

# The Ultimate Guide to Web Forms

Grow Your Business with  
These 5 Form Types



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# How to Leverage Forms to Boost Business Growth

Online forms are one of the key ways your target audience can initiate a connection with you. They're an open communication channel that can facilitate the transformation of a visitor into a loyal customer, client, or community member.

However, if you're simply adding a basic form to your site, you're not making the most of this important website component.

So how can you use forms effectively to reach your goals?

In this guide, you'll learn how to level up your form game by mastering the ability to create high-converting forms that can grow your business.

## Online Forms: What's the Big Deal?

Web forms come in all shapes and sizes and have a wide range of use cases. Businesses can create them to allow users to request callbacks and sign up for newsletters, or even advanced use cases like automatically generating a quote or processing an order.

Choosing the correct type of form and then optimizing it for your audience and goals will increase form conversion rates. With more people using your forms, you'll get more of the inquiries, orders, and sign-ups that will grow your business.

A well-planned and executed form can lead to better user satisfaction, too.

So with that in mind, let's explore five types of forms that can help your business grow, followed by some form building best practices and ways to optimize your forms for higher conversion rates. We'll then finish off with a checklist to help you find the right form builder for your project.



# 5 Web Forms to Support Your Business Growth

A good form builder will let you create any form for your website, but to help you get started, here are five form types that can grow your business.

After that, you'll learn about the key elements of form-building best practices to ensure you create effective forms.

## 01 **Online Event / Webinar Registration Form**

One of the best ways to start growing your business is to connect with potential new customers and clients.

Offering your target audience and visitors to your site the opportunity to learn something beneficial for free can be an effective way to entice those people into your sales funnel.

One way to do this is to run online events or webinars. During these sessions, you can share your expertise with the attendees, answer their questions, and forge a connection with them.

Attendance can be free, and all that's required to secure a place is for attendees to enter their contact details with the option of joining your email newsletter or agreeing to a follow-up call.

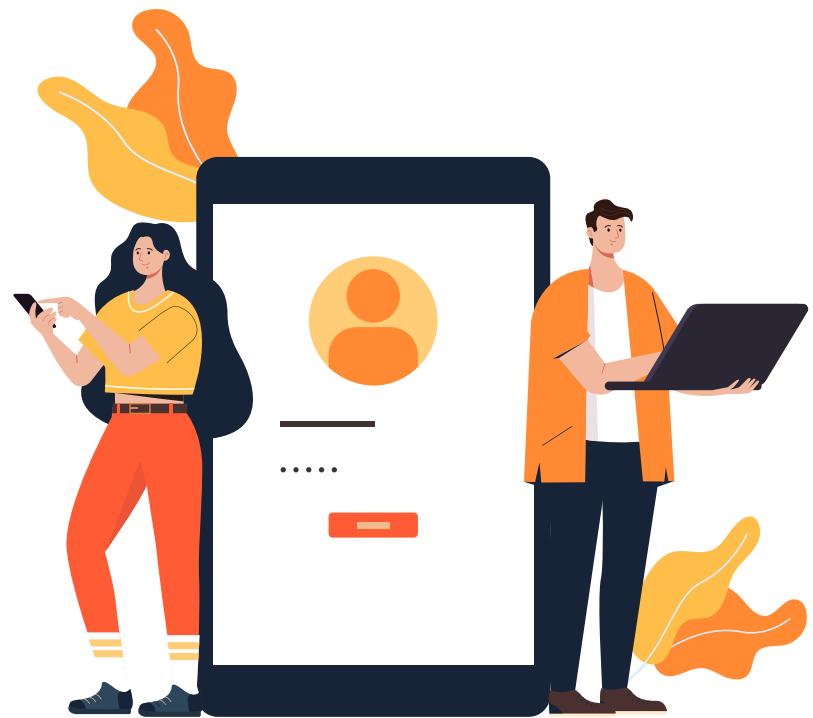


Rather than just publishing the webinar publicly on your site, using an event or [webinar registration form](#) on your website is the preferred approach. Doing so has many benefits for you and the attendees, including:

- ★ Ensuring you collect valid contact details from attendees.
- ★ The ability to better understand your audience by asking for demographic information.
- ★ Gaining the ability to send email notification reminders before the event or webinar starts.
- ★ Option of adding attendees to a CRM or email marketing service to facilitate future correspondence.
- ★ Ability to collect payments if you're charging a fee for attendance.

