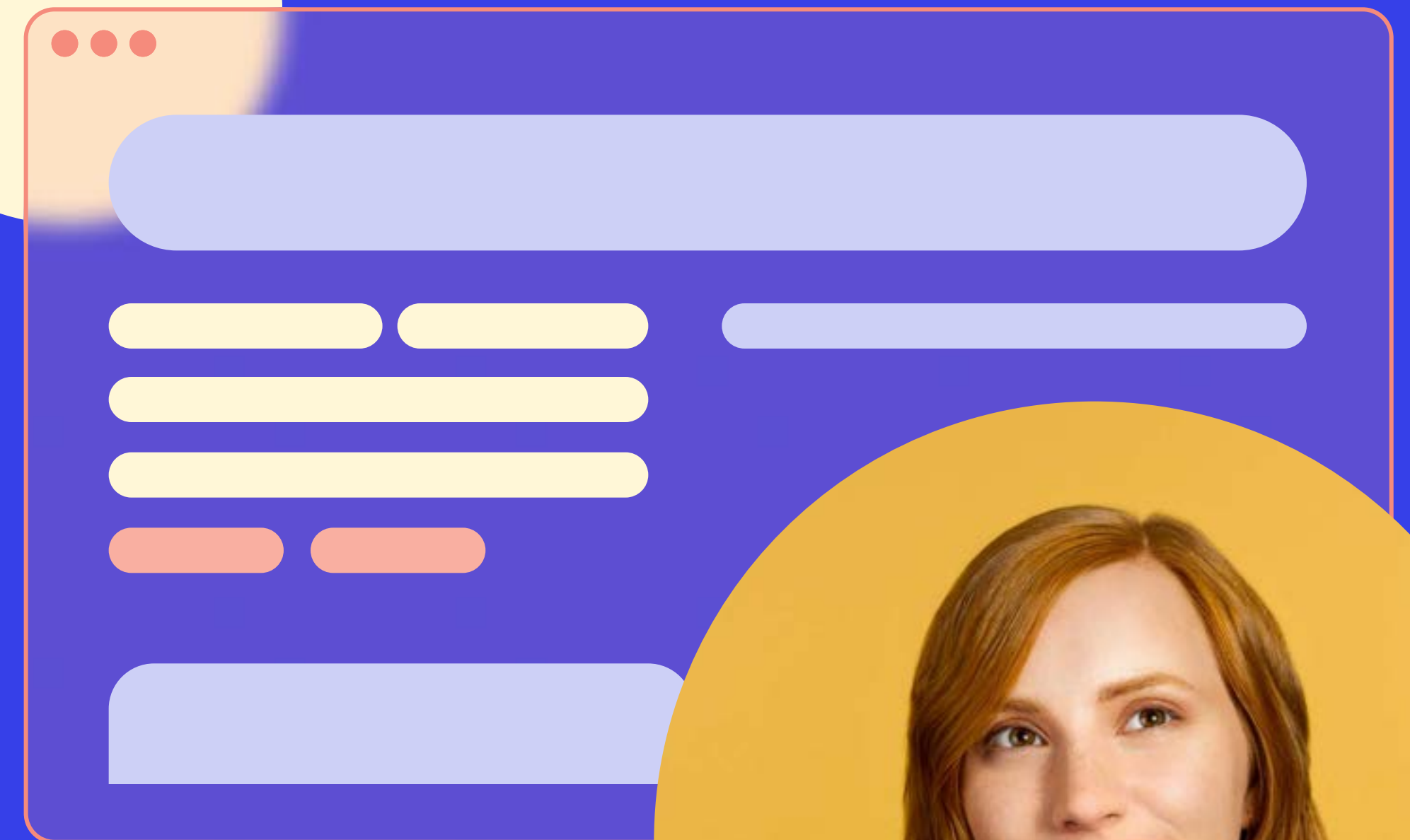
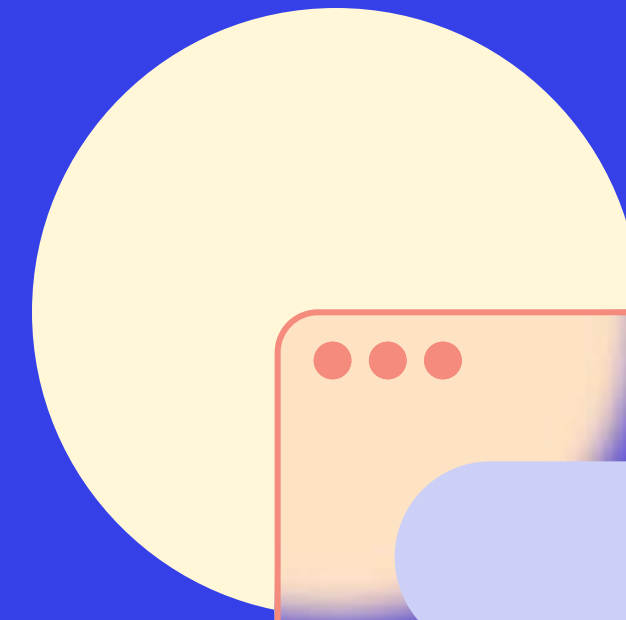




How to improve your **online forms**

50+ actionable insights for building
online forms that convert better



Contentsquare analyzes billions of digital behaviors from brands across the globe, providing unique metrics, visualizations and recommendations that every digital team can use to improve their online experiences.

In this ebook, you'll get your hands on our data-driven and expert advice for creating online forms that convert better and increase growth.

Online forms are a key component of any business. Whether your customers use online forms to open new banking accounts, book car test drives, or sign-up to your email newsletter—online forms can mean big business for your brand, whatever industry you're in.

When done well, they can be a customer engagement and revenue-generating machine, helping customers quickly and efficiently engage with your business and progress along their customer journey. Done badly, however, and you can lose customers (and invaluable data!) in seconds.

Luckily, multiple tactics are available to help you create better online forms. Here are 50+ actionable insights for improving the performance of your online forms and driving stronger engagement and growth for your business.

The anatomy of a text field

Text fields are UI elements that allow users to input information into an element, and are the most common element seen on forms.

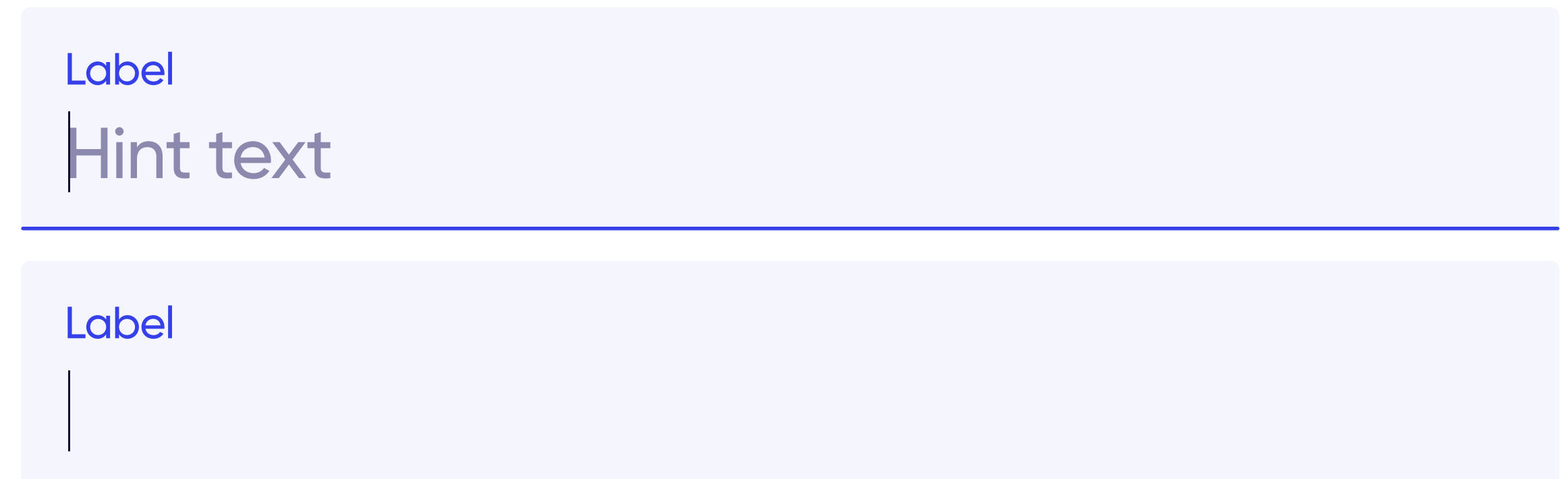
Almost every interface uses text fields, and they remain one of the most universal elements across platforms.

Before exploring guidelines around forms, let's first understand the anatomy of a text field.

The OG text field

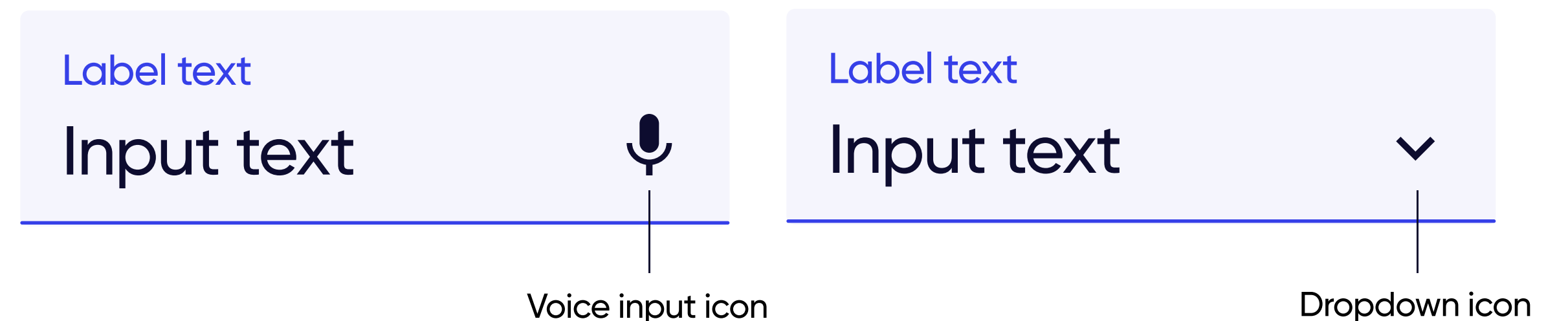


The text fields that gives you a hint before the input



Hints can also live here.

