A resource guide book for

Designing forms that actually generate leads.

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CallRail

Introduction

Lead forms: You almost certainly use them, but are you confident that your forms as effective as they could be?

There's no one-size-fits-all formula for designing a successful lead form. However, there *are* some best practices you should follow depending on your specific business, campaign, website, or audience.

In this ebook, we'll go over three of the main considerations for creating an effective lead form: Question selection, user experience, and form tracking.

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Choosing questions the right way

Chances are, you'd think twice about offering a ton of personal information to a stranger you just met at a bar -- even if you liked them. The same goes for potential customers filling out your lead forms: If you ask for too much sensitive information, you'll scare them off even if they're a good match.

To make sure as many prospects as possible complete your forms, keep in mind the following do's and don'ts when choosing which questions to include.

Do: Consider quality vs. quantity of leads

In deciding how many questions to include on your landing page forms, consider whether the quantity or quality of leads is more important for your business.

Shorter lead forms tend to generate a higher quantity of leads because they're less time-consuming to fill out. This also means you'll see a higher percentage of unqualified leads, who are willing to offer a small amount of info in exchange for an incentive.

On the other hand, if you have a longer form with more questions, fewer people will take the time to complete it. But those who do take the time to finish are indicating they feel strongly about the incentive you're giving them, and are that much likelier to be high-quality leads.

Don’t: Ask new people for too much too soon

It’s understandable that marketers want as much information as possible on their potential customers in order to run targeted and personalized campaigns. That said, it's important to be empathetic towards people new to your brand who may be reluctant to share their personal information.

A general rule of thumb is to only ask new web users for the information you *really* need. Just asking for a full name and email address is the safest option for prospects who are new to your brand. A mandatory text field asking them to describe their pain points is a slightly less reliable (but still reasonable) option. But if you ask for additional information, like their phone number or industry, making it optional can help boost completions and conversions.

Do: Consider funnel stage

Less might be more when it comes to new prospects, but you have more leeway with existing leads, prospects, and customers. Since they already gave you their name and email at a minimum, you can be confident asking for additional information on subsequent forms, such as industry or company name.

Pro tip: See if your CRM has progressive form-fill capabilities. These features will automatically complete whatever information is already stored in your CRM for named leads who are revisiting forms on your site. When they don’t have to fill out the basics all over again, you increase your chances of their answering additional fields with more valuable information.

"Attractive design makes users more patient and tolerant. And when it comes to form-filling—a task that often causes impatience and frustration—that is crucial."

