VIDEO 1: WHY ARE FORMS IMPORTANT?

Hi there. Welcome to an introduction to forms. I'm Angela from HubSpot Academy. We're going to discuss how to use a form to generate leads. After this class, you'll understand how forms work as part of a successful conversion process, have a strategy for developing a customized form and learn how to create a form in HubSpot. So, why are forms important?

When it comes to the inbound methodology, forms fall into the convert stage, where we convert visitors into leads. Now, that doesn't mean that forms aren't applicable in other stages. When leads return to your site and fill out different forms, you'll collect more information. With more info about the leads, marketers and sales reps alike can have better communication with them.

We can also use the information that we gather from our forms to delight our customers into loyal promoters of our brand. A happy birthday email from a company for example, is made possible by collecting birthdays in a form.

But most importantly, a form is necessary to convert visitors into leads, so we'll focus on the convert stage. Let's begin with why the conversion process is so critical.

A conversion process typically begins with a Call-to-Action, or a CTA. When a visitor clicks on it, they're brought to a landing page where they fill out a form with their contact information and become a lead. After that, the lead is directed to a Thank-You page where they receive the offered content.

A form powers the conversion process. Forms collect information and add to your Contacts database. Either a new lead is created, or if it's a lead or customer that already exists, any new information that is collected will be added to the existing contact information.

Form information is stored in Contacts and can be used in your marketing efforts. You can segment your contacts, personalize emails and create personalized smart content across your site, amongst other things. Lastly, your sales team can access the lead's information in order to have great success with closing a lead into a customer.

When thinking about how to construct a form, consider that your forms are an equal information exchange. I'll give you something, typically a content offer, if you give me something, or fill out the form. It can be tempting to ask tons of questions on your form, but that doesn't always result in good conversion rates. As a simple guide, ask yourself if you'd be willing to answer the questions that you have on your form. Up next, we'll discuss how to create the best forms for your marketing efforts and get the most out of the conversion process.

VIDEO 2: HOW DO YOU CREATE GREAT FORMS?

In the last video, we discussed why forms are important and how a form relates to the conversion process. As you know, forms generate leads. But how do you get quality information about your leads? Let's figure that out together.

Now don't forget, a form doesn't exist on its own. Instead, you place a form onto a landing page to power the conversion process.

When creating a form, there's not an exact formula that works for all marketers. Every industry is different and every individual business has different personas. Your forms will be just as unique as your company. The form will be placed on a landing page and we're aiming for a minimum submission rate of 20% on the landing page.

Let's go over some best practices. Use these best practices to create a great form that converts well and gathers helpful information about your leads.

A common mistake is asking too many questions. If a visitor feels like they're being asked for more than what the offer is worth, then they might not fill out the form. Focus on questions that help you segment your contacts for your next phase of marketing. Let's discuss what kinds of questions might be essential for your marketing or sales team in order to move forward with nurturing a lead based on the buyer's journey.

During the awareness stage of the buyer's journey, a lead is gathering information to solve a problem. At this point, the lead is not necessarily collecting information about your specific company. Questioning during the awareness stage should help you understand more about the lead's needs, desires and concerns.

While in the awareness stage, we don't want to push our leads for too much of a commitment to get the offer. Remember to mirror the length of your form with the value of your offer. A top-10 checklist offer shouldn't have a form that asks several questions. Focus on the lead in this stage. What problem is the lead trying to solve? How do they hope to solve it? Is the lead even able to identify the problem that they are having? Create form fields that allow you to get these answers from the lead. In this example, a marketing agency is offering a top-10 SEO checklist. By asking what a lead's biggest marketing challenge is, the agency can address those challenges in future communications.

Let's discuss forms and the consideration stage of the buyer's journey. At this point, the lead is aware of your brand and is trying to determine if your company has the right solution for their needs. This is a great time to determine if your solutions and the lead's problems are aligned. You'll ask questions that will allow you to segment your leads and find the right group to nurture further into the buyer's journey.

