Contents

Foreword Acknowledgements Author Biography Image Credits	xi xiii xv xvii
Introduction: What is a form? Why forms matter Bad forms can have serious consequences Good forms create good experiences What this book is about It's about design, not technology It's about the web, not paper It's about usability: making forms easier to use It's got a process in it: try it, you might like it Some definitions and two processes You know a form when you see it The three layers: relationship, conversation and appearance The messy and typical forms design process The methodical design process that really works	1 2 2 3 4 4 4 4 5 5 5 7 8
Persuading People to Answer If you understand people, you design better forms How people react to forms Readers, rushers, and refusers Pick the right moment to ask a question Relationship varies question by question Three rules that influence response rates Rule 1: Establish trust Rule 2: Reduce social costs Rule 3: Increase rewards A small reward: give them a form when they want one How long can your form be? Who will answer your questions? Design for physical abilities and differences Find out about your users by asking them Find out how users perceive the form Do you know enough about your users? Make your facts about users into pictures of real people by creating personas	11 12 13 15 16 17 19 20 21 21 24 25 25 25 26 27
Summary	29

Interlude: Registration forms: What to do if you can't avoid them

2	Asking for the Right Information	33
	Find out why you need the information	34
	Ask your stakeholders	35
	Ask the people who work with the information	37
	Use a question protocol to think about how information	
	is used browers	37
	Check whether your organization already holds the	
	information	38
	Use information that already exists in your organization	38
	Avoid duplication	39
	Find out what others ask for	40
	What to do if you don't have competitors	40
	An example of looking at competitors	40
	Summary: Ask for information that you need	41

Case study: A conference booking form: A sample question protocol

3	Making Questions Easy to Answer	47
	Ask questions that support smooth conversation	48
	The four steps in answering a question	48
	Make the question easy to understand	50
	Ask about familiar concepts using familiar words	50
	Ask one question at a time	52
	Turn negative questions into positive ones	53
	Clarify meaning by careful grouping	54
	Get rid of decision points	55
	Be aware of cultural biases	56
	Make it easy to find the answer	57
	Slot-in answers are in our heads	57
	Gathered answers are found somewhere else	57
	Third-party answers come from someone else	58
	Created answers are made up on the spot	58
	Mismatches in answering strategies create problems	59
	Know where users will find answers	61
	Know who has the data you want	61
	Help users to find the answers	62
	Write labels that match ways users find the answers	63
	Make it easy to judge the answer	64
	Avoid privacy errors: Explain why you want to know	04
	the answer	65
	rile allower	65

	Make it easy to put the answer on the form	65
	Match the options you offer to the ones in users' minds	65
	Summary: Making questions easy to answer	68
4	Writing Useful Instructions	69
	Write useful instructions	70
	Rewrite instructions in plain language	71
	Plain language rule 1: Use familiar words in	
	familiar ways	71
	Plain language rule 2: Use short, affirmative, active	
	sentences	73
	Plain language rule 3: Demolish walls of words	74
	Plain language rule 4: Put choices before actions	75
	Plain language rule 5: Use helpful headings	76
	Cut instructions that aren't needed	78
	Put instructions where they are needed	79
	Include a title that says what the form is for	79
	Put a list of things to gather at the front of the form	80
	It's OK to guide users to a different form	81
	It's good to replace instructions with questions	81
	A "before and after" example	82
	Summary: Writing instructions	83
	y "thanks" to stoep the conversation principal ainst ont	561 Sa
Int	terlude: Providing help	
5	Choosing Forms Controls	87
-	Choose appropriate controls	88
	Meet users' expectations about how controls work	89
	Is it more natural to type rather than select?	90
	Are the answers easily mistyped?	91
	How many options are there?	92
	Is the user allowed to select more than one	32
	option?	93
	Are the options visually distinctive?	94
	Does the user need to see the options to understand	3 1
	the question?	95
	Describe your options clearly	96
	Choose a sensible order for the options	96
	Consider specialist controls—cautiously	97
	Calendars help to show relative dates	97
	Maps help to show geography	98
	Summary: Choosing controls	99
	Carrinary: Orlooding Controls	33

6	Making the Form Flow Easily Making the Form Flow Easily Break up long forms by topic Crush the fields onto as few pages as possible (sometimes) Split across multiple pages by dividing the form into topics (better) Keep to one topic at a time Ask anticipated questions before surprising ones Ask less intrusive questions before more intrusive If questions come up more than once, explain the difference between them	101 102 102 102 103 104 105
	Use progress indicators Summary menus work better than progress indicators for some forms Don't surprise users with sudden changes Avoid pages that change without warning It's OK to change pages on user command It's OK to build a custom form based on earlier input Avoid tabs as a way of getting around a form Be gentle with errors Validation helps some of the time Validate as early as possible Say "thanks" to close the conversation Summary: Making the form flow easily	106 107 109 109 110 111 111 112 112 113 115 116
Int	erlude: Farewell to pop-ups	
7	Taking Care of the Details The details of appearance Don't stress over the details Put labels where users will see them Eye-tracking shows that users focus narrowly on the fields and labels Users see labels above and to the left of fields Users look at labels for fields only if they think they are relevant Putting the labels above the fields works sometimes If all your fields need slot-in answers, right-aligned labels can work well If all your fields need other types of answers, right-aligned labels are problematic If your form asks for personal data, left-align the labels	121 123 123 124 125 126 126 127 128 128 129

	If in doubt, left-align the labels	129 129
	Special consideration: labels for translation Make sure that each label is closely associated with	123
	its field	131
	Colons at the end of labels?	132
	Sentence or title case for labels?	133
	Indicating required fields	134
	Indicating required fields; if you want to indicate	101
	nonrequired, use "(optional)"	134
	Include an explanation of the indicator you choose	134
	An example: fussing with required fields	135
	Choosing legible text: fonts and words	136
	Choose a good color contrast and large size of font	136
	Use typographic variations with restraint	137
	Use white space to make easy-to-read paragraphs	139
	Summary: Taking Care of the Details	140
	Julillary. Taking date of the Betans	- 10
Int	terlude: Serif or sans serif font?	
8	Making a Form Look Easy	143
	What makes a form look good	144
	Make sure users know who you are: logos and branding	145
	Too little branding undermines confidence	146
	Too much branding is almost as bad as too little	147
	Take care with color combinations	148
	Use a light touch when applying branding to labels,	
	fields, and buttons	150
	When users look at branding—and when they don't	151
	Don't meddle with the user's browser	152
	Make your form look tidy with grids	153
	Line up to a few, strong vertical gridlines	155
	Create a distinctly different gridline instead of failing to	
	match an existing one	156
	Make the form look organized with grouping	158
	Placement is the easiest, clearest way of showing	
	groups	159
	Lines may undermine grouping; try taking some out	160
	Don't break patterns	161
	Don't bleak patterns	
	Don't hide content in grouping devices	162

Case study: A makeover

X