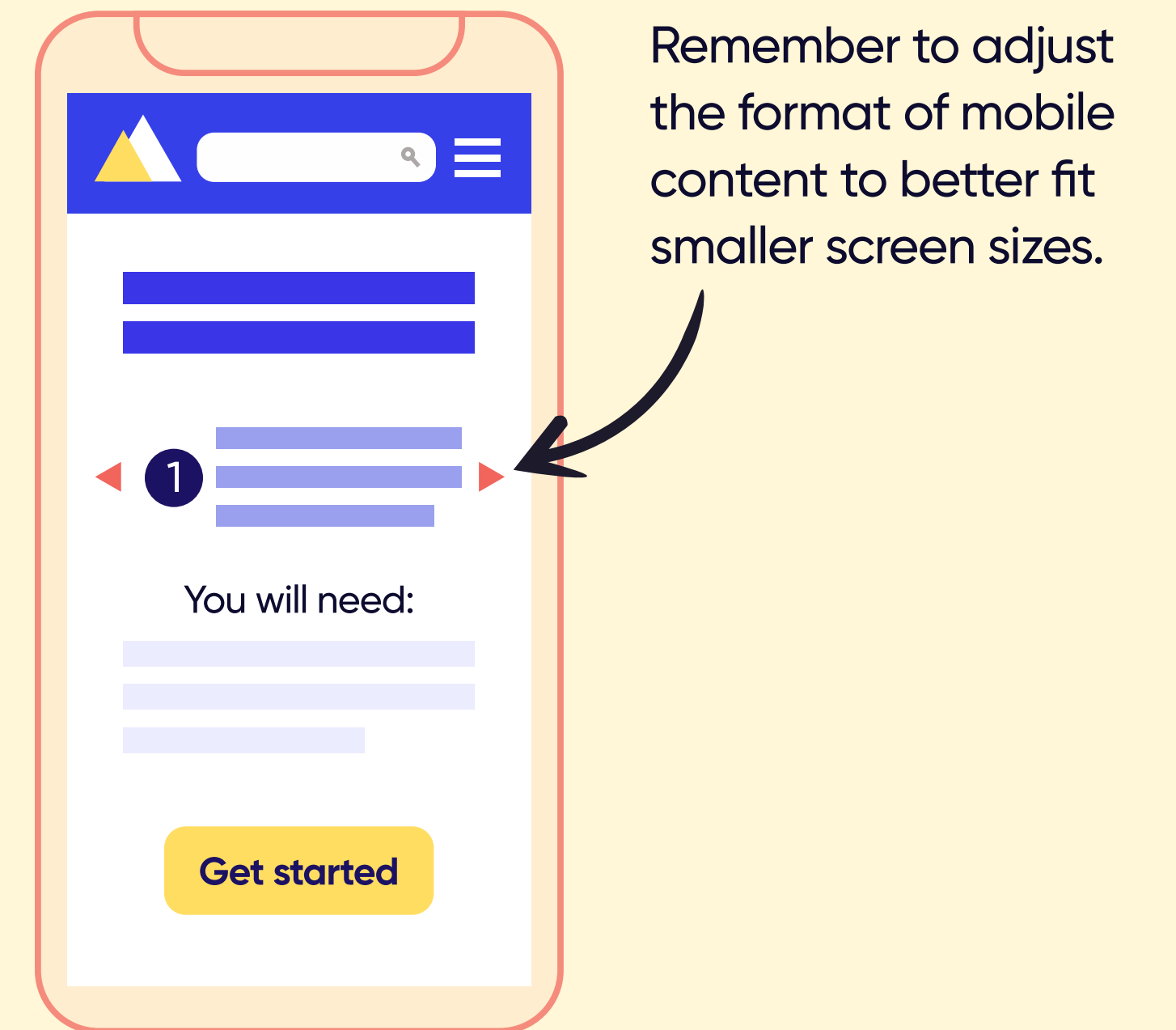
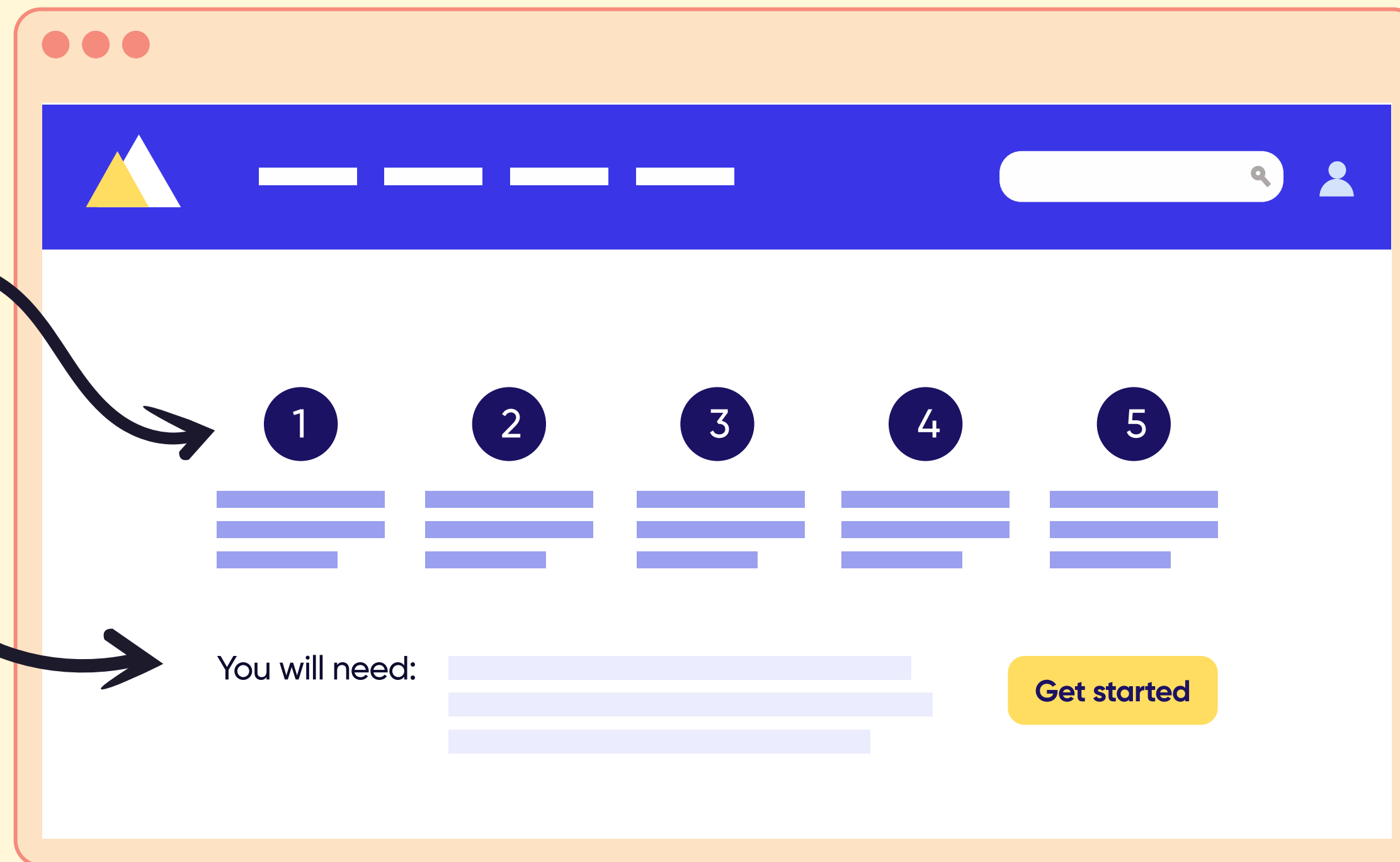
The text fields that are a little different from the crowd



Explain what users should expect before they begin the form.

Before a user begins a lengthy form, make sure you explain the number of steps required for completion.

Don't forget to ask them to find certain documents and information before starting if necessary.

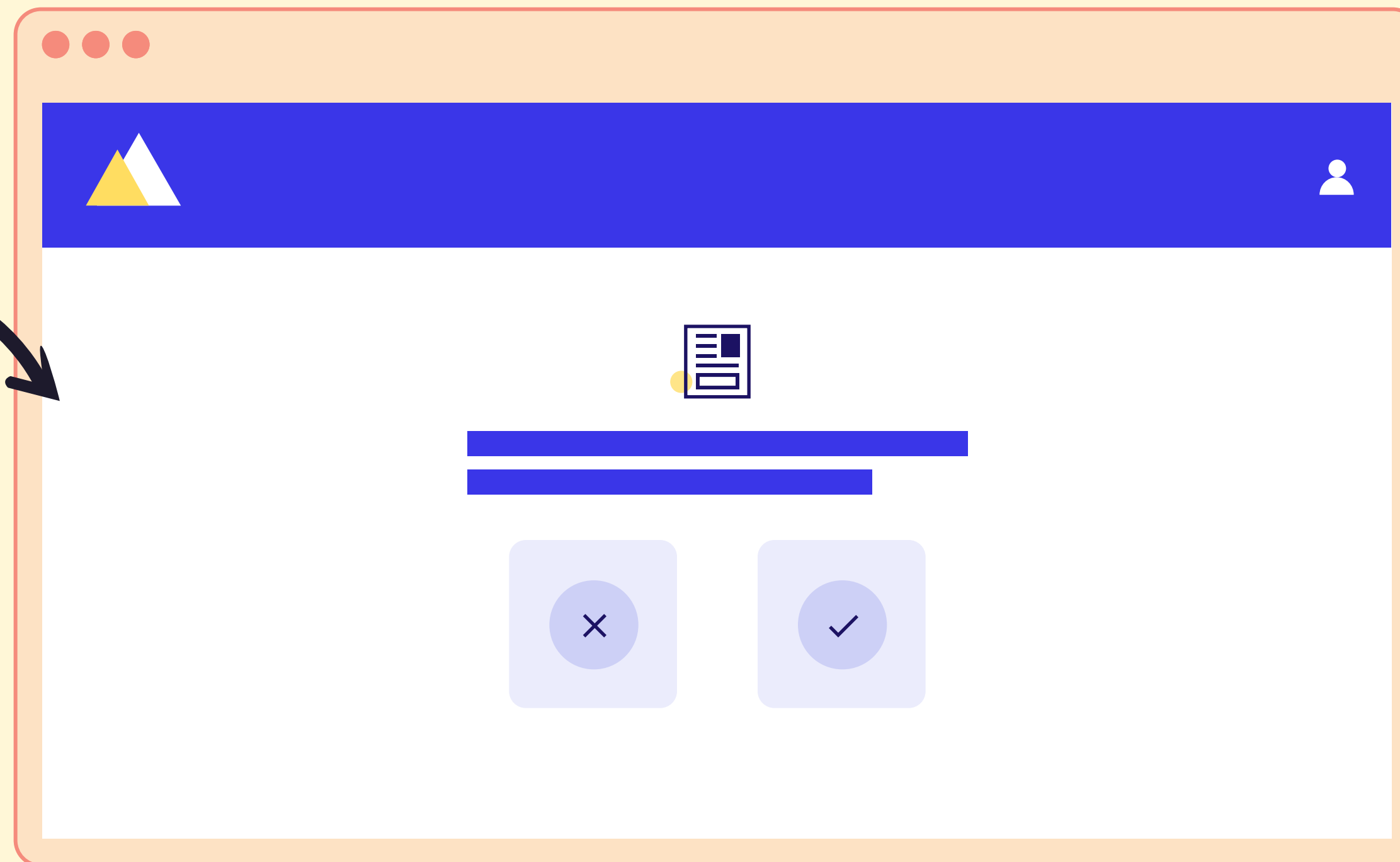


Remember to adjust the format of mobile content to better fit smaller screen sizes.

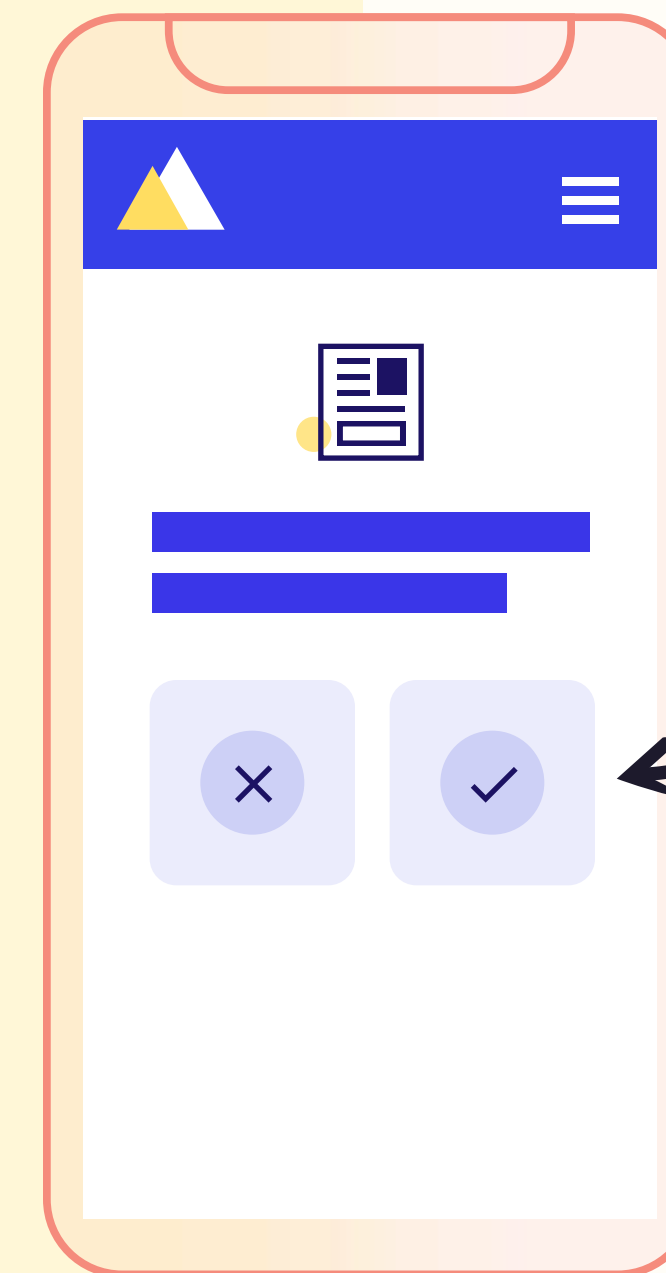
Progressively disclose tasks and questions.

