WHITE PAPER

# Online Data Collection

## Tips for Optimizing and Managing Data Captured Over the Web

Accela COMMUNICATIONS

118 Turnpike Road • Southborough, MA 01772 • 508.303.9704 • www.accelacommunications.com

## Executive Summary

Good web response management techniques are essential for building relationships with new visitors to your web site, especially if you want to optimize your site as a sales channel. Web forms that do not recognize return visitors or are difficult to complete, annoy respondents, leaving a bad impression of your company. Alternatively, you can reinforce relationships with customers by recognizing them when they return, giving them unrestricted access to information when needed, or by accelerating the form submission process. Forms that are correctly optimized for speed and efficiency increase return visits, web traffic and sales. According to a study by the Direct Marketing Association, the share of internet sales will increase to 43% of all catalog, retail and e-commerce sales by 2007 and 46% by 2009. Coupled with growing investments in search engine marketing, the importance of capturing data from new visitors to your web site at the moment they arrive is an opportunity not to be missed.

The following tips and techniques can be used as a checklist when creating forms, or as a guide for evaluating online data collection and form creation tools. For more information, or for specific examples about how to optimize your web response management, please contact Cynthia Keyes at 508.303.9731 or by email, cynthia_keyes@accelacommunications.com.

## Data Collection

***Keep it consistent***

When creating forms for various offers on your web site, the first step is to carefully consider the number and type of questions to be included in your form. Rather than building customized forms one by one with unique database fields for each effort, sophisticated web response management systems allow you to copy forms from existing programs, to ensure compatibility across all data collected. Not only does this save time, if you consistently use the same form or even the same core contact fields, you'll have the ability to "roll up" all data associated with multiple forms, creating a more comprehensive view of all web response activity.

***Keep it short***

Another consideration is what kind of demographic questions you will ask in your form. Rather than building forms with all the information you'd like to have, carefully determine what information is absolutely necessary to create customer segmentation. You can then use this to develop filters for scoring, qualifying and routing the response data once it is collected.

According to survey data from Jupiter Research[1], registration forms including more than 11 fields, experienced significant "drop off" or non-completion rates. Since contact information can easily account for 10 fields (Email Address, First Name, Last Name, Title, Company, Street Address, City, State, Zip, Country), this doesn't leave room for many extra questions before you start depressing response. However, one simple attitudinal question about the type of products and services you offer, can provide a lot of insight into the type of content, tone and frequency of communication that is most appropriate for each new registrant.

***Keep it simple***

Use pre-determined response options for as many of the questions as you can, to make it easier on respondents and give you the ability to aggregate response data. You can accomplish this by using a drop down or check box question type in your form. Common examples of where you can use predefined response options include *State*, *Country* and *Job Title*.

 

***Keep it clean***

For those questions that have multiple-choice options, make sure you include a response such as “Other” or “Does not apply,” so that everyone can respond accurately. Although responses such as these may not be the profile you are seeking, at least you will be able to identify these contacts as less desirable and won’t waste time on them.

Another feature to look for in a web response management system, is the ability to automatically identify and remove “junk” records from your valid pool of responses. Some respondents will enter obviously false information like “Mickey Mouse” or multiple keystrokes like, “alkhdflkhsdf” to pass through forms without providing accurate information. These are not worthy of follow-up efforts and it will save you valuable time to have these automatically filtered out.

## Sophisticated Form Behavior Optimizes Results

***Pre-populate web forms for returning visitors***

When you go back to a web site, isn’t it nice to be recognized? Forms that are pre-populated, or filled out with pre-existing user data, allow return visitors to confirm their information is correct and they won’t need to retype the same information twice. This helps to improve accuracy, as well as response and completion rates, in cases where additional data is required on return visits. Forms can be pre-populated with user-supplied data from previous visits, if a cookie from the server hosting the form exists on the users system. The cookie acts as a key to link the user to the location in the database where their record is stored, which facilitates recognition upon return. If the user has deleted their cookie, you can tell returning visitors to submit just their email address within the form, in order to pre-populate the balance of the information, thereby saving time.

 

### *Passive registration*

Passive registration lets users skip the registration page completely, if they have already provided needed information in prior forms from related programs. This is a useful technique in cases where you have a collection of content that requires some form of registration. Users can register once, and then have access to the rest of the content library at any time, without having to fill out the same form multiple times.