Creating a basic event or webinar registration form is easy, and with the right tools, you can build a more advanced form that lets you do much more during the registration process.

For example, you can accept a one-time fee or set up a recurring subscription if you're running a membership site, and you can register attendees on your site and allow them to create user profiles. You can even give attendees the option of uploading their own content to your site where it can be shared it with others, helping to create a user-powered resource hub.



## 02 Sales Quote Form

As your audience grows, potential new clients and customers will start getting in touch, wanting to know more about your products and services.

One key way to make this process more efficient is to add a sales quote form to your site.

Rather than receiving messages containing a general inquiry, a sales quote form lets you ask for all the critical information needed to generate a quote.

You can also use [conditional logic](#) in your request-a-quote form to show and hide fields based on the user input from previous fields. Doing so prevents your visitors from being overwhelmed by seeing all the form fields at once or interacting with fields that are irrelevant to their situation.

When creating the form, you have two main approaches to consider:

- ★ Use calculated fields to generate and display the quote automatically once the user has entered their details.
- ★ Receive an email with their information and then get back to them with a manually created quote and personalized response.

The first approach works best for standardized services and products that are easy to price. The second option is better when pricing and scheduling are more complex.

However, depending on your business, you might want to generate quotes manually either way. Doing so allows you to interact with potential clients or customers and start a discussion about their needs and how you can help.



## 03 Customer Insights Survey

If your business isn't growing as much as you'd like, or you want to grow it even more, learning about your target audience can help.

Once you know more about the desires of your audience, as well as the problems they're experiencing, you can serve them better through your content, products, and services.

Creating a form that asks for the right information will help you learn where there's an opportunity to improve or if you should refocus your efforts in a new direction.

When it comes to gaining that all-important insight into your potential and existing customers or clients, there are a few different types of forms you can create:



### Site visitor survey

Ask visitors to your site questions about their situation and goals.



### Product or service feedback

Request an appraisal from your customers or clients.



### Market research

Contact potential and previous customers and clients to find out how you can help them.



### Churn feedback survey

Ask questions to find out why customers or clients are abandoning your business.

A good form builder will let you create a custom solution that works in the way you want. By using the appropriate fields, such as drop-down menus, checkboxes, and [Net Promoter Score \(NPS\)](#), you can create a form that's easy for your audience to respond to while also providing you with meaningful data that can help your business improve.

## 04 User Registration Form

If you're running membership programs, online courses, or creating community spaces, you'll want to add a [user registration form](#) to your site.

eCommerce stores and internal employee systems are other instances where a custom user registration form can benefit your business.

Choosing the right form builder will allow you to produce a custom user registration form that matches your requirements and enables you to collect all the data you need.

Some of the key ways user registration forms can help your business grow include:



- ★ Handing over the responsibility for registration to your users and reducing the drain on your resources.
- ★ Collecting the data you need from your users in the way that you want by using a range of form fields.
- ★ Adding users to other services, such as a CRM or email marketing platform, so that you can keep in touch and nurture the relationship.
- ★ Assigning specific roles to users at your site to control what they can do and access.
- ★ Charging users a fee during registration for access to content, such as courses or community features.

Giving visitors the ability to sign up and become registered users at your site has many benefits for your business, not least is creating a connection between your site and the user, which can be used to resume contact at any time.

## 05 Sales Form for Services and Products

If you're selling items online, you might be tempted to take care of payments manually after the product or service has been delivered. Alternatively, you could be considering using an eCommerce tool's default payment forms.

However, you could instead create a custom sales form for your services and products.

Depending on your situation, the form could require a deposit payment from clients before you commence a project. Alternatively, the sales form could be configured to automatically notify your fulfillment team that an order has been placed and that they need to start the shipping process.

If you use a powerful form builder, you can [configure your sales form](#) to work in the way that you want so that it fits into and enhances your workflow.