Avoid placing entire forms on a single page, especially if the form is long enough to fall below the fold.

Use conditional logic and hide irrelevant fields based on user answers.



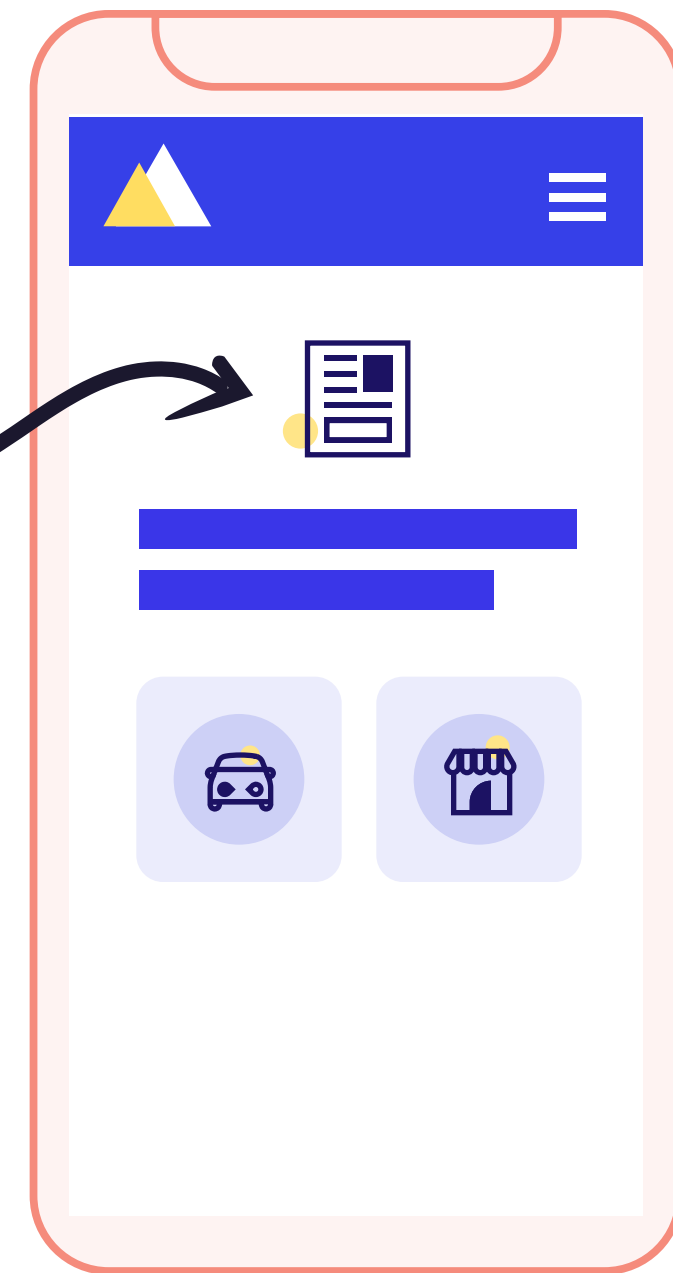
It's common to have a single question per screen to avoid overwhelming the user and encourage a singular focus on one question at a time.



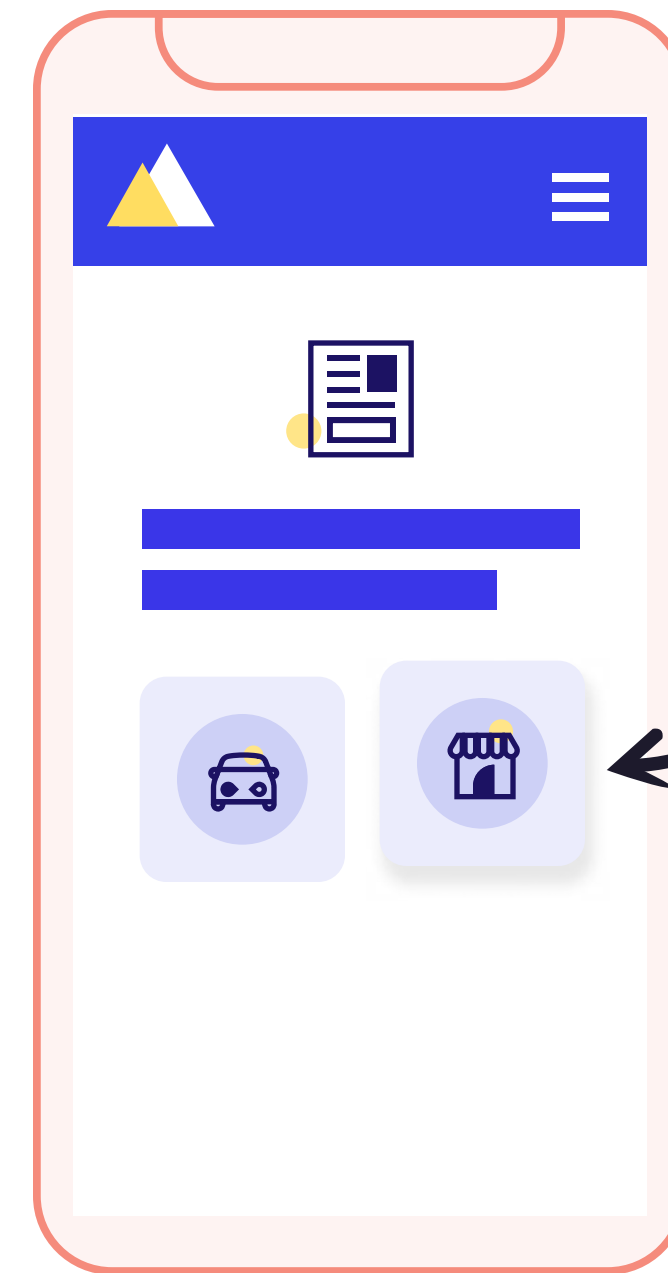
Use micro-interactions, visuals and/or animations.

Add **delight** and elevate the experience of form filling.

Use **visuals** to communicate information rather than text.



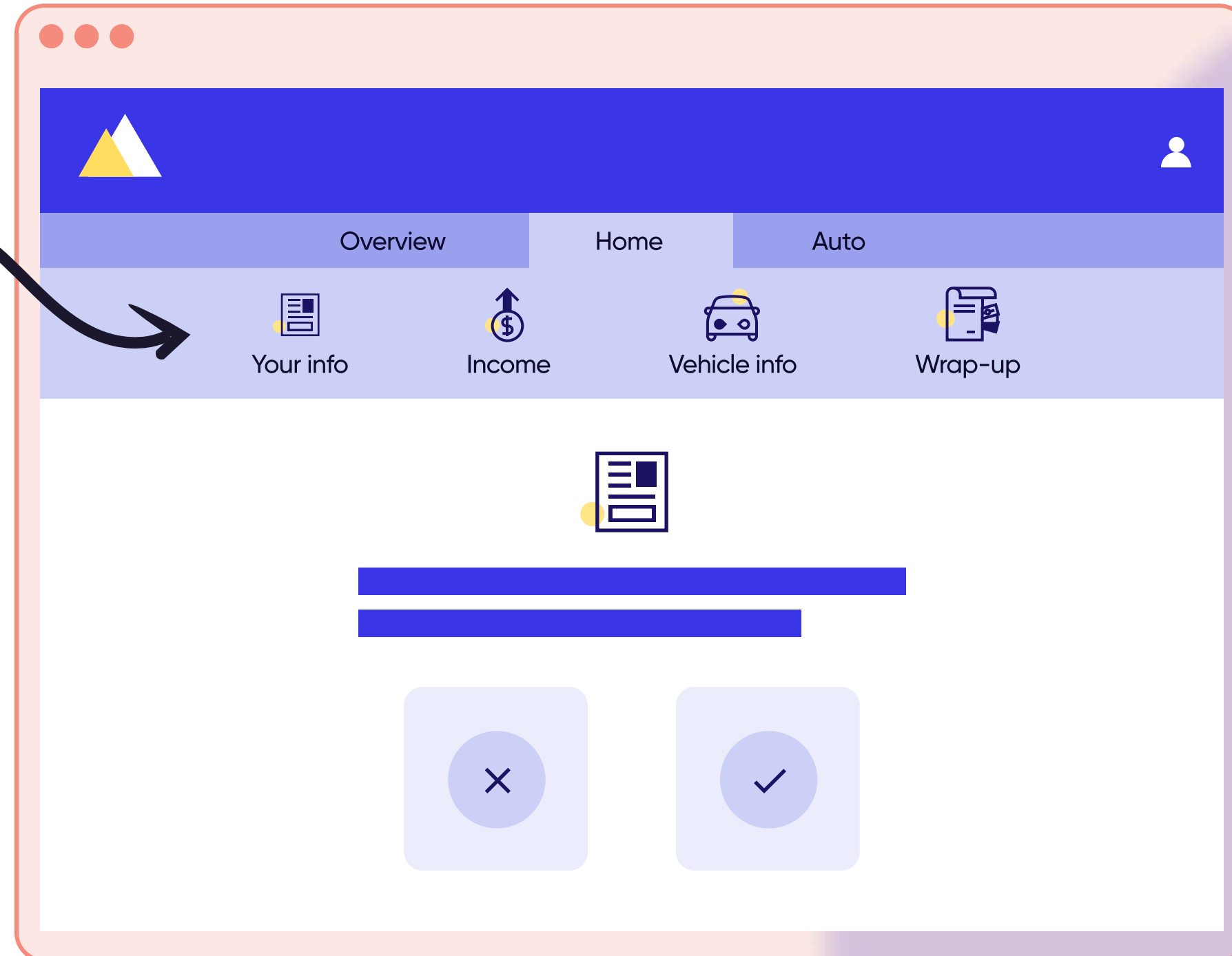
Use **micro-interactions and animations** to provide immediate system feedback for every action.



