

## chapter 8

# forms

*“Why, a four-year-old child could understand this.  
Run out and find me a four-year-old child. I can’t make heads  
or tails of it.”*

— Groucho Marx, *Duck Soup*

Forms are a way of life on the web. They’re on shopping sites, banking sites, social networking sites, and horoscope sites. They can be as simple as a humble login form or as critical and far-reaching as a financial account management form.

Organizations love forms. Forms put the burden of information gathering on the visitor, thereby saving the organization time and customer service costs. Visitors, however, aren’t so enamored with forms, generally viewing them with emotions running the unhappy gamut from boredom to impatience.

Why is this? One reason is that forms ask visitors to do difficult things, like give up personal information, read fine print, look for documents, and remember passwords. All the while keeping an eye out for phishers, identity thieves, and e-mail abusers.

Another reason is that forms are fundamentally boring for visitors. Forms don’t sing, dance, or research potential stock investments; they’re the means to an end, not the end itself. The fun, rewarding stuff that visitors want usually comes after a form is completed and submitted.

Since forms are crucial to many online processes, making them more appealing and easier to use results in widespread benefits that cascade through to other portions of a site. If forms are the road by which potential

leads and customers reach you, then smoothing out the potholes makes a world of difference to the journey.

## Typical Form Goals

A form's primary goal is to be filled out and submitted, and this basic goal supports other larger purposes or processes. For example:

Form Goal	Example
Collect marketing information	A newsletter sign-up form
Guide visitors through a process	A service selection wizard
Enable a transaction	A form to transfer funds from one account to another
Communicate	A contact or feedback form
Verify identity	An account login form
Manage customer support requests	A trouble ticket form

## Visitor Questions

Visitors have two types of questions about forms: those asked when arriving at a form and those asked while filling one out.

### Arrival questions

When visitors arrive at a form, their questions are about appearance, reasonableness of the information requests, and security. Visitors attempt to answer these questions with a few quick glances. Where do I start?

- Does it look easy?
- Will it take a long time?
- Are there a lot of steps in the process?
- Is the outcome worth the effort?
- Is this page secure? Is my browser “lock” icon visible?
- Does it ask for a reasonable amount of information?

### Process questions

As a visitor fills out the form, questions about privacy, clarity, and process arise. A form page should proactively provide information that answers these questions.

Some forms, of course, are complex and extend across several web pages. After the first few form fields, visitors tend to get into a form-filling “groove” and don’t question each separate step in the process as closely as they did the first step. They can still be derailed by poor form design or unanswered questions, though.

- Are the questions reasonable? Do they fit the situation?
- Is my information secure and private? How private?
- I don’t understand this question; is there an explanation?
- I’m not comfortable filling out the form online; is there another way?
- I’m having trouble with the form; how do I get help?
- What happens when I click the Submit button?
- How much more do I have to go?

## Key Metrics for Forms

There’s one form metric that’s more important than any other:

- **Percentage of form submissions.** The percentage of visitors to a particular form page who successfully complete and submit the form on that page.

### **Example:**

*During August 1,000 unique visitors reach Form Page A. During the same period, web analytics show 370 unique clicks on the Submit button on Form Page A. The conversion rate for this form is*

$$370 / 1,000 = 37\%.$$

## Considerations

If a form is segmented across several pages, look at the submission percentage for each individual step. Visitors may breeze through some parts of your form and abandon or balk at others. In the Checkout Process chapter we take a closer look at using analytics to learn which parts of a process are problematic.

## Unique Issues for Forms

Forms start out at a disadvantage to other web pages and are seldom welcomed with joy. This can be partly explained by examining the issues forms are prone to, including:

### **They look difficult**

The elements of a form are not very friendly even when taken individually: all those short little boxes to type in, the rigid rows that resemble a to-do list, the tiny black letters, the authoritative tone. Put them all together, and the result is often a complex-looking combination. The more difficult the form looks, the stronger the incentive visitors need to fill it out.