Other benefits of creating a custom sales form include:

- ★ Ensuring you can collect payments in the best way for your business and its products and services.
- ★ Reducing admin load by automating the payment collection, after-sales, and invoicing processes.
- ★ Connecting your sales form to third-party tools and services, such as payment processors, CRMs, and email marketing platforms.
- ★ Providing the ability to set up recurring payments.
- ★ Increasing the chances of getting paid by requiring full or partial payments upfront.



Creating a [custom sales form](#) for your services or products gives you much more control over handling payments and processing orders.

# Form Building Best Practices



Now that you're aware of a few different web forms that can help your business grow, it's time to learn how to make sure the forms you use are up to the job.

Here are the top three best practices to help you build effective forms.

## Form Design

The design of your form has a significant [impact on conversion rates](#). Here are some tips to help you with form design:

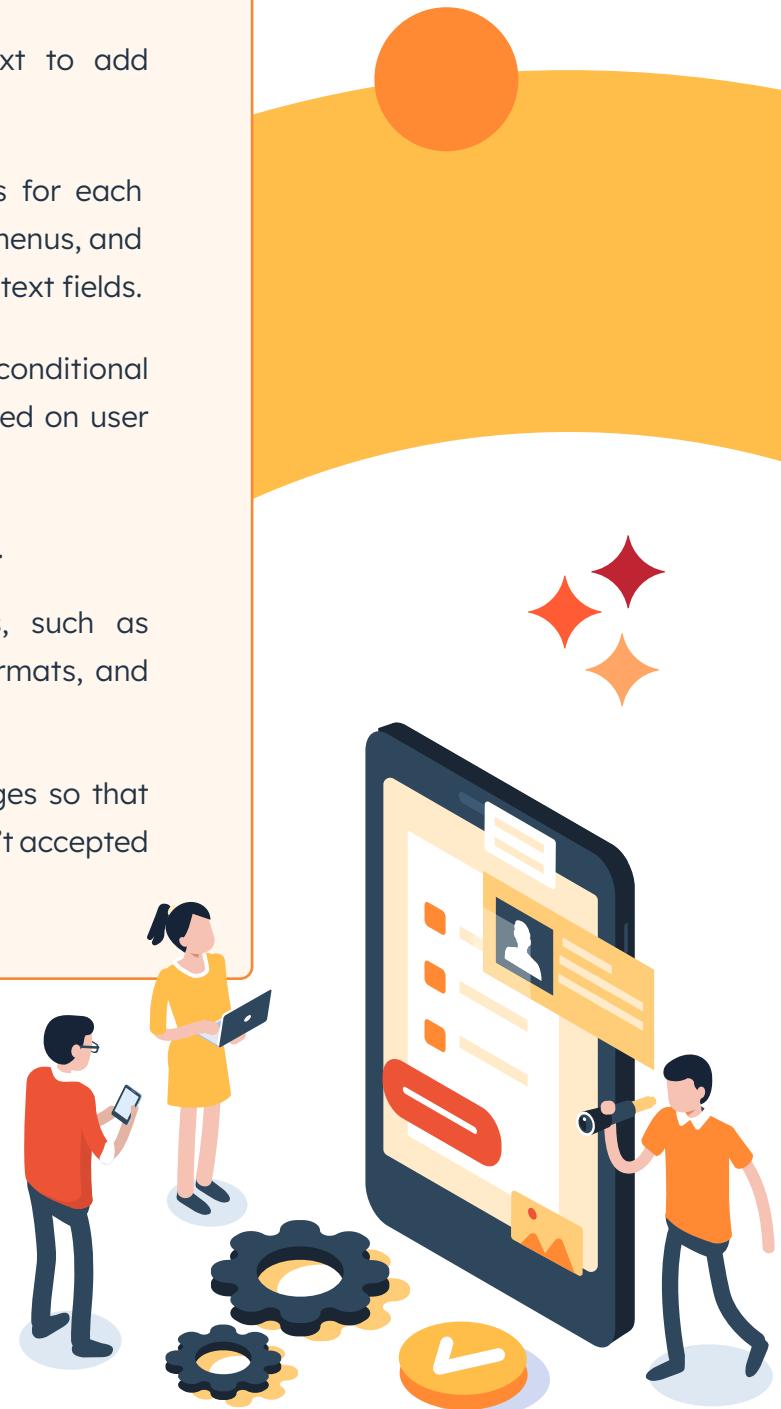
- ★ Make sure the appearance of your forms matches the design of your site.
- ★ Consider the layout of your forms and use columns and dividers to organize fields.
- ★ Use colors to draw attention to key components of your form, such as calls-to-action and submit buttons.
- ★ Use a form builder that gives you complete control over the design of your forms.
- ★ Choose a form builder that provides well-designed templates you can use as the foundation for your own forms.

