5 Tips for

Optimizing Website Forms

TO BETTER GENERATE
AND QUALIFY LEADS

Intellimize
Continuous Conversion™

Introduction

Effective lead generation and qualification is the key to shorter sales cycles and higher revenue. It all starts with your website forms and how you're optimizing them to encourage the highest volume and quality of leads to fill them out and submit.

When you pass along highly qualified leads, you empower your sales team to focus on the prospects most likely to convert into customers. At the same time, you identify the leads requiring further nurturing so marketing knows where to focus efforts. While lead generation and qualification involve multiple steps, your website forms are a powerful tool in the process.

Here are 5 proven ways to effectively generate and qualify more leads through your website forms:

- **Streamline your forms**
- **Test interactive forms**
- **Pre-populate form fields**
- **Hide fields based on what you know**
- **Use form validation**

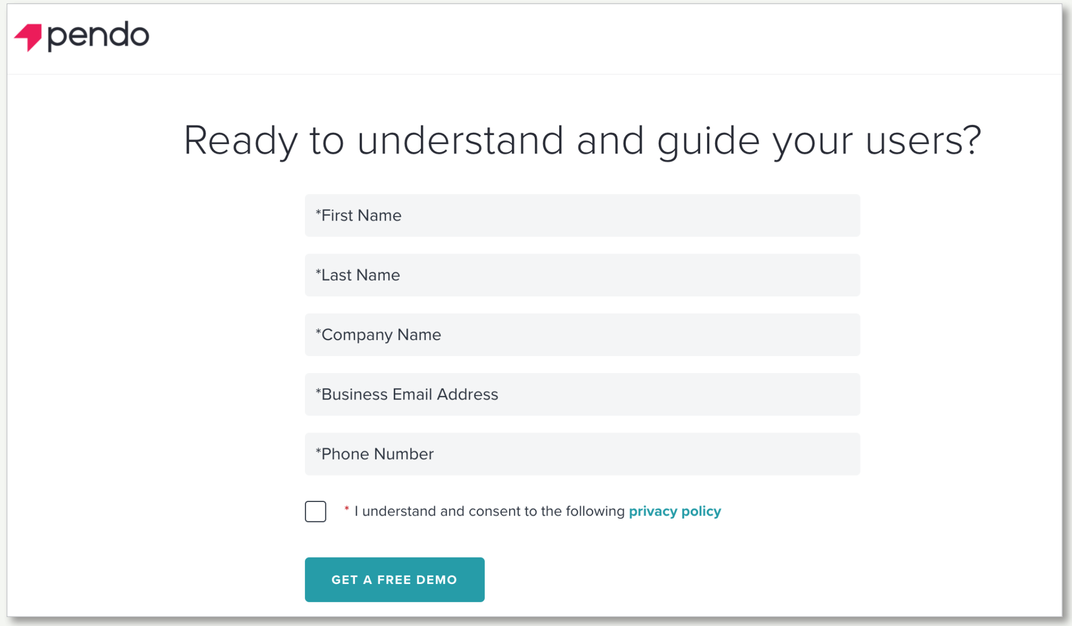
Streamline your forms

only include necessary fields

Knowing the power of your forms for lead generation, you want to make the form experience as painless as possible to limit the chances that site visitors back out. Put yourself in your prospect's shoes. Would you be more inclined to fill out a short form with just the essentials or a longer form with what may seem like irrelevant details? The latter can be frustrating for the visitor. It may not only reflect poorly on your brand, but prevent you from getting the lead altogether.

To pare back your forms, decide which information is essential and make those fields required. Either leave off all other fields or include optional fields that the site visitor can leave blank.

The Pendo form to the right is a good example of marking all fields as required, and ensuring that there's a relatively small number of them so that the form is not visually overwhelming. It's immediately clear to the prospect what is needed in order to move forward.



Test interactive forms

Liven up the experience to encourage engagement

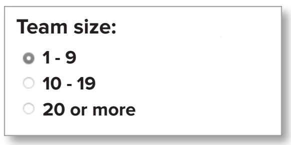
Consider thinking outside of the form field box by injecting some color and life into your forms. Anything that saves your prospects time and effort is going to come across as a win. Every second counts. Try adding elements to your form that the prospect only has to click to answer, instead of manually inputting the info.

