

Design Luring Forms

Examples Cited From The Email Service Industry

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Abstract

The professionals that determine a good forms structure include the usability practitioner, the designer, and the user. This paper talks about affordance, orientation and chunking in the creation of a persuasive form.

1. Introduction

In this paper, I would like to take a simple example of how users register for an email account online. For a first timer, is the transition from a real world of letter writing to the online medium easy? And for a frequent user, is he or she motivated enough to create an email account with another service provider?

This paper is targeted towards usability practitioners, information architects, designers, managers, project leads, editors, and people who are looking to develop their UX practice.

In the modern family, where often both parents are working full-time and the children are involved in many after-school activities, people may only have a few minutes to spare on an important task during the day. And it's the Internet that supposedly helps people achieve this. But do we, as designers and usability practitioners, always help them do it? I say, "No."

Just the other day, a friend of mine begins to complain of the spam mails that she receives everyday. "I have two separate email ID's to keep myself away from such mails—one for official purposes and the other for my junk emails. But even my official ID seems to be flooded with these emails. So I found myself moving to another email service provider. Again, I found myself grappling with the registration process."

There are three people who determine success of a web based form: the usability practitioner, the designer, and the user (Figure 1). Taking a simple everyday example like an email service, I aim to discuss the various aspects that lead to a great forms structure.

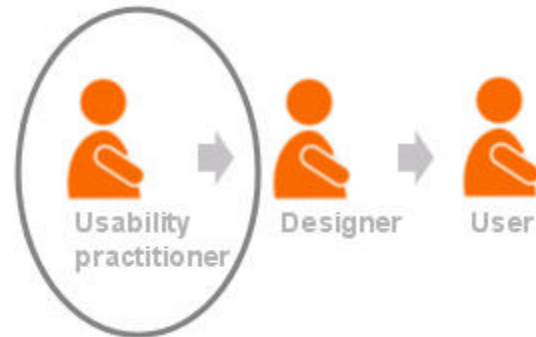


Figure 1. Success of a web-based form requires involvement of a usability practitioner, designer, and user.

There are a million email service providers out there. How do you ensure that you gain the right audience to join your service? What are those factors that will help users move ahead and become your loyal customer? Part of the answer has to do with the first step: REGISTRATION!

In the first part of this series, I will focus on the basic issues that a usability practitioner must address to create a usable web-based form:

- Affordance
- Orientation
- Chunking

2. Affordance: The Lure

We all know how grueling and tedious a registration process can be. Therefore, we need

to ensure that our sites adequately “lure” users into the process. To do this successfully is not just a matter of providing the right cues, but how and where we provide them.

2.1 Coming From the Real World

Every online form was created keeping the real world in mind. We all once began filling in forms in real life before we began moving to the online medium of getting things done quicker.

Users should know the advantages of the service provided as compared to the real world scenario of letter writing. Why would users move to your service when they can just write a letter? What are the advantages of sending an email? Is it quick? It is easy? These issues should be addressed upfront to ensure that they are lured forward.

None of the websites that I reviewed follow this practice effectively.

2.2 Entry Points

An entry point to an application must be clear and appropriate to the specific needs of the user. Let’s say a user visits a website to send out an email to a distant relative. He or she has never used a web-based email service before. Not knowing that he/she needs to register, they would look for a direct cue to send out an email. Where do you think this user would look for a cue? This is where you need to perform a quick goal-task analysis. Let’s consider a scenario:

A first timer enters the website to send out an email. This user is hauled because he/she is unsure of their next step.

Let’s have a look at Gmail, our most used email provider. Most websites that I reviewed allow you to register. But users are not lured into it. As a first time user of a website, they need to know the benefits of registering clearly, up front. Gmail does a good job of this (Figure 2).

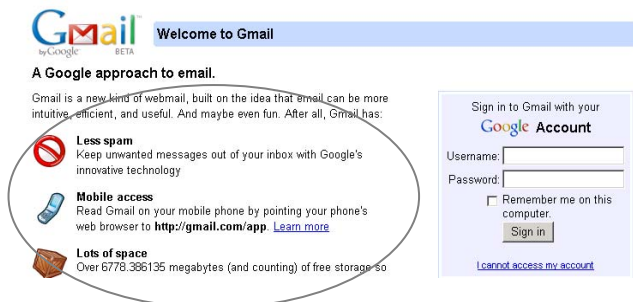


Figure 2. A good example of enticing users to register online by clearly listing the benefits up front.