Also, ask questions that help you understand the lead's buyer persona. As an example, a software company has established two different buyer personas. A large difference between their two buyer personas is each persona's job title. By simply asking for a job title on the form, the company would be able to categorize each lead into their appropriate buyer persona. Consider your own buyer personas and ask questions that help you segment your contacts.

Lastly, you'll connect with leads that are in the decision stage. If a lead indicates that they are ready for a demo or consultation offer with your company, you'll want to ask questions that help to qualify that the lead is ready to make a purchase.

Ask questions to qualify in the decision stage. Your goal is to segment leads that are closer to a buying decision than others. This is also the time to consider what a salesperson would need to know about the lead in order to close the sale. Here's an example of how a company might go about qualifying a lead. If a law firm can only represent clients that live in California, then asking for state on the form would allow them to segment all of the leads looking to obtain a consultation.

Alright, so now that you've crafted some great questions for your form take a step back and evaluate the form as if you were the lead.

This is a simple exercise, but a rather important one. Would you be willing to answer all of the questions you've posed on the form? A form that's too long may turn away some visitors.

Ask yourself if you'd be willing to exchange this information for different types of offers and then imagine how your buyer personas would interpret the form. Is it visually overwhelming with the number of questions that are asked? Is there some information that might be too sensitive to share at a certain stage of the buyer's journey?

You might need to make some changes to the form to make sure that you don't miss out on the opportunity to convert a visitor into a lead. Do your best to keep the form as short and simple as possible.

The next best practice is to always add a label and placeholder text to each form field. A label on a form field defines what the field is asking for. It prompts for input on the form and it can be read by screen readers, so labels are an important accessibility feature of your form.

The thing to keep in mind is that more explicit you can be, the better. The label in this example reads phone number. Think about your phone number for a moment. Did you think of your home phone, work, mobile or some other phone number that you have? Without a good label, you might not get the data you had hoped for.

Placeholder text on the other hand, shows what kind of information you are looking for in the field. If I asked you to type in your phone number, would you add the country code? Would you use spaces, periods or dashes in your phone number?

Different people will format their phone number in different ways. Using placeholder text on your forms keeps your visitors from having to guess how to format or phrase their answer, which leads to better data collection and in turn better segmentation for you as a marketer!

Lastly, you might need to use help text in order to explain the form field a little further. Here's an example. Let's say you have a form field that asks users to select the best day for you to contact them. The help text could read (check all boxes that apply) to ensure that visitors know to choose every option that is applicable to them.

Which leads us to the last best practice we'll discuss. Form fields should have limited input options when appropriate. Whenever you create a new field for the form you're building, take a moment to consider what kind of field you'll use to ask the question.

Form field types include the following: text input, dropdown select, radio select, single or multiple checkboxes, number and date fields, and a file upload field. Variety in the field type can keep the visitor engaged. When a form is easy to submit, there's a higher chance that a person will fill it out.

When you pick the right field type for your form, you'll get better data and have an easier time with creating lists. It's important to note that a contacts database doesn't understand context. Let's go through an example of how this can impact contact segmentation.

The example form is asking for country. Let's say that Visitor A types in their country as 'United States' and visitor B types in 'USA'. Those are different entries, even though you might be able to understand that these two visitors are from the same country. If your contacts were segmented by country, these two wouldn't end up in the same group.

We can easily avoid this problem by choosing a different field type. So the next time you create a new contact property, take some time to consider which field type is best. A text field is not always the best option. In this case, a dropdown select field rather than a text field will give better data to segment by, which will save you time in the long run.

And again, here are the best practices for creating forms. Focus on questions that help you segment your contacts for your next phase of marketing, evaluate the form as if you were the lead, always add a label and placeholder text to each form field and lastly, form fields should have limited input options when appropriate.

VIDEO 3: TOOL WALKTHROUGH

View the user guide or additional resources on the class page for a text version and instructions on how to use the tool.