

How To Master Lead Generation with Opt-in Forms

mailmunch

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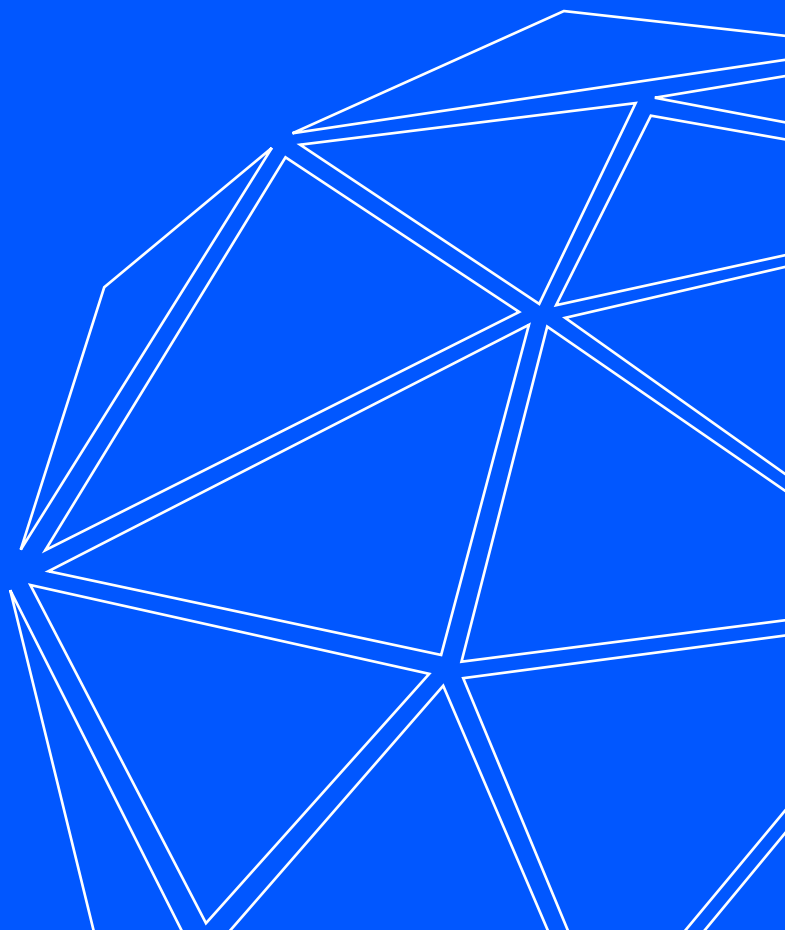
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1. Introduction

First of all, congratulations, you're here!

You know you should be getting more leads. And with this ebook, you'll be all set to achieve your goal! This resource will help you get more leads and get the most out of your website when it comes to growing your email list.

There can be multiple reasons for growing your own email list (which we'll get into), and this book will show you all the steps required to set up your website for higher lead collection, whatever your email marketing goals may be.

We'll break the whole process down for you. From explaining what opt-in forms are, why it's crucial to have them in the first place, to the process of setting them up. We'll look at how you can smartly deploy them for greater conversions, and test and improve your lead generation campaigns.



2. Why it’s essential to have an email list

The whole point of becoming a conversion pro and deploying opt-in forms across your website is to create a solid email list. This is your channel for direct communication with your audience.

Advantages of an email list

Instantly inform your audience as hundreds, and potentially thousands of people get notified through an electronic slab they're holding in their pockets. How amazing is that?

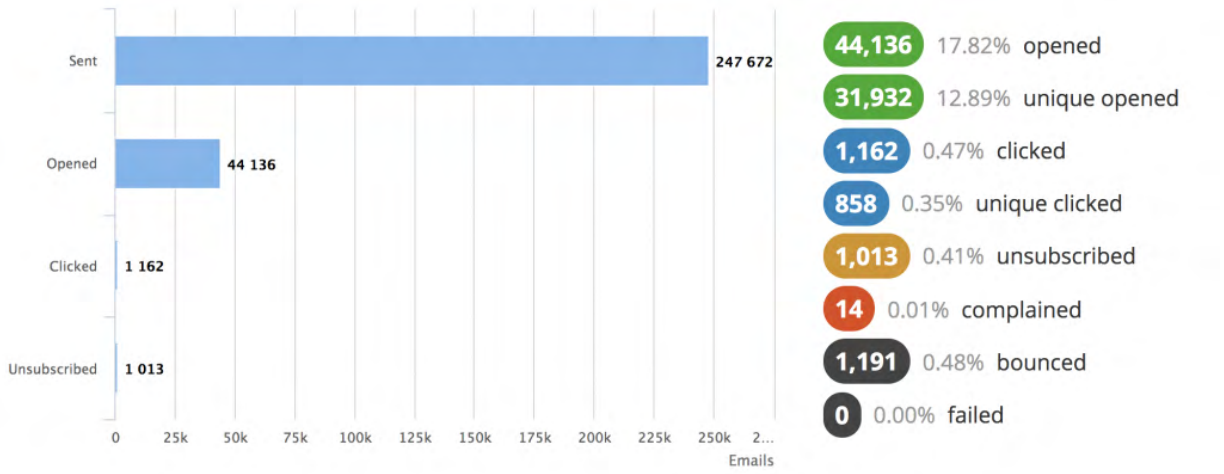
Build brand awareness and appeal. Awareness comes from attracting attention. People learn about you when you make yourself visible by sending emails. The better they know you, the more likely they'll buy from you.

Inspire action. You can easily embed call to action buttons in your emails. These call to action buttons can do a multitude of things. You can use them to:

- Ask people to sign-up for your latest course
- Direct them to your blog/website
- Nudge them towards a sale
- Ask to share content on social networks
- Offer discounts

Measure results easily. Most email marketing services give you access to critical numbers like:

- Email open rates
- Click rates
- Delivery reports
- Percentage of clicks
- Emails opened by geography
- Emails opened by device/browser



All this rich information makes it easy for you to justify your marketing activities while also giving you access to valuable, actionable data.

Generate more traffic. Imagine you've grown your email list to 100,000 contacts, and you have an average open rate of 5%.

Imagine you publish an article that announces your latest product launch and share it with your email list. Even if 5% of the recipients click and visit your article, you're going to have 5000 people who immediately know about your new product. At almost no cost!