2.3 Service/Product Comparison

Remember, your users are watching your competitors as well. So if you aren’t that big in the market, how exactly would you think big? Compare your features with that of your competitors to formulate your strengths over the others in the market. Let’s see how Bluebottle effectively does this (Figure 3).

COMPARE

See how Bluebottle Freemail stacks up against some of the leading free email providers.

	bluebottle	hotmail	yahoo	gmail
Spam Free Email	✓	X	X	X
Attachment Size	10mb	10mb	10mb	20mb
POP3/SMTP	✓	X	✓	✓
Challenge/Response	✓	X	X	X
Virus Protection	✓	✓	✓	✓
No Graphic Ads	✓	X	X	✓
Trusted Delivery	✓	X	X	X

See a [detailed comparison](#) to other email providers



Figure 3. Bluebottle’s website allows users to take a peek at service comparisons. Users also have the freedom to view a detailed comparison.

2.4 Online Benefits

It is important to inform the user up front of what they will gain after registering. It’s a competitive world out there and users must and should know what the website is selling them. This affirms the brand’s identity and responsibility to gain customers online. A basic cue reassuring users about the benefits helps build trust which encourages them to use your services. As shown in figure 2, Gmail clearly provides the online benefits.

Another clever way to entice them is to provide a view of what the service looks like once they have registered or applied. In this case, it would be ideal to show users on the homepage a view of what their personal landing page (the inbox) would look like once they have registered.

None of the websites that I reviewed follow this practice rightly.

2.5 Security

It is essential that users know that the information they are entering will be secure. A basic "Lock" or "Key" icon would do the trick. Also, providing them with security information and its benefits improves customer loyalty and trust. With the case of Yahoo, the website uniquely utilizes this feature to grab users towards their secure service (Figure 4).



Figure 4. Providing a security message increases loyalty which moves users towards registering.

2.6 Taking A Tour

Before users move ahead to encounter a form, it is necessary to tell them why they need to do it and most importantly how they need to do it. Again, taking the same examples forward, if you look at the example below, you will see how AIM Mail allows users to take a tour (Figure 5). This also gives an edge to its competitors as they are showing them of what's inside even before registering.



Figure 5. The website allows users to take a tour before registering.

2.7 User's Path Forward

This doesn't just end with the benefits. Users have to be told where to go after they have been guided. All websites do provide a way to move ahead. But I specifically want to use an example that can show improvement in terms of placement of this cue, which is most important while users are making a decision.

We love Gmail. But we sometimes wish it were always right.

Provide users with a clear path forward AFTER you are done enticing them with the meat.



Figure 6. The website must provide a clear path forward after enticing users with the benefits.

2.8 Consistent Design

As users transition from the homepage to the form, it is important that the design of the pages remain consistent. Any small change in the design or layout could affect their performance and decrease the overall experience.

Most websites get this right. But we can still look for improvement. Let's have a look at the example below (Figure 7). Here, as users move from the landing page to the form, we see significant changes in the layout and the visual design.

For Individuals (Compare Plans)

Guest - Details	Member - Details	Full - Details	Enhanced - Details
Email 10MB, IMAP 45 day inactivity time Ads + taglines	Email 16MB, IMAP SMTP for sending email 120 day inactivity time No ads or taglines	600 MB email, IMAP/POP SMTP for sending email Advanced spam filter Forwarding, aliases 100MB files, PTD/DAV Publish website, support	6GB email, IMAP/POP SMTP for sending email 2GB files, PTD/DAV All Full level features + Hot even domain
FREE Sign up Guest	US\$14.95 one-time Sign up Member	US\$19.95 / year Sign up Full	US\$39.95 / year Sign up Enhanced

For Groups, Businesses & Families

Sign up for HotMail™ Login screen Help

FastMail™ has a lot of online help. Everywhere you see a "?" or "Help" link, you can hover the mouse over it for quick information, or click on it for detailed information. Try it here for **important information** about our usage policy. [http](#)

Select your service level. See our [pricing table](#) for detailed information.

Select	Level	Cost (US\$)	Username	Mailbox	Bandwidth	Features
<input type="radio"/>	Guest	FREE	7+ chars	10M	40M/month	Fast web interface, IMAP, retrieve external POP/HotMail email, no commercial use
<input type="radio"/>	Member	\$14.95 setup fee	5+ chars	16M	80M/month	Guest + SMTP, forwarding, no taglines, virus protection, personalities, commercial use
<input type="radio"/>	Full	\$19.95 per year	4+ chars	600M	300M/month	Member + POP access, advanced spam protection aliases, email support
<input type="radio"/>	Enhanced	\$39.95	3+ chars	6000M	1000M/month	Full + own domain hosting, priority support, almost

Figure 7. The design of the page is inconsistent with the previous page.

