Option 1 – optionally collect name/email of new customers in Qualification or Product Selector forms

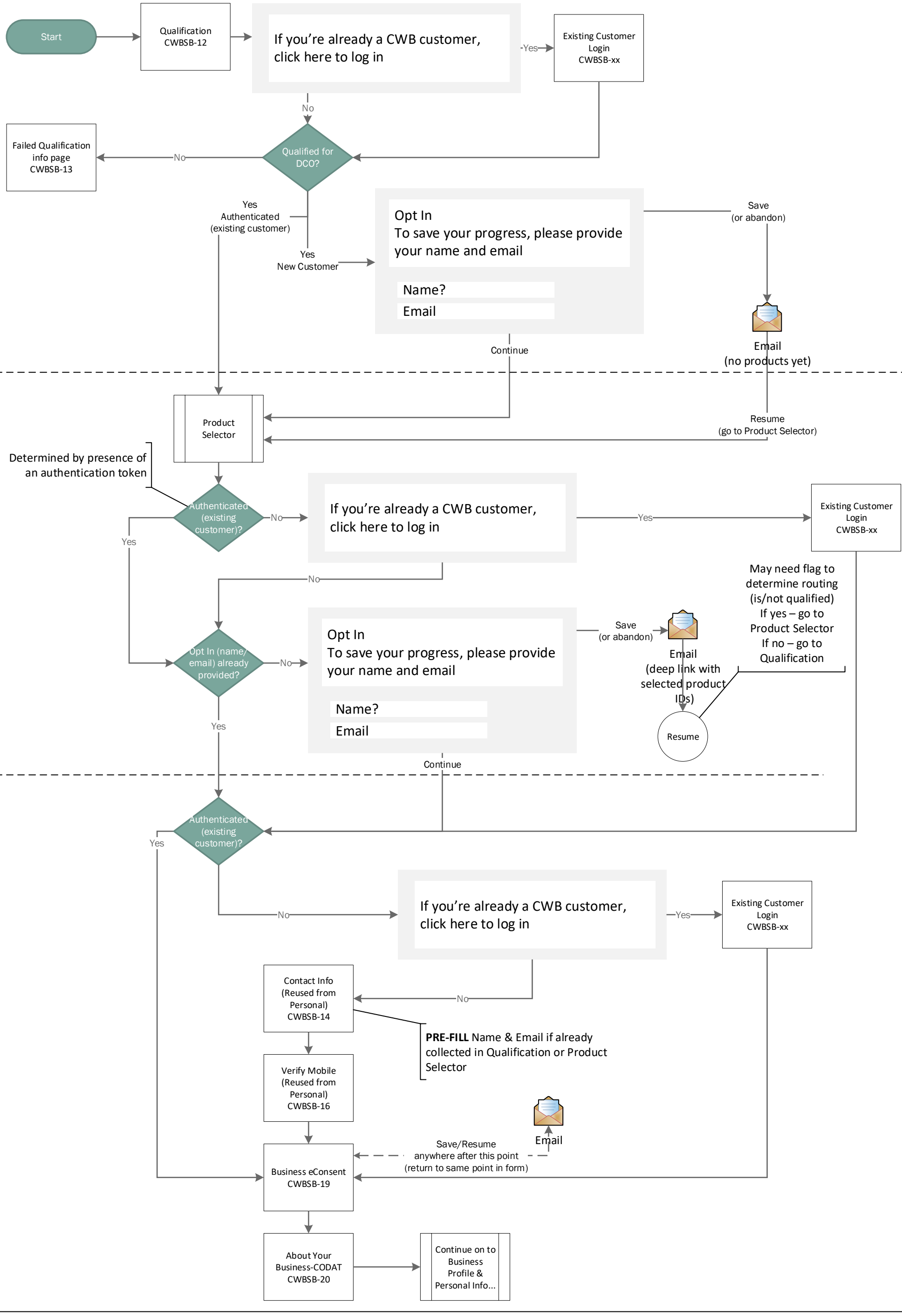
Qualification Form

Pro:
1) Allows earliest possible collection of name/email, so client can choose to save/resume or we can contact them (if form abandoned or not continued after a period of time).
2) Providing name/email is optional, so mitigates some of the risk of abandonment.

Con:
1) No products yet, so nothing to save other than the fact that they have "passed" the DCO qualification conditions.
2) Need to persist name/email (if provided) from Qual form to Product Selector.