Besides these direct advantages of owning an email list, the most significant benefit of collecting subscribers is that **you own your data:**

Search engines and social media networks are constantly updating their algorithms to improve user experience. Sometimes these tweaks can affect your search results ranking and social visibility. Even worse, a social media platform can lose popularity or shut-down, rendering all your hard work of collecting followers useless. When you have an email list, all these troubles go out the window as you never have to depend algorithm changes or dwindling platform popularity to deliver your marketing. You have direct communication.

By now, you know how powerful an email list can prove to be. To learn about even more advantages, read our resource on the **advantages of email marketing.**

In the next section, let's cover the tools you'll use to grow your email lists.

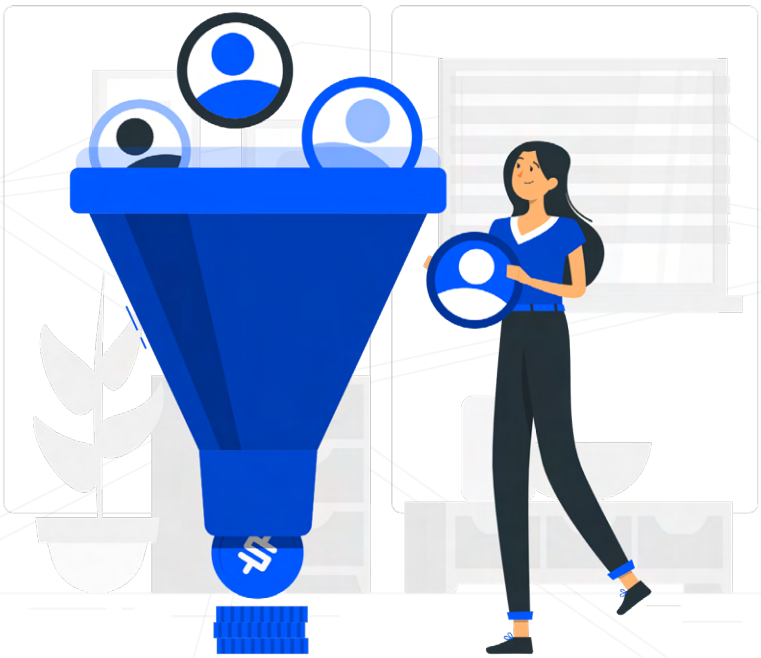
3.
Your ticket to conversions: What are opt-in forms?

Converting visitors into leads starts with **opt-in forms.**

Opt-in forms are your gateway to start building an email list and nurturing connections with your visitors and customers. Here's a quick definition to get you started:

An opt-in is a form of consent used to acknowledge interest in a product or service, allowing you to collect email addresses to contact visitors with further information. They're part of an inbound marketing approach used to collect permission to send newsletters, product sales, and other marketing materials.

These forms vary in their appearance and functionality. Let's look at some of the **most common opt-in forms.**

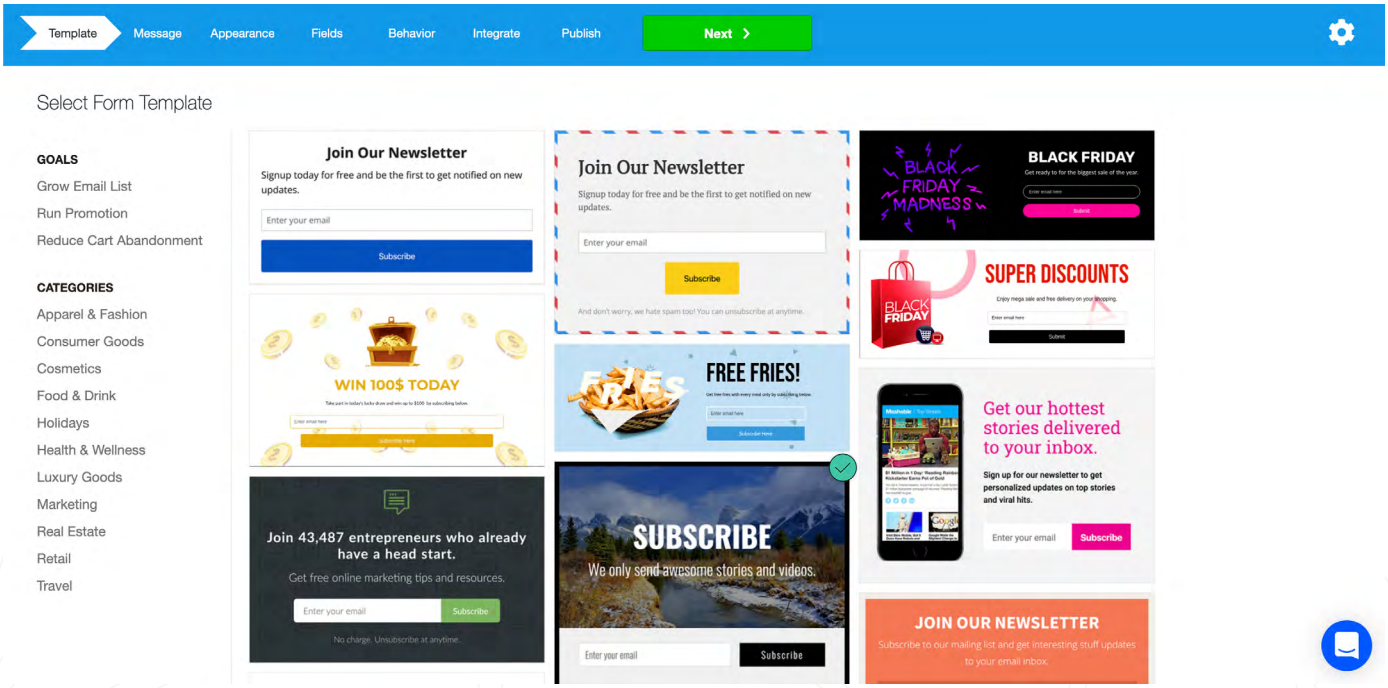


Types of opt-in forms

Popup: The king of all forms

Most of us are well-familiar with popups. They serve a very basic yet crucial function on the internet. They are built to grab the immediate attention and entice viewers to click on a link or collect their email address.

