# 9 Nifty Tips To Optimize Web Forms

Contact Us
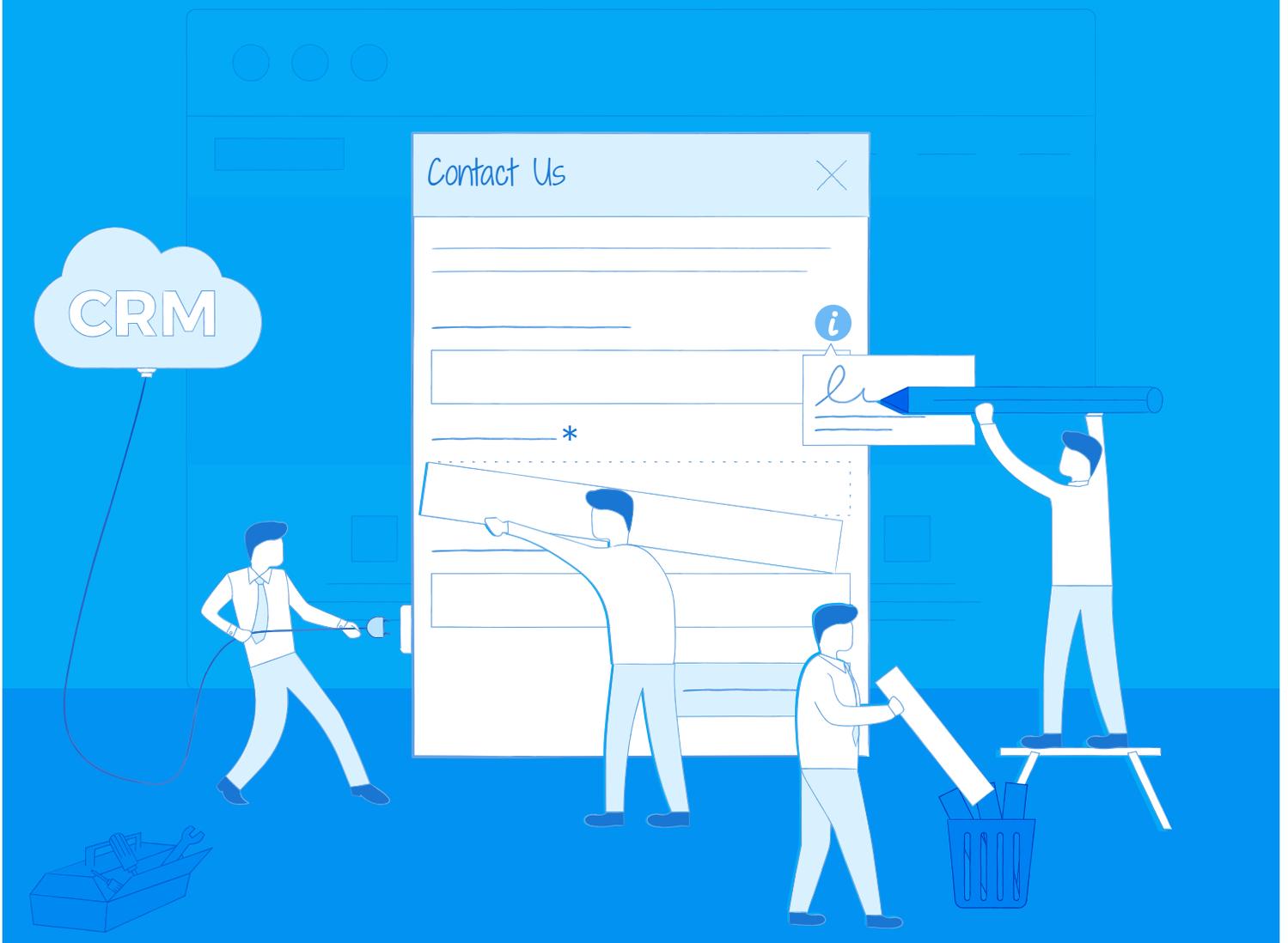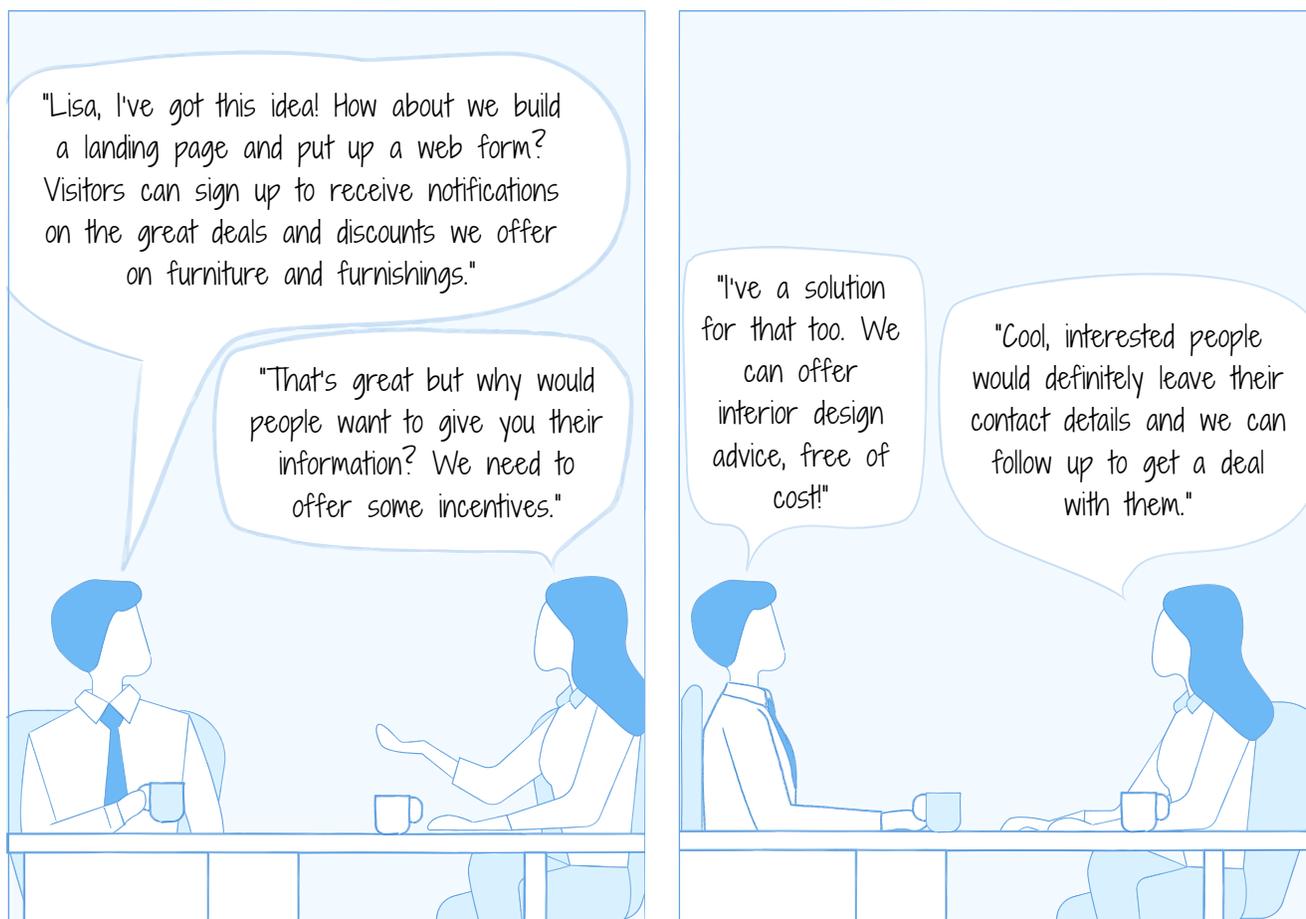
Do you have such conversations at your workplace too? Are you trying to figure out a way to convert the traffic to your web page into quality leads?

