How to save money by fixing forms

Caroline Jarrett
@cjforms
#WebExpo2023

Let's have a look at a form

Czech railways

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Is this a form?

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

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A good form needs a lot of design

Interaction design

Content design

Service design

Looks like a form and works like a form

Asks questions and expects answers

Allows someone to achieve a goal

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A good form works well across the layers

Interaction design

Easy to read

Easy to use

Appearance

Content design

Easy to understand

Easy to answer

Conversation

Service design

Easy to get it done

Easy to move on

Relationship

The outside world sees you through your forms

Caroline Jarrett @cjforms (CC) BY SA-4.0   Thought for the day by Tim Paul: a diagram about forms
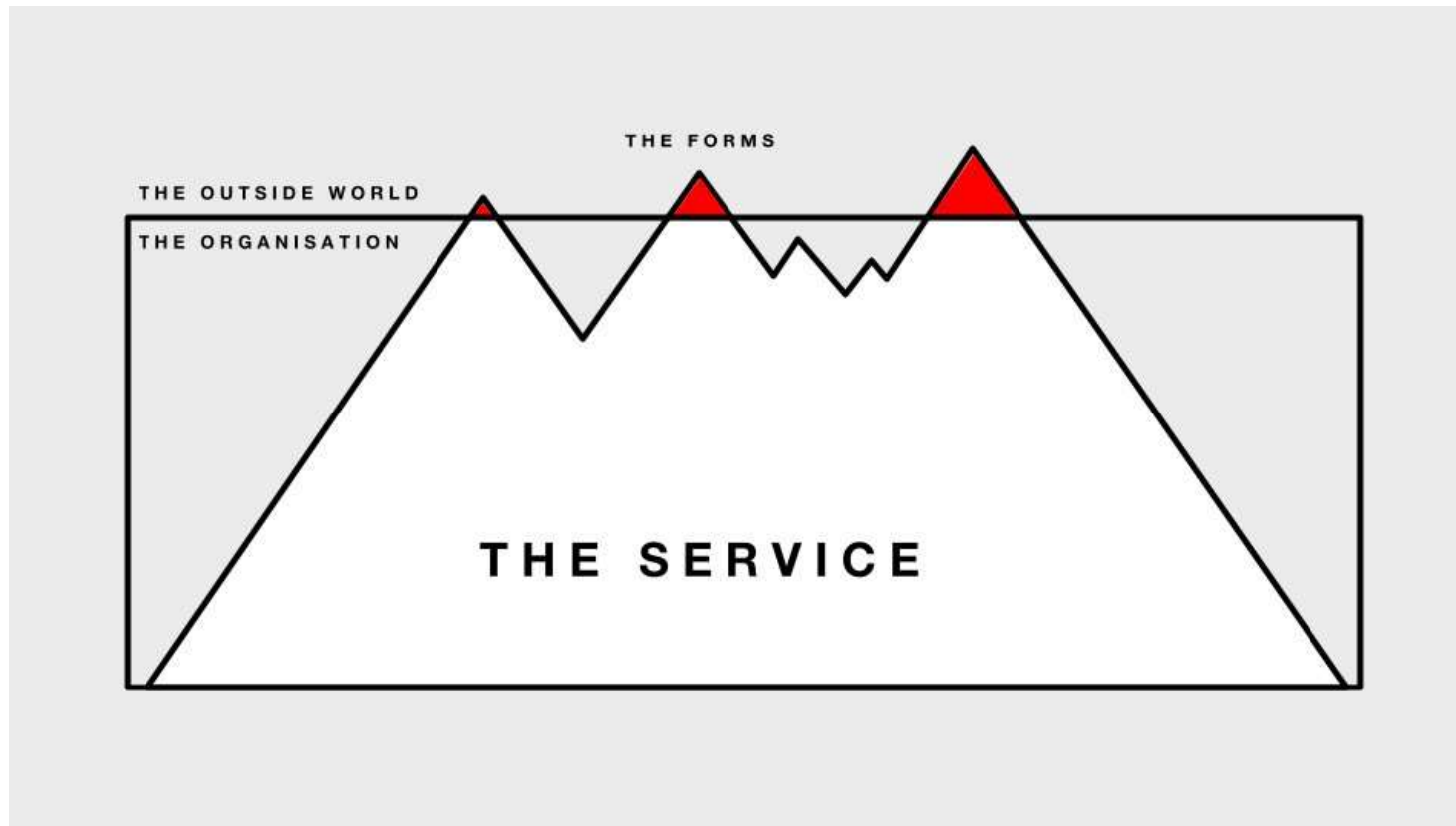
A good form starts with user and business needs