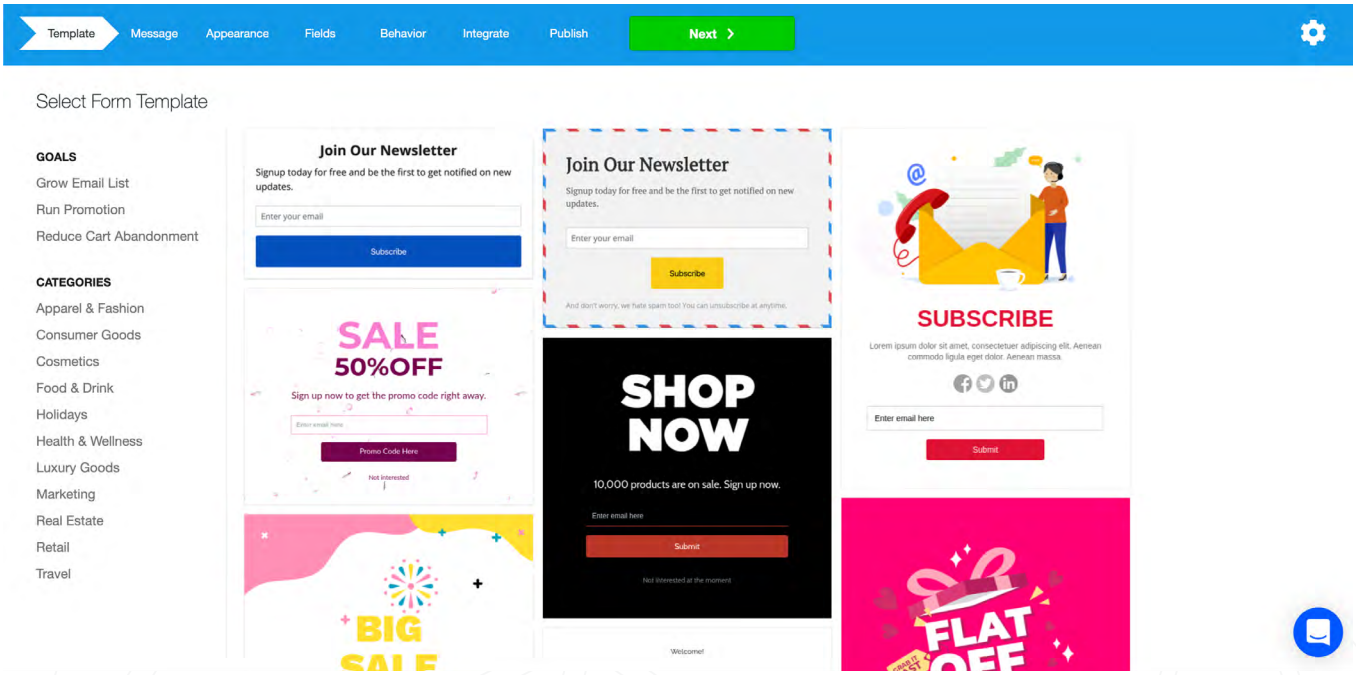
Most websites now use popups as non-intrusively as possible, and their conventional design has also been overhauled to offer a consistent experience. They are now also commonly known as popovers, lightboxes, or hover boxes.



Slidebox: Striking the perfect balance

Slide box is an opt-in form that usually appears on the bottom right corner of a page and is triggered after you've browsed a certain length of a webpage, or after a fixed time.

It lets you divert attention towards an offer without interrupting the flow of a visitor. It is used to showcase content or a deal relevant to the page the visitor is browsing. Slide boxes also help to capitalize on interest or intent of a visitor, since they are triggered only after the visitor has viewed some or most of your content.



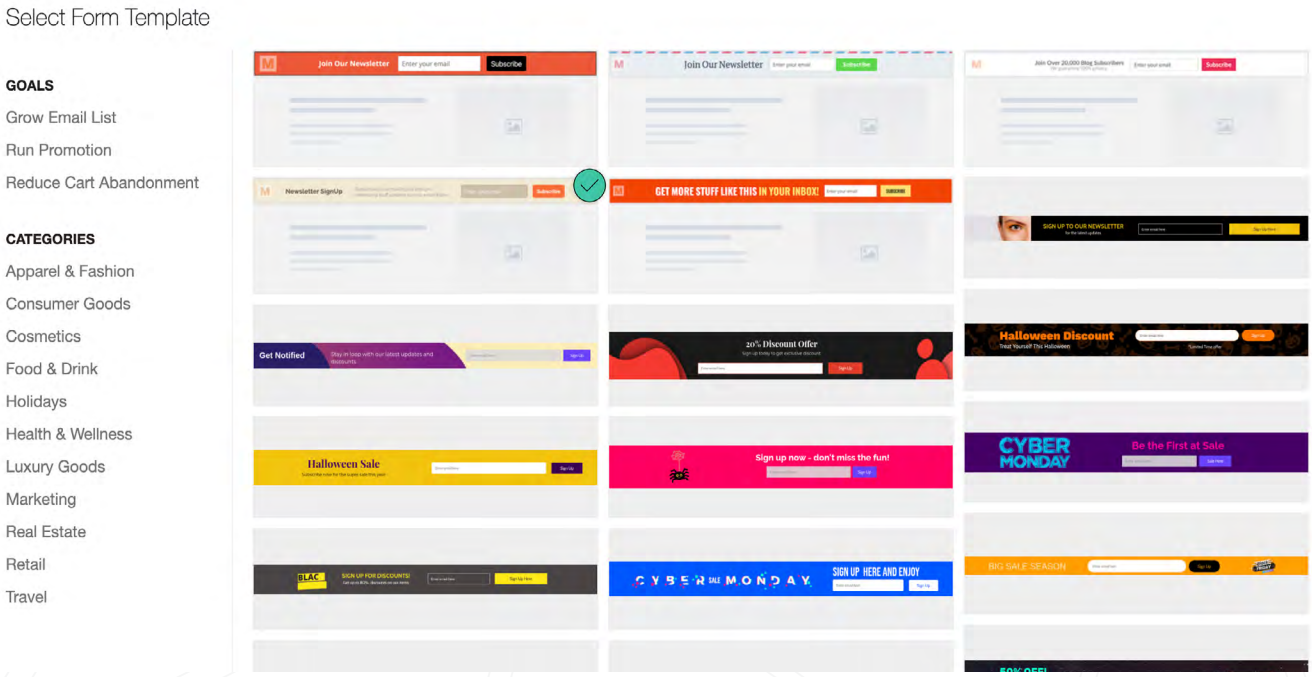
Top bar: The conversion underdog

A top bar is an opt-in form that hovers on top of a webpage as you continue to scroll through the page. It usually contains a one-line copy and a button to take the visitor to another page.