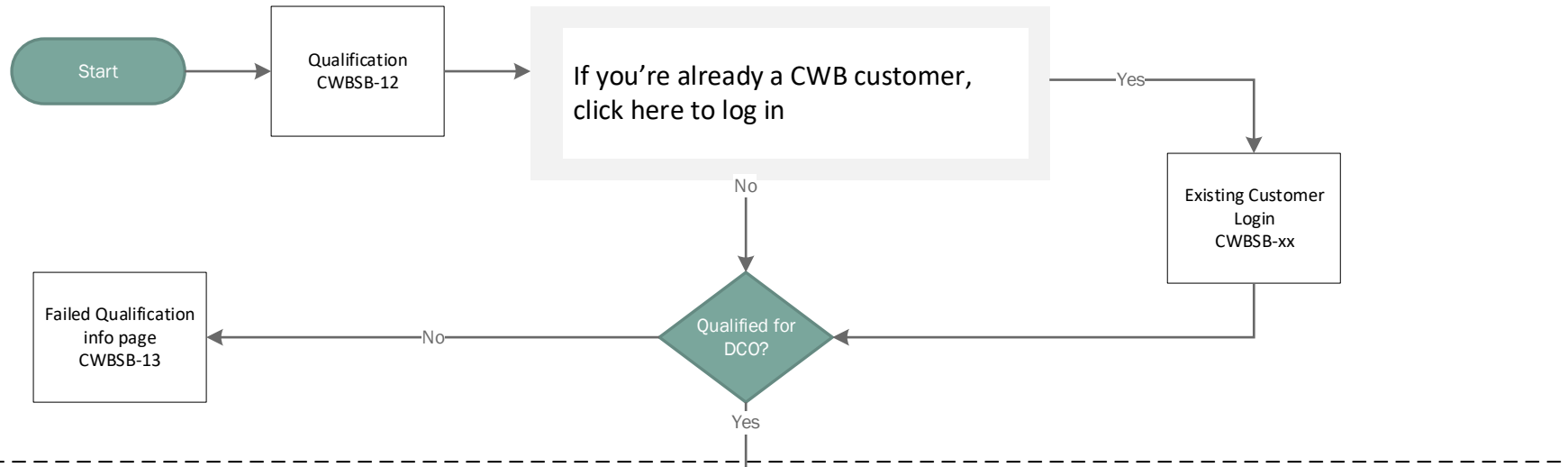
Product Selector Form

Small Business DCO Form



Option 2 – optionally collect name/email of new customers in Product Selector form