B. Kaan Kavuştuk - *UI Developer at JotForm.*

Mandatory Fields

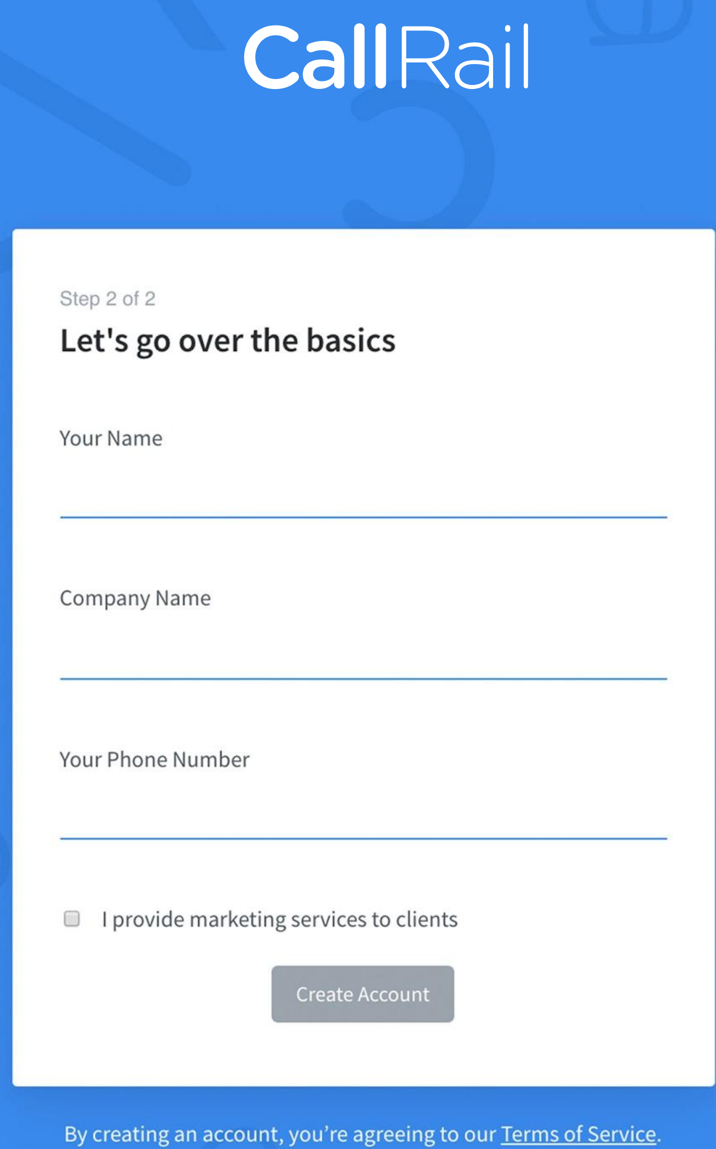
- Full Name
- Email Address

Reasonable Fields

- Pain points text box
- Company Name

Optional Fields

- Phone number
- Company size
- Industry
- Revenue



Be specific with your words.

Any user experience writer will tell you that minor copy changes can make a huge difference. The same goes with the questions you ask on your forms: While common form questions like those below often work just fine, consider these slightly tweaked alternatives depending on your goals and audience.

Instead of:
What can we help you with?

Try:
What is your biggest challenge?

Rephrasing the question this way implies you're offering solutions based on your expertise, instead of expecting the visitor to tell you their needs. This is especially relevant for agencies taking on clients who may not yet understand where their marketing is going wrong.

Instead of:
Annual revenue

Try:
Company size

Unless the form filler is a high-ranking employee, chances are they don’t know the answer to this question off-hand. Company size is an easier question for most people to answer, while still being a good proxy for revenue.

Instead of:
Company name

Try:
Company website

Your sales team will be researching company websites anyway, so you might as well have that website link ready to go in your CRM. Additionally, asking for a company website will help you catch companies whose domain name doesn’t line up with their company name, or consultants and freelancers who don’t really have a company name at all.

Do: Offer a compelling incentive

If you're asking your site visitors to offer their personal information, you need to make sure you're offering something worthwhile in return. Depending on your business and marketing goals, that could be a free ebook, webinar download, or consultation.

However, remember that "free" does not inherently mean "compelling". Keep in mind who your audience is and where in the buyer's journey they'll most likely be seeing your incentive. If they're new to your product, for example, a hard sell ebook on your product features would be too much too soon.

Instead, opt for offering an ebook on a pain point related to your product. Those who download it will get helpful *and* free information that encourages trust in your brand's expertise to help guide them down the sales funnel.

Crafting the best user experience

Even if you ask the perfect questions, a bad user experience can hinder the success of your forms. Keep in mind these design tips to make submitting forms as easy and intuitive as possible for your potential customers.

Stay above the fold

"Above the fold" means placing content at the top of the page, so visitors don't have to scroll down to see it. (1) Research has demonstrated that website visitors are most engaged when viewing content located above the fold, so it's worth placing your forms above the fold to encourage conversions.

(1) 7 Ways to Increase Your Form Field Conversion Rate (by Up to 672%)
https://neilpatel.com/blog/the-definitive-guide-to-lead-generation-form-optimization/

Optimize for mobile.