Topbars are a great opt-in form on their strength of being:

- Very visible as they usually sit on top of a page
- Recognizable. Everyone has come across a topbar and know how to interact with them

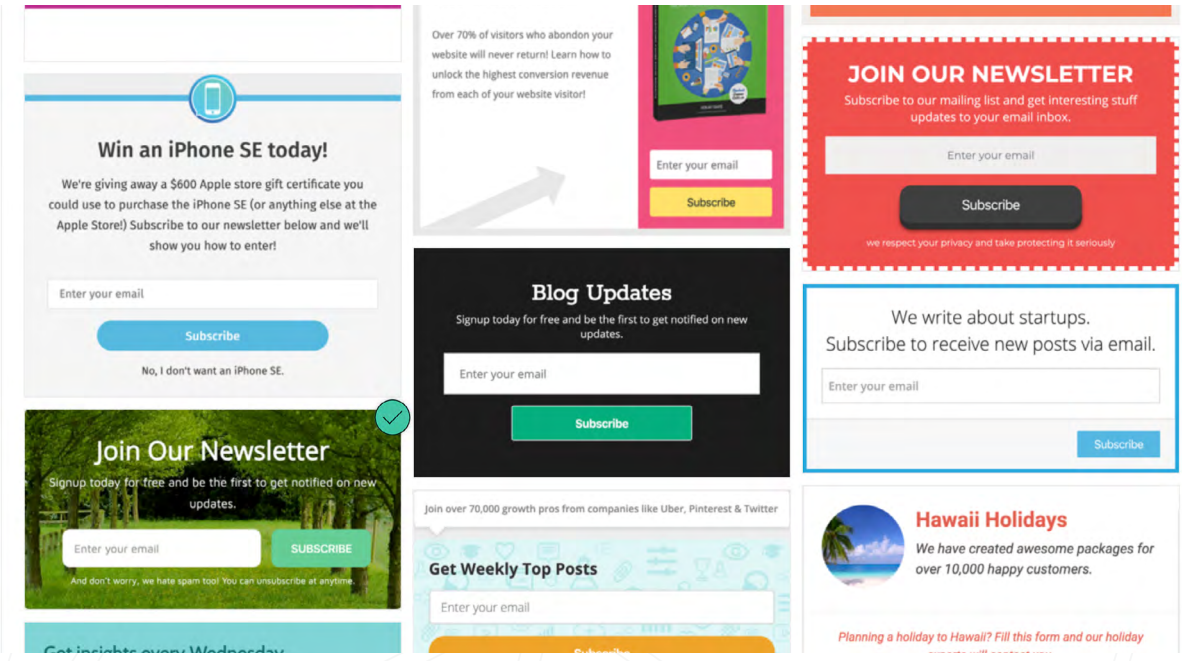
In comparison to popups, top bars are also highly mobile-friendly.



Embedded Form: Your friendly neighbor

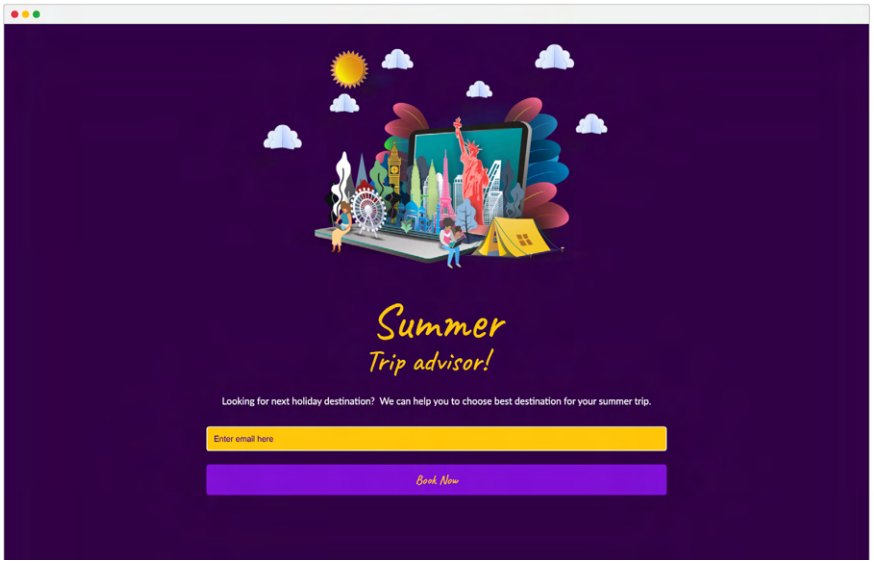
Embedded opt-ins are static forms that are either embedded in the body of a webpage or the side panels. They offer a break from content that a visitor is browsing through, and they can be used either as advertisements or subscription forms.

Embedded forms work best for readers who are engaged with your content. They don't have conversion rates as high as some of the other opt-in forms, but they are a reliable, non-intrusive substitute or complement to them.



Site cover: The new superstar

Site Covers or Cover Forms are the latest innovation in opt-in technology. They take over the page a visitor is on and display as a full-page form. They have the **highest engagement rates** of all forms and offer the most amount of creative real estate.



With a full-page form to work with, you can add striking images, use more text to explain your offer, and place videos to provide your visitors with the full experience of what you have to offer them.

These five form types are what you'll use to increase your conversions and turn visitors into subscribers. In the coming sections, we will also look at where and when to use these forms, along with key points on how to optimize these forms for conversions.

Before that, let's see how to actually create these forms.