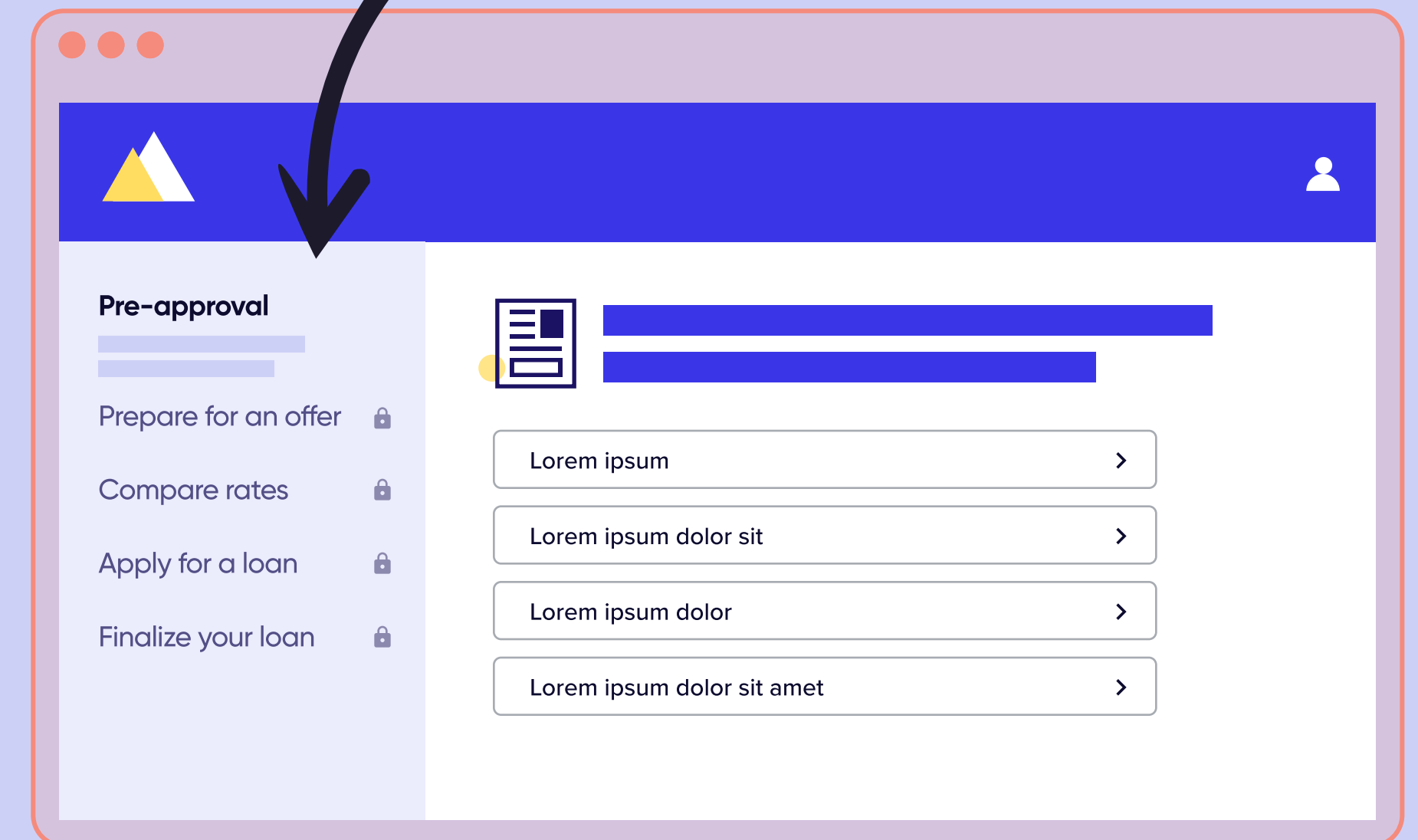
Indicate what step users are on.

Display a progress tracker to show what step the user is on, especially if there are multiple steps. This can also be used as a navigation tool, but only previous steps should be navigable to avoid errors.

On desktop, use the space to the left or top of the page to show progress.

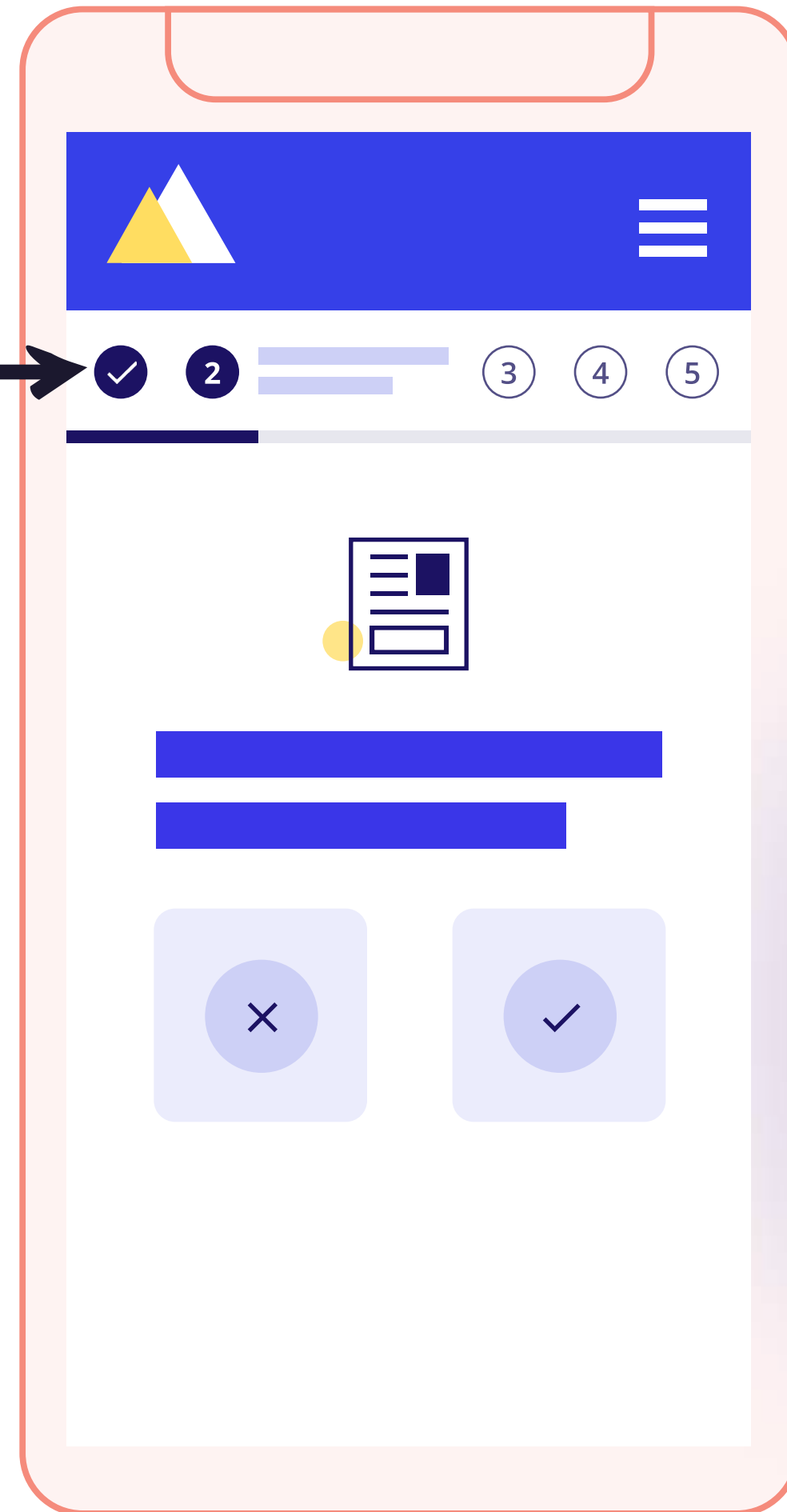


Specify which step is next before proceeding. If possible, let users know if they need certain information before they can complete each step.

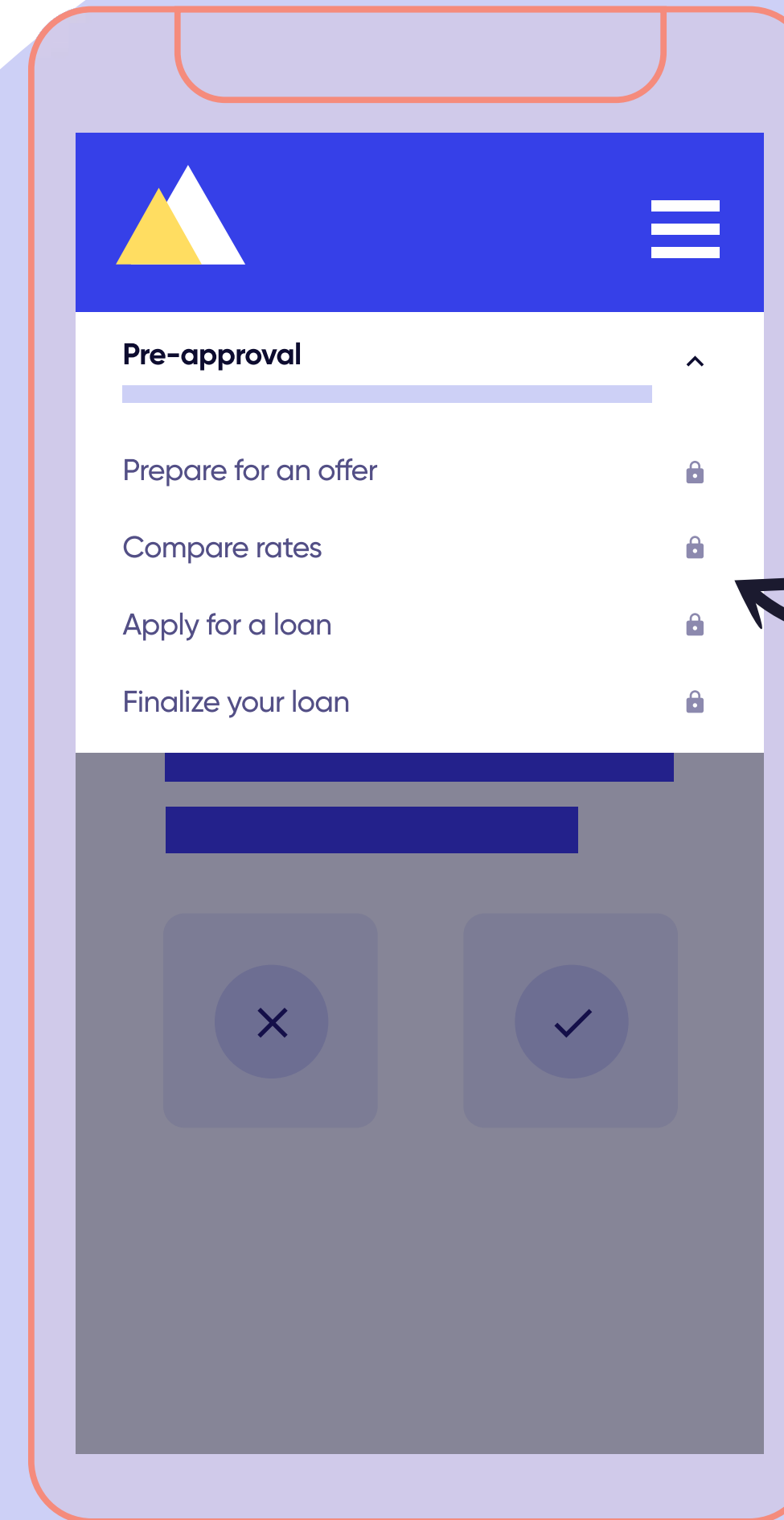


Indicate what stage or step users are on.

On mobile, the top of the screen is commonly used to display progress.



You can also explore using a dropdown, which users can scroll and browse remaining or previous steps.



Indicate which fields are required and which are optional.

Ensure the user knows what fields are required and which are optional to avoid submission errors.

Use a small legend and/or text to indicate which fields are required. Asterisks are most commonly used to indicate which fields are required when not using text.

If all form fields are required, state this at the top of the screen.

Alternatively, you can individually label required fields with text.




* Required Fields are indicated with an asterisk.

