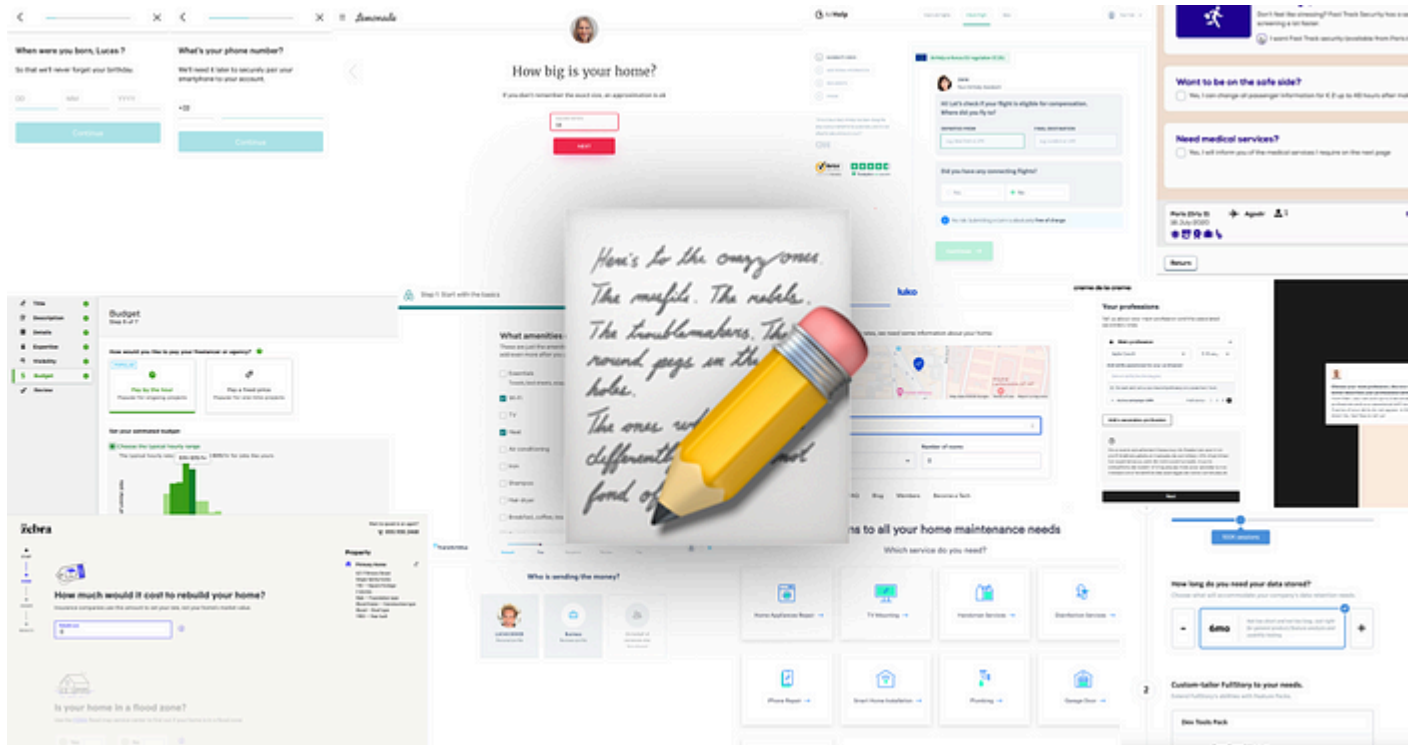


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# Designing complex user forms: 12 UX best practices

Tips on how to make something complex look simple



**Lucas Didier**

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UX Collective a11y-light ~10 min read · May 26, 2020 (Updated: December 14, 2021) · Free: No

It's been a few years that I've been taking interest in designing complex user forms, where a lot of information is requested from users. Here are a few industries where you regularly find such flows:

- 🏠 Real estate / Accommodation (e.g. publishing a listing on Airbnb)
- 💰 FinTech (e.g. sending money with TransferWise)
- 🧑 LegalTech (claiming a compensation with AirHelp)
- ☔ InsurTech (e.g. getting a quote on Lemonade)


Designing such flows is tricky but important, because while asking a very extensive set of data to the user, the experience must look like it's effortless. Here are a few principles that are worth following in order to design the right flow:

- 🏎️ Reassure users on the duration of the flow
- 🍹 Make users feel like they're not working
- 🙌 Present all steps in a clear and understandable way
- 🤝 Explain why you're asking for each piece of information
- 📶 Remove distractions
- 💾 Reassure users that their information can be saved
- ⚡ Show the real-time impact of the user's action
- 💡 Give some hints
- 🧑 Add some human touch
- 🕵️ Bring in some credentials
- 🗺️ Make it clear where users are and where they're going
- 📝 Enable users to review their information

Alright, let's deep dive into each of those principles!

## 🏎️ Reassure users on the duration of the flow

Before they engage in a form, users must feel like this is going to be fast. One of the best examples is the online bank N26, who claims that opening an account with them only takes 8 minutes.




- Personal Information
- Mobile Phone Number
- Home Address
- Additional Information
- Tax Information
- Promo Code
- Create Password
- Create Account


[Update cookie settings](#)  
[Privacy Policy »](#)  
[Imprint »](#)  
 © N26 GmbH 2020

## Start loving your bank


Open your N26 account in 8 minutes.




Confirm your email address



Download the app



Verify your identity





Get your N26 debit card

English
Get started

Opening a bank account in 8 minutes? That sounds pretty futuristic, and yet it's true.

The same goes for Lemonade, an insurance startup, who promises you to get a quote "in seconds":

