

- Sometimes
- Something else
- Partly
- Mixed
- Other*

... or whatever fits the question
(plus maybe a box for details)

*be careful about making people who are in a minority feel “othered”

Takeaway

No 'yes/no' questions

Real life is analogue

There are nearly always other answers



Do usability testing on your form

Get someone to fill in your form while you watch

Extra tips:

Ask them to tell you their answer before they put it into the form

Use cognitive interviewing probes such as “tell me what you’re thinking”



Save money with better interaction

Can you read this?

Most people filling in your form have small screens

Many have poor eyesight

Legibility is important

Create account

You do not need to register again if you already have an MRS web account, just sign in.

MRS collects the data below in order to fulfil our commitment to MRS members and customers. A company mailing address is required to ensure that all applicable benefits are applied to the account holders, including Company Partner benefits and discounts (as applicable). To find out how we use your information you can see our privacy policy [here](#).

Creating a MyMRS account enables you to:

- Access premium content (eg, Impact magazine)
- Access your full range of MRS Benefits (members only)
- Renew your MRS Membership
- Manage your email preferences, sign up for newsletters and decide what you want to receive from us.
- Update your personal information

Title	<input type="text" value="Dr."/>
* First name	<input type="text"/>
* Surname	<input type="text"/>
Job title	<input type="text"/>
* My Company is a Company Partner	<input type="text" value="No"/>
* Company	<input type="text"/>
* Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
* City	<input type="text"/>
* Postcode	<input type="text"/>
* Country	<input type="text" value="United Kingdom"/>
* Address Type	<input type="text" value="Business"/>
* Email	<input type="text"/>
Work Phone	<input type="text"/>
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
* Date of birth	<input type="text"/>
Gender	<input type="text" value="Male"/>

I want to receive MRS marketing emails (eg, awards, events, training and reports)

You have the right to withdraw consent that you have provided to us to process your personal information at any time. You can manage your email preferences through your web account. See our [privacy policy](#).

* Email/Username	<input type="text"/>
* Password	<input type="text"/>
* Re-enter Password	<input type="text"/>

Create account

Check that your colours work all the time

My last name is* Jarrett

You can email me at* caroline.jarrett@effortma

Or call me on +447990570647

I work at an organisation called* Effortmark Ltd

My country of residence is Please Select

And I'm interested in seeing Please Select
UK & Ireland
United States of America & Canada
Australia & New Zealand

Jadu uses the information you provide to contact you about

I agree to receive communications from Jadu.

You may unsubscribe from communications at any time. For more information, check out our [Privacy Policy](#).

By clicking submit below, you consent to allow Jadu to store and process the personal information submitted above.

The basic interactions are easiest to use

- Radio buttons
- Checkboxes
- Text input
- Buttons

Where do you live?

- England
- Scotland
- Wales
- Northern Ireland

Which types of waste do you transport?

Select all that apply.

- Waste from animal carcasses
- Waste from mines or quarries
- Farm or agricultural waste

What is the name of the event?

Save and continue

Don't be fancy for no good reason

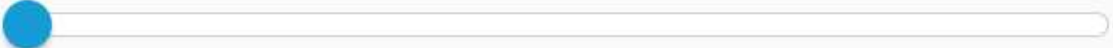
For example, here are some examples of asking for age

Date of birth


01 ▾ 01 ▾ 1900 ▾ 

How old are you?