**Interaction design
Appearance**

Questions
you ask

**Content design
Conversation**

Answers
you need

**Service design
Relationship**

User
needs

Business
needs

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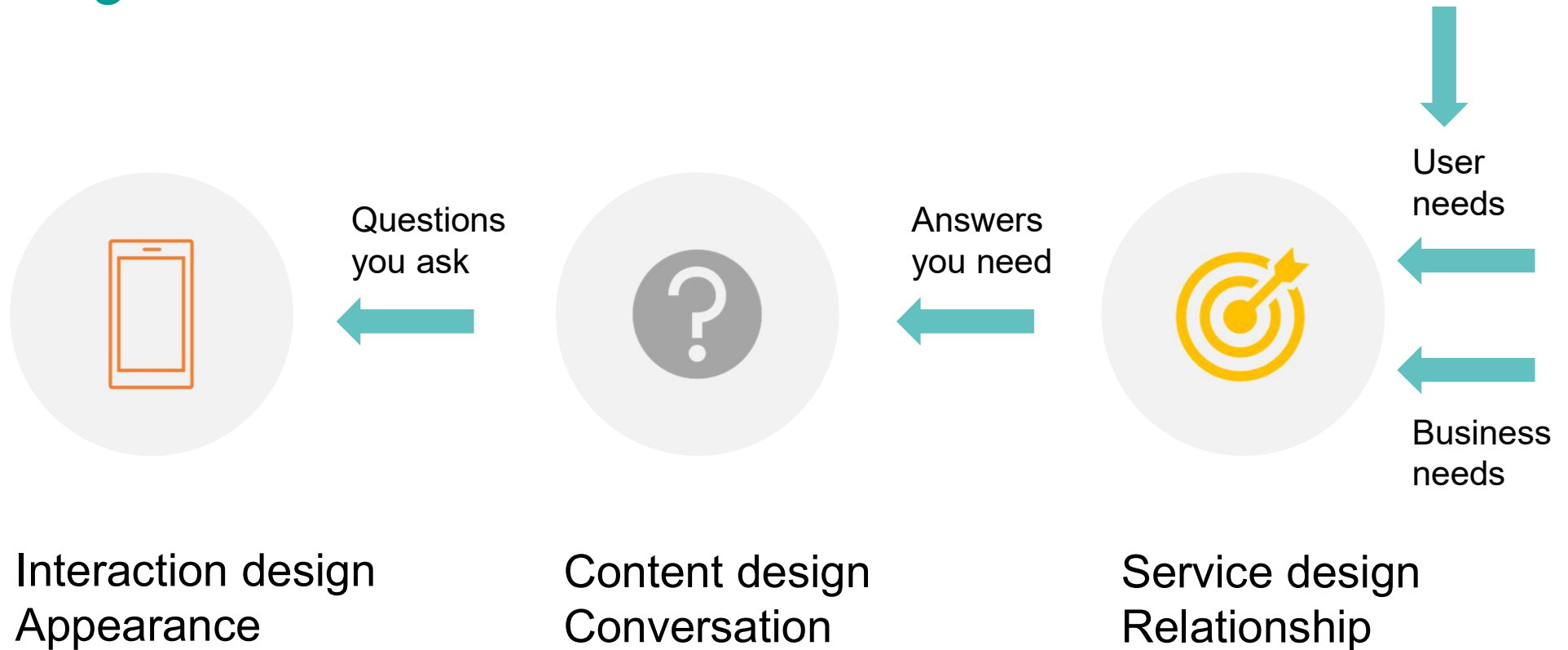
Failures get expensive

