

For web developers who need to improve the usability of forms on their web site, "Forms that work" is a 1-day workshop that shows delegates how to improve forms in three ways: better fit between users' needs and business purpose, questions that are easier to answer, and forms that look easier to fill in. Unlike other usability courses, this workshop focuses exclusively on the techniques you need to design better forms.

Duration

This is a one-day workshop.

Overview

Forms are ubiquitous, essential and widely disliked, but they do not have to be a difficult experience for the user. This workshop concentrates on the human side of forms: how we interact with, and think about forms and how to make them as easy for users as practicable – even if they will never be really pleasurable.

We will review a wide range of forms from the web and on paper. You will practice the techniques that are taught. This is a very interactive workshop with many opportunities for discussion and questions. The principles that you learn are applicable to all types of forms: paper, PDF and web.

Who is the course for?

This workshop is for you if you are have some interest in forms, especially if you are a designer working with forms in some way. If you are a beginner, you will find that this workshop helps you to grips with the many issues that you encounter when designing forms. If you are an expert, you will be especially interested in the references to research that support the concepts taught. You do not need to have any experience in usability or in programming. This is not a programming workshop and we will not be looking at any specific forms technology in detail. (Note: We will briefly consider accessibility issues with forms, but this is not a course on accessible form design).

How will I benefit?

After attending this course, you will be able to:

Improve forms by achieving a better fit between business purpose and user needs.

Improve forms by creating a smoother conversation, with questions that flow and are easy to answer.

Improve forms by making them look good.

Test forms in usability tests and desk checks.

Appreciate the importance of iteration throughout forms development.

What will I learn?

Introduction — what makes a good form?

Warm up section that introduces the topics to be covered

What makes a good form: ranking forms in order from best to worst

The information requirement

Why are error rates on paper forms so high?

Finding out what you need to find out: the business purpose

Finding out what data your organization already holds and uses

Relative business value and likely error rates on four typical fields on a form

Relationships: The users' reactions to forms

How people react to forms compared to other pages on a web site

How the relationship changes from box to box as the user works through the form

Trust and research on response rates in questionnaires as a basis for thinking about response rates / dropout rates on forms

Creating a psychological profile of your users in terms of their views of the form task compared to other aspects of their work or daily lives

Conversation Part 1: Questions

How users answer questions

How reading and legibility affects ability to answer questions

How to choose the appropriate response spaces (also known as 'controls')

The concept of 'burden' (the effort required in filling in forms)

How users find the answers for an example form

Conversation Part 2: Topics and flow

How to split the form up into topics

How to create a flow across topics

Progress indicators and summary pages

Indicating required answers

Designing validations

Sorting out a preamble (also known as the instructions at the start of a form)

The appearance of forms: How to make a form look good

Visual aspects of typography

Using grids to make the form look orderly

Chunking - using graphic and other devices to divide the form into manageable areas

Where to place the prompts relative to the boxes

Creating a prototype form

Testing

How to do layer checks

How to adapt usability testing for forms

Preparing and running a usability test

Summary and Wrap-Up

Brief review of the key topics

Final opportunity for questions

What is the workshop format?

A fast-moving, interactive, but structured training session covering the topics outlined in the programme. This workshop is designed to appeal to different learning styles, with an emphasis on active participation. The workshop includes many practical exercises that allow you to practice what you have learned straight away. You will be encouraged to ask questions and to contribute to the workshop.

Who is the workshop leader?

Caroline Jarrett holds an MA and MBA, and is a Chartered Engineer. She is a founder member of the UK chapter of the Usability Professionals' Association, a senior member of the Society for Technical Communication, a member of the Association for Project Management and an associate member of the Market Research Society. Caroline specialises in usability of forms and work processes involving forms. She has consulted on forms design with the UK Inland Revenue for many years, and wrote their "Body of Knowledge for Forms Usability". Government forms and insurance applications are her favourites, but she enjoys working on any type of form or questionnaire. Recent clients for forms consultancy include the Inland Revenue, the Institute of Chartered Accountants for England and Wales, the University of Melbourne Business School, Standard Life of Canada, the Bank of Ireland (New Ireland) and Cancer Research UK.

Caroline teaches forms design, usability testing and interviewing skills for usability testing. She was the practitioner member of the Open University team that created the course 'User Interface Design and Evaluation', and wrote the units "Evaluation in practice" and "Usability in Organisations". Clients for the in-house customised version of the course include Nationwide Building Society (repeated five times), the USA Internal Revenue Service (repeated four times), Oxfordshire County Council and npower.

What do delegates say about this seminar?

"Caroline provided a wealth of additional information and relevant examples. The day was informative, practical and very valuable."

"An excellent and thoroughly enjoyable day. I shall definitely put the ideas into practice."

"Very nice mixture of hard (practical) and soft (form theory) advice."

"Apart from being fun it gave us the opportunity to apply our new knowledge – I found the user testing fascinating."

"The handout was excellent. I especially like the reference section."

How do I book?

- Call 020 7917 9535
- E-mail helpdesk@userfocus.co.uk
- Web userfocus.co.uk/training/bookingform.html