Label text *
Input text

Label text *
Input text

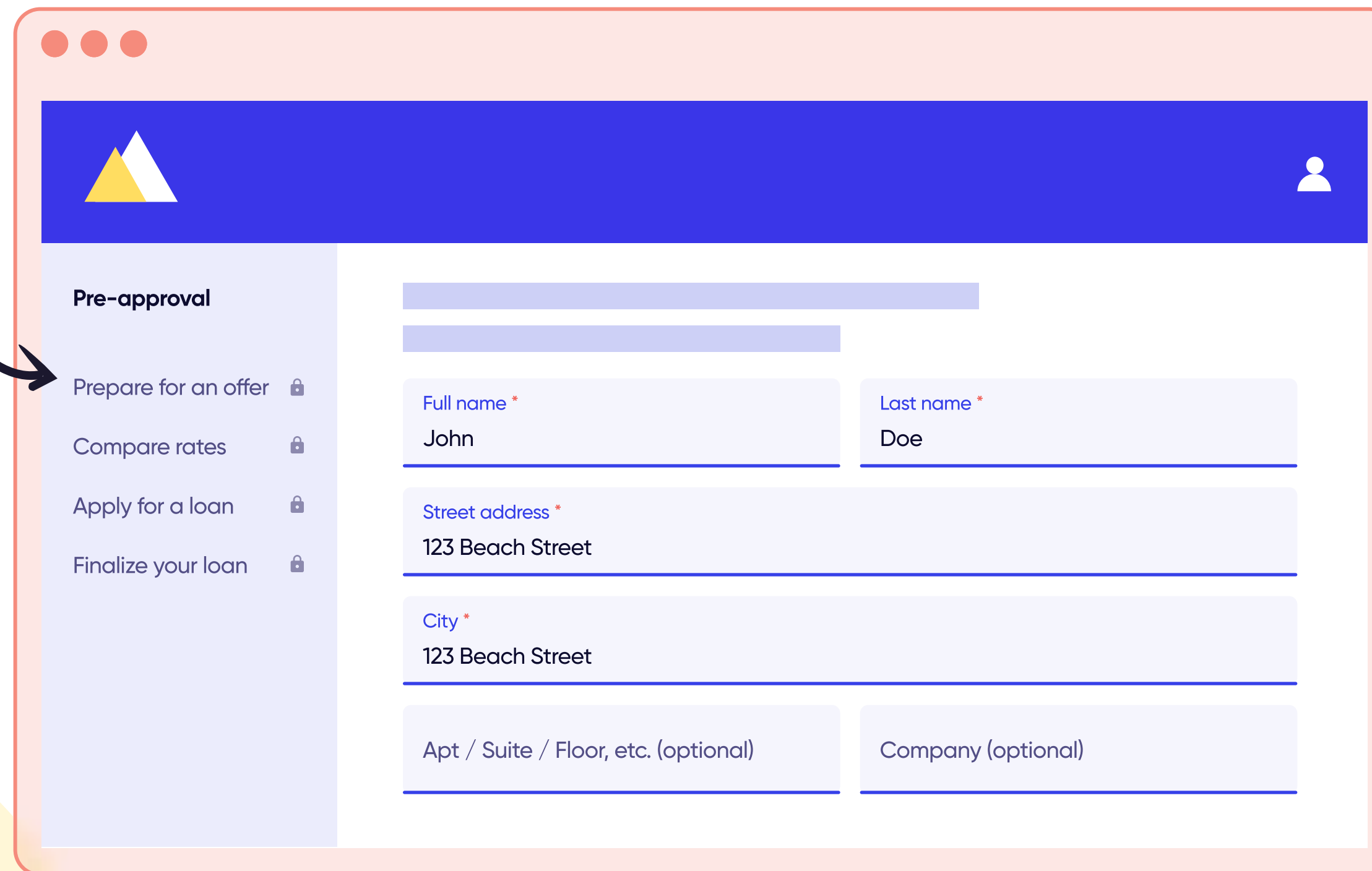
Label text *
Input text

 Contentsquare

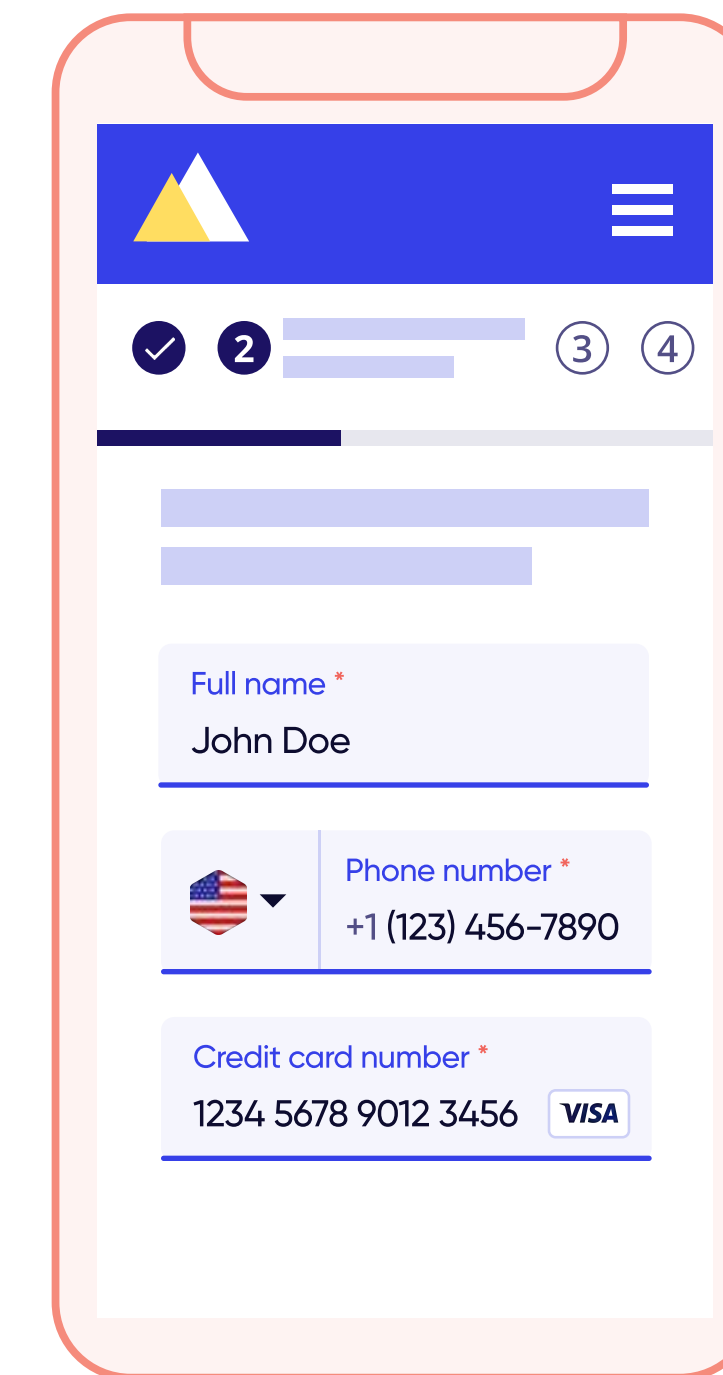
Use appropriate field type and size based on the input.

Providing the most appropriate type of field size helps communicate proper formatting and avoids mistakes.

Based on the size of the field and its relation to other fields, decide whether you can group fields on the same line.



A desktop view of a loan application form. The form is contained within a light orange rounded rectangle. It features a blue header with a logo on the left and a user profile icon on the right. Below the header is a sidebar with a 'Pre-approval' section containing four steps: 'Prepare for an offer', 'Compare rates', 'Apply for a loan', and 'Finalize your loan', each with a lock icon. The main form area contains several input fields: a wide text field, a 'Full name' field with 'John' entered, a 'Last name' field with 'Doe' entered, a 'Street address' field with '123 Beach Street', a 'City' field with '123 Beach Street', and two optional fields: 'Apt / Suite / Floor, etc. (optional)' and 'Company (optional)'. An arrow points from the text on the left to the 'Full name' and 'Last name' fields.



A mobile view of the same loan application form, shown within a rounded rectangle representing a smartphone screen. The form is adapted for a smaller screen, with fields stacked vertically. The 'Full name' field is now a single wide field containing 'John Doe'. The 'Phone number' field is formatted with a country code dropdown (USA), a plus sign, and the number '(123) 456-7890'. The 'Credit card number' field is formatted with the number '1234 5678 9012 3456' and a 'VISA' logo. The 'Apt / Suite / Floor, etc. (optional)' and 'Company (optional)' fields are also present. The sidebar and header are simplified for the mobile layout.

Automatically format the spacing of the input as users type so that information is easily digested and understandable.

For example, automatically place spaces between credit card sequences, or plus signs, parentheses, and hyphens for phone numbers.

On mobile, generally stick to one field per row due to the small screen size.



Label text

Label text

Input text

Label text can move and change size from the middle of the field before input text is typed, to the top left corner to remain visible at all times.

Ensure your form is accessible to all.

Ensure the **correct color contrast ratio and accessible font sizes** are being used so your homepage is legible for those with visual impairments. The acceptable ratio for color contrast is 4.51:1 for a minimum font size of 14px in bold.

Ensure that form fields have both placeholder text and labels.

- Ensure that **placeholder text for each field is visible at all times**, and does not disappear once the user begins typing.
- Labels should appear in proximity of the field, such as below.

Use **alt text on images** that tell people basic and essential details about an image for those using screen readers.

Keep CTAs disabled and provide navigational flexibility.

To reinforce proper form input before submission, keep the main CTA disabled at a low contrast ratio until all fields have been properly completed. Transform the CTA's style and colors back to its normal state once all fields are complete.

The desktop view shows a form titled "Pre-approval" with a sidebar on the left containing steps: "Prepare for an offer", "Compare rates", "Apply for a loan", and "Finalize your loan", each with a lock icon. The main form area has a "Back" link and several input fields: "Full name" (John), "Last name" (Doe), "Street address" (123 Beach Street), "City" (123 Beach Street), "Apt / Suite / Floor, etc. (optional)", and "Company (optional)". At the bottom, there is a yellow "Save and exit" button and a greyed-out "Next" button.

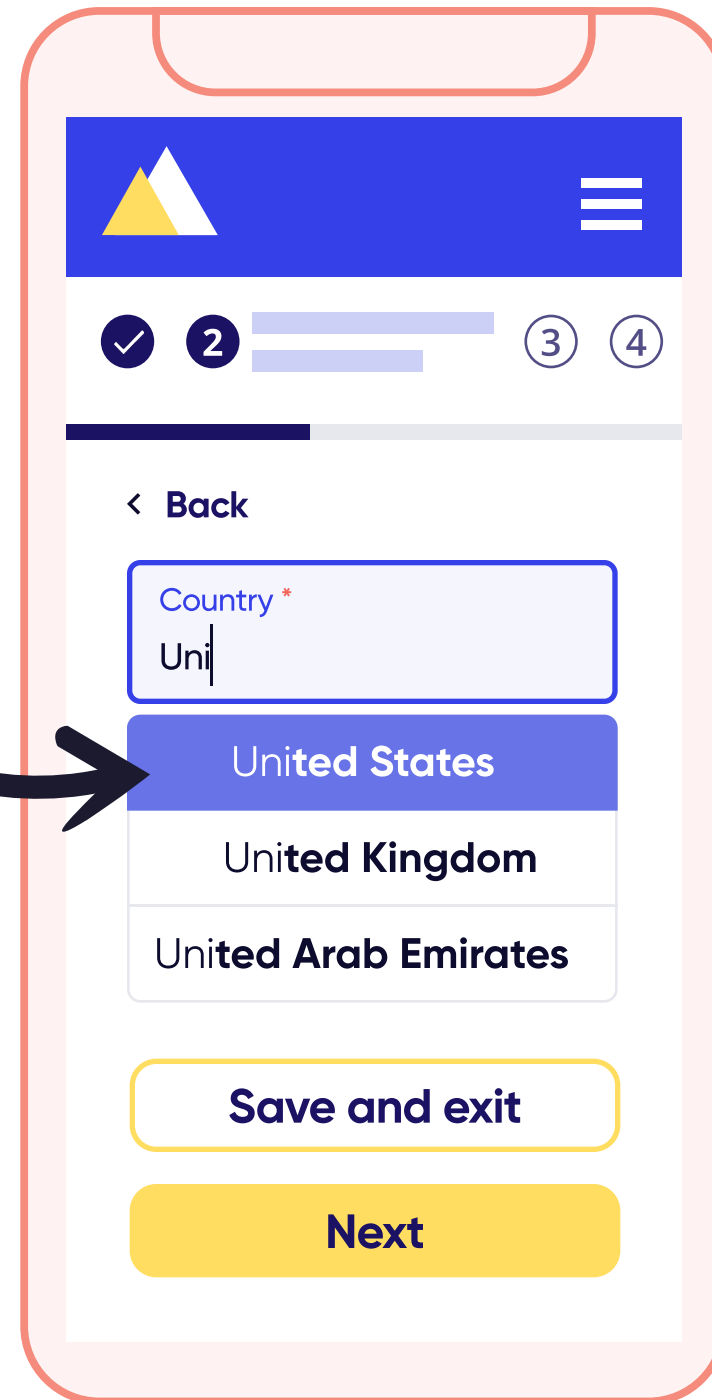
The mobile view shows the same form on a smaller screen. It includes a progress indicator at the top with steps 1, 2, 3, and 4. The input fields are stacked vertically. At the bottom, there is a yellow "Save and exit" button and a yellow "Next" button. An arrow points from the text on the right to the "Next" button.

If possible, allow users to save the form and come back to finish the application later rather than having to start all over again.