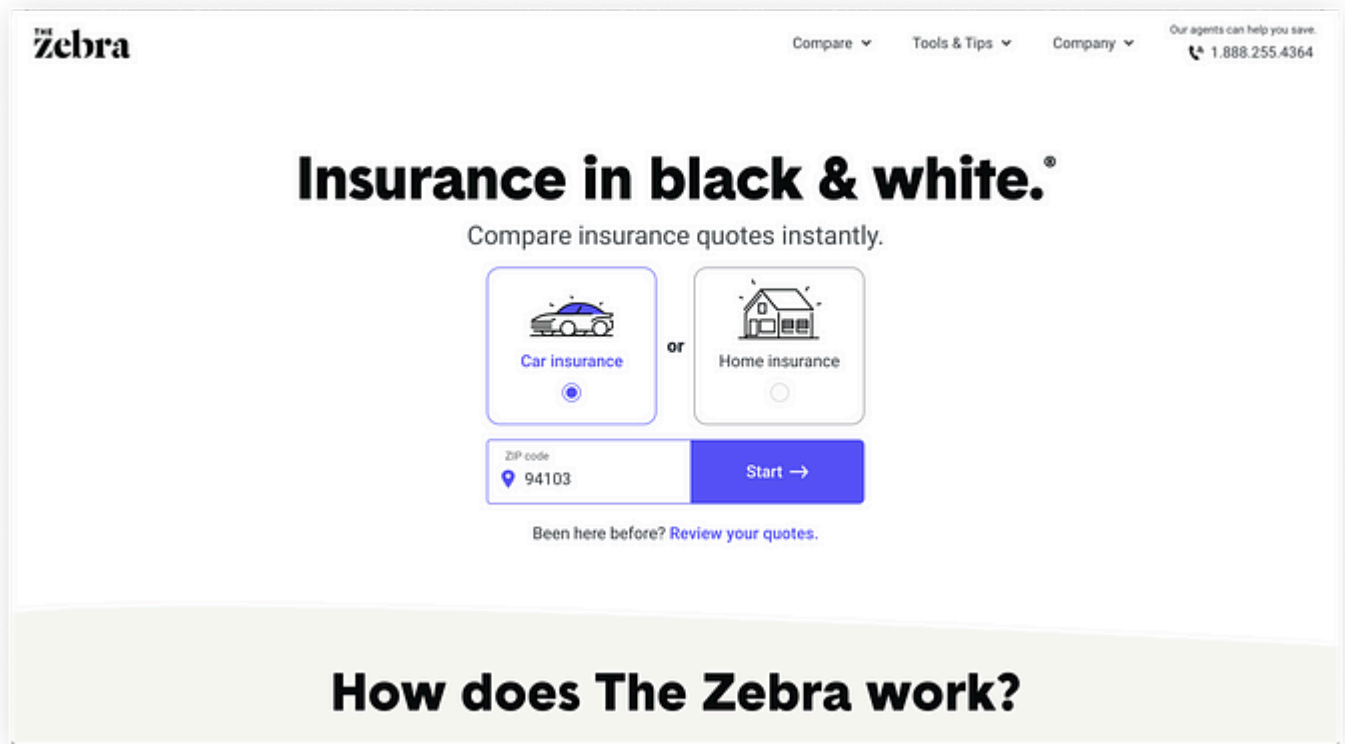
Hey! I'm Maya. I'll get you an awesome price in seconds. Ready to go?

FIRST NAME

LAST NAME

LET'S DO THIS

point is for you to "Compare insurance quotes **instantly**".



The screenshot shows the homepage of 'THE zebra' website. The header includes the logo, navigation links for 'Compare', 'Tools & Tips', and 'Company', and a contact number '1.888.255.4364'. The main heading is 'Insurance in black & white.®' followed by the subtext 'Compare insurance quotes instantly.' Below this is a form with two options: 'Car insurance' (selected with a blue dot) and 'Home insurance' (unselected with a grey dot). A 'ZIP code' field contains '94103' and a blue 'Start →' button. At the bottom, there is a link: 'Been here before? [Review your quotes.](#)' A large yellow banner at the bottom of the screenshot contains the text 'How does The Zebra work?'.

## 🍹 Make users feel like they're not working

This is probably the most critical part. Users are lazy and don't want to feel like you're asking them to work too hard. Hence a few ideas that you can apply to make them feel like you're doing the work for them:

- Offer them a list of pre-defined choices, instead of asking them to manually research what they're looking for

That's why offering a list of pre-defined choices, like Puls (an American home maintenance startup) does, makes it more likely that users are going to complete a complex form.

## Solutions to all your home maintenance needs

Which service do you need?



Home Appliances Repair →



TV Mounting →



Handyman Services →



Disinfection Services →



iPhone Repair →



Smart Home Installation →



Plumbing →

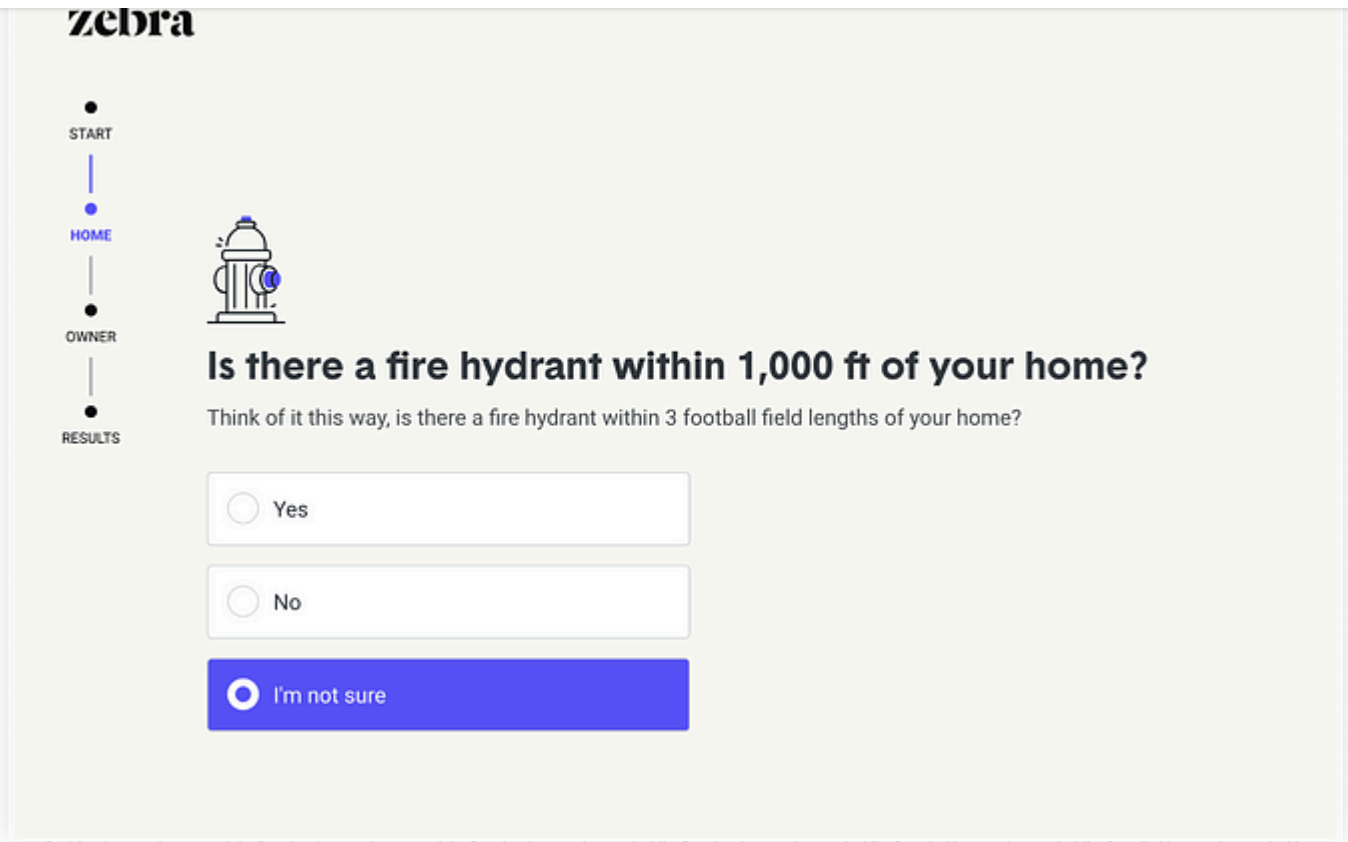


Garage Door →

This follows a psychological principle, "*Recognition over Recall*" (source: Mental Notes card deck). This principle states the following: "*It's easier to recognize things we have previously experienced than it is to recall them from memory.*"


- Illustrate each choice to give more context about what you're asking

The Zebra's fire hydrant illustration is a good example. **Images and pictures speak louder than words.** With this illustration below, I immediately understand what is asked from me.