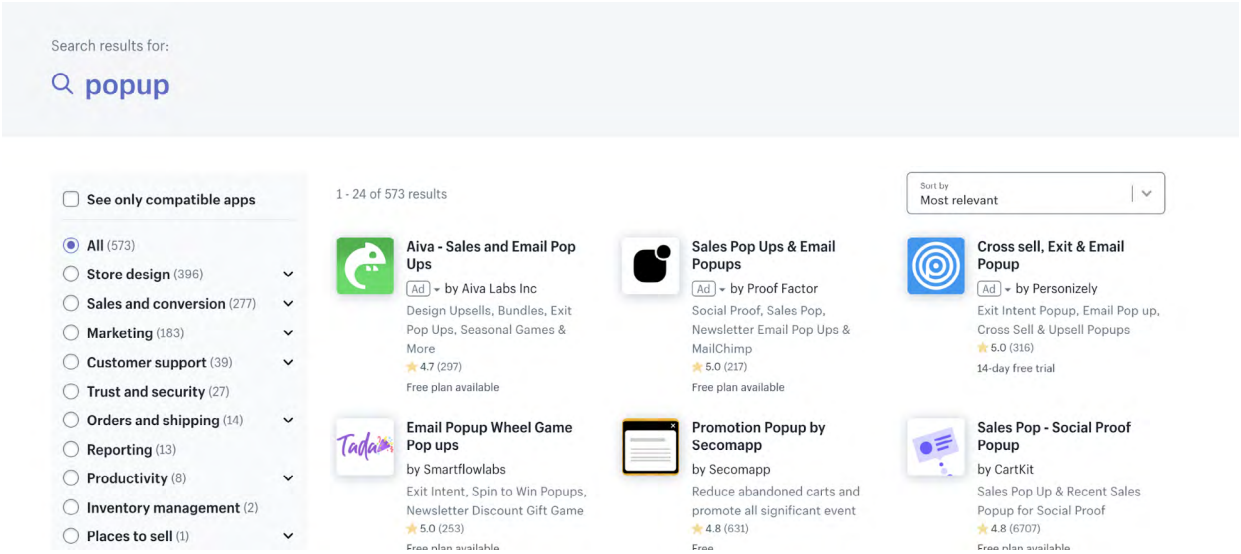
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How to create opt-in forms

There are two ways to go about creating opt-in forms for your website:

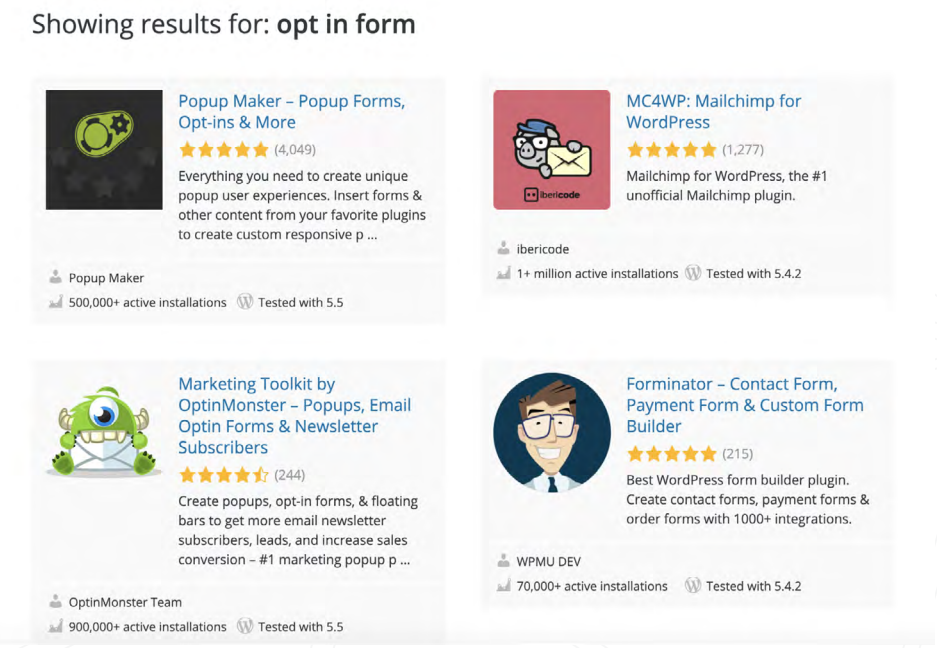
1. Using simple lead collection tools
2. Using full-stack email marketing tools

1. Install a simple lead collection tool

You can download simple form software hosted through WordPress or eCommerce platforms like Shopify or Wix; you can visit their app stores and download various apps for popups and opt-in forms. In most cases, they'll allow you to design only simple lead-gen forms.



A simple search for 'popup' will give you various options to install on your shopify store



You can find many plugins in the WordPress plugins directory.

Although convenient to install, these plugins offer only basic form creation features. They aren't recommended for dedicated lead generation campaigns. You will have to rely on more software to manage your lists and send emails to them. So in pursuit of going for simplicity, you may end up downloading more additional software, managing each separately, which may make your lead nurturing process more complicated.

2. Use an email marketing tool

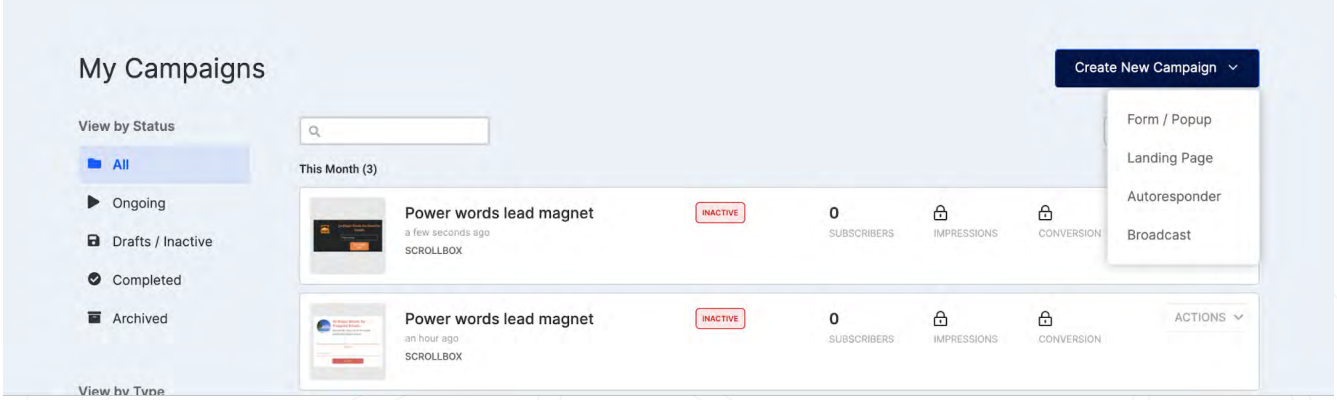
If you're looking for dramatic results, an email marketing solution is your best bet. Dedicated software solutions are incredibly dynamic, packed with features, and much more functional than plugins.

