

## Business Forms that Get Results

Forms are an important part of your corporate image; they act as your silent representatives on a daily basis. The orderly structure and appearance as well as the user-friendly nature of your business forms will help convey your company's organized, efficient methods.

The best forms are those people use; the average business takes one to three weeks to respond to a simple inquiry form. Basically, forms allow you to either collect data or track data — both functions require a tool that is clear, easy to read, and has plenty of room to fill out.

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### Use the recommendations below to design more readable, usable, and successful business forms.

- **Evaluate how the information you plan to collect or track will be used.** Interview those who fill out, process, and file your forms. Learn what “roadblocks” they’ve encountered in the past.
- **Assign information for the form into one of four categories:**
  1. **Intent** — Who “owns” the form, and what is its purpose?
  2. **User** — Who will be filling out the form?
  3. **Content** — What information do you want to collect or communicate?
  4. **Process** — How will the form be routed?
- **Draft your form content.** Divide the space into sections based on how much information must be included for each data category (intent, user, content, process). Stick to the subject within each section. Place information in sequence; don’t make the mistake of placing information out of sequence just because it fits. Make sure you visually signal the user with lines, shading, or other elements when the subject changes.
- **Polish your layout.** To maximize form use, follow these simple design rules:
  1. Make your title plate as attractive as your business cards; consistency among all your written materials conveys professionalism and an attention to detail.
  2. Utilize white space to make the page inviting.
  3. If your form might be completed by hand, design the spaces to be filled in with enough room to accommodate a variety of users’ handwriting, perhaps as much as 12 characters per inch.
  4. Use different weight lines (rules) to divide and categorize information. A winning combination includes using 2-point lines for setting off major sections, 1-point lines to subdivide sections, and hairline rules to separate individual items.
  5. Provide multiple-choice check boxes, especially on survey forms. This technique minimizes fill-in time and ensures consistent answers that facilitate efficient data processing.
  6. Repeat your format as much as possible on all the forms you use. Your company’s forms are seen and handled more often than any other documents you produce. It will enhance your company’s image if business forms look and act as much alike as possible.