### *Incremental registration*

Why not adopt an incremental approach to web site registration data? Rather than present each user with the same registration page every time they visit, collect the core data once and then request only the supplemental information that is required on subsequent visits. This will facilitate building a more comprehensive customer profile over a period of time, rather than all at once. Asking for a lot of data at once may not be successful unless the value exchange for the offer is significant.

### *Multi-page registration*

Another technique for increasing completion rates is to split up your registration process into smaller steps. This allows you to spread data collection over multiple pages in cases where there are several questions to present, such as in a survey.

### *Conditional branching*

Sophisticated registration tools will also allow you to deliver different content based on certain responses to questions within forms. This enables you to send users to different destination pages based on user interest, preferred language, or any criteria you define. Having this feature will simplify your promotion planning and will allow you to serve multiple audiences at one time.

## Personalization Builds Affinity

***Use Personalization Techniques to Reinforce Customer Relationships***

Follow-up communications build confidence with respondents about how their data is being managed and can serve as a reminder of their request at a future date. This can be accomplished using macros, a special-purpose command language used to automate sequences within an application, such as a spreadsheet or word processor. For example, a display field macro can insert the current value of a question field into the text of a follow-on HTML page or e-mail. By embedding the macro within your text on a confirmation page, it can display the contents of the [[FirstName]] field from the original registration form.

Conditional macros may also be used to determine a wide variety of appropriate follow-up actions or communications based on information matches within specific fields. For example, you may want to send a customized email to a respondent based on demographics such as job function, or even the type of interest selections they have made in your registration form. This type of “smart” form will breed confidence in your company and deliver the kind of impression you are seeking with your target audience.

## Classify & Deliver Your Data

***Follow-up: Critical next step***

Now that you have collected the data, you need to get it into the hands of the people who can act on it as soon as possible. An Artemis Group[2] study found that the rate of success for contacting new leads from your web site drops precipitously over time. 35% of contact attempts were successful if made the same day, whereas after one week the success rate dropped to less than 5%. Having tools in place, such as automated routing, facilitates speedy follow-up, helping to maintain the value of a lead to your organization.

Built in functions such as routing rules, enable you to automate the distribution of registration data to multiple contacts in real time, nightly or on a weekly basis.

***Segment and prioritize your data to define follow-up activity***

Having the ability to prioritize your registrant data aids in identifying those that need special treatment, or immediate action. Your ability to score registrations will tie back to the questions asked in your form. Advanced filtering features available in some systems, will enable you to set criteria for identifying "junk" and internal registrations to remove them from the viable pool of contacts, as well as set criteria for the classification of "A", "B" and "C" registrants.

## Source Tracking

***Determine your marketing ROI***

The value of tracking which tactics visitors have responded to on your web site cannot be underestimated. Knowing the source of every registrant is a key part of understanding the ROI of various marketing vehicles, such as websites, emails and in-booth live registrations. If you know where your registrations are coming from, you can build on the most effective tactics to scale your marketing efforts efficiently.

To facilitate marketing optimization, you should look for a web response management tool that has the ability to generate sources automatically for each URL used in your promotion, which can then be passed transparently into the form and stored within the registration record. Knowing what people responded to, will also help you tailor follow-up communications.

 

## Choosing a Web Response Management System

***Requirements: affordable and robust***

Online registration systems have evolved to a point where no special technical support, hardware or software is required. Web-based systems can inexpensively provide you with the features and tools you need to manage your online registration forms, from the point of creation and data collection, all the way through to the distribution of clean records to one, or many points of contact.

Lastly, you should look for a system that will provide you with flexible and robust tools that can be set up quickly, while seamlessly interfacing with existing web sites or content delivery systems. The system should be available on a self-service basis 24/7, so you can have complete control over the entire process.

## Sources

1. Jupiter Research: Online Customer Acquisition, June 2005.

2. Artemis Group, March 2005.

## About Accela Communications

Accela Communications provides web-based marketing services that accelerate sales and business growth for customers and partners across a wide range of industries -- from information technology to healthcare, financial, and other market sectors. Accela Communications creates actionable results through the use of on-demand rich media, web response management tools and through a network of information technology web sites. For more information, please visit http://www.accelacommunications.com.

 