Drops out of the form

Gives a wrong answer
Calls helpline

Lost customer
Lost business

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Takeaway

A good form is easy to:
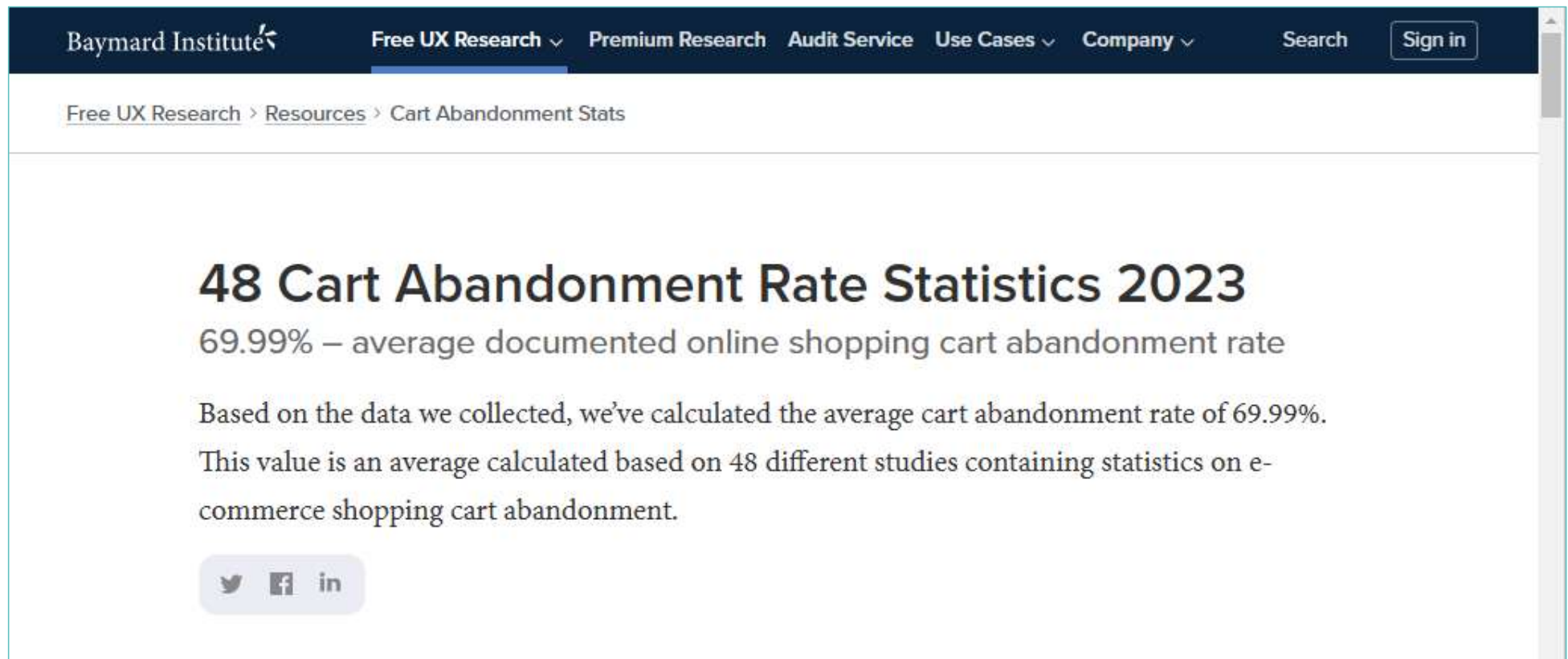
- read and use
- understand and answer
- get it done and move on

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Have you ever abandoned a form?

"I don't want to click the arrow 27 times to get to the right date"

Connections and tickets

FROM	Station / Town	⊕
↑↓		
TO	Station / Town	⊕

| ‹ Wed 22. 2. › | ‹ 11:49 › |

Adult 26—64 years
Without a discount card ✎

More options

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Maybe 70% of shopping carts get abandoned

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.

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https://baymard.com/lists/cart-abandonment-rate

Baymard researched why people abandon carts

Reasons why people abandon shopping carts

Bar chart showing reasons why people abandon shopping carts (approximate values):
- Extra costs too high (shipping, tax, fees): ~48%
- The site wanted me to create an account: ~28%
- Delivery was too slow: ~22%
- I didn't trust the site with my credit card information: ~18%
- Too long / complicated checkout process: ~17%
- I couldn't see / calculate total order cost up-front: ~16%
- Website had errors / crashed: ~13%
- Returns policy wasn't satisfactory: ~12%
- There weren't enough payment methods: ~9%
- The credit card was declined: ~4%

Caroline Jarrett @cjforms   (CC) BY SA-4.0   https://baymard.com/lists/cart-abandonment-rate

Many people abandon because of forms problems

Reasons why people abandon shopping carts

Reason	Percentage
Extra costs too high (shipping, tax, fees)	~48%
The site wanted me to create an account	~28%
Delivery was too slow	~22%
I didn't trust the site with my credit card information	~18%
Too long / complicated checkout process	~17%
I couldn't see / calculate total order cost up-front	~16%
Website had errors / crashed	~13%
Returns policy wasn't satisfactory	~12%
There weren't enough payment methods	~9%
The credit card was declined	~4%

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Save money by improving service design

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Let's think about "too long / complicated"