### **They get greedy**

Any form that includes fields unnecessary for its main purpose is a greedy form. In our experience, forms will become greedy unless they're diligently controlled. A form may start out slim and unassuming with four tidy little fields. Then someone in Sales notices the form isn't asking for a fax number, or favorite color, or some other piece of remotely useful information, and the runaway bloat begins.

We're not saying a short form is best in every situation or for every company. But most forms we've seen include extraneous "nice to have" fields that could be eliminated or condensed with no loss of information quality.

### **They take too long to get to the point**

Many online forms are divided across multiple consecutive web pages. The visitor completes a form on the first page, clicks Submit, waits for the next page to load, and so forth. From the visitor's perspective this is a disjointed, pothole-ridden experience. From an organization's perspective, each pause introduces a possible abandonment point.

In the past, there were programming and cost reasons for this approach. These days, however, newer programming approaches and technologies, like Ajax and Flash, offer ways to provide a smoother, faster, more seamless visitor experience.

### **They break**

Anyone who's filled out a lot of forms has had at least one of them stop functioning at a critical juncture—usually after laboriously entering reams of information. Why don't forms always work perfectly? Partly because there are so many different elements that have to function properly. Many

*Any form that includes fields unnecessary for its main purpose is a greedy form.*

of these elements, like the power supply, server connection cables, or the performance of a visitor's ISP, are outside an organization's control. But others, like poor code, are entirely avoidable.

## Form Design Guidelines

The phrase “form design” may seem like an oxymoron to designers. Forms are, after all, the public-works buildings of the web. They're meant to be functional and utilitarian, not frilly and entertaining.

Designing forms is indeed more about problem solving than pure artistic creativity. The problem in this case is how to create a utilitarian form interface that is as inviting, clear, and easy as possible for the visitor to complete.

### Focus attention on the form area

The sooner you can focus a visitor's attention on the form, the sooner they'll know what to do and where to start. This guideline is as important for subsequent forms in a multi-step process as it is for the initial form in the process.

Forms can appeal to the eye even though they're basically utilitarian. There are a number of ways to make forms stand out on a page, such as



- A light background color behind the form (but make sure the text is still easy to read)
- A border around the form
- Colored field boxes
- Arrows

*The phrase “form design” may seem like an oxymoron to many designers. Forms are, after all, the public works buildings of the web.*

#### netquote.com

*This single-field landing page form employs several tactics to focus attention—a border around the form area, an eye-catching graphic next to the form, and a pointing person.*

## marsrover.nasa.gov

This form allowing educators to request a free Mars poster uses background color to distinguish the form area from the rest of the page.

NASA NATIONAL AERONAUTICS AND SPACE ADMINISTRATION

NASA Home Page  
NASA on Twitter  
NASA on YouTube

SEARCH MARS

### NASA's Mars Exploration Program

HOMEWORK SCIENCE STEREO VIEWS MARS JOURNALS PEOPLE FEATURES EVENTS WEBSTORE ALL ABOUT MARS

Mars for Kids  
Mars for Students  
Mars for Educators  
Mars for Press

Mars Home  
Mars for Educators

This information will not be released to any outside party. For additional information, please see the [NASA Privacy Statement](#).

#### Earth/Mars Comparison Poster Form

For Teachers Only: Complete the form below and you will be sent a FREE Earth/Mars Comparison poster. You can click on the links below to view the front and back of the poster in the Adobe PDF format.

First Name

Last Name

Grade Level

Complete School Name   
(e.g. "Dwight D. Eisenhower High School"; not "Eisenhower High School")

School Address

City

State

Zip Code

E-mail

Check this box if you are interested in receiving occasional e-mail about Mars education opportunities and classroom resources.

## ucop.edu

A border and shaded areas across the top and bottom help focus attention on this application form for the University of California.

UC University of California

PATHWAYS: Apply for Winter 2008

Home > admission > ucalifornia.application > apply for winter 2008

Home | Contact Us | Page | Help

#### Login for First-Time Users

Fill out the fields below to create the user name and password you will use for your online application.

##### Create Login

**Access Information**  
Your user name can be up to 20 characters and can contain both numbers and letters. Your password must be 6 to 8 characters and must include both numbers and letters. Both are case-sensitive, so note how you use upper- and lowercase letters.