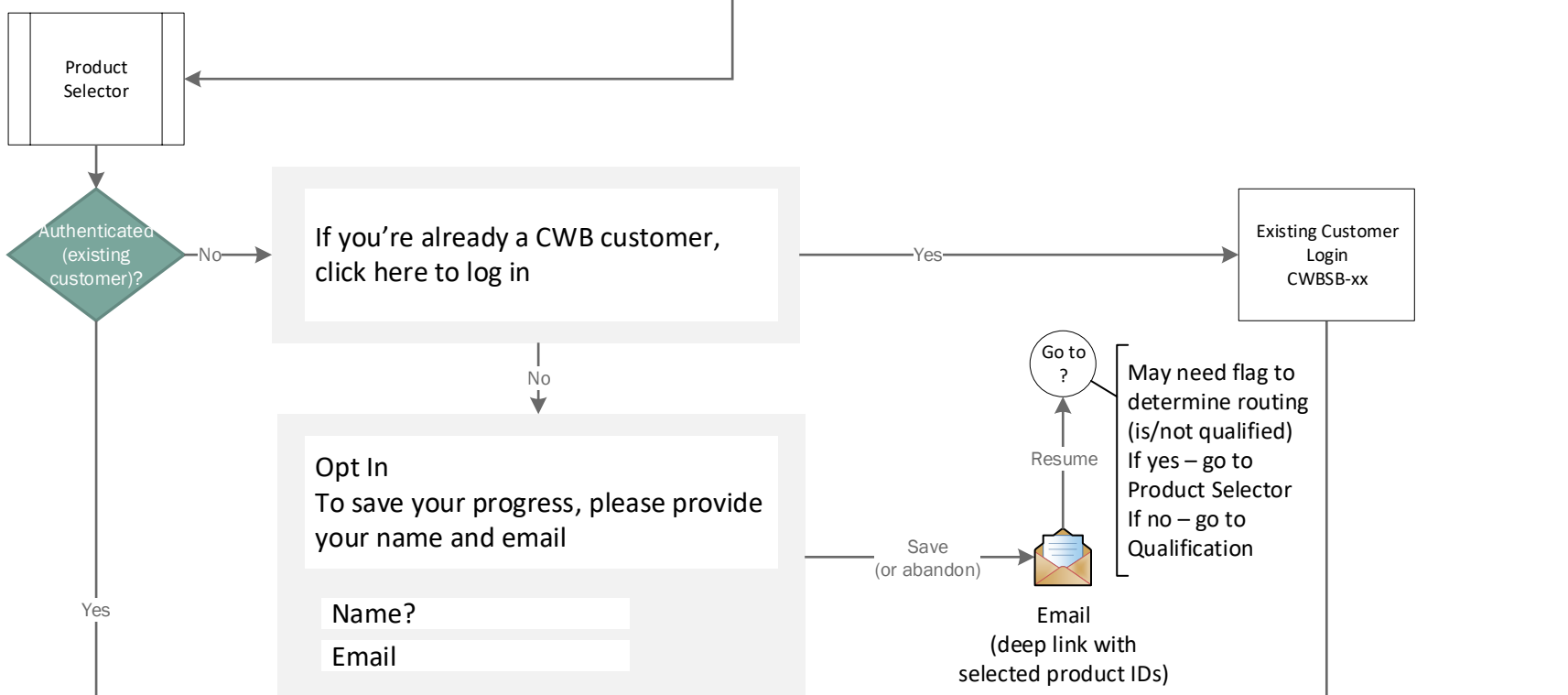
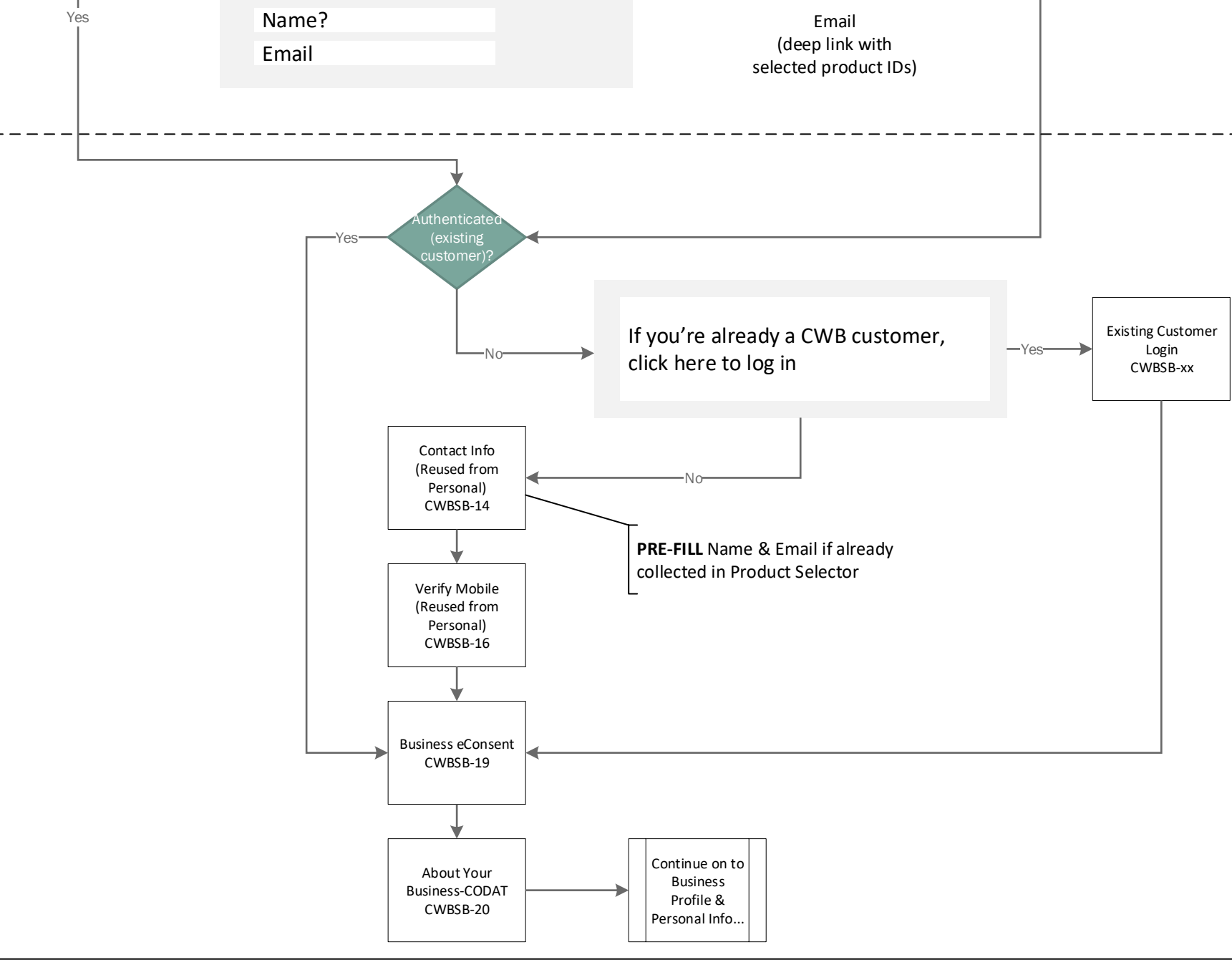
Qualification Form



Product Selector Form

Pro:
1) Keeps the Qual form relatively simple and no data to persist between Qual and Product Selector (unless client has authenticated).
2) Collecting name/email in Product Selector means save/resume can still be offered relatively early, and our email follow-up would have product info, allowing them to re-constitute their shopping cart when they resume.

Con:
1) No ability to follow-up with client if they abandon before Product Selector.



Small Business DCO Form