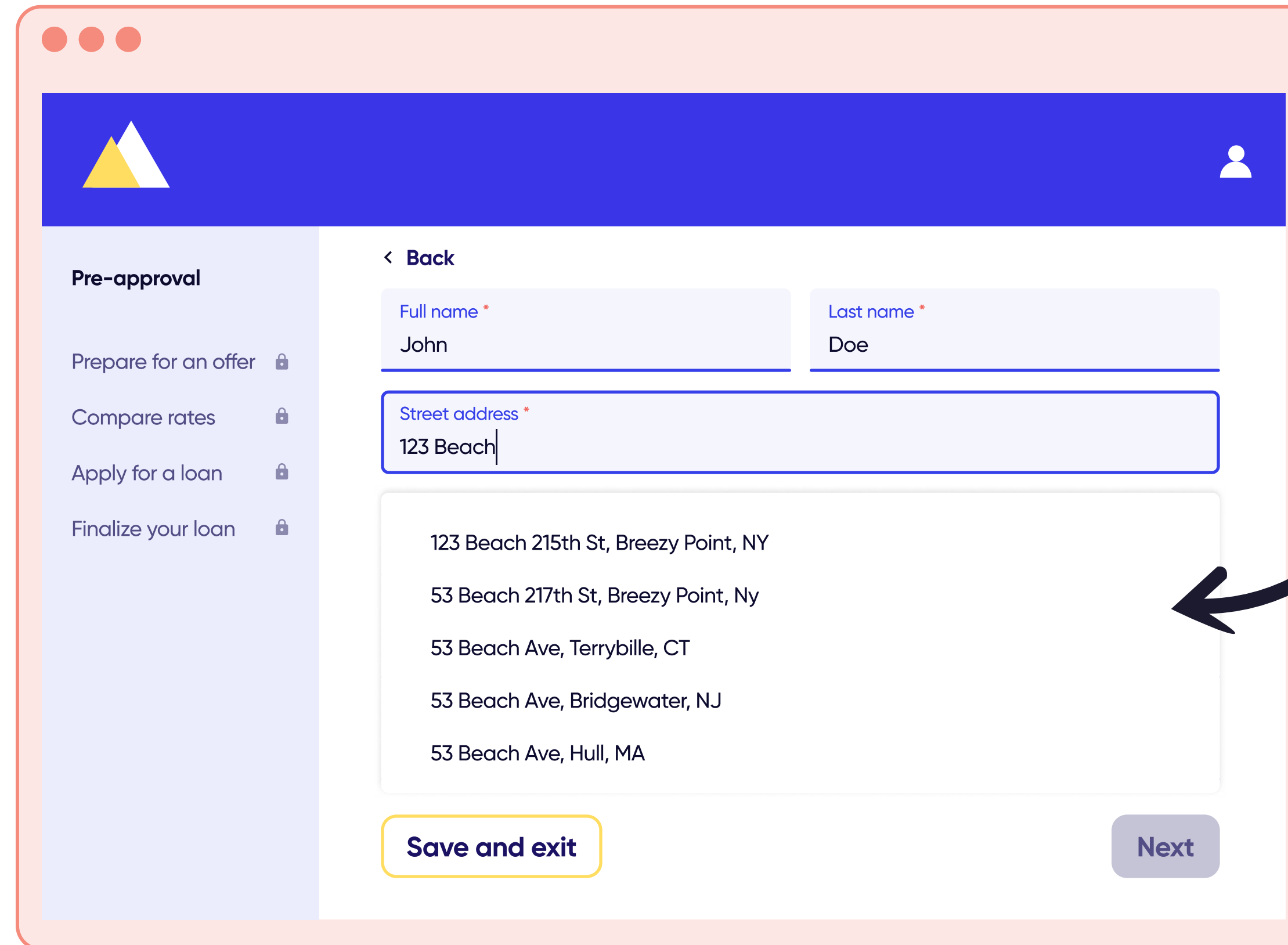
Additionally, refrain from having CTAs sticky to the bottom of the screen; this may encourage users to submit the form without completing all the necessary fields.

Auto-suggest or auto-fill fields where possible.

Help users automatically fill in common information fields where possible. For example, suggest country names as users type.



A mobile app interface showing a form with a 'Country' field. The user has typed 'Uni', and a dropdown menu is open, suggesting 'United States', 'United Kingdom', and 'United Arab Emirates'. Below the dropdown are 'Save and exit' and 'Next' buttons.



A desktop app interface showing a form with 'Full name' (John) and 'Last name' (Doe) fields. The 'Street address' field contains '123 Beach'. A dropdown menu is open, suggesting several full addresses: '123 Beach 215th St, Breezy Point, NY', '53 Beach 217th St, Breezy Point, Ny', '53 Beach Ave, Terrybille, CT', '53 Beach Ave, Bridgewater, NJ', and '53 Beach Ave, Hull, MA'. Below the suggestions are 'Save and exit' and 'Next' buttons.

Other common practices are automatically selecting an address which fills in the rest of the form fields, including town, state, and zip code.

Avoid using a calendar for date of birth.

Because users' birthdays may be very far from the current date, users may become frustrated by how much time it takes | to get to their year of choice from the default.

Consider using simple text fields or dropdowns that can host the appropriate number of characters. Don't forget to trigger an error message if users attempt to put characters other than numbers.

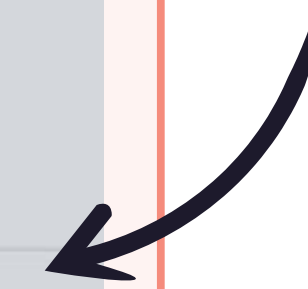


Month: Janu | Day: | Year: |

Month: January | Day: 25 | Year: 2022

Month	Day	Year
April	22	1987
May	23	1988
June	24	1989
July	25	1990
August	26	1991
September	27	1992
October	28	1993

Consider using a native date picker (dialog box). Users can easily and quickly scroll through field options.



Clearly state formatting requirements.

If a field has specific formatting requirements, it should be **clearly stated and visible** prior to the user attempting to input data. Avoid only surfacing requirements after the user makes an error.

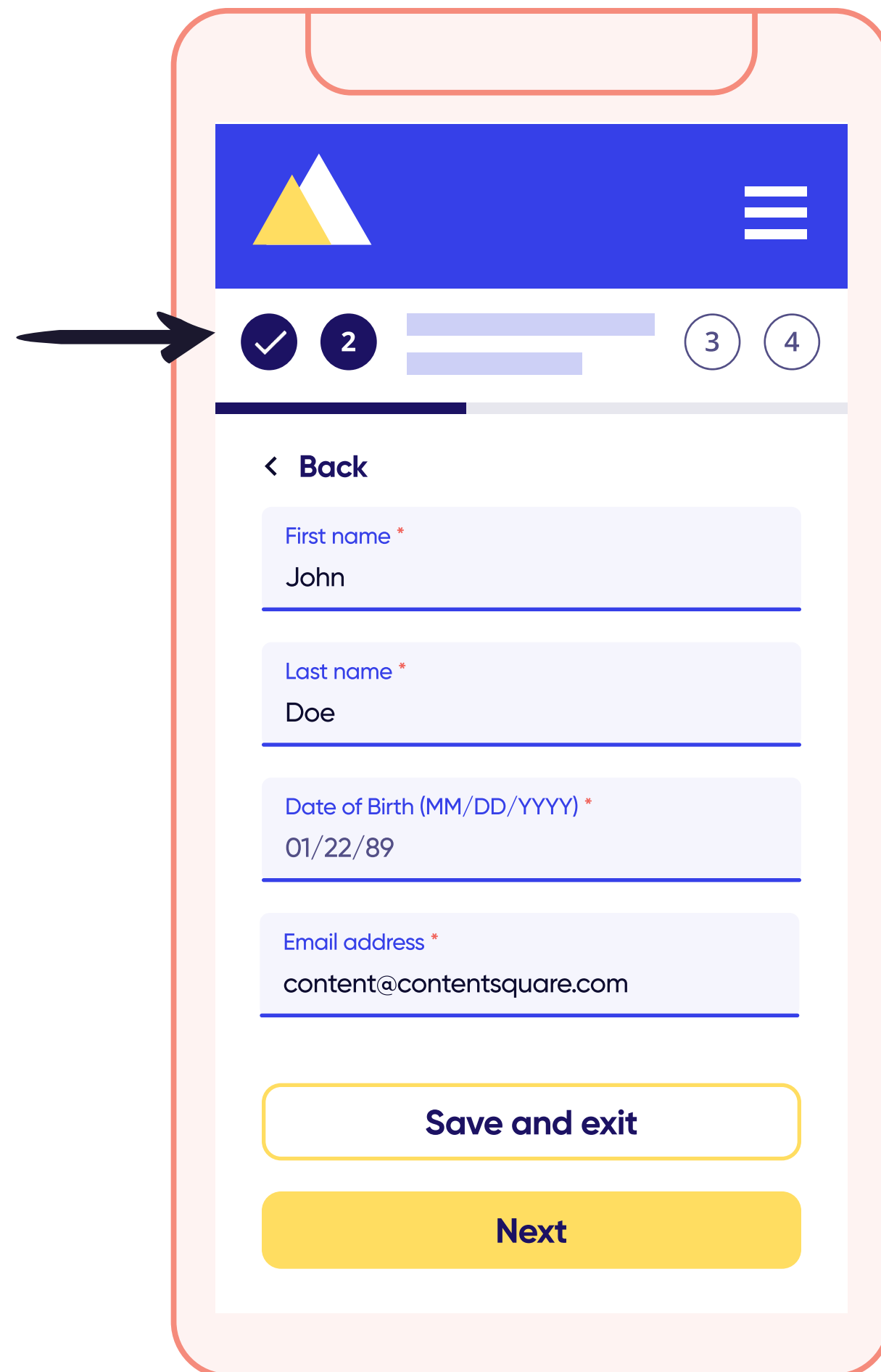
The desktop view shows a 'Pre-approval' sidebar on the left with steps: 'Prepare for an offer', 'Compare rates', 'Apply for a loan', and 'Finalize your loan'. The main form area has a 'Back' button and two input fields for 'Full name' (John) and 'Last name' (Doe). Below these is a 'Create a password' field with a visibility toggle (eye icon). The password requirements are listed below the field: a red 'X' for 'Password must contain at least 8 characters', and two green checkmarks for 'Password must contain at least one letter and number' and 'Password must contain at least one of these special characters: ! @ # \$ % &'. A 'Confirm password' field is also present with the placeholder 'Enter your password again'. At the bottom are 'Save and exit' and 'Next' buttons.

The mobile view shows the same form but with the password requirements hidden. The 'Create a password' field is filled with 'C@ntent' and has a visibility toggle (eye icon with a slash). The password requirements are only visible below the field, after the user has entered the password. The requirements are: a red 'X' for 'Password must contain at least 8 characters', and two green checkmarks for 'Password must contain at least one letter and number' and 'Password must contain at least one of these special characters: ! @ # \$ % &'. The 'Next' button is visible at the bottom.

Allow users to **unhide their password** as they type to avoid any mistakes when creating a password.