Email marketing tools enable you to completely manage your opt-in forms, from creating and editing them to testing, tracking, and monitoring them. The more control and customization you have over your forms, the better you'll convert visitors.

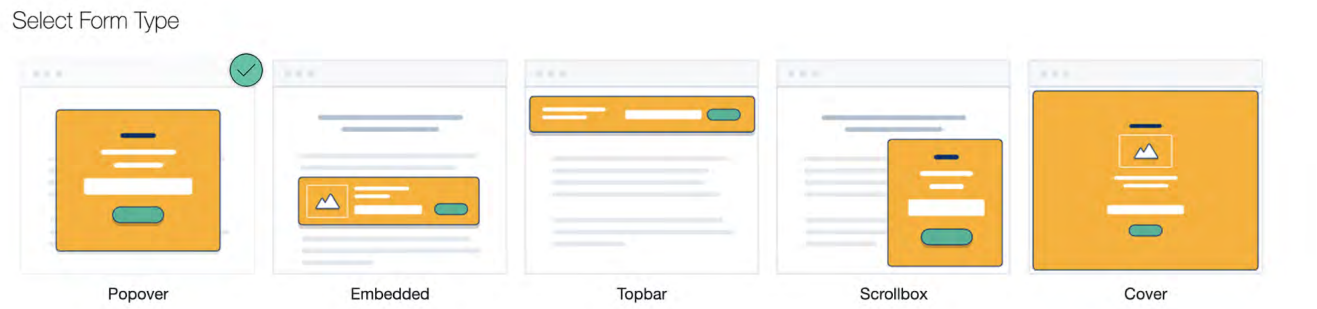
Take Mailmunch for example. It allows you to create and experiment with various opt-in form types, including popups, topbars, slide boxes, embedded forms, and site covers. You can choose from hundreds of form templates, customize form appearance, behavior, and fields, and do lots more.

You can download and install it directly from WordPress directory, Shopify App store, or add a small snippet of code to your website to have it **up and running on your website.**

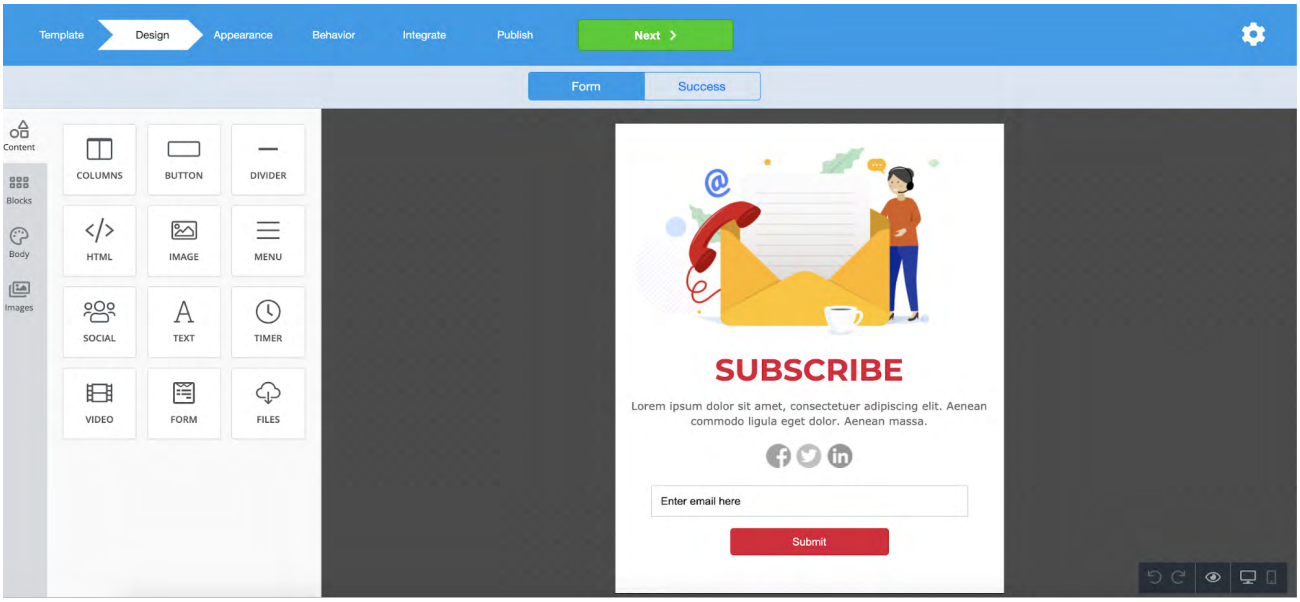
To create a new form with Mailmunch, sign-in, and go to the Campaigns tab and select 'Create New Campaign'.



Select form/popup and you'll be directed to your form builder. Here, select the type of opt-in form you want to create.



Once selected, choose an appropriate theme for your form and be redirected to the form builder.



Here you'll have complete control over your form. You can change its layout, colors, graphics, CTAs, appearance, behavior, and subscription settings. Once you're happy with your form, you'll go to the 'publish' tab and choose when to make your form live on your website.

Most other lead generation solutions will also provide you with similar feature sets.

Now that you know how opt-in forms are created, the next section will dive into the importance of 'lead magnets' and why it's important to offer something valuable to your subscribers before asking for their email addresses.