Move the slider until it shows the correct number in the box on the left



Thanks for that! Now we'd like to get to know you a little bit better. So please select your date of birth from the drop downs below:

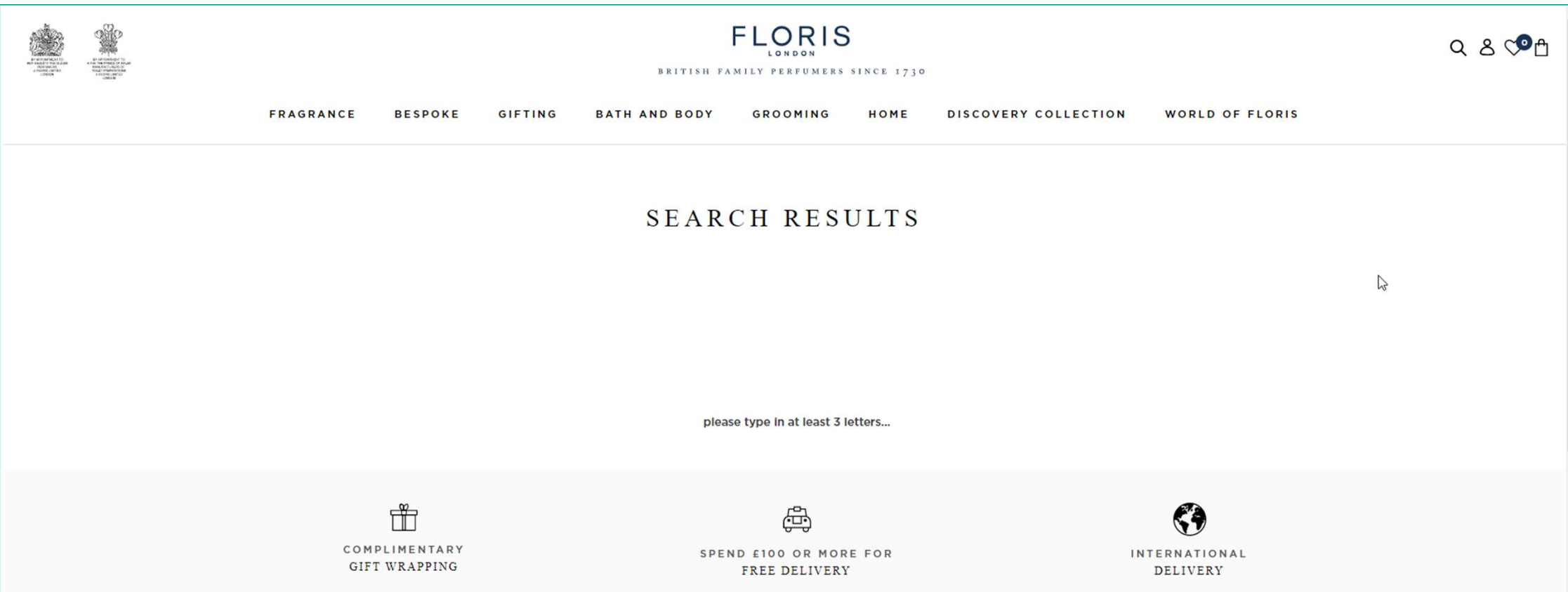
mm/yyyy 

← Apr ▾ 1999 ▾ →

OK

CONTINUE

Excess minimalism can also be too fancy



The screenshot shows the top section of the Floris London website. On the left, there are two royal warrants from the British Royal Family. The center features the brand name 'FLORIS LONDON' and the tagline 'BRITISH FAMILY PERFUMERS SINCE 1730'. On the right, there are icons for search, user profile, and shopping cart. Below this is a horizontal navigation menu with categories: FRAGRANCE, BESPOKE, GIFTING, BATH AND BODY, GROOMING, HOME, DISCOVERY COLLECTION, and WORLD OF FLORIS. The main content area is titled 'SEARCH RESULTS' and contains a search bar with the placeholder text 'please type in at least 3 letters...'. At the bottom, there are three promotional banners: 'COMPLIMENTARY GIFT WRAPPING' with a gift icon, 'SPEND £100 OR MORE FOR FREE DELIVERY' with a delivery truck icon, and 'INTERNATIONAL DELIVERY' with a globe icon.

Somebody at the website noticed and fixed it - yay

FLORIS
LONDON

BRITISH FAMILY PERFUMERS SINCE 1730

MOTHER'S DAY GIFTS

FRAGRANCE

BATH AND BODY

HOME

GROOMING

BESPOKE FRAGRANCE

WORLD OF FLORIS

Search Results

webexpo



Please try another search term...

