

A photograph of three business professionals in a meeting. A woman with curly hair is leaning over a man, pointing at a laptop screen. Another man is looking on. They are in a bright office setting with large windows in the background.

Forms Best Practices

Converting Website Visitors to Leads

Act-On forms have enhanced functionality and are the key to learning the behaviors of your audience. Even if you prefer to host your own forms, the goal is to tie form activity to Act-On behavioral tracking. This linkage is the foundation of all advanced marketing automation strategies.

Form Intro

In order to build a relationship with your audience, you need content – lots of it – and you need to make it available across various media and multiple channels. Lots of organizations make a common mistake: They wait until an audience member is 80% – 90% of the way through the decision making process before they create an opportunity to get the prospect's information using a "Contact Us" form.

Here, we will explore other form strategies to help maximize audience engagement and nurturing.

Presentation

Forms can be presented using several methods. Depending on your needs, these options provide different benefits that will be covered in this document.

Display Forms are forms that are visible when a user views a web or landing page, and the completion of the form is the call to action. Gated URLs are triggered by clicking on a link that subsequently "pops up" a form between the user and the desired content.

Types of Forms

There are several basic types of forms which will be discussed for your content marketing strategy:

- Sign-up forms
- Access forms
- Contact forms
- Progressive profile forms

When a member of your audience submits an Act-On form, Act-On's marketing automation platform connects that user's behaviors on your tracked marketing, sales, and retention assets to their email and identity.



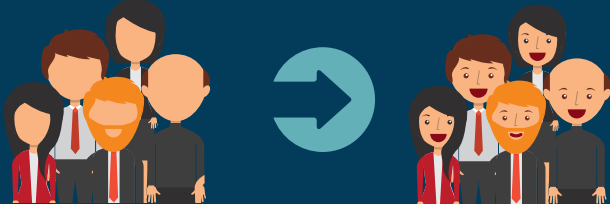
START WITH US TODAY

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Email Address *	
<input type="text"/>	
Business / Organization *	Telephone Number *
<input type="text"/>	<input type="text"/>
<input type="submit" value="SUBMIT"/>	

Asking for Information

The amount of information that you request should be appropriate based on your relationship and offer content. As an example, asking for a Social Security Number is appropriate for a bank loan, not a white paper. The less information that you request, the higher your form conversion rate will be. Using tactics like Progressive Profiling, you can learn a lot about your audience over time!

What do we wish to accomplish ?



Types of Forms

The key to determining what type of form to use

Understanding what we are trying to accomplish is the key to understanding how information should be displayed and what our calls to action should be.

Sign-Up Forms

Sign-up forms are presented alongside content and provide a way for the individual to register or sign up for a resource or event that will happen later, or be delivered later.

