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Top 10 Best Practices for Driving Form Fills on Your Website

It's essential to optimize the path to form and application completion on your website. To do so, you must have a clear understanding of your customers, take steps to generate more traffic and use testing and personalization to increase conversions. Following are some best practices we have developed as a result of working with our clients in the financial services industry.

1. Map your customers' cross-channel journeys.

Understand the customer journey and map your digital touch points to its key phases. Ensure you are able to connect individual visitor data across channels (computer/mobile web/mobile app) in order to understand how each is uniquely used and identify common hand-off points. Identify opportunities to utilize visitor behavior, device usage and communication preferences in personalized experiences. Consider the different segments of customers that visit your site – such as known, unknown and current product holdings – to identify variations to the customer journey.

2. Measure all relevant data points within the application process.

It's vital to collect robust data on the full application process. Be sure that you can identify each step uniquely, and that all entry and exit paths for each step are captured and reviewed on a regular basis. Some steps are common to all channels, but others might be unique or different depending on the channel. Collect detailed error information so corrective actions can be prioritized based upon the impacted visitor segments.

Identify all the conversion events that contribute to a completed form or application, not just the submission itself. For example:

- What drove a visitor there – the campaign ID associated with the ad or email, for instance
- Number and type of products viewed in the converting session
- Interaction with content at each stage of the process

3. Optimize for mobile.

Analyze each point in the application process with an eye toward device type. Identify shortcomings that are specific to one device – and fix them. Instrument your mobile apps properly to maximize data collection for tablet and phone users. A detailed form built for your website may be good for a visitor on a computer but too long, complex or difficult to complete on mobile.

4. Generate traffic and demand for the application process.

Not all traffic sources are created equal in driving conversions, so develop an understanding of where your site traffic is coming from and its overall quality. Some channels may be better for earlier stages of the customer's journey (PPC and social, for example), while others may be important to prompt the final completion of the form or application (personalized offer in email).

5. Ensure relevant content is driving quality traffic to your application funnel.

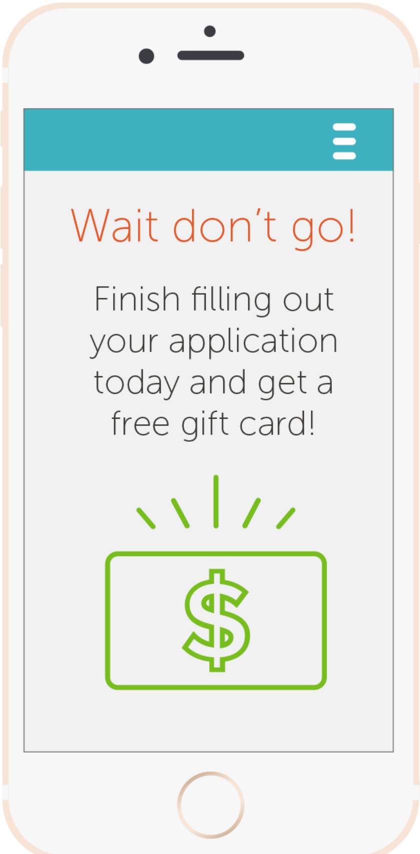
Measure the content and entry points that are driving the best results. Determine which content is appropriate and performs best at each stage of the research and application completion process. Regular A/B or multivariate content testing can help determine the most relevant content for the visitor segment and stage. Pathing and aggregate event data are also paramount to developing a deeper understanding of the value of each piece of content within the application process.

6. Be transparent about privacy and security.

Provide callouts to what user information is being collected and display your privacy policy clearly whenever requesting personal data. Audit-based services that demonstrate digital security measures for your touch point, such as TRUSTe, should also be considered.

7. Right-size the application funnel.

If your form or application is longer than a few steps, such as when regulations require many steps, review your process to see if any simplification is possible. During your review, ensure that the form reflects the customer needs, rather than your organizational process by removing or consolidating extraneous steps built to satisfy an internal need. Consider fewer steps by using more prepopulated information (e.g. zip code entry vs. city, state, country) or combining steps into single pages when possible. Test to determine what works best.



8. Identify treatments for application abandonment and exit intent.

Consider tactics such as retargeting for those who abandon the application process, inline prompts to connect with an agent in person or presentation of personalized offers for those who exhibit exit intent. For abandoners, be sure to make a second attempt easier by pre-populating the elements of the application that they previously completed.

9. Integrate human touch points and ask for feedback.

Don't forget to provide invitations to connect with you through a human touch point. Whether it is getting assistance through click-to-chat, click-to-call or click-to-callback, these options often turn would-be abandons into conversions while enhancing the customer relationship through a personal interaction.

Once visitors complete their applications, be sure to include an optional step with a very quick, easy way to provide feedback regarding their application experience and satisfaction levels through surveys and other methods.

10. Analyze to take action.

Use the data collected on the application funnel to analyze overall conversion rates and at each step in the process. Analyze your funnel data multi-dimensionally (by referrer, segment, time period, entry path) and in the context of other internal data sources. Once a change is made, actively monitor side-by-side time comparisons to understand positive/negative changes at top/bottom of the funnel and prioritize further funnel optimization. Consider the use of predictive models for key conversion areas such as attribution and the allocation of media spend by channel/activity.

Optimizing your application funnel is not a one-time event. It is important to measure and learn continuously and apply these learnings to improve conversion rates. Take a structured and programmatic approach based upon a solid measurement framework.

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