**zebra**

START  
HOME  
OWNER  
RESULTS



### Is there a fire hydrant within 1,000 ft of your home?

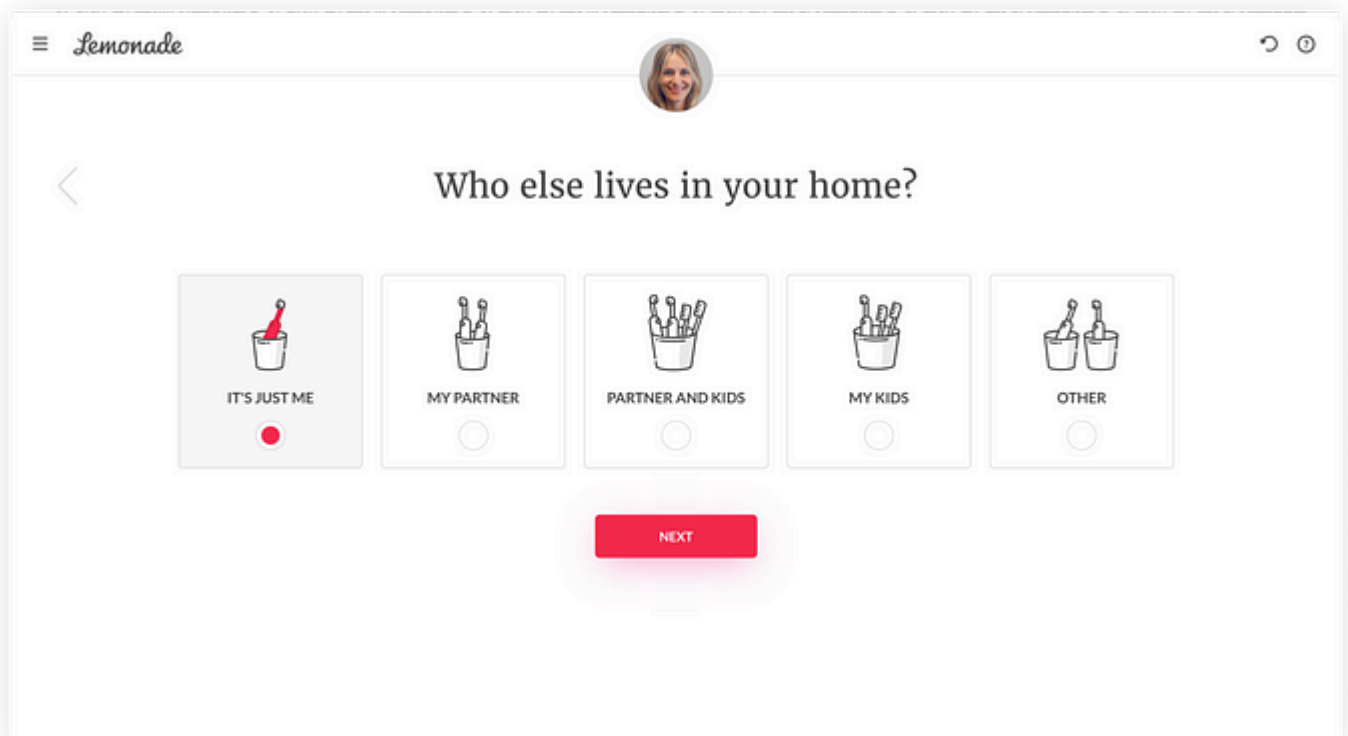
Think of it this way, is there a fire hydrant within 3 football field lengths of your home?

☐ Yes


☐ No

☒ I'm not sure


It can also be illustrated in a fun/creative way, like Lemonade does with its toothbrushes to ask who's living in your home:



≡ Lemonade




< Who else lives in your home? >




IT'S JUST ME

☒




MY PARTNER

☐




PARTNER AND KIDS

☐



MY KIDS

☐



OTHER

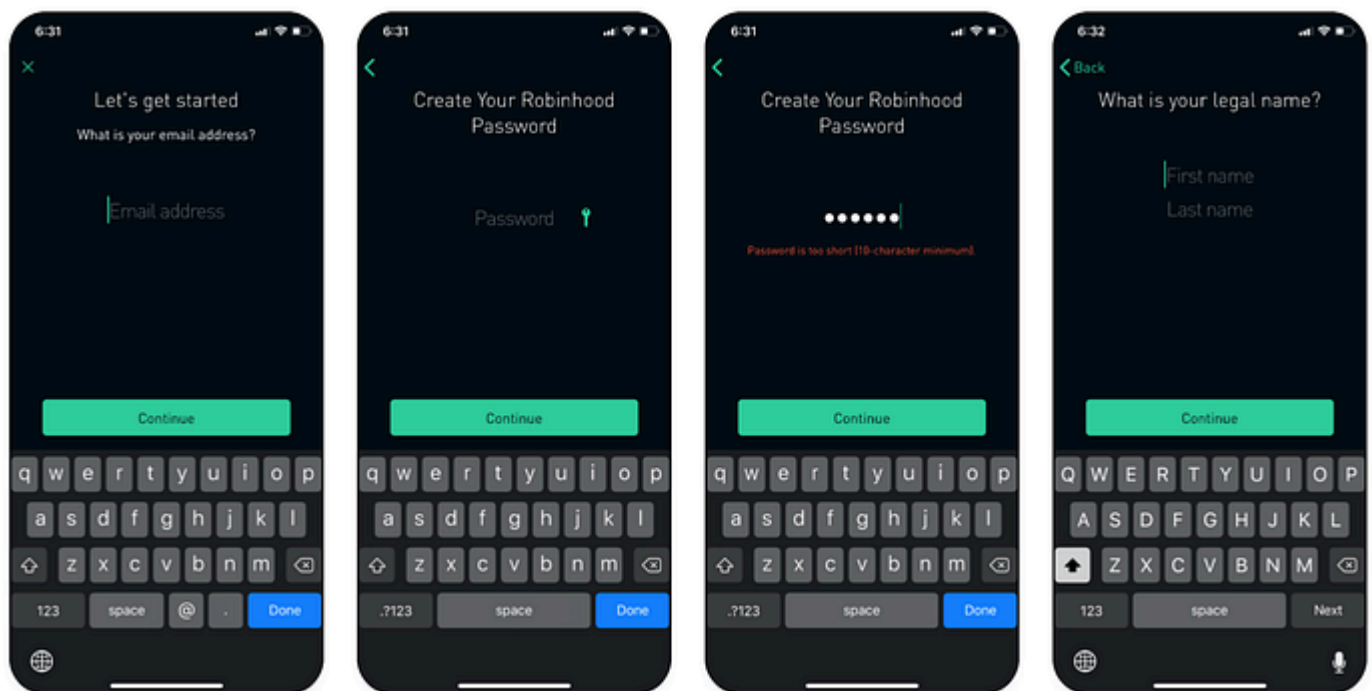
☐

NEXT

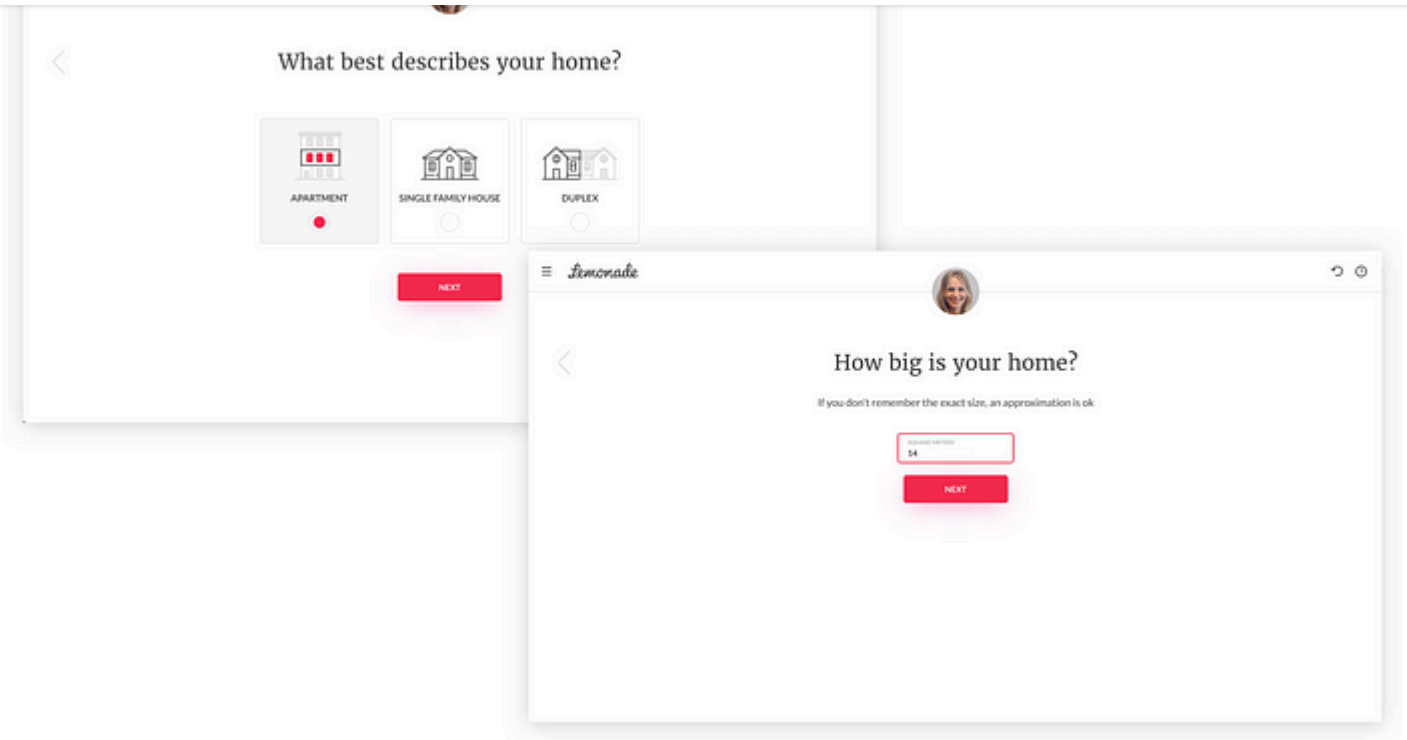
That's where "Sequencing", a psychological principle, comes into play: *"We are more likely to take action when complex activities are broken down into smaller tasks"* (source: [Mental Notes](#)).

Sequencing is applied on many digital products, by cutting down complex forms into smaller sub steps. It's what we also sometimes call a "One screen, one action" experience.

For instance, [Robinhood](#), the investment app, breaks down its sign up flow into 3 steps instead of one:



The same goes for Lemonade, which asks information about your home screen by screen, which makes the flow feel smoother and the user more serene.



This "one screen, one action" experience is now a common practice that has been widely adopted by lots of digital products.


## 🤝 Explain why you're asking for each piece of information

Since the Cambridge Analytica case and a few other user data breaches (Adobe, LinkedIn, Canva, eBay, etc.), users don't give away all their data as easily as before. You have to be transparent why and how you will be using their personal information.

It's good to give some reassurance about data privacy, like The Zebra does ("We take your privacy seriously and your information is always secure with us").

**zebra** 855.933.1462

START  
HOME  
**OWNER**  
RESULTS



**Tell us a little about yourself.**  
We take your privacy seriously and your information is always secure with us.



First name  
Lucas

Last name  
Didier

Date of birth  
03/10/1992



Email

**Property**

 **Primary Home** 

621 Fillmore Street  
Single family home  
156 — Square footage  
2 stories  
Slab — Foundation type  
Wood frame — Construction type  
Wood — Roof type  
1983 — Year built  
1.5 miles — Fire station proximity  
\$50,000 — Rebuild cost

**Owner**

 **Lucas Didier - 28 yrs** 

It's even better to explain why each piece of information is required...

- ...When you ask for personal information

The best example I've found to date is N26's sign up flow from 2018. In this flow, each and every piece of personal information was justified with a very convincing description.

**When were you born, Lucas ?**  
So that we'll never forget your birthday.

DD MM YYYY

Continue

**What's your phone number?**  
We'll need it later to securely pair your smartphone to your account.

+33

Continue

**What's your gender?**  
This will help us to address you correctly in some languages.

☒ Male

☐ Female

Continue

**In which country are you tax liable?**  
This information is required by the tax authorities and will be required within the first 90 days of account creation.  
[Am I liable to pay taxes in the United States? ↗](#)

France

Tax ID (optional)

+ Add another

Skip

- ...When you ask for information that's tricky to get

can get quickly discouraged by such questions.

THE

zebra

Want to speak to an agent?