1 User Name

2 Password

Re-Enter Password

3 E-Mail Address

E-Mail Address

Re-Enter E-Mail Address

4 Hint

If you forget or lose your password, you'll be able to access your application by answering the question you enter here.

Secret Question

Answer

100 Characters max. e-mail to send postal, time sensitive correspondence to applicants. Provide an e-mail address that you check regularly and plan to keep until you enroll. 000000

## Use a clean, simple layout

To reduce the perception of a form being difficult or complex, simplify and clean up the form layout.

What makes a form look simple and clean?

- **White space.** Leave enough empty space—whatever the color—around the form and between the form rows. This improves legibility and scannability.
- **Removal of all extraneous elements.** Everything in, on, and around a form should contribute to its completion and submission.
- **Clear label-field association.** There is such a thing as too much space, especially when it's between a field and its label. Too much space here makes visitors try to track horizontally across a blank area hoping to end up at the correct field. Strongly associate the field with the label by positioning them closely together.
- **Legible text.** Make sure the form text doesn't send visitors diving for their reading glasses. Tiny, low-contrast text (like pale gray on a white background) is difficult to read on a computer monitor. The text used for form field labels and inside the fields themselves should be high-contrast, uncomplicated typography that's easy to read.

*Make sure the form text doesn't send visitors diving for their reading glasses.*

The image shows a screenshot of the California DMV website's 'Change of Address' form. The form is titled 'Change of Address' and is part of the 'California Driver License/Identification Card Information' section. It includes fields for Driver License/ID Number, Last Name, First Name, Middle Initial, Date of Birth, and Last 4 Digits of Social Security #. The form is clean and simple, with clear labels and fields. A blue box highlights the form content, and a blue arrow points from the text 'Make sure the form text doesn't send visitors diving for their reading glasses.' to the form.

**Change of Address**

California Driver License/Identification Card Information

Enter your California Driver License/ Identification Card Information as shown on the front of your DL/ID Card. [Show Me How](#)

Driver License/ID Number:   
For example: Z1234567  
Do not use blank spaces.

Last Name:   
First Name:   
Middle Initial:

Date of Birth:  /  /   
For example: 05/08/1978

Last 4 Digits of Social Security #: XXX-XX-

DL/ID Card Issue Date:  /  /   
For example: 05/31/2005

**dmv.ca.gov**

*We were pleasantly surprised to find forms with clean, simple layouts on the California DMV site.*

*This change of address form illustrates the guidelines we discuss here, especially legible text, good use of white space, and use of left-aligned text and fields to improve scannability.*

- Left-aligned text and fields.** Visitors look to the left to locate the beginning of a text line. Right-aligned text makes it more difficult to locate the beginning of each line, increasing the apparent complexity of the form. Left-aligned fields also help visually organize the layout for easier, faster scanning.

### Text alignment

A form with left-aligned text will appear simpler and easier than one with right-aligned text.

In this right-aligned text example, notice how each line of text begins at a different horizontal point. More eye motion is required to scan and read these labels.

### Right-aligned text:

### Left-aligned text:

Notice how a consistent beginning point for all lines of text makes it easier to scan straight down the field labels.

## Be ruthless: remove unnecessary fields

Most forms ask for more than is absolutely necessary, and as a general principle the more fields a form has, the less its chance of completion. That said, however, a form submission is useful and valuable only if it contains a sufficient amount of qualifying information. There are always indispensable fields. For example, a company might need a ZIP code to refer visitors to the correct service area or an e-mail address to enable a newsletter subscription. The challenge is to strike a balance between qualifying visitors and boosting conversions. We believe a form is ready for prime time only when every field can be rigorously defended as absolutely necessary.

### Before:

The screenshot shows the original landing page form for theonline401k.com. It features a navigation bar with links like 'Home', 'About Us', 'Success Stories', 'Referral Network & Partners', and 'Increase Your Knowledge'. The main content area is divided into several sections: 'GET A QUOTE FOR YOUR SMALL BUSINESS 401(k) PLAN', 'REQUEST A QUOTE', and 'OUR CLIENTS'. The 'REQUEST A QUOTE' section contains a long list of fields: Company name, Total no. of employees, First Name, Last Name, Title, Address line 1, Address line 2, City, State, Zip, Email Address, and Phone number. There are also several dropdown menus and checkboxes for additional information.