Reasons why people abandon shopping carts

Reason	
Extra costs too high (shipping, tax, fees)	~48%
The site wanted me to create an account	~28%
Delivery was too slow	~22%
I didn't trust the site with my credit card information	~18%
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The credit card was declined	~4%

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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

https://gds.blog.gov.uk/2014/11/28/simpler-carers-allowance-digital-service-now-live/

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
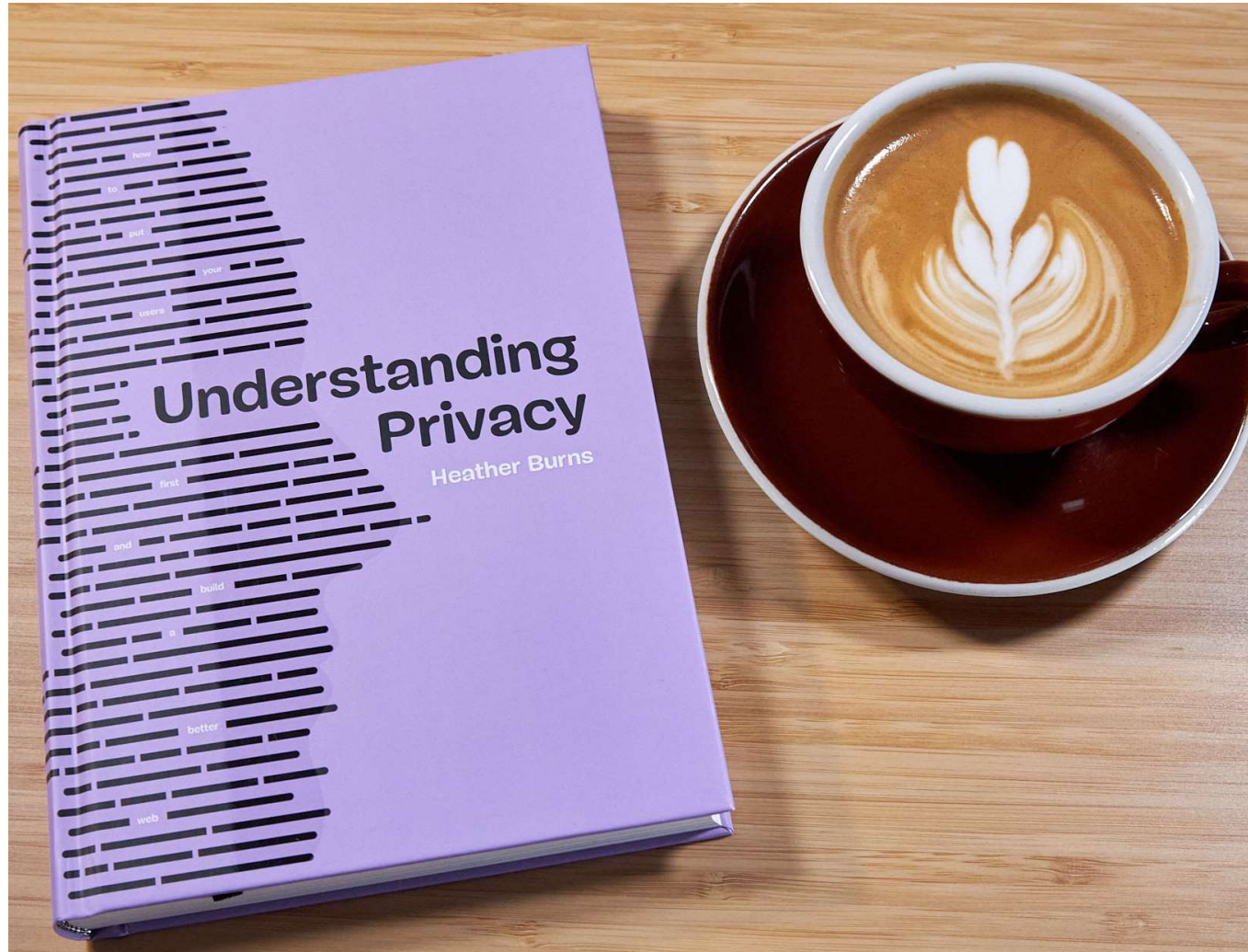- Know what you will do with every answer

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

Keep reviewing the question protocol, minimum once a year

Caroline Jarrett @cjforms (CC) BY SA-4.0   https://www.effortmark.co.uk/question-protocol-make-sure-every-form-field-necessary/