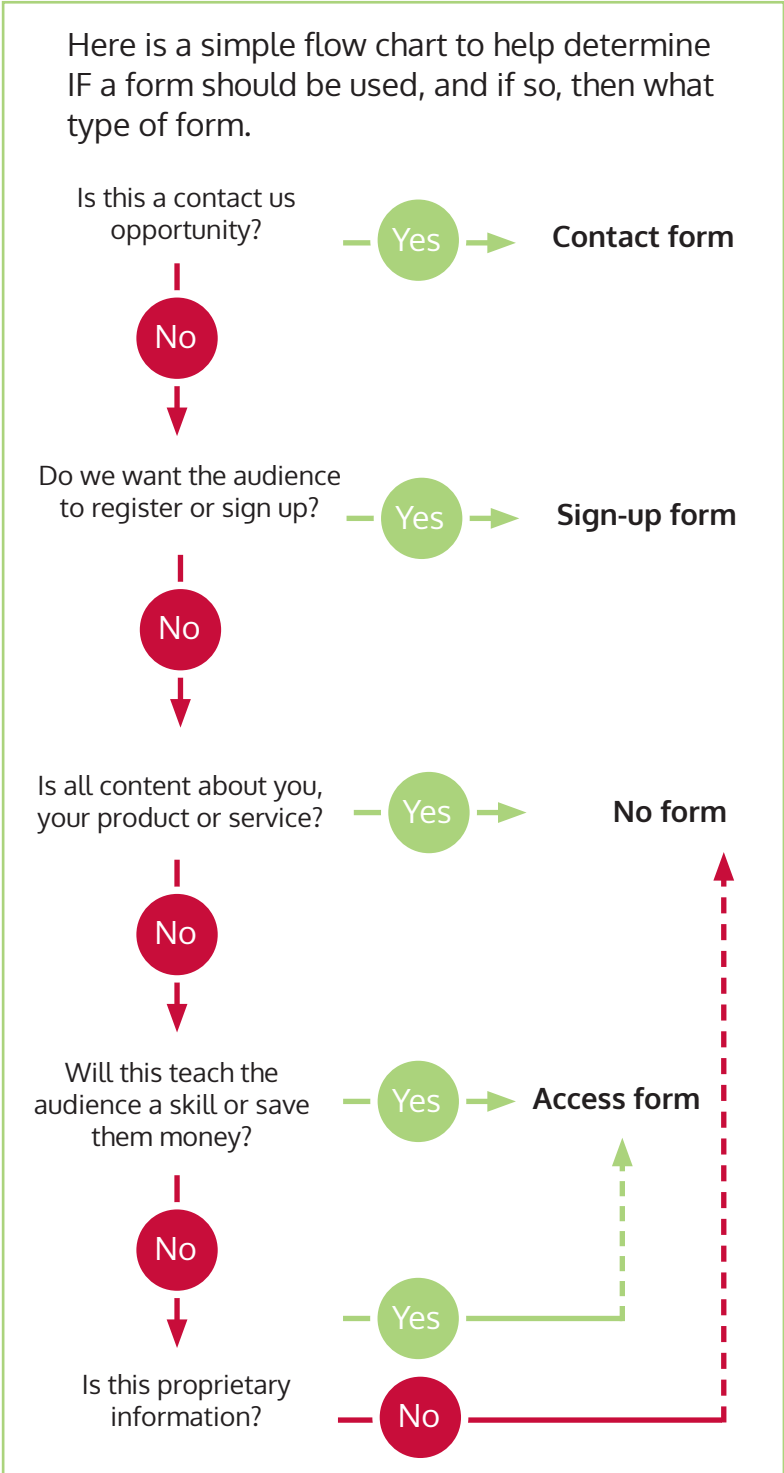
Access Forms

Access forms let people have access to content right away, for example an on-demand video, or a downloadable eBook. Access forms use web pages or landing pages to provide a synopsis of the content being offered, a value proposition for why the individual should want the information, and the call to action is to submit the form visible on the screen.

Contact Forms

Contact Us forms are typically used in the last stage of a nurture process and are a very clear indication of serious intent. Contact Us forms often request detailed information from users as it relates to a customer engagement.

See appendix for examples of these Act-On forms.



Form Presentation

When to Use Display Forms and Gated Content Forms

Display Forms

A Display form is visible when a user views a web or landing page, and the completion of the form is the call to action. The additional content drives submission commitment.

Gated URL

Alternately, one can use the Act-On Gated Content link to create a form, which when used as a link to content in the media library a form is triggered that subsequently “pops up” between the user and the desired media asset.

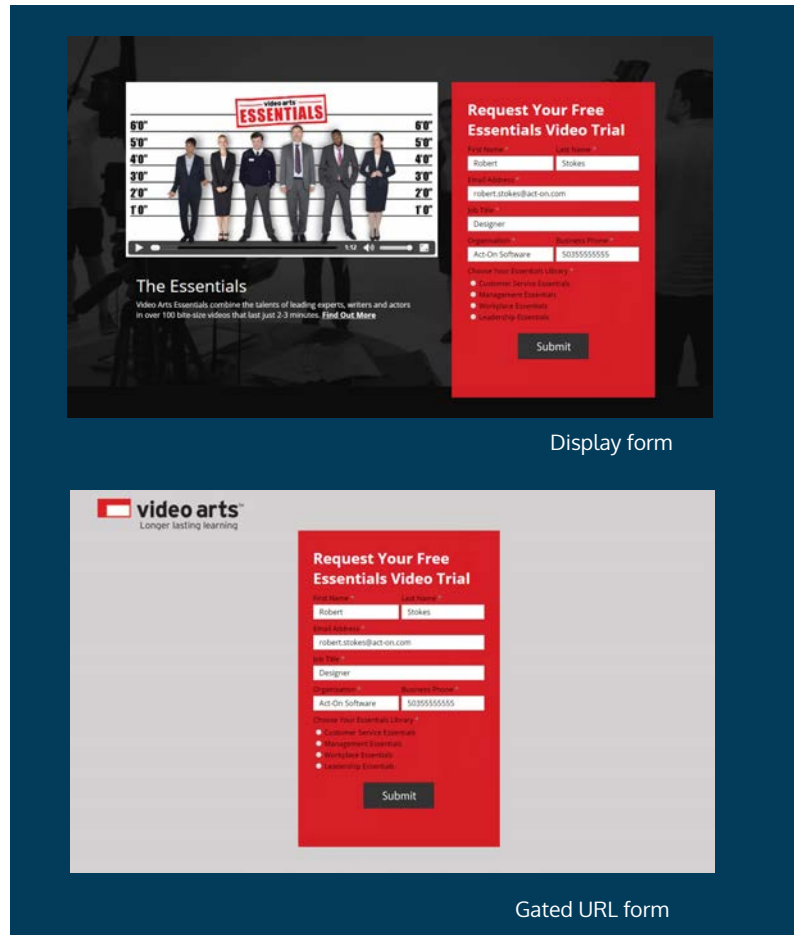
By selecting the “Gated Content URL” option in Act-On media library, you can easily make a gated URL hyperlink.