### After:

The screenshot shows the redesigned landing page form. It is significantly simplified, focusing on a 'Which Retirement Account Would You Choose?' section. This section includes a bar chart comparing 'Competitor with \$600,351 15 "wrap" fee' and 'The Online 401(k) with \$764,600 with 0% "wrap" fee'. Below the chart, there is a 'MAKE A SMART CHOICE.' section with a call to action for a free report. The form fields are reduced to: First Name, Last Name, Company Name, Total no. of employees, E-mail Address, and Phone Number. There are also dropdown menus for 'Do you currently have a retirement plan in place?' and 'Are you interested in an integrated payroll solution?'. A prominent 'GET YOUR FREE REPORT' button is at the bottom.

### theonline401k.com

The original landing page included a long, complicated-looking form with no fewer than 21 fields.

We reduced the form field count from 21 to 8, with no reported impact on lead quality. Fewer fields, combined with the new form design and updated messaging, yielded a 200% conversion increase.

## Overcome hesitation with benefits

Remind visitors of the benefits they'll receive by filling out a form. Remember, you may not have their complete and undivided attention during their visit to your site. They may be sidetracked by a ringing phone, an IM, or any number of distractions in their environment. The clearer the benefits, the easier it is for visitors to get started.

### sierraclub.org

The Sierra Club's membership/donation page provides a list of benefits, complete with a picture of the free backpack.

**Join online today and show your support for wildlands and wildlife and get this free Expedition Backpack!**

In addition to helping us protect America's natural resources, your membership will also earn you these benefits:

- A free Sierra Club Expedition Pack (limited time only)
- One-year subscription to Sierra magazine
- Members-only ecotravel opportunities
- Automatic membership in your local Chapter
- Discounts on Sierra Club calendars, books, and other merchandise

**Join online today and show your support for wildlands and wildlife and get this free Expedition Backpack!**

In addition to helping us protect America's natural resources, your membership will also earn you these benefits:

- A free Sierra Club Expedition Pack (limited time only)
- One-year subscription to Sierra magazine
- Members-only ecotravel opportunities
- Automatic membership in your local Chapter
- Discounts on Sierra Club calendars, books, and other merchandise

When you give to the Sierra Club you will have the satisfaction of knowing that you are helping to preserve irreplaceable wildlands, save endangered and threatened wildlife, and protect the fragile environment we all share. This can be done through your choice of one-time or recurring contributions and your participation in the environmental issues that matter to you most. Thank you for your contribution.

Note: Contributions, gifts, and dues to the Sierra Club are not tax deductible. They support our efforts, other-level advocacy and lobbying efforts. Your dues include \$7.00 for your subscription to Sierra magazine and \$1.00 for new Chapter membership. (Additional financial and regulatory information.)

## Use clear, descriptive field labels

Writing descriptive, effective field labels is an art in itself. Certainly, the typical ones are easy enough: First Name, Last Name, Address, and so forth. But using a generic label can cause misunderstandings.

For example, depending on the context, the label Username could be either a request for an existing username or a directive to create a new username for a new account. We've seen visitors stumble over this distinction by thinking they were being asked to remember a username that didn't yet exist.

## Consider using active verbs

When there is room for doubt or misinterpretation, using active verbs in the label can help clarify and guide the process. Here are a few examples:

Passive Labels	Active Labels
Country / Region	Select the country or region where you live
Language	Choose your language preference
Password	Create an account password
Domain name	Enter your current domain name

The screenshot shows a registration form titled "Register, It's Free". A blue box highlights the "Choose a Username" label, which is an active verb. Below it is a text input field with a "check for availability" button. Other fields include "Email Address", "Choose a Password", and "Retype Password". A sidebar on the right contains a list of benefits and a "Is My Information Safe?" section with a link to the privacy policy.