Privacy is important

Read "Understanding Privacy" by Heather Burns

Do what she says

Caroline Jarrett @cjforms   https://www.smashingmagazine.com/printed-books/understanding-privacy/

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

21   Caroline Jarrett @cjforms   (CC) BY SA-4.0
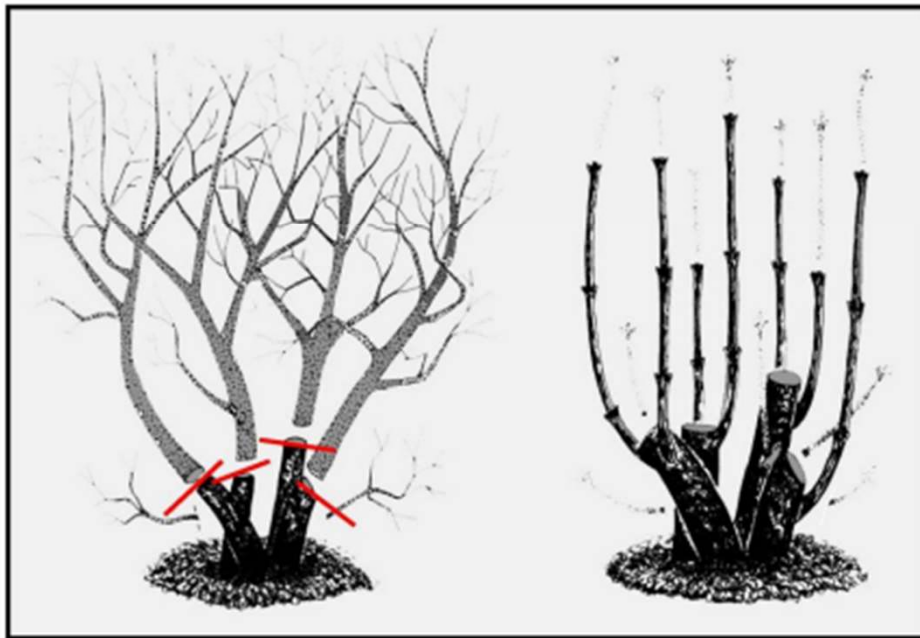
Keep it realistic. Extremely short fails, too.

Figure 11.
REJUVENATION PRUNING: UNTRUSTWORTHY
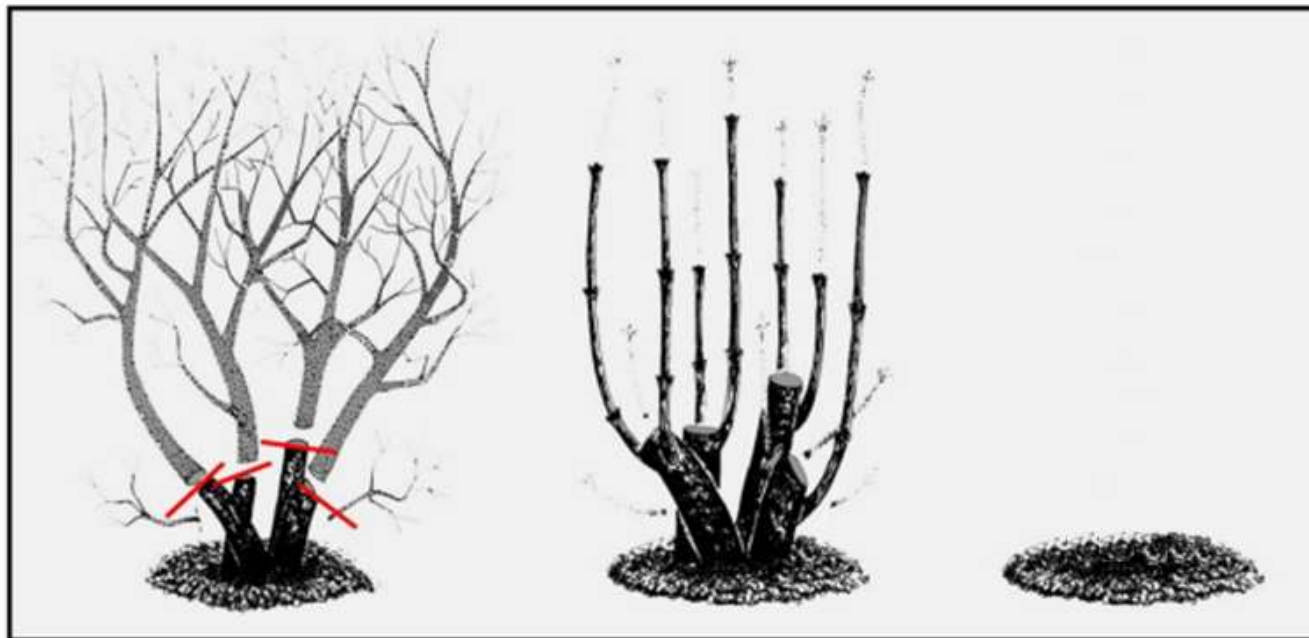
"I removed all the fields that people actually want to interact with and only left the crappy ones they don't want to interact with. Kinda stupid."

