Webinar Topic

9 Nifty Tips to Optimize your Web Forms for Lead Generation

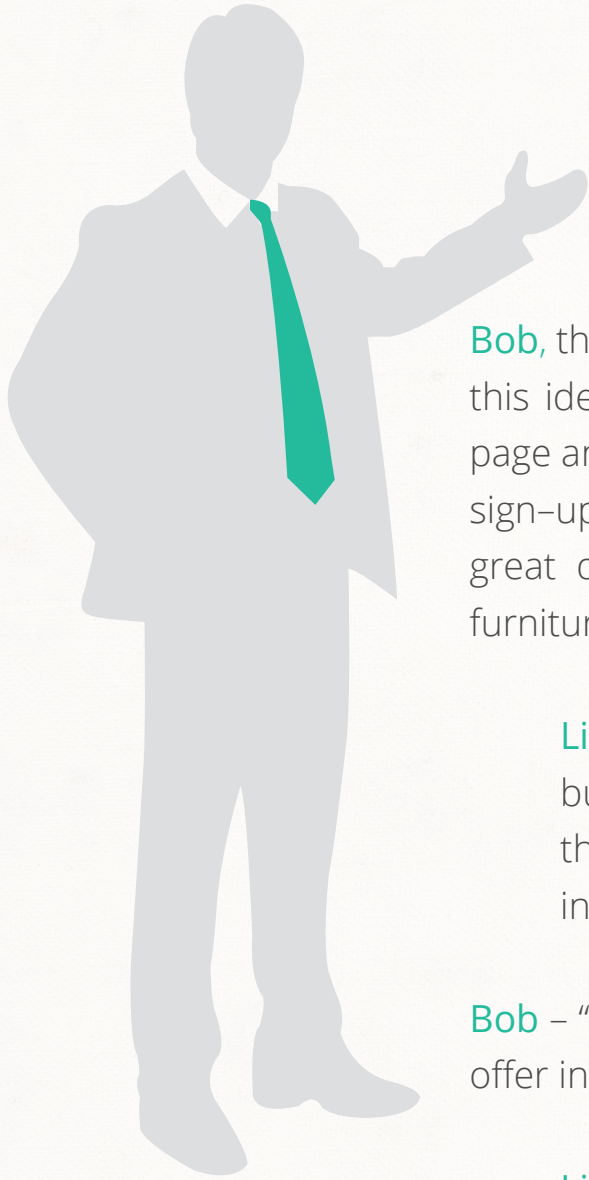Date ⌄

Full Name

Email

Register

ZOHO CRM

Bob, the product marketer – "Lisa, I've got this idea! How about we build a landing page and put up a web form? Visitors can sign–up to receive notifications on the great deals and discounts we offer on furniture and furnishings."

Lisa, another marketer – "That's great but why would people want to give you their information? We need to offer some incentives."

Bob – "I've a solution for that too. We can offer interior design advice, free of cost!"

Lisa – "Cool... interested people would definitely leave their contact details and we can follow up to get a deal with them."
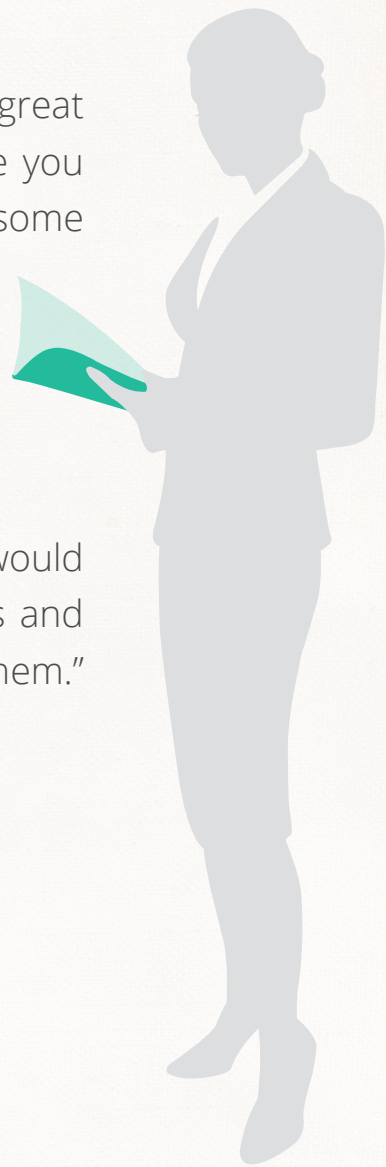
Do you have such conversations at your workplace too? Are you trying to figure out a way to convert the traffic to your web page into quality leads?

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!

#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.

Take a look at some tips on setting up a good web form. Along with them are hints on how to implement them using Zoho CRM.

#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, etc.

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-to-Lead Forms

#2 Provide links and hints to fill fields.

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

Hints on the data and time format, phone number with or without the area code, are very useful to maintain your CRM with clean data.

In ZCRM – Help Links for Each Field in the Forms

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

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 field would be a wise choice. Build a form with just the important fields that take less than 2 minutes to fill. Ask for only the basic contact details that are necessary for the sales reps to contact the leads and follow them up.

In ZCRM - Required Fields + Form Layout Settings
for the Forms

#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 of your form. 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 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 Forms

#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. And 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.
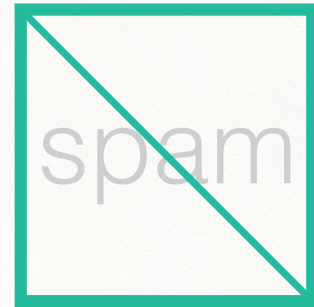
In ZCRM - Captcha in Forms

#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 to a 'Thank You' page!

In ZCRM - Landing Page URL in the Forms

#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 & Autoresponse Rules

#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?

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.
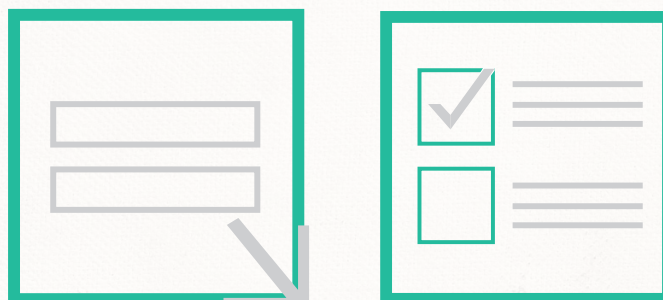
In ZCRM – Assignment Rules + Follow-up Tasks for Record Owners

#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 is 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 Form

Contact Us

USA Office

California
Zoho Corporation
4141 Hacienda Drive
Pleasanton, CA 94588, USA
Phone: +1 888 204 3539

Austin
Zoho Corporation
805 Las Cimas Pkwy, Suite 380
Austin, TX 78746, USA

✉ support@zohocrm.com

🐦 www.twitter.com/zoho
in www.linkedin.com/company/zoho-corporation
f www.facebook.com/zoho

India Office

Zoho Corporation Private Limited
DLF IT Park, Block 7, Ground floor,
No. 1/124, Shivaji Garden,
Nandambakkam Post,
Mount PH Road, Ramapuram,
Chennai 600 089, INDIA

Author: Pavitra J.

Pavitra is the Lead, User Education at Zoho CRM.
You can reach her at www.twitter.com/jpavitra/