5.
The needs for lead magnets

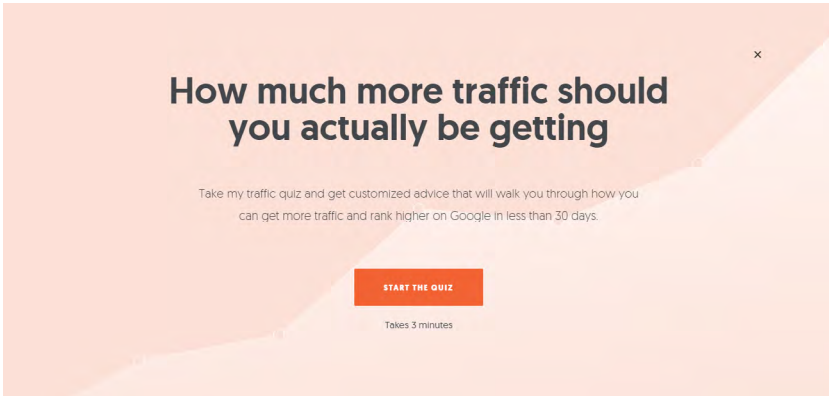
Why does anyone visit a website? Because they expect to derive value from the visit.

The reason why someone signs up for a mailing list is the same. Do they want you to market your product to them? That's hardly ever the case. So why do they still sign up? It's because they buy into your promise of value.

Businesses nudge visitors to hand over their email addresses by offering them something in return. Resources, freebies, and discounts are all examples of such offerings. That's how you collect leads.

In your opt-in forms, you create value with lead magnets.

A lead magnet is a marketing term for a free item or service given away to gather contact details.



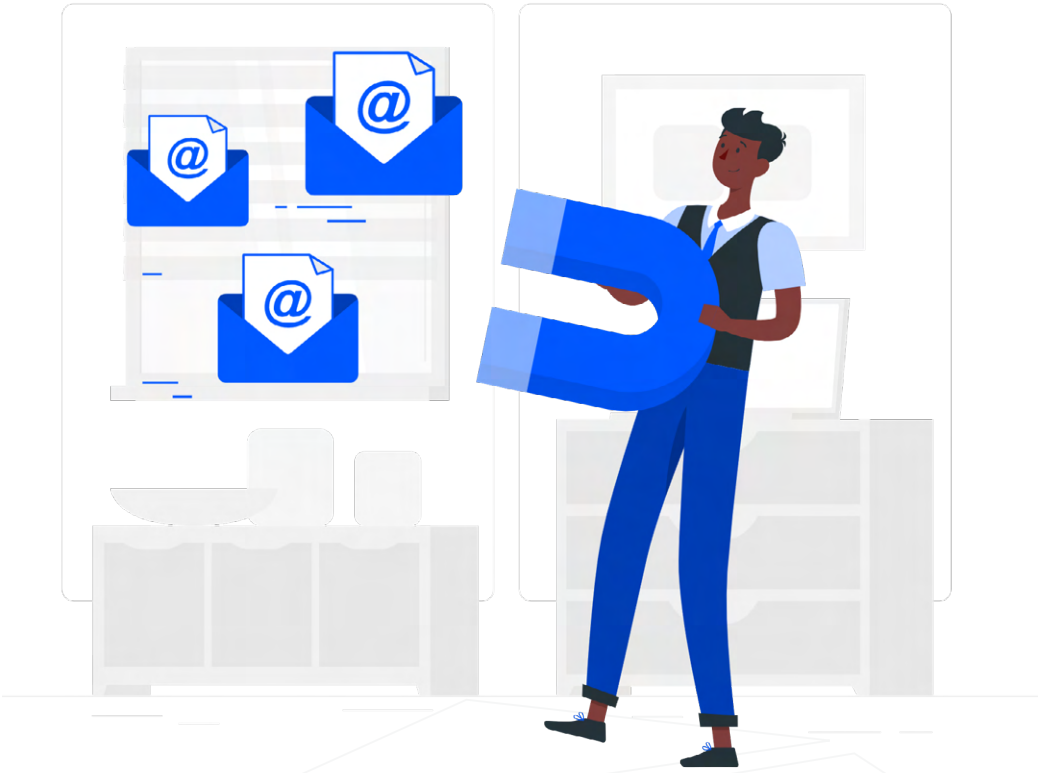
A simple lead magnet from Neil Patel: His audience includes marketers, so he offers a relevant quiz and sends the results through email.

Lead magnets come in all shapes and sizes and can be altered according to the type of website you run. Some common and useful lead magnet examples are:

- ebooks
- webinars
- mini-courses
- checklists
- spreadsheets
- toolkits
- planners
- calculators
- guides
- infographics
- videos
- PDFs
- podcasts
- quizzes
- free trials
- coupons
- discounts
- giveaways

With so many variations of a lead magnet, picking the right one(s) can be difficult. This is why it is vital to research what will appeal to your subscribers. You must also consider what kind of visitors you wish to attract from specific lead magnets. If you offer an iPhone giveaway, sure, you'll have thousands of sign-ups but will they constitute quality leads? Probably not.

It's better to offer lead magnets that your target audience is interested in. If you're a digital design firm, it would make sense to offer 'the best free design resources list' rather than an iPhone. The people who sign up will have a higher chance of being a quality lead with such lead magnets.