Michael Aagard

Caroline Jarrett @cjforms   (CC) BY SA-4.0   https://insiteful.co/blog/dont-reduce-form-fields/

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

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Please tell me your answers for this form

Select all that apply.

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Let's start with the button

Also known as

"Call To Action"

(CTA)

Select all that apply.

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

Confirm Back to Login

Your registration information has not been saved. If you continue you will have to complete your registration details again.

Ok   Cancel

Label the button with what it does*

*I think this is what these buttons do

Confirm Back to Login

Your registration information has not been saved. If you continue you will have to complete your registration details again.

Abandon and exit   Finish registration

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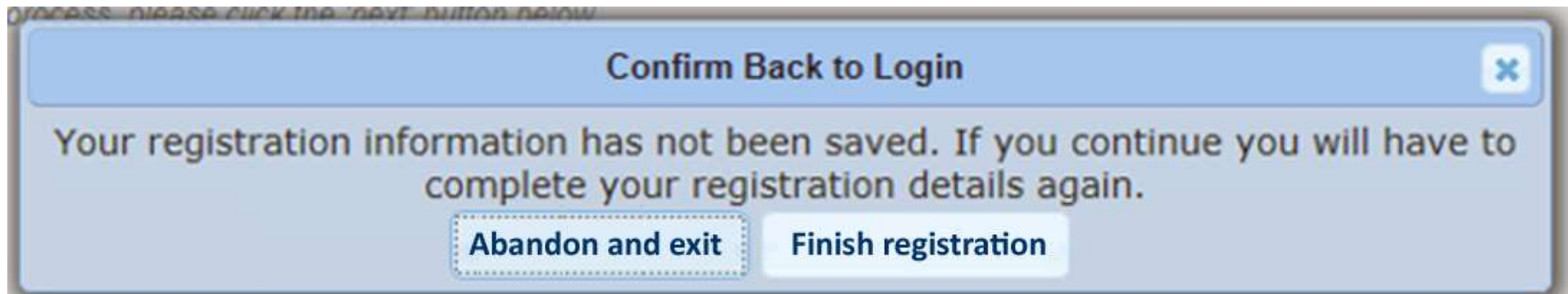
The best CTAs are strong verbs

- Sign up
- Start
- Download
- Apply

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You can add some extra encouragement

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

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But look across all the buttons

• I was applying for a credit card

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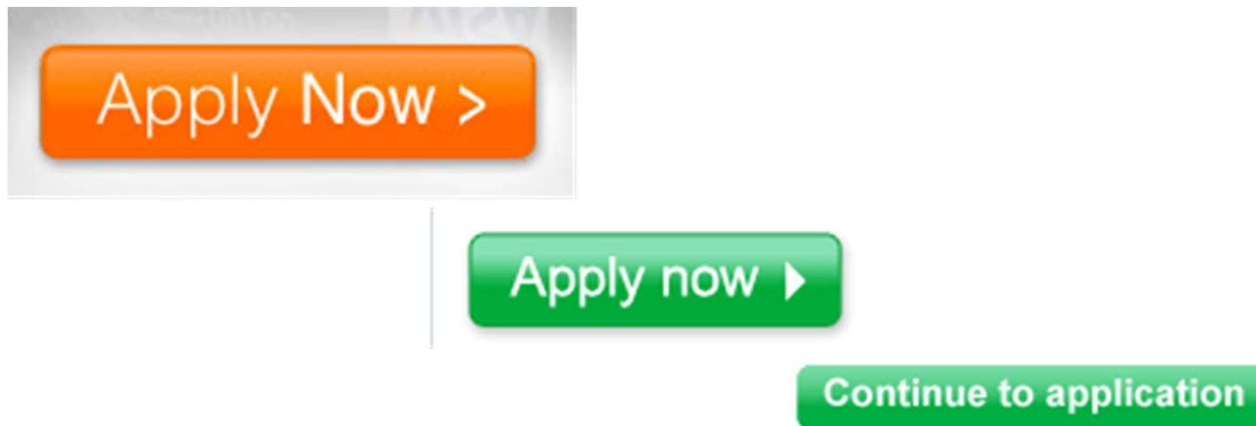
Takeaway

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

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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 <u>why your age is important</u>.