Progressive Profiling

Using Gated URLs, you can configure Act-On to ask for different information based on what you already know about your audience.

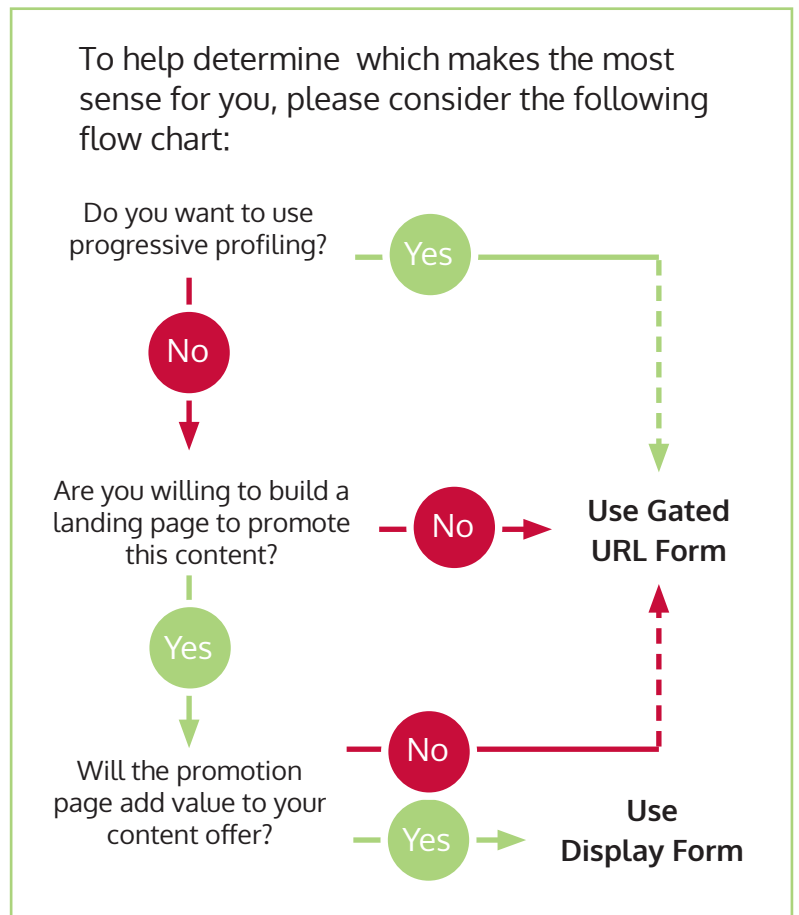
For example, if you already know First Name, Last Name, and Email Address; Act-On may automatically ask for City, State, and Zip Code.

 [Read More About Progressive Profiling](#)



Display form

Gated URL form



Asking for Information

It is critical that the information you request in a form is appropriate to the funnel stage.

The primary goal of your content will probably be either to create new interest or to help interested individuals take a next step. You should make process stage a major factor in your form strategy, so that you can apply the right content to get more conversions.

Content designed for general interest (top of funnel) should be deployed as free content (which means it doesn't require the individual to give information to see it). This content should provide compelling reasons for your audience to want more information. Once you establish your brand as a source for great content, then offer more, and make this additional information require a simple form asking for first name, last name, and email address. This will convert your individual to a known visitor.

Content that promotes a organization or services (middle of funnel) is more valuable to your audience, and therefore the price of entry should be higher. In order to have maximum effectiveness, the forms you use for this content can be more robust. In this stage, you will often request first name, last name, email address, and relevant information for more targeted marketing.

Why are we using a form here?



Content designed for direct engagement (bottom of funnel) will have longer, more detailed forms. Good examples of this type of content include scheduling appointments, requesting medical advice, or arranging to speak with a specialist. If a patient is looking for this information, there's a good chance they are completing the research phase of the decision process and moving into deliberation. At this stage, it is perfectly reasonable to be seeking specific information from your audience about budget, role, business needs, and timeline to purchase.