Don't "save space" by putting labels inside boxes

The image shows a web browser window with a registration form for 'INSIDER' overlaid on a background article. The form is titled 'Become an Insider today!' and asks for various details. The labels for the input fields are placed inside the boxes, which is a poor design choice. The form fields are:

- first name
- last name
- company
- business address
- country (dropdown)
- state (dropdown)
- city
- zip / postal code
- phone number
- job title
- position (dropdown)
- function (dropdown)
- company size (dropdown)
- industry (dropdown)

A 'Submit' button is located at the bottom of the form. The background article is from CSO (Computer Security Online) and discusses security polls.

Also, don't use float labels

Email address
adam@example.com



Small label text

Email address

adam@example.com



Large label text

Smashing Magazine used to have float labels

Your message

Ironically, at the moment of writing, here at Smashing Magazine we are actually using the floating label pattern that Adam heavily criticizes in this article. From our usability tests we can confirm that floating labels aren't a particularly great idea, and we are looking into adjusting the design – by moving to conventional text fields – soon. ✓

Your (real) name

Vitaly Friedman ✓

Your Twitter (e.g. 'smashingmag')

smashingmag ✓

Post Comment

2 4 21

Put the question outside the box

Leave the box empty for the answer

Question here, near but outside the box



What is the name of the event?



Empty box here for the answer

Do usability testing on your form

Get someone to fill in your form while you watch

Extra tip - find some people who:

- Have disabilities such as tremor
- Use old or slow devices
- Only recently started using a digital device
- Don't use digital devices



Takeaway

No-one wants to be delighted by your form. Make it easy, so they can do other things instead.



Image credit: Alberto Casseta on Unsplash
<https://unsplash.com/photos/REKXJ7Jhwil>

56 Caroline Jarrett @cjforms [\(CC\) BY SA-4.0](#)

A good form works well across the layers

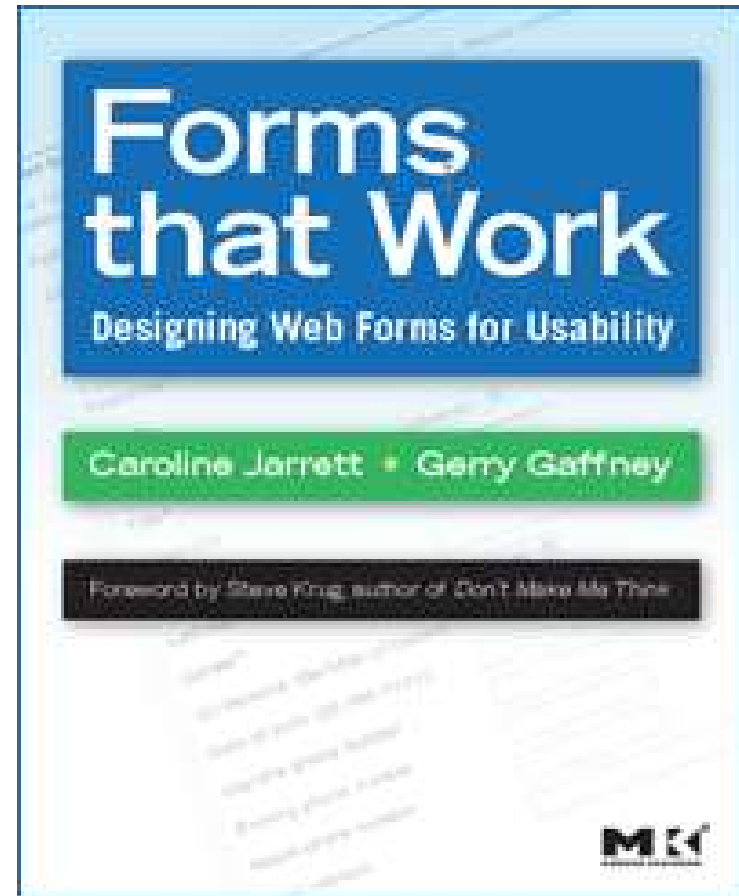
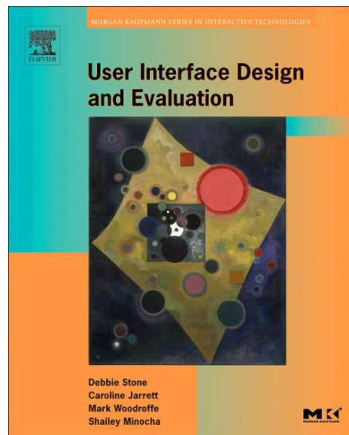