855.930.2468

START

HOME

OWNER

RESULTS

How much would it cost to rebuild your home?

Insurance companies use this amount to set your rate, not your home's market value.

Rebuild cost

\$

Is your home in a flood zone?

Use the [FEMA](#) flood map service center to find out if your home is in a flood zone.

Yes

No

Property

Primary Home

621 Fillmore Street

Single family home

156 — Square footage

2 stories

Slab — Foundation type

Wood frame — Construction type

Wood — Roof type

1983 — Year built

Luko, a French insurtech startup, justifies asking detailed information about your home in order because they want to "offer you the best rates".

← back

luko

Log in

Emma

In order to offer you the best rates, we need some information about your home:

Boulevard de Wau...

Hôtel Altona

Hôpital Lariboisière AP-HP

Total living space in m²

0

Floor

Select which floor

Number of rooms

0

Emma

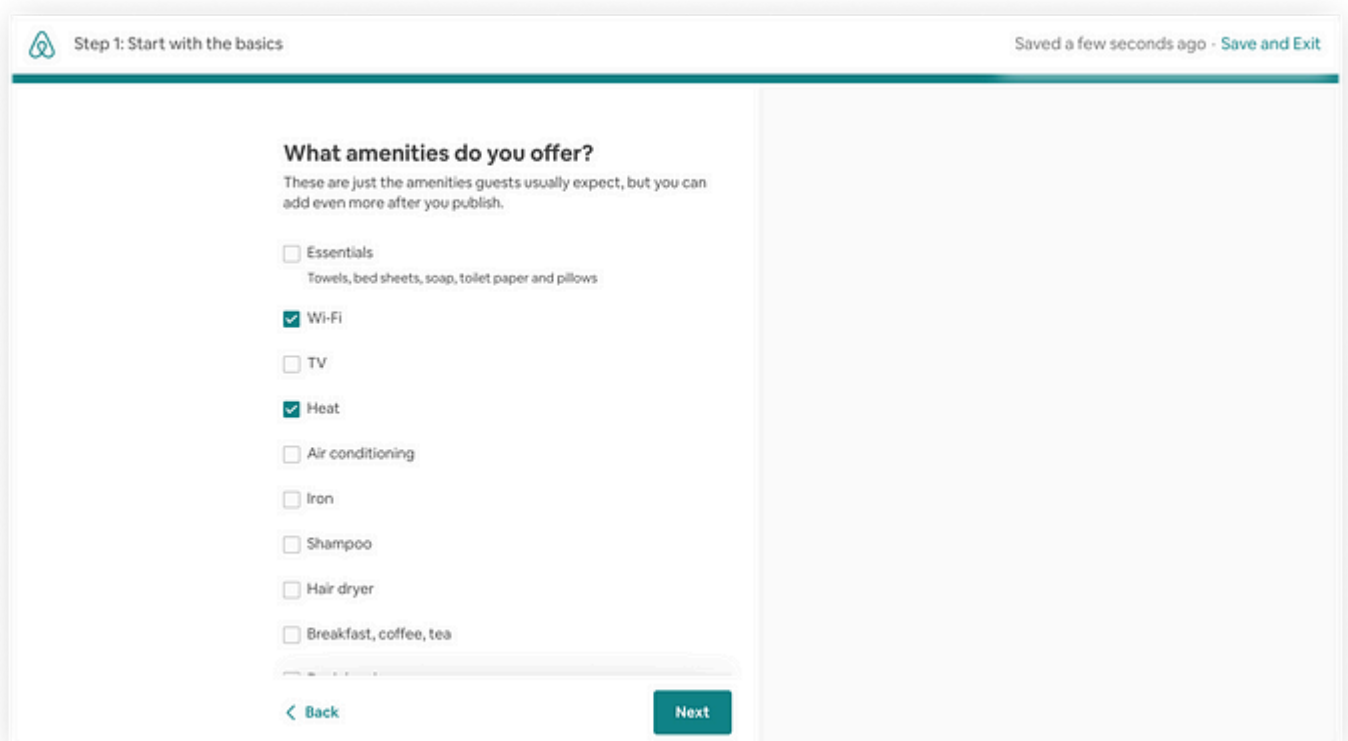
The number of rooms includes rooms, such as bedrooms, living rooms or dining rooms. Kitchens, bathrooms, and closets **are not** included in the number of rooms.

next

## Remove distractions

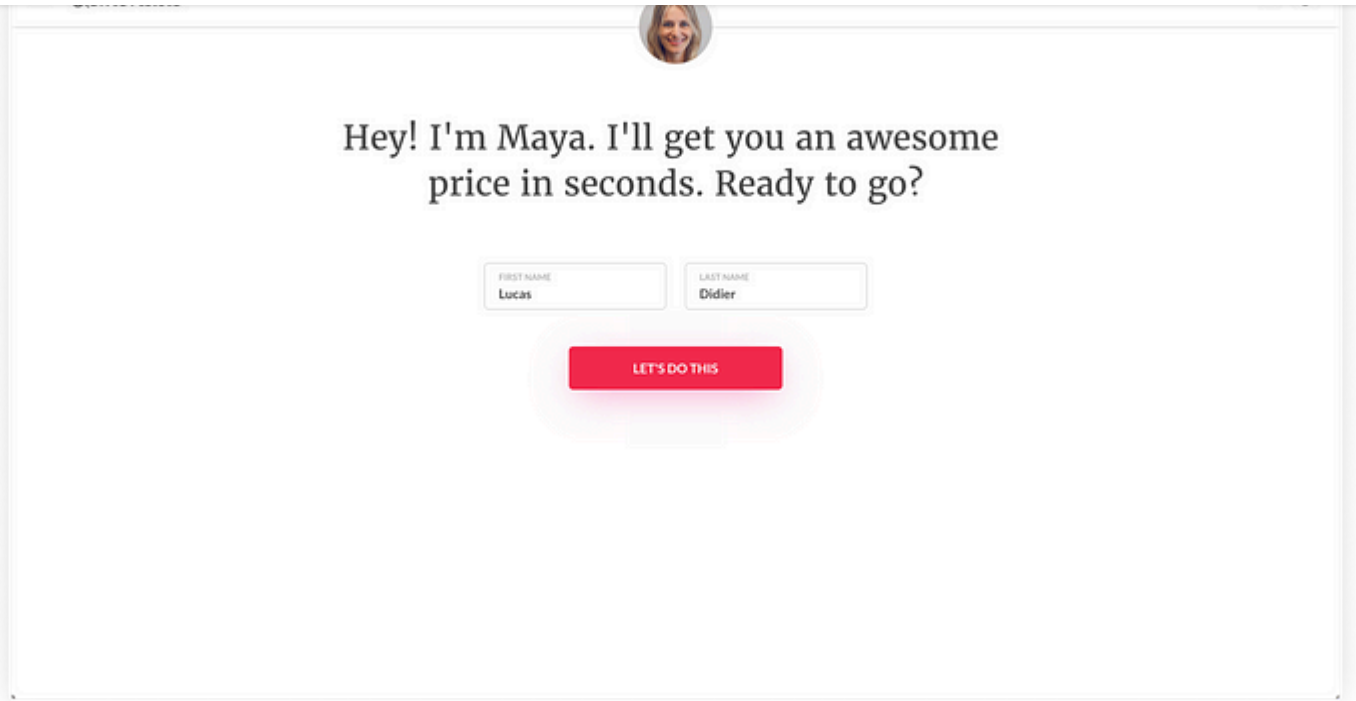
In a complex user form, it's important to provide a clean interface where users aren't distracted too much by banners and navigation links.