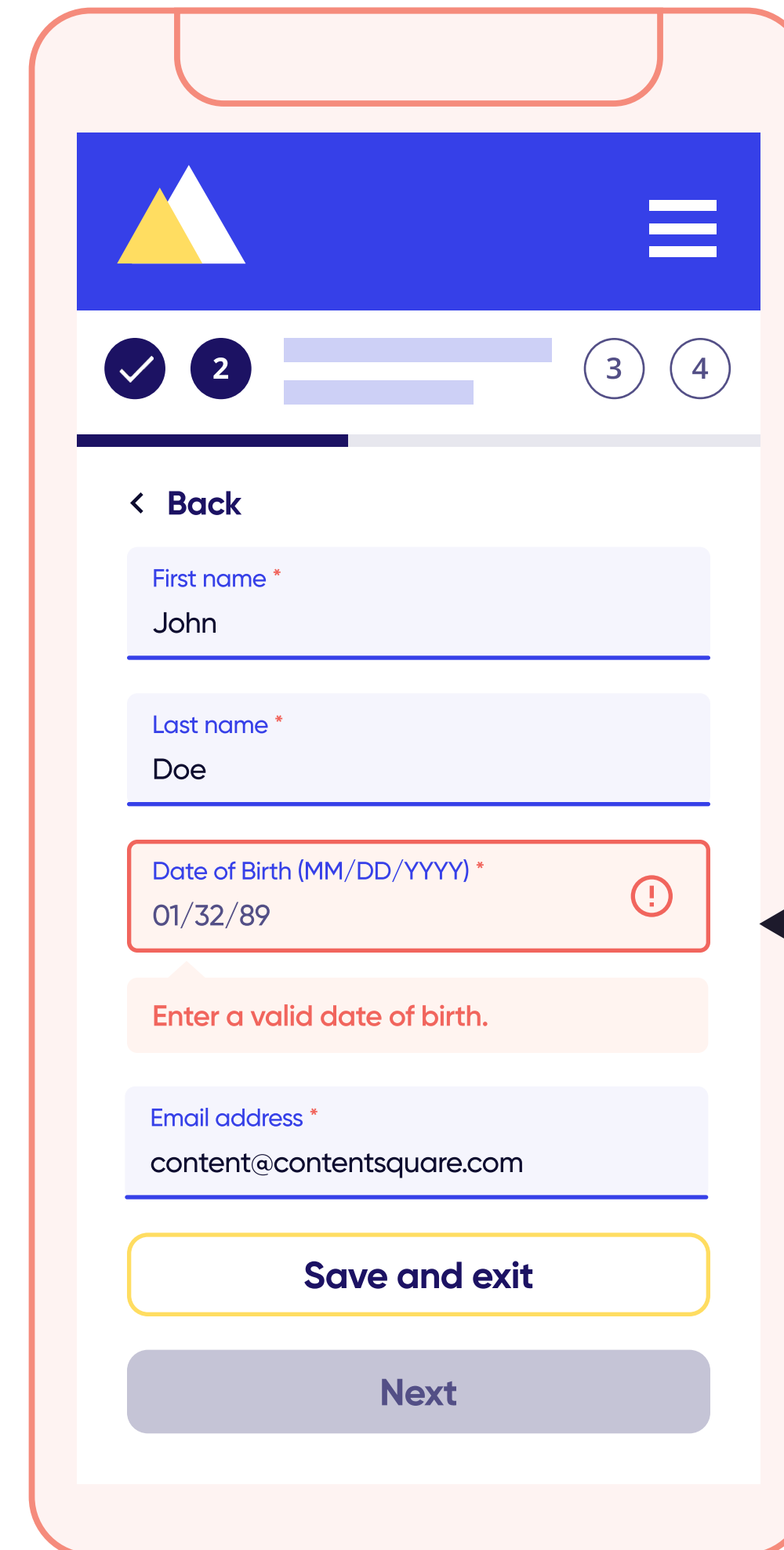
Implement live, inline form validation

Validate whether form fields were completed correctly or incorrectly **as the user fills out the form**, not after they move on or submit.



A mobile form interface with a blue header and a progress indicator at the top showing a checkmark and the number 2. The form contains four input fields: "First name" with the value "John", "Last name" with the value "Doe", "Date of Birth (MM/DD/YYYY)" with the value "01/22/89", and "Email address" with the value "content@contentsquare.com". Below the fields are two buttons: "Save and exit" and "Next".


When indicating errors, don't rely on color alone; provide both text and visual indicators that something has been improperly filled to accommodate users with accessibility needs.



A mobile form interface similar to the first one, but with an error. The "Date of Birth" field is highlighted with a red border and contains a red exclamation mark icon. Below the field is a red error message: "Enter a valid date of birth." The "Next" button is disabled and greyed out. The progress indicator at the top shows a checkmark and the number 2.

What not to do during live form validation

Full name *



Premature validation

Wait until users are finished typing their answer before validating their response. Premature validation which scolds the user before they've finished can confuse users about errors that aren't there.

Enter a valid date of birth.



Outdated error messages

Error messages are not removed even after the user has fixed the problem, potentially prompting further attempts to fix it.

Add specificity and instructions to error messages.

Be specific with error messages and provide instructions to help guide the user in solving any errors.

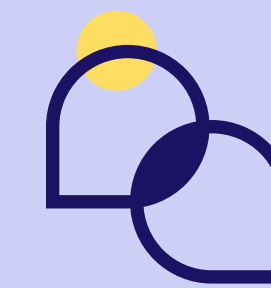
We're sorry, there is an error with your email and/or password. Remember that passwords are 4 to 12 characters long, including letters, numbers, and special characters.

Email address *
content@contentsquare.com

Create a password *
●●●●●●●●

[Forgot password?](#)

Sign in **Sign up instead**



Other great examples of specific and instructional error messages to help your users combat frustration:

'There is no account associated with this email address—try a different email address or create an account instead.'

'We encountered an error! As a reminder, use the email address you signed up with as your Account ID.'

'This promotional code has expired.'

'Enter a valid birthdate or adjust the format to MM/DD/YYYY.'

Help users navigate errors when they occur.

Users may encounter multiple errors at a time. Anchor links can be a simple way to help users navigate more than one error, especially on mobile screens where all the errors may not be immediately visible.

The image shows a mobile app form with a blue header and a progress indicator (1-4) at the top. The form contains several input fields: 'First name' (filled with 'John'), 'Last name' (empty), 'Street address' (filled with '123 Beach Street'), and 'City' (filled with 'New York'). A red box highlights the 'Last name' field. A red circle highlights the 'Enter a valid phone number' error message next to the phone number field. A red box also highlights the 'Enter a valid date of birth' error message. A 'Back' link is visible at the top left of the form area.

The image shows the same mobile app form after the errors have been addressed. The 'Last name' field is now filled with 'Contentsquare'. The 'Phone number' field is filled with '(123) 456-789081'. The 'Enter a valid phone number in the format XXX-XXX-XXXX.' error message is still present. The 'Next' button is highlighted in yellow, indicating it is the next step in the process. The 'Save and exit' button is also visible.

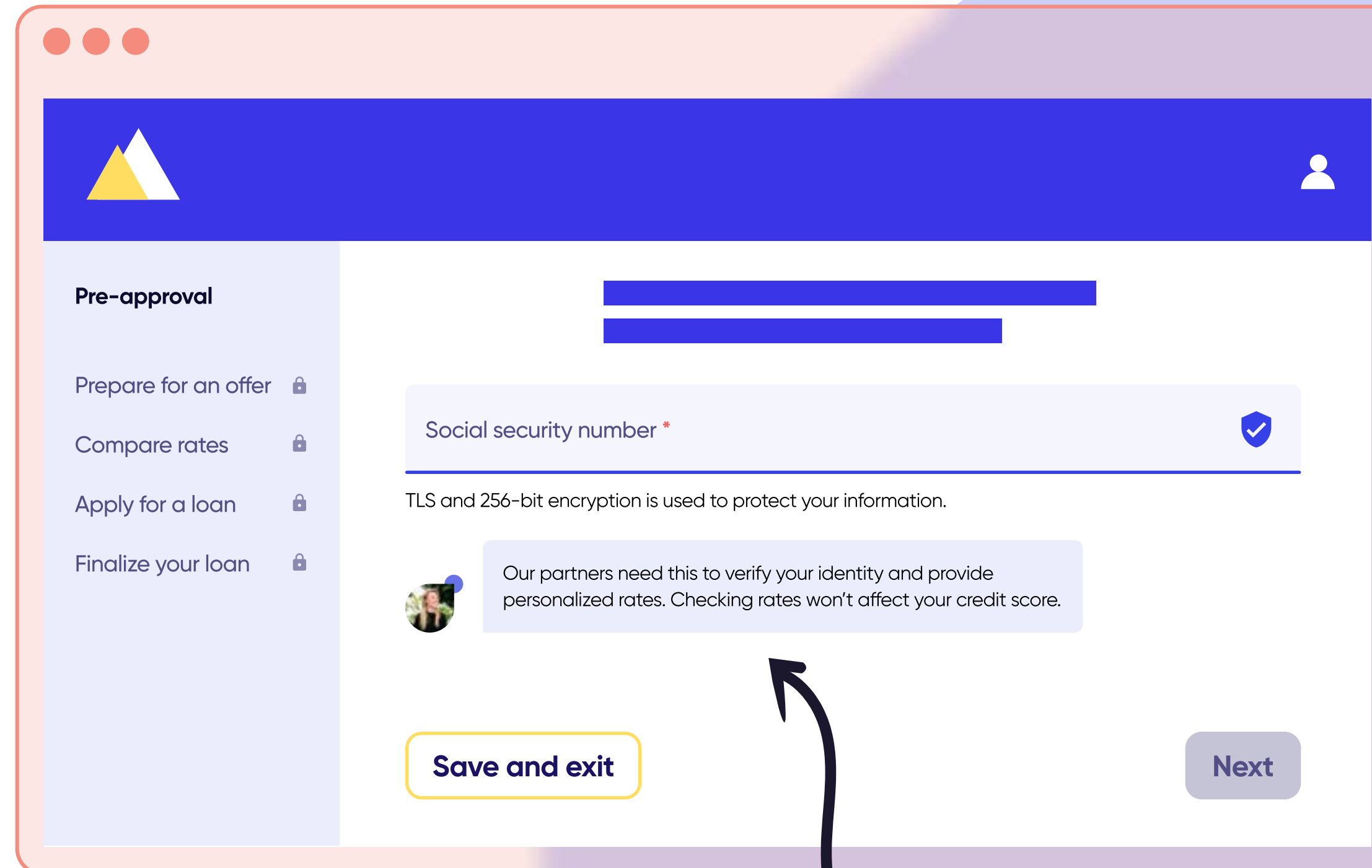
Try to avoid refreshing the page, and instead alert users with a message as to which errors should be addressed before continuing.

Provide helpful information and reassurance.

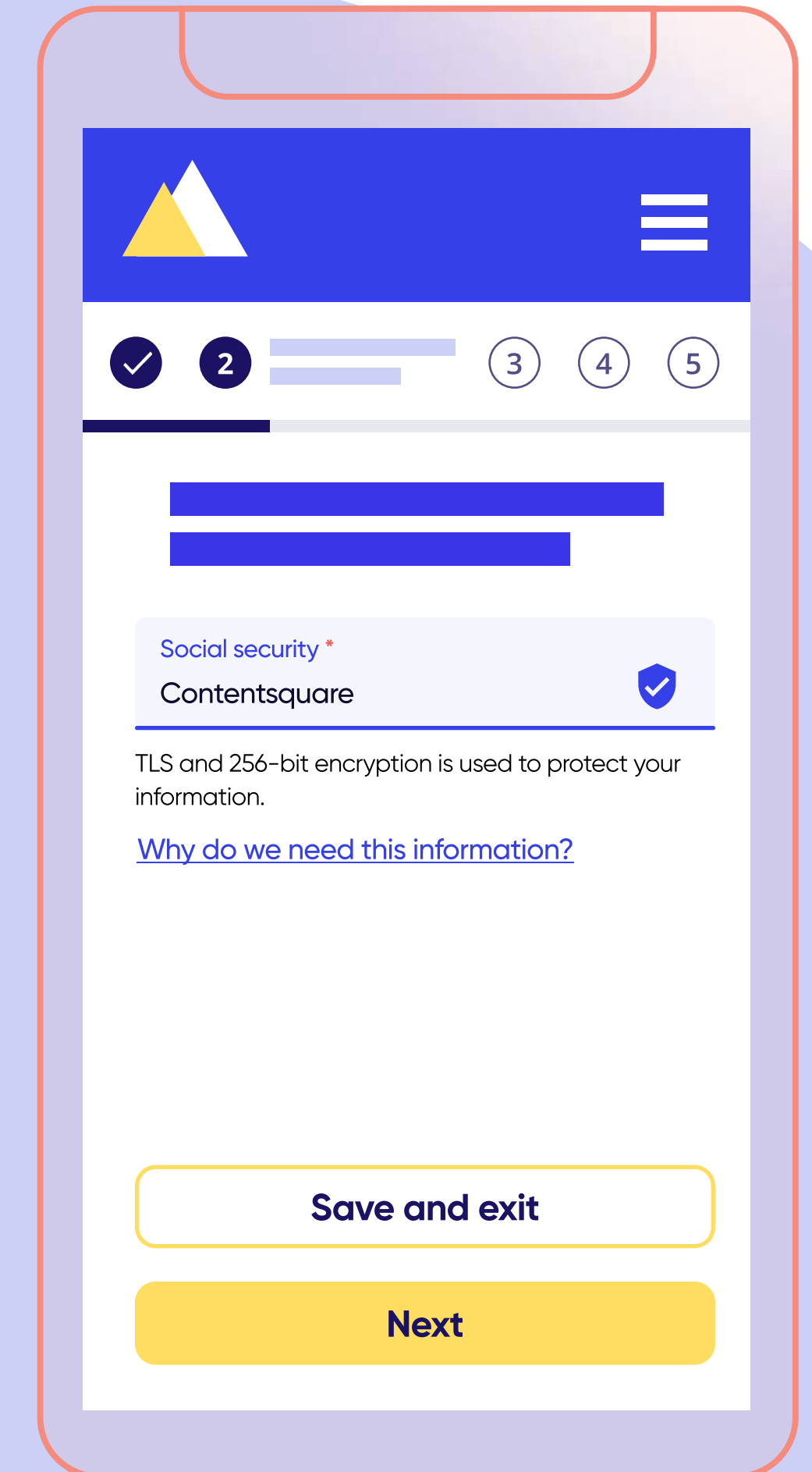
For difficult and complicated questions or those that involve personal information, provide helpful information or answer common questions.

