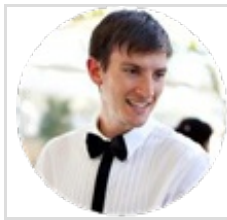# Make better web forms 🔗

Guest Author:

Edward Bell
Client Success Manager & On-boarding Coach
Launch Business Automation

Web forms are often overlooked or oversimplified because they're 'necessary'. But getting them right can mean the difference between floods of new leads vs a trickle, or high-quality data vs muck.

Web form Use Cases:

- Contact Us
- Lead Magnet
- Consultation Request
- Customer Questionnaire
- Quick Quotes
- Surveys
- Abandon Cart or 2-step web forms

High-Level Overview:

- Best practices for web forms
- What to include for each type of web form

These are crucial to the lifeblood of your business and turning your database into a goldmine: the more data you have, the richer your database. Have a read to see how you can get more juice from your web forms below:

1. Have ONE purpose for your web form. Let this purpose guide your field choices
   For example:
   - Is this for brand new prospects, existing clients, or both?
   - Is this for an expression of interest, lead magnet optin, contact us or something else?
   - Do I want high volume opt-ins or more quality responses?

2. Choose if you want high volume opt-ins or more quality data.
   - Use less fields to potentially get more submissions (make it easier to complete and submit).

- Use more fields for potentially more extensive data capture (gets higher commitment and trust from them upon submit and completion.)

3. Use clear field labels to guide your prospect or client through the form. This helps reduce 'web form friction' (makes it easier for them to complete and submit the web form)
    - Ask questions. E.g. 'How can we help?' instead of 'Comments:'
    - Include instructions. E.g. ctrl + click to select multiple options
    - Give examples. E.g. Date fields could be followed by 'e.g. 11/9/1987'
    - Ask yourself: if I'd never seen this before… would I know exactly what to put in this field? If 'no', take it one level clearer.

4. Divide your form into clear sections with headings
   For Example:
    - Your Contact Details
    - Your Project Details
    - Key Company Info
    - Past Experience
    - Your Contact Preferences
    - Where Would You Like Us To Send It?

5. Auto-populate wherever possible. This is a great way to get an 'easy opt-in' because it fills out the web form with all the details they have already given you, which means they can simply click to submit straight away.
    1. Double click to edit your web form
    2. Once in, click the **Settings** tab
    3. Make sure the box is ticked to say *Auto-populate this form with a Contact's information when visited from an Infusionsoft-delivered email*

6. **Important Note!** This will only work as long as the data already exists inside Infusionsoft. E.g. they have already given you their email address, first name, etc. AND if they arrive at the web form from an Infusionsoft-delivered email (not by clicking around on your website.)

7. Create a personal "I remember you" touch by hiding the email field when your prospect is clicking through from an Infusionsoft-delivered email. This means when they click through from the email, you don't need to waste any of their time confirming or gathering contact details again. This allows you to get creative, ask juicier questions and gather priceless data.
    1. Click on the **Field Snippets** tab.

    2. Drag in a **Hidden Field** to the top of your web form

3. In the popup that appears, select **Email** from the dropdown

4. Leave the text field underneath blank (this will allow the field to automatically grab your prospect's email address

8. **Important!** This will not work for cold traffic to your web form – they must click through from an Infusionsoft- delivered email e.g. broadcast or campaign builder email. You must ensure that the **auto-populate** box is ticked in the 'settings' tab in your web form for this to work. See Step 5 for instructions.)

9. Use radio buttons to segment your list so you can send relevant follow up emails to them
    1. Drop in a radio button snippet on your web form
    2. Edit the radio button label and options to suit your purpose (e.g. What kind of pet do you have? Options: Dog, Cat, Bird, Fish, Rabbit… etc)
    3. Apply tags depending on the option they choose by clicking the rectangular **Tag** button to the right of each option.
    4. Exit your web form builder and drop one sequence for each radio button option onto the canvas (with a little breathing room just to the right of your web form goal)
    5. Rename your sequences so they marry up with your web form options.
    6. Hover over your web form goal and drag the green arrow appears onto one of the sequences, then repeat for each sequence.
    7. Double click on the decision diamond that appears
    8. Click on the **+Rule** button for each sequence
    9. Click on the **choose** link and select **form submissions**
    10. Then choose the radio button option that matches the sequence title, then choose **is selected**
    11. Repeat for all sequences
    12. Exit the decision diamond and craft emails in each sequence relevant to the option they have chosen on the form