### digg.com

The field labels on this registration form use active verbs to sidestep potential confusion. For instance, the verb “choose” clarifies the Username and Password labels.

## Consider using sentence completion

Another alternative is to tie the label and field together into a sentence. The field label begins the phrase, and the field options “fill in the blank.”

The screenshot shows a registration form titled "Register and Start Using Facebook". A blue box highlights the "I am:" label, which is part of a sentence completion structure. Below it is a dropdown menu with options: "in college/graduate school", "at a company", "in high school", and "none of the above". Another "I am:" label is visible below it, also followed by a dropdown menu.

### facebook.com

This registration form uses a creative approach to clarify a field label. Rather than a potentially confusing descriptor, like Status or Employment/School, the label begins a sentence and the field options complete it.

## Consider using a complete question

In some cases using a complete question is the clearest way to label a form field:

### **zopa.com**

The application form on this social lending site uses full questions instead of descriptors as field labels. This makes it friendlier and much easier to scan and understand. A further improvement would be to use a darker, more legible color for the question text.

**Get a rate**

Zopa is a live marketplace, and the rates are set by our lenders. Use the rate finder below to see our latest typical APRs, or hit apply now to begin your application

**How much do you want to borrow**

(Min £1000, Max £15000)

**Over how many months**

(Remember you can repay early at no extra cost)

12 24 36 48 60

**Want Payment Protection Insurance?**

It can cover your repayments and protect your credit rating if you get ill, have an accident or lose your job. See what's covered.

Yes, I'd like that peace of mind

**GET RATE**

## Provide help and contextual answers

Filling out a form can be a lonely experience. There's the visitor, sitting at the kitchen table with a laptop trying to fill out a complicated form with no help from anyone except a ten-year-old neighbor kid. What if questions come up? What if the form asks for something odd or unfamiliar?

Many questions are answered best with contextual information, meaning the answer is placed near the area or item that triggers the question.

### **fantasybaseball.com**

This registration form includes a somewhat unusual field: Cellular Service Provider. A contextual explanation is provided to immediately answer questions.

**Cellular Service Provider:**

Select your provider

**Why are we asking for this?**

With your FantasyBaseball.com Platinum membership, you have the option of receiving notifications via Text Message directly to your cell phone.

Of course, forms would quickly become messy and chaotic if explanatory text was next to every field. One solution is to provide the contextual information in a linked pop-up window or layer. This shifts the explanation off the surface of the form, leaving it clean and simple looking while offering assistance when and where it's needed.

Some visitors will want the reassurance of human interaction. Provide a phone number or a live chat feature to fill this need.

The screenshot shows the esurance.com website with a quote form. The form includes a progress bar (Start, Quote, Buy, Print, Finish) and a navigation menu (household, cars, drivers, coverage, your quote). The main form area is titled "Household Info" and asks "How many cars are you insuring?" with a dropdown menu. A "Speak to an agent! Click here now" pop-up is visible, along with a "Get personalized comparison rates!" pop-up. A "GO" button is also present.

**esurance.com**  
Quote. Buy. Print.  
24/7 Customer Service 1.800.ESURANCE home about us learning center contact us site map

Start Quote Buy Print Finish

household cars drivers coverage your quote

Household Info

How many cars are you insuring?

1 2 3 4 5 6 7 8 9 10 11 12

— Please select —

Yes No

— Years continuously insured —

next >>

Speak to an agent!  
Click here now  
Or call us at  
1-800-580-7750 Available 24/7

Get personalized comparison rates!  
Esurance shows you rates from top companies based on the information you provide. We'll also help you figure whether policy is priced right for you.

Looking for motorcycle insurance? Visit our trusted partner. **GO**

Speak to an agent!  
Click here now  
Or call us at  
1-800-580-7750 Available 24/7

### esurance.com

This form provides contextual information via pop-up windows linked from a question-mark button. This provides a detailed answer without cluttering up the form. Notice that buttons are placed contextually—that is, close to the fields—so there's no doubt about the relationship.

Phone and chat options are also available for visitors with questions.