## User Experience

Your forms shouldn't just look nice; they should also be easy to use.

Here are some ways you can make your forms more user-friendly:

- ★ Ensure form field labels are informative and clearly convey what information is required from the user.
- ★ Use descriptions and placeholder text to add additional instructions to your forms.
- ★ Use the most appropriate input types for each field, such as date pickers, drop-down menus, and checkboxes, rather than only using free text fields.
- ★ Avoid overwhelming users by using conditional logic to show and hide form fields based on user input dynamically.
- ★ Split up long forms over multiple pages.
- ★ Clearly explain any field restrictions, such as maximum characters, specific date formats, and if a field is required.
- ★ Create custom validation error messages so that users know exactly why their input wasn't accepted and what they need to do to fix it.



## Data Management

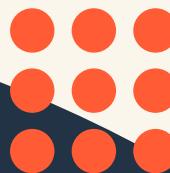
The journey doesn't end with a form submission. Once a user has sent data via your form, there's still lots that can happen and opportunities to improve the default workflow.

Here are some data management issues and post-form submission actions to consider:

- ★ Send a custom email notification to the user that contains content relevant to their form submission, such as requested information, a copy of their submission, or further steps to complete.
- ★ Send form data to third-party services, such as an email marketing tool or a CRM, so that users can be easily contacted again.
- ★ Form submission content can trigger custom workflows and integrations, such as posting a message to a Slack channel, sending an email to a team member, or forwarding the form to another user for approval.
- ★ Documents can be generated from a form submission, such as a PDF invoice, certificate, or other custom documents.

Creating well-designed forms will make them more appealing to your visitors. And a positive user experience makes it more likely that visitors will complete the form correctly.

Using the data management capabilities of your form builder means you can create custom workflows, integrations, and automations that reduce your workload, make your processes more efficient, and enable you to harness the power of third-party tools to grow your business further.



# Form Builder Checklist

Now that you know the theory behind creating successful forms, you need to choose a form builder.

Here are some important points to consider when weighing up the options:

- ✓ **Ease of use** — Look for a form builder with easily accessible features, a well designed interface, and helpful documentations. An online demo can help you determine if a form builder is easy to use.
- ✓ **Versatile form builder** — The form builder should be easy to use and give you a high level of control over how your forms look. Being able to customize the appearance of the form, such as changing the layouts and colors, is important. Custom CSS support can give you even more control over the appearance of your forms.
- ✓ **Library of form templates** — Templates make it quicker and easier to add forms to your website. If the templates are editable, you should be able to customize them to meet your specific requirements.
- ✓ **Wide range of features** — Useful features to look out for include a good selection of form field types, conditional logic, paginated forms, calculations, and anti-spam solutions.
- ✓ **Focus on accessibility** — It's important that everyone can access your forms, so be sure to look for a builder that has been created with accessibility in mind.
- ✓ **Third-party integrations** — Being able to connect your form to third-party platforms, such as a CRM, email marketing service, or payment processor, is vital in most cases. Integrating with other services lets you do so much more with your forms.

There are [lots of form builders out there](#), so be sure to determine which features you need, then see which one best meets your requirements. If you can try before you buy with an online demo, then that's even more helpful.



# Create Your First Form Today!

Now, you have the information you need to start creating powerful and effective forms for your business website.

To quickly recap, we covered the following:

- What web forms are, and why you should use them.
- Five web forms that support business growth.
- The key areas of form building best practices.
- How to improve form conversion rates.
- How to choose the right form builder.

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