Sample form

Access Form



— FEATURED EBOOK —

How to Profit from Account-Based Marketing



5 Principles for Success; 5 Pitfalls to Avoid

Account-based marketing has captured the attention of the marketing industry for good reason. According to ITSMA, 84% of B2B marketers say that ABM delivers a higher ROI than any other approach. By leveraging the five key principles of ABM in this eBook, you'll be able to deploy a successful ABM strategy that produces real and repeatable success – with technology you probably already have.

In this eBook we'll cover:

- ✓ The key players in ABM, and how they work together
- ✓ Six steps to kickstart your first ABM program
- ✓ Five success principles
- ✓ Five pitfalls to avoid when getting started
- ✓ Tools you'll need to build a scalable ABM system
- ✓ How to measure your success

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Business Phone *	Business Email *
<input type="text"/>	<input type="text"/>
Company *	Website *
<input type="text"/>	<input type="text"/>
Country *	
<input type="text" value="Bahamas"/>	

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Sample form

Display Form

The Essentials

Video Arts Essentials combine the talents of leading experts, writers and actors in over 100 bite-size videos that last just 2-3 minutes. [Find Out More](#)

Request Your Free Essentials Video Trial

First Name * Last Name *

Email Address *

Job Title *

Organisation * Business Phone *

Choose Your Essentials Library *
 Customer Service Essentials
 Management Essentials
 Workplace Essentials
 Leadership Essentials

The Cast includes: Robert Webb (Peep Show), Helen Baxendale (Friends), Sally Phillips (Bridge: Jones's Diary), Mark Heap (Friday Night Dinners), Tom Bennett (Phone Shop) and Kobna Holdbrook-Smith (Turks & Caicos).

Famous for intelligent, entertaining and straight-talking training.

Video Arts Essentials are 135 funny, bite-size videos that make employees more effective at work. In each film, lasting between one and three minutes, the viewer will grasp the key learning points of a subject while enjoying the Video Arts comedy approach which we know delivers highly effective, compelling learning.

Meet Bad Manager and Good Manager... or Bad Leader and Good Leader... or Bad Service and Good Service!

In each scenario, Bad Manager takes the lead on a workplace issue. Bad Manager thinks he knows exactly how to approach the situation and fails dismally, exhibiting all of the negative behaviours people sometimes demonstrate at work. Thank goodness for Good Manager, who picks up the pieces and de-briefs on why one way might be better than the other.



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2015 Guinness Gold Winner
IELA
Winner of:
2014 WorldMediaFestival Award Winner
2014 WorldMediaFestival Award Winner
2014 WorldMediaFestival Award Winner
IVCA AWARDS 2014

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Sample form

Event Sign-Up Form



We're hosting an event in Dallas on July 21, 2016 and would love for you to join us.

Join us for a complimentary, half-day marketing workshop, followed by cocktails. This is an exclusive opportunity to learn, share, network, and get power-user best practices to improve your marketing results.

AGENDA:
1:00pm - 2:30pm | The New Marketing Workspace: Brand, Demand & Expand
2:30pm - 2:45pm | Snack Break
2:45pm - 3:15pm | Product Roadmap
3:15pm - 4:00pm | Let's Create: An Act-On Workshop (Customers)
3:15pm - 4:00pm | A Deep Dive: Get to Know Act-On (Prospects)
4:00pm - 6:00pm | Cocktails & Appetizers

RSVP TO:
i marketing Roadshow - Dallas, TX
The Highland Dallas

First Name*

Last Name*

Company*

Business Email*

Business Phone*


[SAVE MY SEAT](#)

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Sample form

Contact Us Form

The image shows a sample contact form for a company named 'True Blue'. The form is presented within a dark grey frame. At the top left of the frame, the text 'True Blue' is displayed in white. At the top right, there is a blue button labeled 'Start Today'. The form itself is divided into two main sections. The left section, titled 'Contact Us', contains a blue heading, a paragraph of blue text describing cloud services, a block of grey placeholder text (Lorem ipsum), and a blue line of text that says 'We are here to help.' The right section, titled 'Start Today', contains a form with several input fields: 'Email Address *', 'First Name *', 'Last Name *', 'Company *', and 'Business Phone *'. Below these fields is a larger text area labeled 'Note to Us'. At the bottom of the right section is a blue button labeled 'Submit'. The entire form is set against a light blue background with a subtle cloud pattern. A solid blue horizontal bar is located at the bottom of the dark grey frame.



In order to build a relationship with your audience, you need content – lots of it. You also need to make it available across various media and multiple channels. Finally, you have to know who is engaging with it. Act-On forms allow you to do that.

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About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more

www.act-on.com @ActOnSoftware | #ActOnSW