## Allow estimated answers

Many forms ask for information that's not immediately handy. Requiring an exact, correct answer at this point is like telling the visitor "Quit now, it's not going to get any easier!" Whenever possible, ask for an estimated, rather than exact, answer and make it clear when a best guess is acceptable.

The screenshot shows the LowerMyBills.com website with a mortgage quote form. The form includes a progress bar (Step 1, 2, 3, 4) and a "Get Quotes Now" button. The main form area is titled "What Are Your Mortgage Needs?" and includes fields for Property ZIP Code, Purchase Year, Estimated Home Value, 1st Mortgage Balance, 1st Mortgage Interest Rate, Existing Type of Rate, and Do you have a 2nd mortgage?. Each field has a dropdown menu or radio buttons. A "Continue" button is at the bottom. A "OK to estimate" button is visible next to the Estimated Home Value field.

**LowerMyBills.com**  
an Experian company Mortgage Quotes. Fast. Easy. FREE.® Contact Us

Do You Have the Best Loan for Your Needs? Let Us Help!

Get Quotes Now Step 1 2 3 4

What Are Your Mortgage Needs?

Property ZIP Code

Purchase Year Select One

Estimated Home Value \$ Select One

1st Mortgage Balance \$ Select One

1st Mortgage Interest Rate Select One

Existing Type of Rate Fixed Adjustable Don't Know

Do you have a 2nd mortgage? Yes No

Continue >>>

OK to estimate

OK to estimate

OK to estimate

OK to estimate

OK to estimate

OK to estimate

FOX TODAY

Forbes

FOX

AP Associated Press

### lowermybills.com

This mortgage loan application form provides extra reassurance that an estimated entry is acceptable.

*If you have a lengthy form process, it may be tempting to obscure the fact by not providing any indicators. This can backfire.*

### **livestrong.org**

*This donation form includes a graphic element indicating how many steps there are in the process and what to expect at each step.*

## **Prefill as many fields as possible**

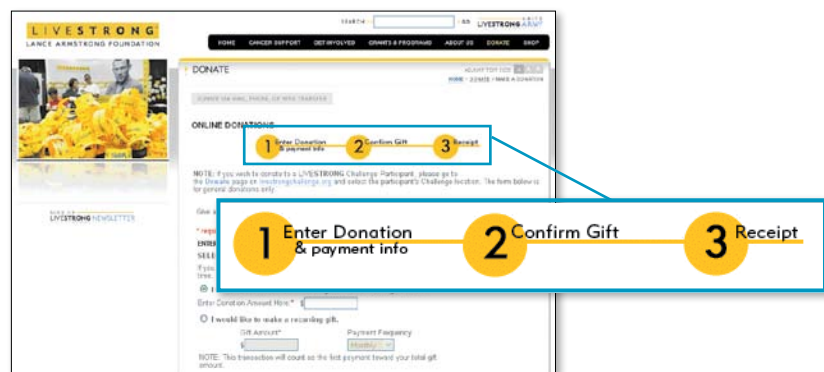
Once a visitor begins to fill out a form, it's in everyone's best interest for the process to go quickly. If some of your form questions have common answers, make them the defaults for those fields. For example, if you know the significant majority of your visitors are from the United States, make the Country field default to United States.

At minimum, place the most common selections at the top of any long list of options, and repeat them in the longer, full list if needed. This reduces the number of clicks and mouse movements visitors have to make in order to complete the form. There, that's much easier!

## **Clearly indicate the steps or time involved**

Think of the last time you got driving directions from a friend or an online map site. Isn't it reassuring to know approximately how long it will take to get to your destination? Visitors facing a multi-page form process feel the same way. They'd like to know in advance what kind of time commitment they're getting into.

If you have a lengthy form process, it may be tempting to obscure the fact by not providing any indicators. This can backfire. Many experienced visitors won't even start a form without some advance information. Other visitors willingly start a form and slog on for one or two pages, then grow weary and drop out if they can't get a sense for how much longer the form will take to complete.



## **Provide security and privacy reassurance**

With the growth of identity theft, phishing, e-mail spam, and other security concerns, reassuring your visitors about the security and privacy of their information is increasingly important.