◯ Yes   ◯ No

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Idea 1: Re-design the conversation

1. Are you 16 – 65 years old?

Find out more about <u>why your age is important</u>.

◯ Yes   ◯ No

How old are you?

Validation:

If 16 to 65, continue to next question

Anything else, explain

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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?"

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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

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https://www.effortmark.co.uk/no-yes-no-questions/

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"

I'M NOT SURE

Caroline Jarrett @cjforms (CC) BY SA-4.0   Image credit: Drawn by Tasia Graham, illustration from Caroline Jarrett, "Surveys that work" (2021)"

Save money with better interaction

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Can you read this?

Most people filling in your form have small screens

Many have poor eyesight

Legibility is important

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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

Please Select
UK & Ireland
United States of America & Canada
Australia & New Zealand

And I'm interested in seein

Jadu uses the information you provide to contact you abo

☐ 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
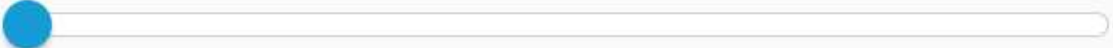
What is the name of the event?

Save and continue

https://design-system.service.gov.uk/components/

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:
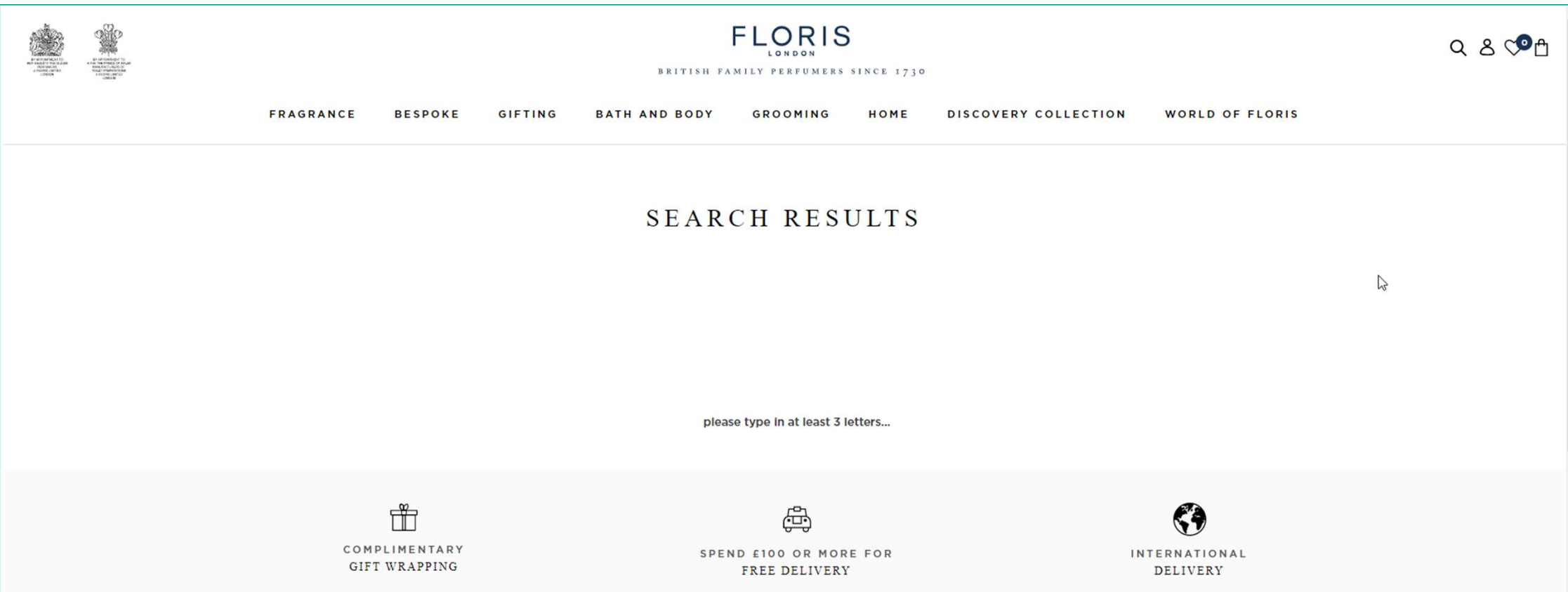
mm/yyyy   📅