More users than ever are browsing websites and filling out forms on their mobile devices these days, so mobile-friendly contact forms are a must.

When designing forms for mobile, make sure that all of the fields can fit on-screen without scrolling. (Users often abandon forms if they have to scroll left or right to read them.) It's also wise to stick to single-column forms that highlight input fields as users fill them out. This helps prevent confusion while navigating the page, and helps guide the user down to the call to action button.

Handle error messages with care

Error messages should use natural and humanizing language, clearly point out errors, and never blame the user. Make sure it's clear what users need to do to fix the errors, and use inline validation instead of displaying every single error at the top of the page.

Invest in A/B testing

A/B testing can show you with certainty which forms are performing best. While we recommend using it to figure out the ideal number of questions to ask, you can also A/B test design elements and copy, so long as you stick to one variable at a time.

(2) This luxury home-builder used A/B testing to improve form conversions by 166%.

(2) Reducing Form Fields
https://www.slideshare.net/marketingexperiments/reducing-form-fields

Use text area and select box questions sparingly.

Not all form field types are created equal. According to a (3) study from HubSpot, every additional select box field you add causes your conversion rate to go down by an average of 3.2%. Text areas are even worse -- you're looking at an average of 5% decrease in conversion rate per extra text area.

If you can answer your question with a single line field, do it. But if you must use select boxes or text areas, it's wise to only use one of each per form.

(3) Which Types of Form Fields Lower Landing Page Conversions?

https://blog.hubspot.com/blog/tabid/6307/bid/6746/Which-Types-of-Form-Fields-Lower-Landing-Page-Conversions.aspx

(4) “Improving lead quality is the most important objective.”

(4) 70% of B2B Marketers Want More Quality Leads
https://www.convinceandconvert.com/digital-marketing/quality-leads/

Tracking forms to the source.

It’s crucial to know whether or not your marketing dollars actually generate form submissions. But if there’s any question you shouldn’t put on a form, it’s “Where did you hear about us?”

That’s not because it’s a bad question. Rather, it’s because there are robust form tracking tools on the market that answer that question far more effectively.

What is form tracking?

Form tracking is a marketing tool that reveals every touchpoint that resulted in someone filling out a form. This comprehensive view of the buyer’s journey lets you see where (and how much) every marketing channel contributes to a form submission, giving you the insight you need to maximize your marketing budget.

Why is form tracking necessary?

Let’s say you run a law firm, and your marketing efforts include paid search ads, public transit ads, and Facebook ads. Before form tracking, you included “Where did you hear about us?” on your form and found most people identified public transit ads. As a result, you invested more money into those ads at the expense of the other channels. You expected to see a boost in lead form submissions, but only found an increase in website traffic.

What gives? Well, “Where did you hear about us?” only tells you so much. In today’s digital marketing landscape, people may interact with your brand through multiple channels before ever filling out a form. “Where did you hear about us?” doesn’t take this into account, and gives you an incomplete picture of your marketing as a result.

That’s where form tracking comes in. Instead of attributing each form submission to a single channel, it reveals every step the user took before submitting a form. So, your law firm may dig into the data and find that your public transit ads are great for getting people to your form landing page, but most people fill out your web form weeks later via paid search ads. Armed with this information, you'll have a deeper understand of the role each marketing channel plays, and can allocate your marketing spend accordingly.

The perks of tracking your forms with CallRail.

With CallRail’s marketing attribution platform, form tracking is just a Javascript snippet away. Simply add it to your site, and we’ll begin tracking your form data immediately for you to review in a user-friendly dashboard. You can make forms using our form builder, or we can track your own custom forms. Once you integrate CallRail with your CRM, you'll also see which channels are generating the most form leads that convert to customers.

Even better, CallRail tracks your calls and texts, too. Our software gives you a complete picture of your marketing performance across all of your online and offline channels, all in one dashboard. You’ll have the data you need to make sure you only spend money on what works.