2.9 An Overview Of What's To Come

As users enter the application, they need to know what to expect, however short it maybe. Therefore, throwing users directly into a form is not the best way to help them achieve their goals. Instead, the website must first provide users with an overview of what's to come, including the application requirements and the next steps. This can be just a few lines telling them of the benefits, the things that are expected and an instant access to their emails soon after they are done.

Let's have a look at Yahoo as an example (Figure 8). It doesn't do a perfect job. But it's nearly there. All the information that the user is expected to provide during the registration process is described up front.

YAHOO! Yahoo! - Help

Hi there!

We'll get you set up on Yahoo! in three easy steps! Just answer a few simple questions, select an ID and password, and you'll be all set.

Already have an ID or Mail address? [Sign In](#)

[Forgot your password or Yahoo! ID?](#)

Indian version also available. [Switch to Yahoo! India in English.](#)

Yahoo! India in English offers access to news and information geared toward India and may better serve your needs:

- News, maps, movies and other personalized content will be geared toward an Indian audience
- Your email address will end in yahoo.co.in

I prefer content from [Yahoo! U.S. in English](#)

1. Tell us about yourself...

My Name: First Name Last Name

Gender: - Select One -

Birthday: - Select Month - / /

I live in India

Postal Code:

Figure 8. The website informs users of what is expected of them while registering.

2.10 Lending A helping hand

We need to help users along the way through a course of navigation and interaction. For applications that drive business, a toll free number is essential as this brings in the revenue. But with the case of an email service provider, online help would suffice.

The visibility and location of the help link is equally important. By providing this, you can ensure that users not only find it quickly but also feel safe just by seeing it. This is also useful for first time users who are just transitioning from the real world of letter writing to the web world of emails.

None of the websites that I reviewed follow this practice successfully.

2.11 Language Aid

There are websites that allow users to view their services in the language they choose. This should also be the case with web forms. Choosing the language of their choice gives them freedom and control. It also helps them move forward and register as they can be assured that the website caters to their needs as well.

Gmail Create a Google Account - Gmail

Change Language: English

Create an Account

Your Google Account gives you access to Gmail and [other Google services](#). If you already have a Google Account, you can [sign in here](#).

Get started with Gmail

First name:

Last name:

Desired Login Name: @gmail.com

Examples: J.Smith, John.Smith

Figure 9. The website provides a way for users to set their language preferences.

2.12 Save and Continue

Let's say that the basic goal is to register online, so why not just save users' information automatically as they proceed? A basic "Save and Continue" button would not only tell users that their information is automatically saved but it would also allow them to access the information if they need to resume the application later.

Now if your form is just a page long, you would obviously need a button that reads “submit” or “done”.

Most websites only follow the latter.

3. Orientation

Orientation is knowing exactly where you are at a point in time. It identifies your surrounding area and the steps ahead. As users move through an application process, they need to know where they are and how they reached the desired location in a form.

3.1 Forms Title

Ensuring that the page header follows a clear task flow from the preceding cue helps applicants orient themselves to the page. Most websites do this successfully. Let’s take a look at the example below (Figure 10). Gmail follows a clear flow from one page to another, telling the users where they are at each specific point in time.



Figure 10. The website provides a clear orientation feedback to the users as they move from one page to another.

3.2 Progress Indicator

How ever short or long your application form maybe, users need to know their path ahead. A

well-positioned progress indicator outlining the entire application process helps users see what lies ahead of them. There’s no use of providing the progress indicator on the left or the right of the form. Users need it up front as they do not tend to look to the left or the right of the form when they are entering information into an application. The best way to grab the user’s attention is to display the progress indicator on the top of every page of the application.

Let’s have a look at an example below (Figure 11). This website has got the concept right. Yet, it can further deliver what’s best for users at this point. If you are providing users with a form, make sure that you tell them what each step entails. For example, Step 1: Enter your personal details. The example below does provide a progress indicator by telling users of the number of steps ahead. Yet, it fails to mention the step details.



Figure 11. An example of a progress indicator. Though, the website needs to take a further step to provide the step details.