Lead generation, as we all know is all about attracting people to your business. You could start a campaign, advertise, participate in trade shows, or conduct webinars. All this to get people interested in your product, just enough to persuade them to know more about it!

You can take these efforts a step further by using a good web form builder. And if the form builder has a WYSIWYG editor, you can just drag and drop and create web forms in minutes!

In this ebook, take a look at **9 nifty tips on how to optimize web forms**. Along with them are hints on how to implement them using Zoho CRM.

#1 Connect your web form with CRM.

#2 Provide links and hints to fill fields.

#3 Avoid too many required fields and keep the form short and simple.

#4 Automatically pass hidden values for multiple forms.

#5 Eliminate spam and automatic form submission.

#6 Keep the visitor engaged by redirecting to another page.

#7 Reply back with personalized emails.

#8 Assign records automatically to sales reps for quick follow-ups.

#9 Filter records before adding them to your CRM.

ZOHO CRM

TIP # 1

Connect your web form with CRM.

Why should you wait until a fair number of leads are collected and then transfer them to a CRM system? Getting a bunch of leads at once is difficult to manage. But if you get them one at a time, it is much easier to assign them to the sales reps, add tasks, schedule calls, and start following up right away.

Use web forms that are well connected to your CRM and get the data straight into the CRM database.
You can relax without a tiny bit of doubt on the accuracy of the data that is captured from the web form and is accessed by your sales reps.

In ZCRM - Web forms

TIP # 2

Provide links and hints to fill fields.

Often people are reluctant to give away information, especially when email address, contact numbers, etc. are involved. Provide a link to the privacy policy and assure them that the information is safe with you.

Hints on the information such as the data and time format, phone numbers with or without the area code, are very useful to maintain your CRM with clean data. It ensures that all the data is collected in the same format and also helps the visitor in filling up the details.
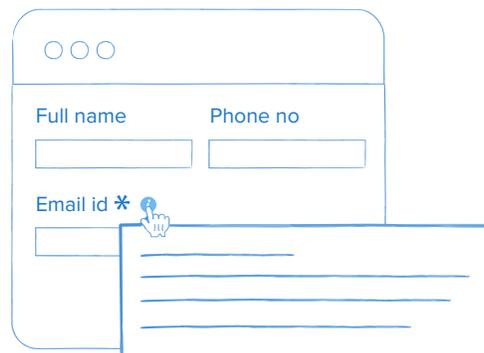
In ZCRM - Help links or texts for the fields

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TIP # 3

Avoid too many required fields. Only ask what is relevant.

It would be a loss if you get huge traffic to your web page but don't have a web form that's appealing enough to get the user to fill it. Again, you can't deny that it is always tempting to collect as much information as possible. But do you think a lengthy web form with clumsy layout and too many required fields will work? It may just scare them off instead!

Keeping the form simple with less required fields would be a wise choice. Build a form with just the important fields that take less than 2 minutes to fill. Maybe adding an extra field may look good but double check if it is really worth it. Ask for only what is necessary for the sales reps to contact the leads and follow up with them.


In ZCRM - Making fields mandatory and form's layout.

TIP # 4

Automatically pass hidden values for multiple forms.

Often, there is a need to associate some details to the new leads without revealing it to the visitors. It could be the campaign that generated the lead, or the source of the lead, or any other hidden value that you want along with the lead's details.

Add hidden values that come in handy for such requirements. For example, if you want to host the 'Request a Demo' form in a couple of pages, get a clear picture of the source of lead generation by automatically passing hidden values.

In ZCRM - Hidden fields in the web form

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TIP # 5

Eliminate spam and automatic form submission.

The last thing you want is your site to get attacked by 'bots' that would sign up hundred times within a minute. Moreover, you definitely don't want to receive frequent junk requests that are considered spam. Captcha is a well-known solution to this.

Captcha is used a lot, but is very useful too! Include captchas that tell humans and Computers apart and eliminate automatic form submission to a great extent. It would reduce the amount of spam and give you quality leads to work on.
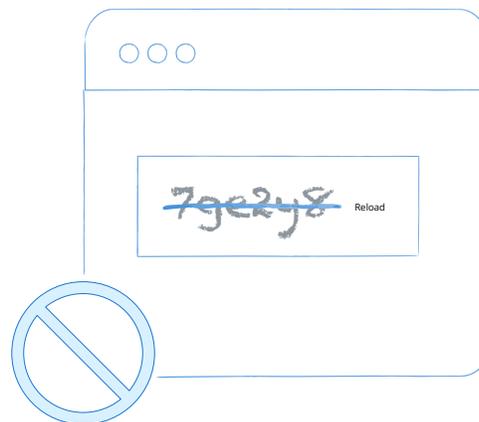
In ZCRM - Using Captcha

TIP # 6

Keep the visitor engaged by redirecting to another page.

Persuading the visitors to fill up the form need not be the only goal. You can go further and keep the users engaged. Get their attention by leading them to a page that gives them additional relevant information.

You could redirect the users to a page that:

- Highlights the latest updates, offers or discounts.

- Provides an overview of the product in the form of

a video or an interactive UI.

- Lists the testimonials from existing customers.

Or simply redirect them to a **'Thank You'** page.