Try clickable answers

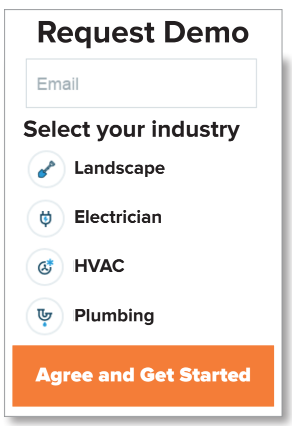
When there are only a few answers the prospect might provide, try clickable elements instead of text fields:

- Radio buttons for lists of items
- Buttons or images that act as buttons
- Sliders to select a range
- Checkboxes to select multiple items at once

Illustrative example: Radio buttons
Here, we might only have a few buckets we want to capture. Instead of a text field or dropdown menu, it might be cleaner and easier to simply click the applicable option.



Illustrative example: Buttons with images
The example to the right leverages a form and elements from ServiceTitan's website. Here, we see what a form industry selector might look like with clickable images/ buttons to make the experience of filling out a form more visually interesting.



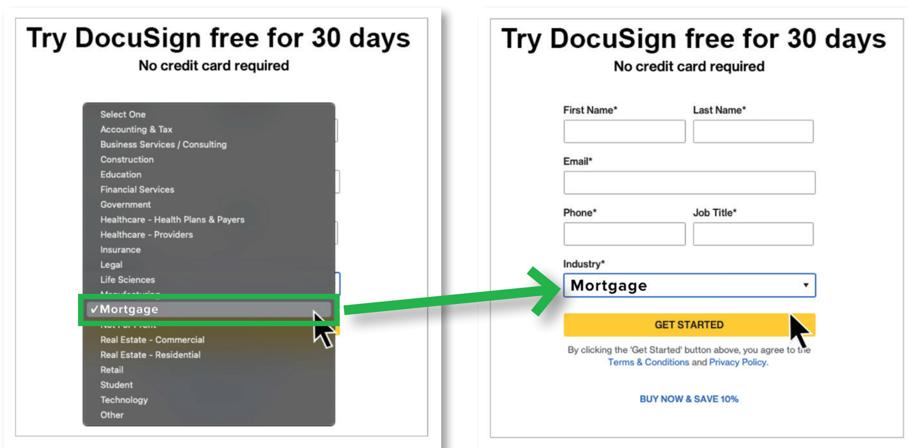
The use of icons or buttons can:

- Break up a form so it seems less form-like
- Present a more engaging way to collect info
- Reduce the number of keystrokes and clicks, making it easier and quicker to submit

Try dropdown menus

Another idea to consider is a dropdown menu to select an option from. This can be useful for both a small list or a large list of options. For larger selections, dropdowns might present a cleaner design.

Example: DocuSign
In DocuSign's trial sign-up form, they've added a dropdown for selecting your industry:



Pre-populate form fields
based on data you already have

You can further streamline the site visitor experience by pre-populating fields from data you already have for the visitor, and then only asking for additional information that you really need. Data you may already have includes:

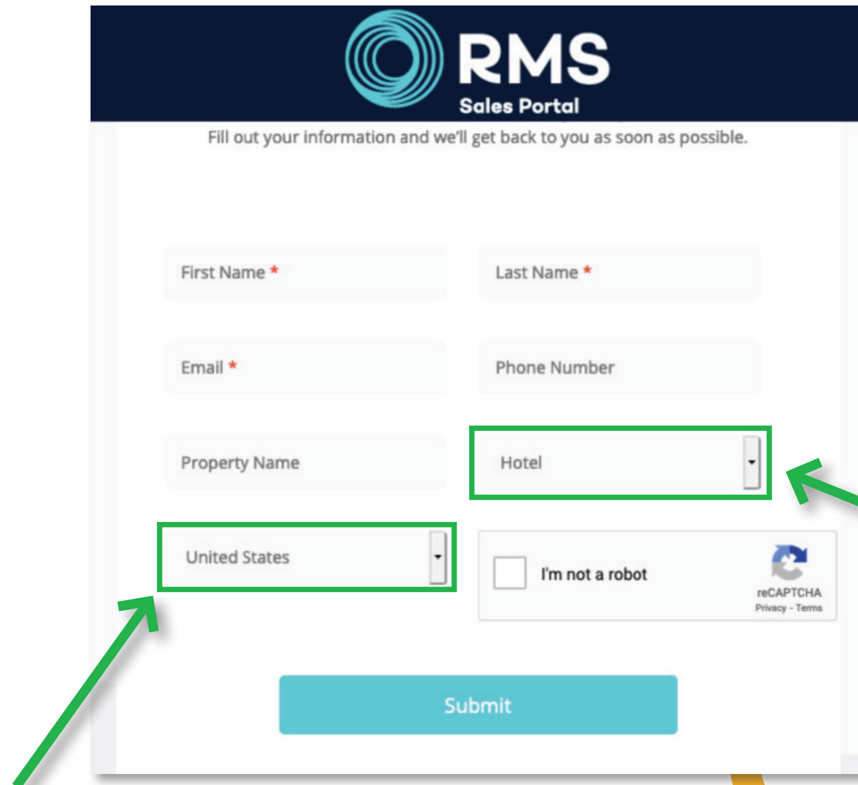
- Job title
- Company
- Industry
- Country and state (note that zip codes often are inaccurate with reverse IP lookup)

In the RMS Cloud form to the right, the country and industry fields are both pre-populated.

They were able to identify that the site visitor was US-based and in the hotel industry based on:

- How the visitor interacted with their site
- Because the visitor arrived on the site from an email campaign / paid ad catered to their industry
- Associating the visitor with data via other means (e.g. CRM or a marketing automation tool)

Further, make sure to leave pre-populated fields editable so that the site visitor can fix any incorrect info as needed. If your data is reliable and you're choosing to pre-populate form fields, you'll enable your visitor to fill out fewer fields and only have to eyeball the others. This way, you're reducing the time it takes to complete the form, keeping up momentum, and thereby increasing the likelihood of submissions.



Hide fields

based on data you already have

This is similar to pre-populating fields, but with a twist. If you're confident that the information you have on hand about the site visitor is correct, you might consider simply hiding the corresponding field in its entirety.

This will save the prospect from needing to review this piece of information, further streamlining their experience. And at first glance, the form also looks less intimidating, therefore increasing the chances that the prospect will decide in that moment to even start filling it out.

Additionally, this is a great way to remove distractions and avoid having the visitor "stop and think" – you're helping keep up momentum from clicking on the call-to-action to submitting the form!

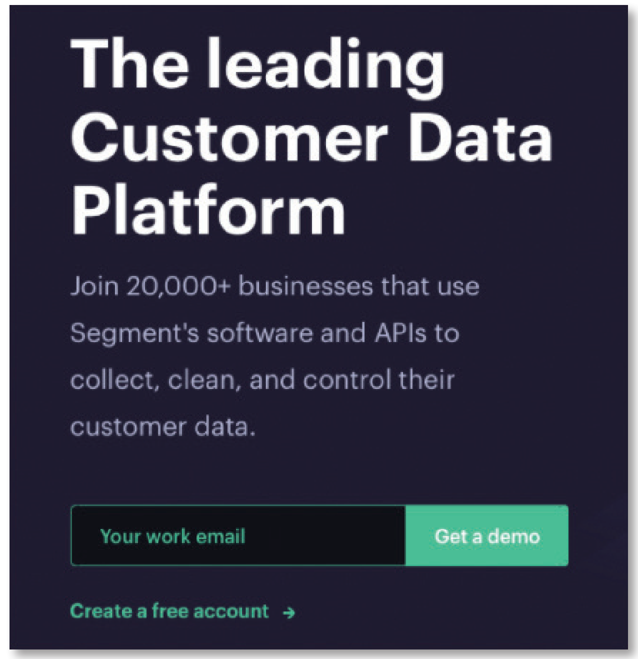
Use form validation
to filter out non-fit leads

Since your website forms capture information about site visitors, they are helpful in filtering out less qualified leads. Filtering out effectively is a matter of defining the criteria you find less desirable for a prospect and letting form validation be the gatekeeper.