Caroline Jarrett

twitter @cjforms

caroline.jarrett@effortmark.co.uk

www.effortmark.co.uk



INSIDER

Become an Insider today! [Learn More](#)

Please fill out the information below to complete your registration

<input type="text" value="Caroline"/>	<input type="text" value="Jarrett"/>	
<input type="text" value="company"/>	<input type="text" value="16 Heath Road"/>	
<small>This field is required</small>		
<input type="text" value="United Kingdo..."/>	<input type="text" value="Non-US"/>	<input type="text" value="city"/>
		<small>This field is required</small>
<input type="text" value="LU7 3AB"/>	<input type="text" value="+441525370379"/>	
<input type="text" value="job title"/>		
<small>This field is required</small>		
<input type="text" value="position"/>	<input type="text" value="function"/>	
<small>This field is required</small>	<small>This field is required</small>	
<input type="text" value="company size"/>	<input type="text" value="industry"/>	
<small>This field is required</small>	<small>This field is required</small>	

CSO Online and group undertakings may collect, store and process my Personal Data for the purpose of my accessing the requested content or receiving the requested service including registration for and attendance of events, and also for the purpose of my receiving offers for similar content or services by direct marketing including email, telemarketing and SMS/text. My Personal Data will only be transferred to third countries if an adequate level of protection or safeguards exist to protect my Personal Data. My consent can be withdrawn at any time in the future by updating my [member preferences](#).

I agree



[Keep up with 8 hot cyber security trends (and 4 going cold). Give your career a boost with top security certifications: Who they're for, what they cost, and which you need. | Sign up for CSO newsletters.]

While the Cohen story is big news, it is by no means unique. Surveys have a

Cloud Computing
Curtis Freed Associates Limited in
Information & Cyber Security
Policy Manager

Create a Trello Account

[or sign in to your account](#)

Name

caroline.jarrett

Email

caroline.jarrett@effortmark.co.uk

Password

e.g.,

We use cookies to personalize content and ads, to provide social media features and to analyze our traffic. By clicking "Accept Cookies", exiting this banner or continuing to use our site you accept our use of cookies. You can change your preferences in [Cookie Settings](#)

Accept Cookies

How many times will YOU click for your year?

Date of birth

01 ▾ 01 ▾ 1900 ▾ 

 0137 | MM / YY CVC LU7 3AB

Customer Details (Already have an account? [Log in](#))

Email

ylativ@gmail.com

Shipping Address

First name

Vitaly

Last name

Friedman

Country

Germany

Postal code


40595

City

Düsseldorf

Street address

Apt / Suite (optional)

 No imaginary addresses, please!

Company (optional)



TypeScript in 50 Lessons

Book

1 × 44.00€

- 1 +

Discount code

Cash in!

SUBTOTAL 41.13€

TAXES 2.87€

AIRMAIL SHIPPING FREE

PAY BY CARD OR PAYPAL FREE

DELIVERY AIM  MAR 8-14

FEELING SMASHING PRICELESS

TOTAL EUR 44.00€

Including 2.87€ in taxes

This is an example of a bad choice

What is your gender?

Female

Male

Unspecified