√ **Thank You!**

Click here
To See Our Latest Offers
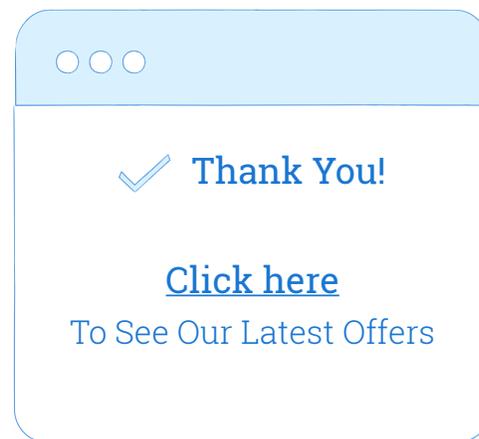
In ZCRM - Landing page URL

TIP # 7 Reply back with personalized emails.

Walking into a nearby cafe, if you hear "Good Evening! What would you like to have?". That would sound very "usual".

Who does not like a personal touch - "Hello! Welcome to the Coffee Shop. Would you like to try out the 'Drink of the Day' – Iced Coffee Slush with a hint of orange?"

Sending emails to acknowledge the requests sent by your leads is a good practice to nurture leads, but making it automatic is no fun. Add a personal touch to your emails and set the right note for customer relationship and sales. Let your customers know that you're genuinely trying to help.
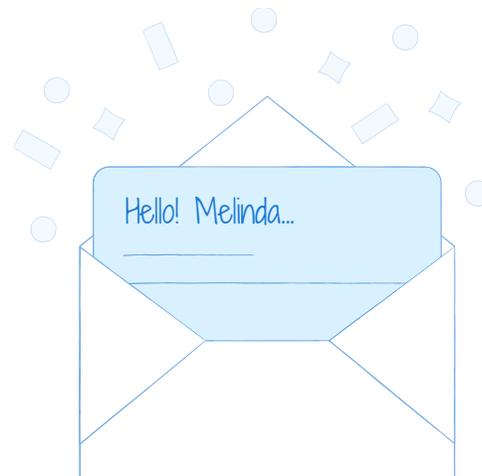

In ZCRM - Automated personalized emails or Auto-response Rules.

TIP # 8 Assign records automatically to sales reps for quick follow-ups.

Your leads may fill up a form to find out more about your product, or to download a white paper or ebook. Whatever the case maybe, the question here is – How long does it take for your sales reps to follow-up on the leads and get back to them? There are various ways to connect to the leads or prospects, but the timing needs to be right.

If it takes too long, then you need to revisit the lead management and follow-up process. Grab the opportunity and don't make your leads wait for long. Create a simple workflow to assign and route the leads to the sales reps for quick follow-ups.
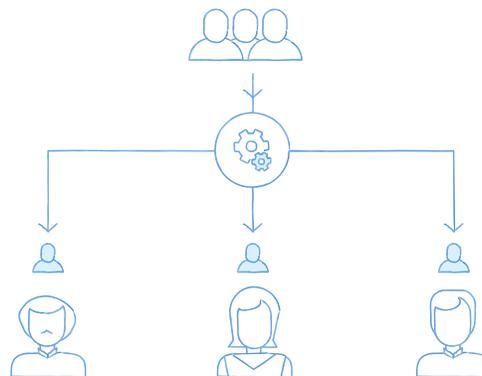
In ZCRM - Assignment Rules and follow-up tasks for record owners

TIP # **9**

Filter records before adding them to your CRM.

Someone in your sales team needs to give thumbs up to the leads that are getting added to your CRM system. Captcha is basically to avoid spam. But what about junk leads that enter your CRM?

When your web form and CRM system are tightly connected, possibilities are that the 'not seriously interested' leads get added too. You definitely do not want your sales people to waste their time on junk leads. Keep a check on records that are automatically added and approve them before they are ready for the sales team to follow up.
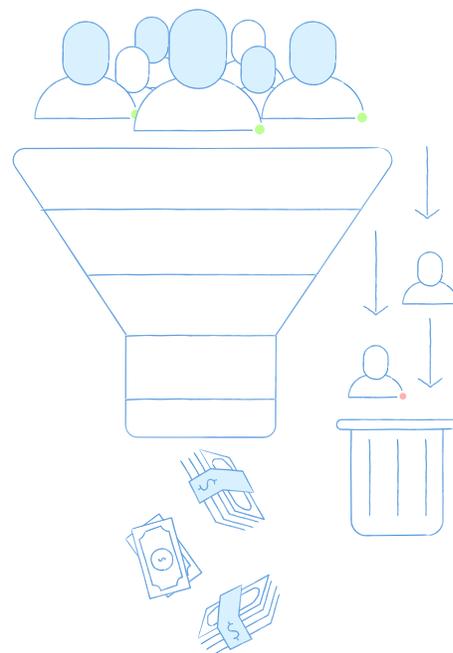
In ZCRM - Approve records generated from web forms

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