For instance, in the Airbnb publication flow, the only link you'll find is "Save and Exit". There is no possibility to access your user profile or make a search. This maximizes the chances that users will stay focused and complete the funnel.



The screenshot shows a form titled "What amenities do you offer?" with a subtext: "These are just the amenities guests usually expect, but you can add even more after you publish." The form contains a list of amenities with checkboxes: Essentials (unchecked), Wi-Fi (checked), TV (unchecked), Heat (checked), Air conditioning (unchecked), Iron (unchecked), Shampoo (unchecked), Hair dryer (unchecked), and Breakfast, coffee, tea (unchecked). At the bottom, there are "Back" and "Next" buttons. The top of the form has a header bar with the Airbnb logo, "Step 1: Start with the basics", and a "Save and Exit" link.

Lemonade went for a compromise: they're still giving users the possibility to access navigation links, but those are hidden behind a hamburger menu in the top left section of the screen.



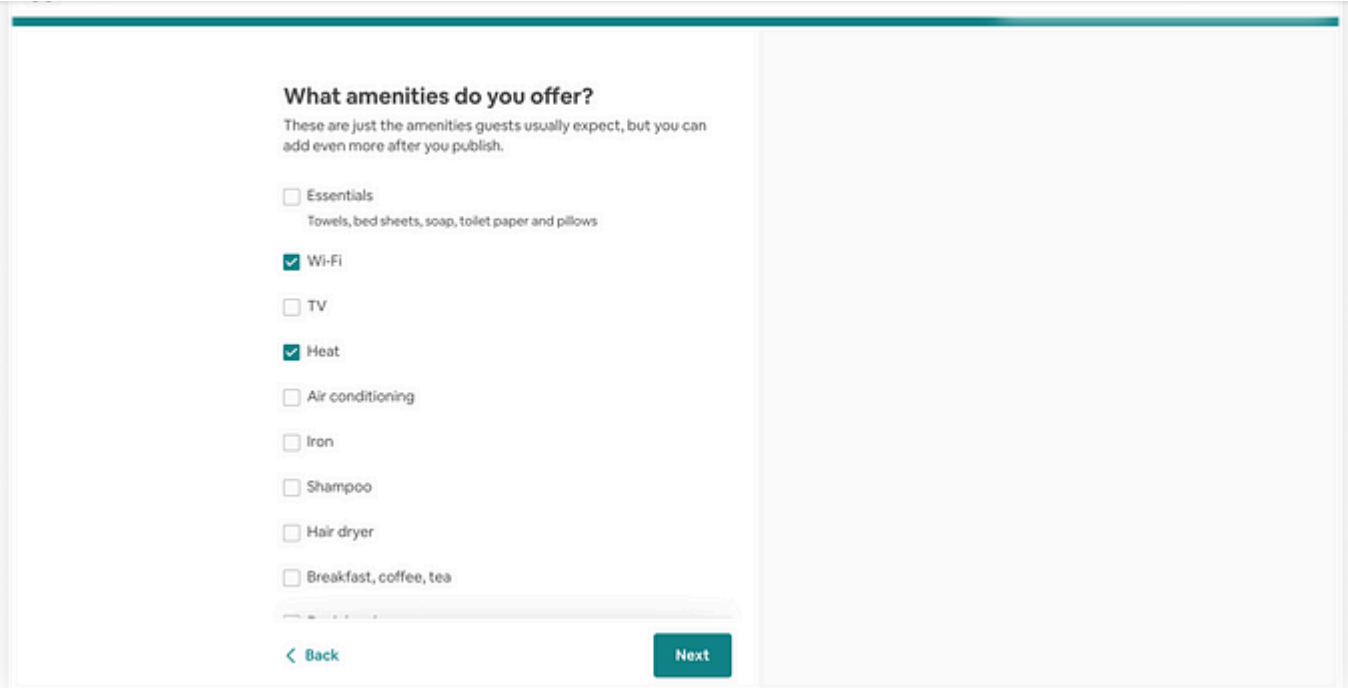
A user interface for a character named Maya. At the top center is a small circular profile picture of a woman with blonde hair. Below it, the text "Hey! I'm Maya. I'll get you an awesome price in seconds. Ready to go?" is displayed in a dark, sans-serif font. Underneath the text are two input fields: the first is labeled "FIRST NAME" and contains the text "Lucas"; the second is labeled "LAST NAME" and contains the text "Didier". Below these fields is a prominent red button with the text "LET'S DO THIS" in white, uppercase letters. The entire interface is enclosed in a light gray border with rounded corners and a subtle drop shadow.

## Reassure users that their information can be saved

Complex user forms can sometimes require users to complete them over the course of several sessions. Indeed, they can require some information, documents or pictures that users can't immediately access.

That's why it's important to make it clear that all the efforts that users have made so far aren't in vain. That all their information has been saved or can be saved easily.

Publishing a listing on Airbnb can take some time, because you need to upload the right pictures. That's why the interface lets its users know that their progress has been automatically saved, and also displays a link that enables them to "Save and Exit".



**What amenities do you offer?**

These are just the amenities guests usually expect, but you can add even more after you publish.


- ☐ Essentials  
Towels, bed sheets, soap, toilet paper and pillows
- ☒ Wi-Fi
- ☐ TV
- ☒ Heat
- ☐ Air conditioning
- ☐ Iron
- ☐ Shampoo
- ☐ Hair dryer
- ☐ Breakfast, coffee, tea

[< Back](#) [Next](#)

## ⚡ Show the real-time impact of the user's action

In forms where user actions have an impact on a major piece of information (e.g. price), showing the real-time impact adds a lot of serenity.

For instance, when you're booking a flight on Transavia, a European low-cost airlines, any extra service you're opting for is immediately shown in the sticky footer. You see a new icon for the extra service you've selected, but you also see the price being instantly updated.


 I want Fast Track security (available from Paris (Orly 3)) for € 7

**Want to be on the safe side?**

☐ Yes, I can change all passenger information for € 2 up to 48 hours after making my booking.