← | Apr ⌄ | 1999 ⌄ | →

OK

CONTINUE

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Excess minimalism can also be too fancy

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Somebody at the website noticed and fixed it - yay

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

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Also, don't use float labels

Email address
adam@example.com

❌ Small label text

Email address

adam@example.com

✅ Large label text

https://adamsilver.io/blog/float-labels-are-problematic/
https://www.smashingmagazine.com/2021/02/material-design-text-fields/

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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

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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

I'M NOT SURE

Caroline Jarrett @cjforms   (CC) BY SA-4.0   Image credit: Drawn by Tasia Graham, illustration from Caroline Jarrett, "Surveys that work" (2021)"

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/REKXJ7JhwiI

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A good form works well across the layers

Easy to read

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Interaction design
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Easy to understand

Easy to answer

Content design
Conversation

Easy to get it done

Easy to move on

Service design
Relationship

Caroline Jarrett @cjforms

Caroline Jarrett

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www.effortmark.co.uk

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[INSIDER image/form overlay:]
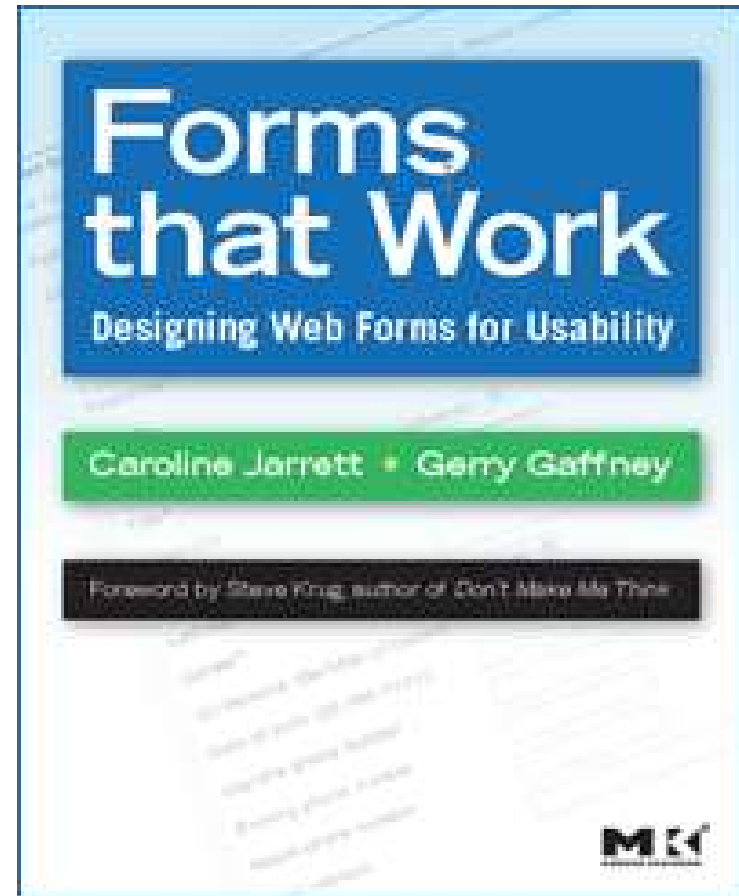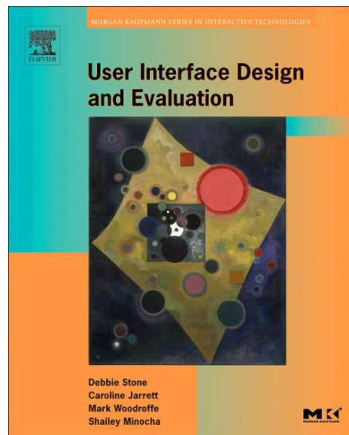
INSIDER

Become an **Insider** today! <u>Learn More</u>

Please fill out the information below to complete your registration

| Caroline | Jarrett |

| company | 16 Heath Road |
This field is required

| United Kingdo... ▼ | Non-US ▼ | city |
This field is required

| LU7 3AB | +441525370379 |

| job title |
This field is required

| position ▼ | function ▼ |
This field is required   This field is required

| company size ▼ | industry ▼ |
This field is required   This field is required

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 <u>member preferences</u>.

☑ I agree   **Submit**

The news
ground for
He alleges
then-cand
online poll

[Keep up with 9 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

Caroline Jarrett @cjforms (CC) BY SA-4.0

How many times will YOU click for your year?

Caroline Jarrett @cjforms

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

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