The criteria you choose to filter out leads will vary based on your key business goals and ideal buyers. Examples of this criteria include:

- Email address (excluding personal email addresses from being submitted)
- Employee count/company size (excluding those that aren't a good fit for using your solution)
- Position in the company (excluding roles that aren't involved in the purchase decision)
- Country or region (excluding those your solution doesn't serve)

Segment's demo form to the right is a good example of using a form for filtering, as it is proactive in asking visitors to submit a work email address.

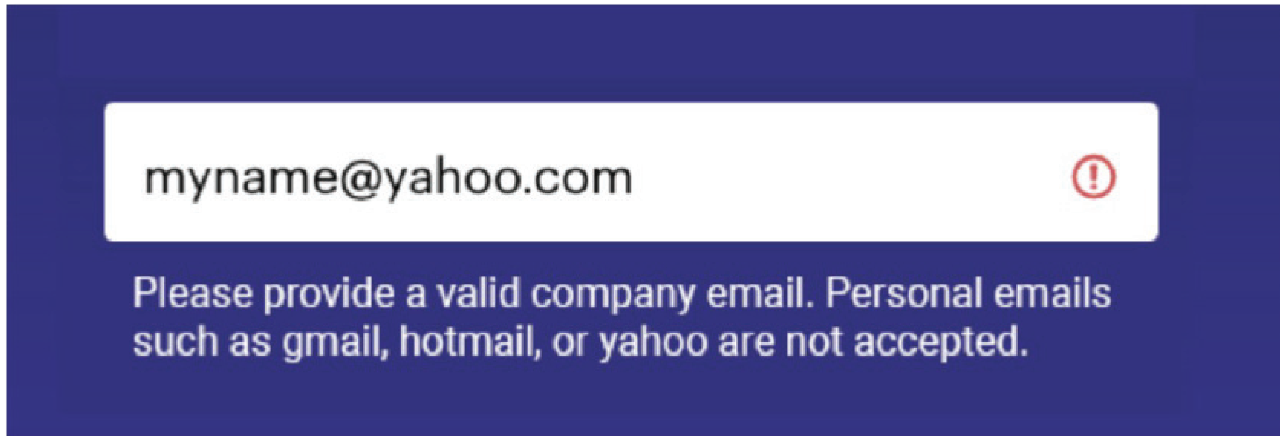


Segment

continued...

The company requires that site visitors interested in a demo enter a business email address. This might filter out smaller businesses that use a personal email address, and which are not a good fit for Segment. Additionally, it streamlines the process on the sales side, enabling sales to know immediately who the prospect is and can properly route it internally to the right sales rep to follow up with context.

On the flip side, with Segment's form, if the visitor enters a personal email address, the submission does not go through and instead they are immediately prompted for a valid business email address:



Form validation is also a great way to encourage visitors to self-filter themselves out. For instance, if a solution can only serve e-commerce companies, then it would make sense for a company to have "Industry" be a field. If the visitor selects any option on the pull-down menu besides "e-commerce", such as "computer software", then an alert message may pop up that kindly notifies the visitor that the company is currently only able to serve e-commerce companies at this time and then perhaps encourages the visitor to check back later. This way, it prevents a non-fit lead from being submitted and then sales having to take the time to process it and reach out to decline the request, and it immediately sets expectations with the lead that they shouldn't expect outreach and should seek out alternative solutions.

Optimize for Continuous Conversion™

Your website forms are a critical element in your lead generation and qualification process. To make the most of every conversion opportunity, we advise you to embrace the best practices in this eBook, update your forms, and then test and iterate continuously.

Continuous Conversion™ with Intellimize can help. Fueled by machine learning, Continuous Conversion helps you optimize your website automatically, including all elements of your forms and the calls-to-action that support them. The result is a never-ending amount of CTA clicks and form submissions.

Learn more at intellimize.com

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