**Need medical services?**

☐ Yes, I will inform you of the medical services I require on the next page



Paris (Orly 3) ✈ Agadir 👤 1 [Details ^](#)

16 July 2020



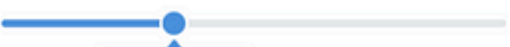
**Total amount** € 279.<sup>00</sup>

[Next →](#)

[Return](#)

Same idea in the B2B space. When you upgrade your FullStory account, there's a fixed block dedicated to the details of your offer on the right side of the screen. This shows the content of your offer as well as the monthly price instantly updated when you make changes in the left part of the screen.

**1 What are your monthly traffic needs?**



100K sessions

**How long do you need your data stored?**

Choose what will accommodate your company's data retention needs.

- **6mo** +

*Not too short and not too long. Just right for general product/feature analysis and usability testing.*

**2 Custom-tailor FullStory to your needs.**

Extend FullStory's abilities with Feature Packs.

Dev Tools Pack

**fullstory PRO**

**SUMMARY**

**100K sessions / 6mo history**

Session and data retention needs can be adjusted at any time. And as with any plan change, your bill will reflect a pro-rated amount.

**FEATURE PACKS**

[Choose Feature Packs...](#)

**\$633**

per month billed annually or \$949 month-to-month

Not ready to go Pro? [Try FullStory Free](#)

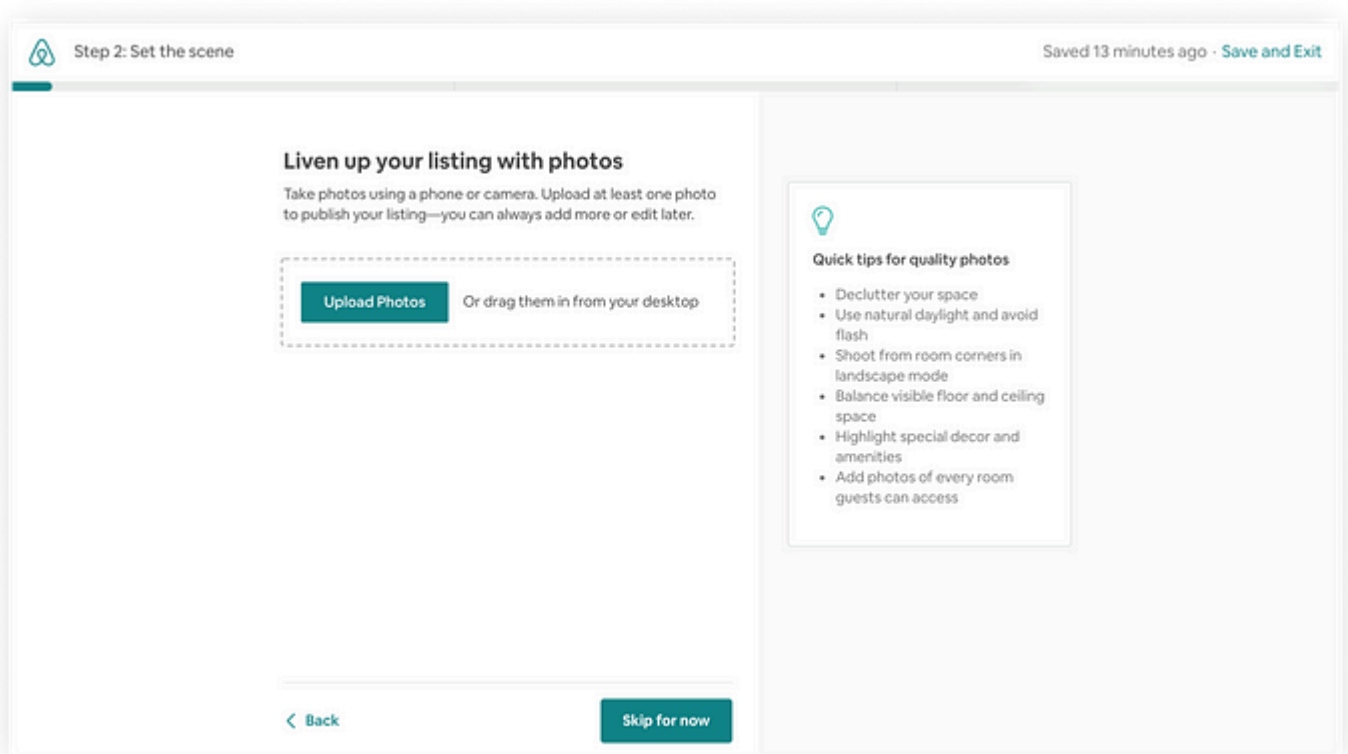
[Chat](#)

This sort of "real-time update" experience adds a lot of transparency to the pricing of a service.

## 💡 Give some hints

When a flow requires very specific information where users can easily get mistaken, it's relevant to add some hints.

Photos are the most important asset of an Airbnb listing. If you upload ugly photos, chances are very limited that you will be able to host guests. That's why Airbnb gives some hints on its right side panel on how to take quality photos.



But hints can also be **inspirations from other users**. When you start creating an experience on Airbnb, they display similar experiences on the right side panel, which enables you to benchmark other experiences in order to find inspiration in terms of name, branding, photos, description, price, etc.

### Submit your experience

- Your idea
- Location
- Your theme**
- What we're looking for
- Basic information
- Experience page
- Settings
- Your submission

## What type of experience will you host?

Select a theme that best describes what guests will mainly be doing on your experience. This will help guests find and book your experience.

Choreography class  
Entertainment • Dance • Choreography

How about another theme? *(optional)*  
The most unique experiences have more than one theme. Capture different aspects of your experience by including more.

Add a secondary theme

Back
23 items to submit
Next

### Similar experiences guests love

**UNITED STATES** ★ 5 (36)  
**New Orleans Bounce and Twerk with MoeJoe**  
From €78/person

**SOUTH KOREA** ★ 5 (37)  
**Dance like a K-pop star for Beginners**  
From €20/person

**UNITED KINGDOM**  
**Adapted Dance Class**  
From €14/person

**BRAZIL** ★ 5 (250)  
**samba class in Ipanema**  
From €21/person

**SWITZERLAND**  
**La Tehima, Méditation en**  
From €10/person

The same goes for pricing. When you post an offer for a project on Upwork, they show you a range of hourly rates for similar projects. This enables you to increase chances that you'll find a relevant freelancer for your job.

- Title
- Description
- Details
- Expertise
- Visibility
- Budget**
- Review

## Budget

Step 6 of 7

How would you like to pay your freelancer or agency? ⓘ

**POPULAR**

**Pay by the hour**  
Popular for ongoing projects

**Pay a fixed price**  
Popular for one-time projects

Set your estimated budget


**Choose the typical hourly range**


The typical hourly rate **\$30-\$35/hr** | ~\$33/hr for jobs like yours


### **Add some human touch**

In verticals where users are usually cautious (e.g. insurance or legal expertise), adding a human presence in the flow can feel reassuring. It looks like there's someone personally taking care of your case, even though it's just a computer-generated form.


luko



**Emma**  
 Looks great! Is it a house or an apartment?


**A house**


**An apartment**



next


 Lemonade





Hey! I'm Maya. I'll get you an awesome price in seconds. Ready to go?