3.3 Progress Feedback

More than 60% of web-based forms that I’ve encountered add in extra steps along the way, ones not included in the progress indicator. As applicants do not see all the steps up front, they are baffled when additional steps start appearing. When you tell users that the form entails 3 steps, don’t cheat them. Keep it to 3 however tempted you might be. With the example above (Figure 11), users are probed into a number of pages, viewing the same orientation feedback for pages to come. Make sure that each step is provided on the same page. Moving them through pages and providing them with the same orientation feedback is only going to cause confusion.

4. Chunking

People perceive information more easily when related parts are grouped. This increases users’

efficiency and reduces reading effort. Chunking information into related parts helps users better understand information to navigate more effectively.

4.1. Headers

Ensure that you break the form into logical content groups and provide relevant headers for each information chunk. I have seen more than 90% of web forms that just provide the main header and then continue with about 20 questions on the same page. This can overwhelm a user. A quick way to organize information into groups would be to do a card sort with potential users of the application or even your co-workers. An example of effective chunking is found at Yahoo and My Way (Figure 12 and 13).

A clever trick is to number the chunks to allow users to perceive how much is left and also to perceive that they are moving forward. It provides clear direction of a way forward.

1. Tell us about yourself...

My Name

Gender

Birthday

I live in

Postal Code

2. Select an ID and password

Yahoo! ID and Email @ yahoo.com

Password Password Strength

Re-type Password

3. In case you forget your ID or password...

Alternate Email

Security Question

Your Answer

Figure 12. The form is well-chunked, with clear headers describing the grouped content.



Figure 13: The form is well-chunked, with clear headers describing the grouped content.

4.2. Labels

Labels on individual pages within the application process must be related to the main header as well as its elements. For example, forms should display a clear and simple header along with related sub-headers. In the example above (Figure 12 and 13), the sub-headers (labels) are clearly grouped with their header. You have personal information and password information separated with clear headers that define the structure. This provides clarity and direction.

5. Summary

As usability practitioners, we need to first and foremost understand the user's intentions and expectations, in order to provide an online experience that accommodates them. The figure below (Figure 14) shows the mapping between the user's intentions and expectations and the ways in which the usability practitioner can help accommodate them in order to ensure the ultimate success of online application forms.

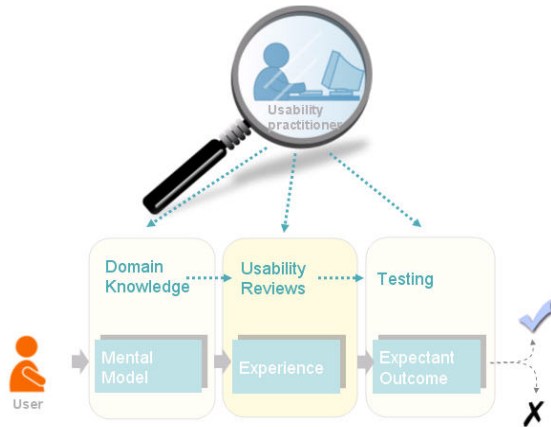


Figure 14. The usability practitioner ensures that the form's structure accommodates the user's mental model, experience, and expectations.

The journey of creating a successful online application form requires three people working in parallel: the usability practitioner, the designer, and the user. The usability practitioner needs to keep in mind the big picture. The designer needs to have a clear understanding of all the details that will go into the form's structure. The user helps shape the overall approach to the application form and ensures its ultimate success.

6. Podcast

An interview based on this paper was published by Jeff Parks, podcast editor at <http://boxesandarrows.com/view/getting-a-forms146>

7. References

[1] Laura Arlov. GUI Design for Dummies. 1997.

[2] Jeff Johnson. GUI Bloopers: Don'ts and Do's for Software Developers and Web Designers. 2000.

About The Author



With a background in cognitive psychology, Afshan has been a user experience analyst for a period of 3 years. She has worked on websites, applications and hand held devices to analyze and determine the need of

users in an environment. Her studies go beyond the cognitive approaches taken by a user in a context, while using an interface. Essentially, she believes that without the understanding and interpretive knowledge of the human mind and perceptual understanding of the world, creation and innovation fails in delivering what is essential.

Her experience spans across domains like banking, insurance, retail and e commerce, travel and transportation, media and entertainment, networking, education and gaming.

Applying her knowledge across domains, this analyst believes that it is essential to globally connect with other experts in the industry. She also contributes to lectures at the HCI meet. A speaker and author for Boxes and Arrows and UX Matters, Afshan believes in innovation and has faith that user experience will emerge as a best practice, globally.