Of course, it's not enough merely to reassure visitors. Behind the scenes, organizations must comply with credit card company requirements and government regulations about the handling and storage of customer information. And while visitors may not be aware of these efforts, they will look for evidence of trustworthiness.

Many visitors will automatically look for the “lock” icon on their web browser to check whether a form is using a secure connection, so make sure this is present for forms that ask for personal information.

Other visitors will look for, or at least notice and be reassured by, privacy and security icons. These can include a secure certificate icon or a seal from a privacy verification company such as TRUSTe. Examples of secure certificate and privacy verification icons include:



Finally, questions of privacy and security arise when a specific request is made for sensitive information—such as an e-mail address, credit card number, or social security number. Place a brief, clear summary of your privacy and security policy near this request.



## Putting it all together

Because forms are interactive, it can be difficult to pinpoint form problems without watching visitors use them. Which is where *informal usability testing* can be very helpful.

It's become an open secret among web professionals that usability testing doesn't have to be a formal, expensive undertaking to be beneficial. While there is much value in large-scale, rigorous testing, it can be pricey and time-consuming. Informal usability testing will quickly uncover many qualitative interaction issues that could otherwise be missed.

### marketingsherpa.com

*This purchase form includes a reassurance about information safety and security, contextually placed near the payment information fields.*

### Informal usability testing:

*An approach to usability testing that emphasizes discovery of major design and interactivity problems in any type of interface. Typically used in earlier stages of design and development.*

Stop reading and try this...

### FEATURED TECHNIQUE: Informal Usability Testing

What does an informal usability test look like? It can be as simple as asking a few friends and colleagues to try out your site while you observe and document their reactions. To get the most out of an informal test, do the following:

- **Test early and often.** The earlier you conduct user testing in your site update or development process, the easier and less expensive it is to make needed changes. For instance, getting feedback on concept sketches or using a method called *paper prototyping* to test a layout or interactive process will provide valuable insights before hours of design and development have been committed to the project.
- **Plan the scope of your test in advance.** Decide what task, page, or element you want feedback on, and limit your test to that.
- **Practice your test.** Plan how you'll record participant feedback, whether you'll need an assistant, where participants will sit, where you'll sit, what materials you'll need, how you'll begin the test, what you'll say, and what each step should be. Practice on coworkers or family members.
- **Select test participants** with characteristics similar to those of your site's audience.
- **Include at least five participants.** More participants will uncover more issues and provide more reliable results, but you'll gain valuable insights from as few as five.
- **Assure the participants that they aren't being tested or graded.** They're helping you to improve your site. Encourage them to think out loud and to be honest.
- **Avoid guiding or prompting the participants.** After describing the task to them, do not attempt to help them complete it if they stumble. Wait to see what they do on their own.

#### **Paper prototyping:**

*A type of usability test that simulates a web interface using paper mockups. Paper prototyping is valuable for providing early insight into the usability of draft designs or processes.*

- **Keep your language neutral and nonjudgmental.** If participants give suggestions or criticisms, thank them and assure them that their input is helpful.
- **Document feedback and observations** (for example, “Participant B did not see the sign-up link.”). You may need an assistant to do this for you, while you administer the test.
- **Summarize your findings.** Note any repeated patterns or feedback, because these represent areas that warrant further study.

**Learn more:**

Usability Net.

<http://www.usabilitynet.org/tools/test&measure.htm>

Usability.gov.

<http://www.usability.gov/refine/index.html>

Others: Find other resources by searching for “how to run a usability test” on Google or another search engine.

## Summary

Forms may not be the most welcome of web page elements, but they are crucial to the success of many web sites. Simple design updates can make them less painful for visitors and more effective for site conversion goals.

Next, we look at a common yet frequently confusing form-based feature, a veritable form jungle in which more than half of all prospective customers are lost: the checkout process.

Excerpted from *Web Design for ROI: Turning Browsers into Buyers & Prospects into Leads* by Lance Loveday and Sandra Niehaus. Copyright © 2008. Used with permission of Pearson Education, Inc. and New Riders.