NEXT


 Claims & Flights
 Check Flight
 Help
 

1 ELIGIBILITY CHECK  
 2 ADDITIONAL INFORMATION  
 3 DOCUMENTS  
 4 FINISH!


**AirHelp enforces EU regulation EC261**



**Jane**  
 Your AirHelp Assistant

Hi! Let's check if your flight is eligible for compensation.  
 Where did you fly to?

DEPARTED FROM

FINAL DESTINATION

"Since it launched, AirHelp has been doing the dirty work on behalf of its customers, and it's not afraid to take airlines to court."



community is giving some tips on how to best fill in the required information.

The screenshot shows a form titled "creme de la creme" with the section "Your professions". The instructions say: "Tell us about your main profession and the associated secondary ones." The form has a "Main profession" section with a dropdown menu showing "Agile Coach" and a "5-10 ye..." dropdown. Below this is a section "Add skills associated to your profession" with a "Select skills/technologies" input field. A note says: "For each skill, tell us your level of proficiency on a scale from 1 to 4." There is a list of skills with "Active campaign CRM" selected and a proficiency level of 4. Below this is a button "Add a secondary profession". At the bottom is a "Next" button. To the right of the form is a large black and orange graphic with a white box containing a user profile picture and the text: "Choose your main profession, the one which better describes your professional activity. From then, you can pick up to 2 secondary professions and your associated skill level. If some of your skills do not appear in the drop-down list, feel free to tell us!"



## Bring in some credentials

In verticals depending on an official regulation, it's important to show that you have the appropriate credentials. That's why AirHelp shows an informational banner proving that it's enforcing the "EU regulation EC261". This plays on **authority** — thanks to this, users are better convinced of AirHelp's legitimacy regarding flight compensations.

In highly competitive verticals, credentials can also be emphasized with **social proof**. Using customer testimonials and third-party ratings, this reinforces AirHelp's legitimacy.

## **Make it clear where users are and where they're going**

In a long user form with many steps, it's important to give users some peace of mind by clearly showing their progress. This can be done through 3 interface elements:

- **Showing a progress bar**

This is the most frequently used UI component to show progress. It works easily both on desktop and mobile.

The image shows four sequential mobile app screens for account registration, arranged in a horizontal row to illustrate a vertical flow. Each screen has a title, a brief instruction, input fields, and a 'Continue' button.

- Screen 1:** 'When were you born, Lucas ?'. Subtext: 'So that we'll never forget your birthday.' Input fields for DD, MM, and YYYY. A teal 'Continue' button is at the bottom.
- Screen 2:** 'What's your phone number?'. Subtext: 'We'll need it later to securely pair your smartphone to your account.' Input field for a phone number starting with '+33'. A teal 'Continue' button is at the bottom.
- Screen 3:** 'What's your gender?'. Subtext: 'This will help us to address you correctly in some languages.' Radio buttons for 'Male' (selected) and 'Female'. A teal 'Continue' button is at the bottom.
- Screen 4:** 'In which country are you tax liable?'. Subtext: 'This information is required by the tax authorities and will be required within the first 90 days of account creation. [Am I liable to pay taxes in the United States?](#)' Input field for 'France'. A 'Tax ID (optional)' field. A '+ Add another' link. A 'Skip' button in a black box at the bottom.

- Showing the main steps of the flow

This can be either displayed horizontally, through breadcrumbs, like on TransferWise's money transfer flow...

The image shows a web interface for TransferWise. At the top, a horizontal breadcrumb trail shows the steps: 'Amount' (in blue), 'You' (active), 'Recipient', 'Review', and 'Pay'. Below this, the main heading is 'Who is sending the money?'. There are three selectable options, each in a light blue box with a circular icon:

- Option 1:** Features a profile picture of Lucas Didier. Text: 'LUCAS DIDIER' and 'Personal profile'.
- Option 2:** Features a briefcase icon. Text: 'Business' and 'Business profile'.
- Option 3:** Features a person icon. Text: 'On behalf of someone else' and 'Not allowed'.

... Or vertically, through a side panel, like on Airbnb's experience publication flow:

**Submit your experience**

- Your idea
- Location
- Your theme**
- What we're looking for
- Basic information
- Experience page
- Settings
- Your submission

### What type of experience will you host?

Select a theme that best describes what guests will mainly be doing on your experience. This will help guests find and book your experience.

Choreography class  
Entertainment • Dance • Choreography

**How about another theme? (optional)**  
The most unique experiences have more than one theme. Capture different aspects of your experience by including more.

+ Add a secondary theme

Back 23 items to submit Next

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Adapted Dance Class  
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- BRAZIL** ★ 5 (250)  
samba class in Ipanema  
From €21/person
- SWITZERLAND**  
La Tehima, Méditation en  
From €10/person

- Using "checkpoints" screens

A "checkpoint" screen is a screen that you see after completing each step of a flow. If you have a flow that can take several user sessions to complete, it can be relevant to implement such an interface. That's what Airbnb does in its publication flow.

## Great progress, Lucas!

Now let's get some details about your place so you can publish your listing.

Beds, bathrooms, amenities, and more  
[Change](#)

**STEP 2**  
**Set the scene**  
Photos, short description, title  
[Continue](#)

**STEP 3**  
**Get ready for guests**  
Booking settings, calendar, price



## Enable users to review their information

In flows where the last step includes a very committing action (e.g. transferring money or making a payment), users can easily drop off if they're not sure that all of their information is correct.

That's why you need to provide them with an easy way to review all of the information they've completed throughout the flow, as well as a way to easily edit any piece of information that might be incorrect.

A good example is TransferWise's "Review" page, just before sending a money transfer.

TransferWise

Amount You Recipient Review Pay

### Review details of your transfer

Transfer details	<a href="#">Edit</a>
You send	1,000 EUR
Total fees (included)	8.98 EUR
Amount we'll convert	991.02 EUR
Guaranteed rate (48 hours)	11.3493
Anna gets	11,247.38 NOK
Should arrive	by April 7th

Recipient details	<a href="#">Change</a>
Name	[REDACTED]
IBAN	[REDACTED]
Bank code (BIC/SWIFT)	[REDACTED]

Reference for Anna

Message or KID to Anna

Confirm and continue

That's it for this post. I hope you enjoyed those best practices! Feel free to share some of your own examples of how to make complex user forms look simpler.

*Need product/UX consulting on your own product? Check out my services! 🙌*

**<http://www.lucasdidier.com>**

#ux

#design

#ui

#product-design

#startup