Use **tooltips** to help users access specific answers or access FAQs. Avoid redirecting them to a new page and disrupting the journey.

Explain to users why you require sensitive information, especially when related to privacy concerns.



Explore ways to make tips feel approachable and easy to understand, with images or language, or both.



Remember!

Question order matters.

Follow how the user thinks. Ask easy questions first. Ask general before personal.

Avoid asking for information that is not absolutely required for application submission, **or could be retained later.**

How NatWest optimized its mortgage calculator tool to drive an additional £500k per annum

The context

The NatWest Mortgage Calculator Tool is a crucial first step in helping customers on their home buying journey, enabling users to get an agreement in principle (AIP) online.

With over 2.5m completions in the tool each year, AIPs are the lifeblood of NatWest's mortgage business. Even incremental increases in completion rates could hugely impact performance, so it was important to remove as many UX frustrations as possible to increase the number of people completing an AIP online.

In their own words

"Contentsquare is at the heart of our decision-making process. Since it's been introduced to the bank, it has rapidly become a key tool for prioritizing wins for the business and for the customer. Without it, we would have missed a lot of opportunities."

Nathan King

Digital Experience Manager



The insight

Contentsquare analysis into advanced customer behavior data revealed the **'Compare' functionality was only being used by 6% of customers**. This highlighted an opportunity to replace the rarely used feature with a CTA to get an agreement in principle instead.

Contentsquare recommended relegating links to the "Compare" feature and instead increasing the prominence of the "Get an Agreement in Principle" CTAs throughout the journey.



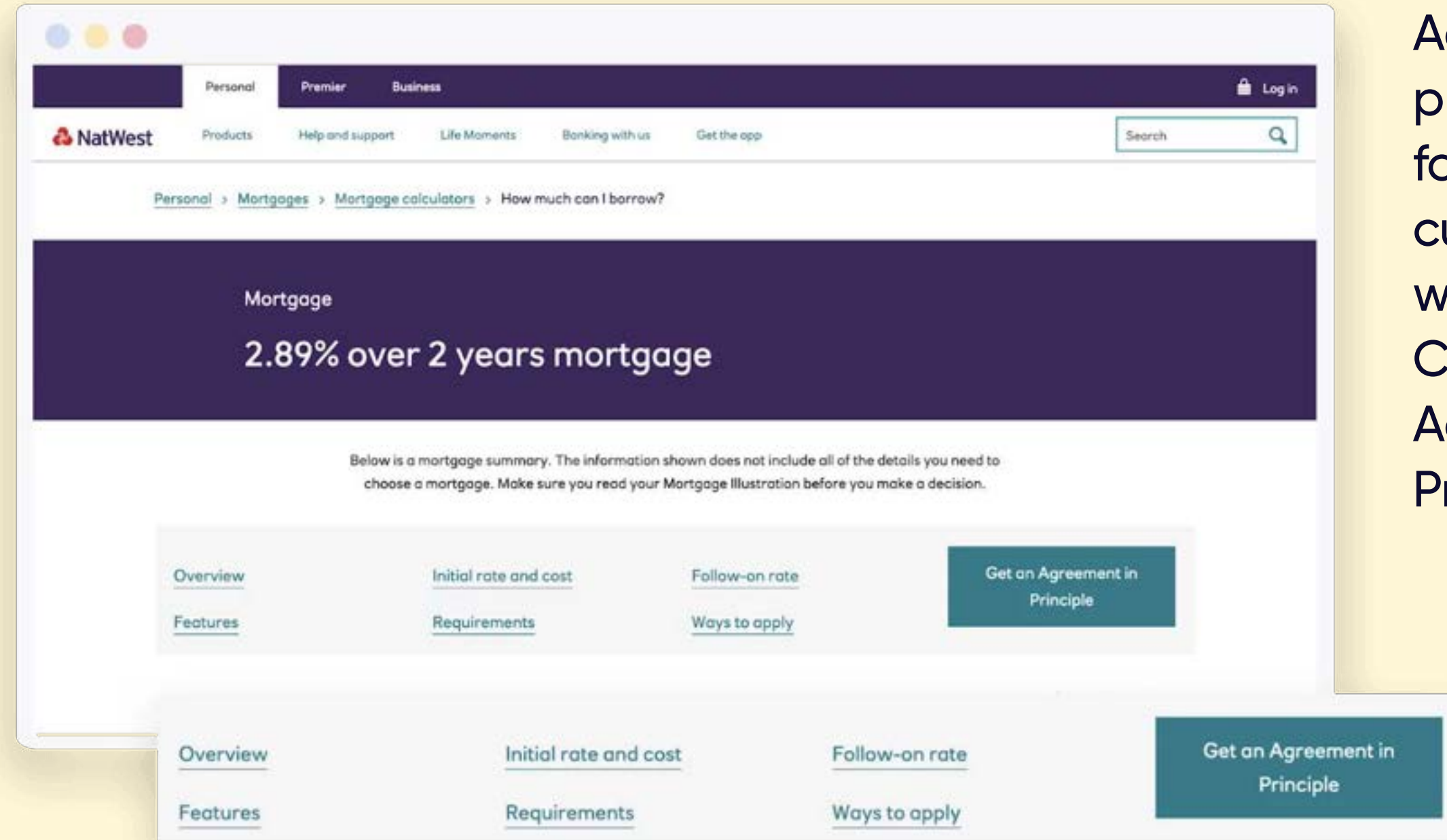
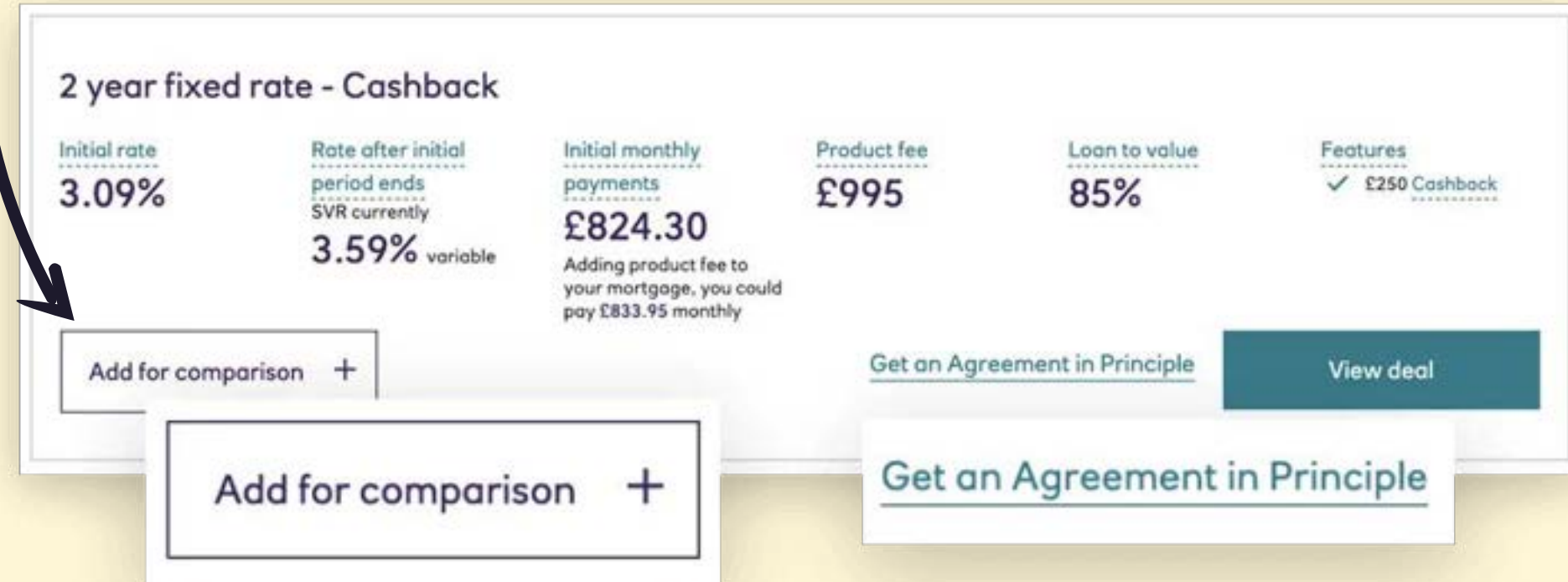
Compare the mortgages

2 year fixed rate - Green Mortgage – A or B Energy rated properties only - Cashback (2.89%) ×	5 year fixed rate - Green Mortgage – A or B Energy rated properties only - Cashback (2.99%) ×		Compare (2) mortgages
			Cancel comparison

The solution

Thanks to Contentsquare analysis, the digital team at NatWest made the following changes:

Shifting the "Add for Comparison" button across and instead adding a direct link to "Get an Agreement in Principle" next to the main CTA.



Adding new product navigation for the "Apply" customer journey, with the primary CTA to "Get an Agreement in Principle."

The results

20%

in customers completing an AIP

\$500k

estimated additional revenue

Ensure fast load times

Load times will make a huge impression on visitors to your site, so ensure your site loads fast.

Google also uses a range of website performance criteria to rank sites in the search engine results page (SERP), so ensuring fast load times is now a key ranking factor for search engine optimization (SEO) too.

Make sure the search field and the main navigation are the first things that load when users get to the homepage.

Run a speed analysis of your site to determine what issues may be slowing it down, measuring metrics such as;

- The Largest Contentful Paint (LCP), which measures when the largest image becomes visible, should be less than 2.5 seconds.
- Total Blocking Time (TBT), which is the total time where the browser is blocked long enough to prevent user input responsiveness, should be less than 300 milliseconds.
- Cumulative Layout Shift (CLS), which indicates visual stability, should be less than 0.1 seconds. The more the page layout has shifted and the bigger they are, the higher the value.
- Time to First Byte (TTFB), which indicates the time elapsed between the sending of the web page request and the reception of the first data by the user, should be less than 200 milliseconds.
- The Speed Index, which is the metric for the rendering speed of the above-the-fold area of the webpage, should be less than 1000 seconds. The faster the rendering the smaller the speed index is.



Conclusion

The layout and functionality of your online forms can greatly impact your customers' experience with your brand.

If forms are accessible to everyone, simple to complete and follow an intuitive flow, completions will be higher. And so will brand loyalty and trust. The easier you can make it for your customers to engage with you, the better relationship you'll be able to build with them.

True success, then, relies on having an in-depth understanding of your customer's online behavior and then optimizing the experience in line with your data. And for that, you need more insights than your typical analytics tools can provide.

Remove the guesswork with Contentsquare

Contentsquare Digital Experience Analytics Cloud is the only experience analytics platform that delivers the agility, depth of insights, and scalability required to master the new digital reality of constant and unpredictable change. Our platform enables brands to understand the digital body language of their consumers across the entire customer lifecycle so they can deliver perfect customer experiences.

With intuitive applications for both business and operational users, brands have quick access to deep insights and actionable recommendations that help to drive business impact and differentiate their brand.