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Powering the good to be great.

Donation Form Optimization Checklist

To Use This Template: Click file -> make a copy to enter your information.

Here's a comprehensive checklist of recommendations for effective forms. Not every item will apply to you, but many will.

Content

- ☐ The reason for the form is clear.
  (Your headline can spell out the effect of a donation.)
- ☐ You have included a value proposition.
- ☐ Fields are labeled.
- ☐ The form has five or fewer fields.
- ☐ You have eliminated all unnecessary requests for donor information.
  (Most of the time, you don't need a home phone if you have a mobile field, so don't ask for it.)
- ☐ For longer forms, you indicate how long it will take to complete the form.
- ☐ The text is clear and concise.

Design

- ☐ Your font size is at least 14px or 16px.
- ☐ Your form is optimized for mobile.
- ☐ Forms fields are tappable so fingers of all sizes can select fields and buttons.
  (Best size is between 32px and 20px in height.)
- ☐ Required fields are indicated.
  (If the information is not required, think carefully about asking for it.)
- ☐ If the form has more than two fields, they are stacked vertically.
  (They're easier to read this way.)
- ☐ Your field size is relative to the data that will be input. Don't have the field for the zip code the full width of a screen!
- ☐ If you choose to use an image, ensure it's relevant to the purpose of your form. And don't include video on a donation form.

- ☐ If you have many options for an answer, you use a dropdown menu instead of a bunch of radio buttons.
- ☐ The design is simple. You don't want multiple design elements competing for attention.
- ☐ Your form Is logical. Most forms start with name, move to address, move to email or phone. Use the order people expect.
- ☐ The format of the requested information is clear. For example, if you want a phone number, you could have XXX-XXX-XXXX in the field.
  (By the way, people don't like to give phone numbers. They're wary of spam. Only ask if you need it for phone or SMS outreach.)

Frictionless User Experience

- ☐ Expected user actions are obvious. If someone wants to donate, the button is clearly labeled.
- ☐ You offer users the ability to specify their gift, if applicable. It can be a tribute gift in honor of someone or be slated for a special program or project.
- ☐ You offer a checkbox to cover processing fees.
  (This increases the amount of the donation you keep.)
- ☐ Users can tab from field to field.
- ☐ There is an error message that clearly tells users what field to fix.
- ☐ The call-to-action button (donate, for example) is clear and easy to find.

Ways to Increase Conversions

- ☐ Your fields autocomplete with addresses or payment information.
  (This will increase conversions.)
- ☐ You offer multiple payment options.
- ☐ If one-click giving is an option, it's enabled.
- ☐ If your CRM allows you to recognize a repeat donor, the form grays out information you already have.
- ☐ The form is secure, through the PCI certification of your payment processor or the use of Captcha/CVV. If possible, CVV and Captcha are avoided.
- ☐ Your form offers the ability to turn a one-time gift into recurring donations.

Post-Donation

- ☐ You send users to a thank-you page after they submit their form.
- ☐ Donors can choose to have their gift matched by their employer.
- ☐ Emailed donation receipt is sent promptly.