Read our resource: **How to create lead magnets that convert like crazy**

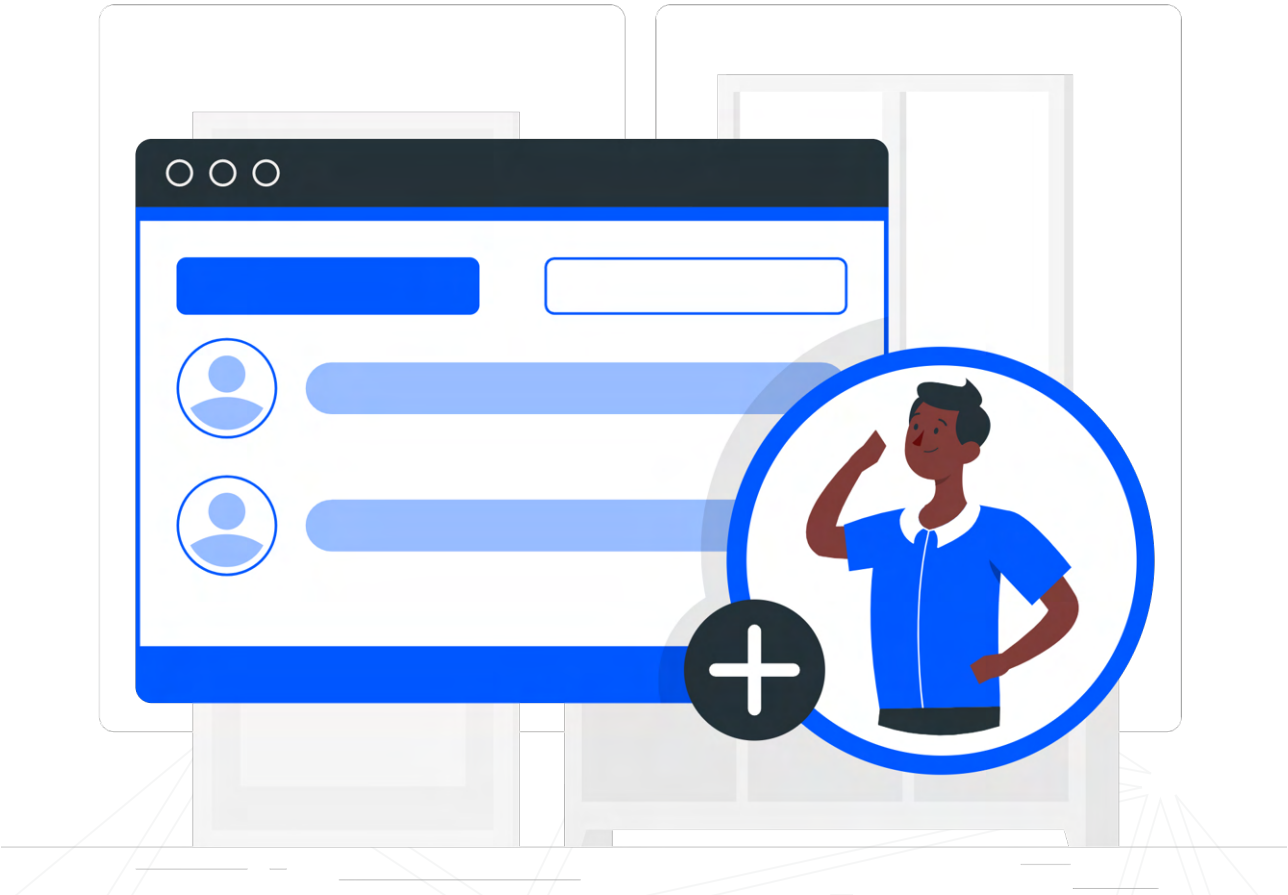
Now that you know how to create opt-in forms and the mechanisms behind the exchange of email addresses, the next thing to consider is the singular elements that make-up an opt-in form. Are you creating them in a manner that ensures you're getting maximum results from them? The next chapter touches on the optimization of forms.

6.
How to optimize your opt-in forms

Opt-in forms are only good at collecting leads if they're optimized to gain traction. We dive deep into all the factors that help you prime your opt-in forms for the maximum leads. Digital strategy guru Andy Crestodina lays out the **3P's of a great email sign-up form:**

- Prominence: an opt-in form needs to be visible and prominent enough to catch the eyes
- Promise: it should offer value that your target audience is seeking, i.e. "marketing automation tips"
- Proof: it should leverage the bandwagon effect by building social proof, i.e. "Over 100, 000 businesses across the globe rely on our tips".

These will be our three guiding principles as we learn how to optimize our forms in this ebook.



Structure

To start, let's have a look at how opt-in forms are structured. Additionally, these elements may be accompanied by images, gifs, or videos.

Here are the four pieces that make up every opt-in form:

- **Headline**
- **Description (recommended but not necessary)**
- **Form fields**
- **CTA**

Additionally, these elements may be accompanied by images, gifs, or videos.

Design

Most users land on your pages to glean insights or learn about new strategies. They don't expect to see an opt-in, much less act upon it.

To make them pay attention to it, you need to offer a seamless user experience.

A well-designed form not only looks good but also makes it simpler and more likely for users to convert.



The recommended design tips for opt-in forms are as follows:

Form fields

The easier your form is to fill, the more leads it will generate. A major player here is form field design.

The four main suggestions for form field design are:

1. Offer a single column for all your fields. This design is much easier to scan and fill out.
2. Try to aim for a single field per form. This is usually the email address which is often enough data for email marketing. But if you're looking to qualify leads or personalize your campaigns, only ask for information you absolutely need. Every time you add a field to a form, you **reduce your conversion rate** by 11%.
3. Use placeholder text as a guide to help visitors understand what information is expected from them OR place form labels vertically above the field.
4. Trigger descriptive errors to facilitate form filling and get accurate information.

There may be exceptions to the rules though! This is why testing is so essential (discussed in-depth later on in this book).
One such example is of subsequent horizontal fields when they make more logical sense together. Examples include First and Last name in the same row or City and Country in the same row. But for all other intents and purposes, stick to a single column!

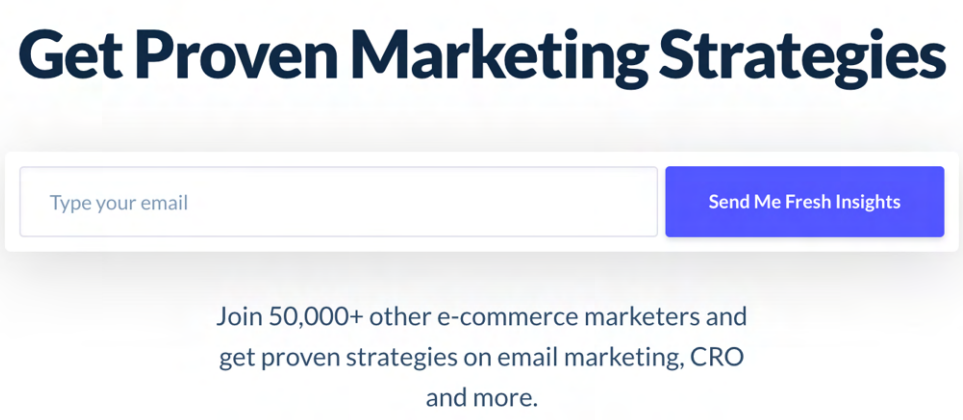
Copy

We all know the powerful effect copy can have on conversions. This is especially true for opt-in forms. The way you pose the request could make or break your lead generation.

The best practices for writing stellar copy are:

- **Make the headline eye-catching. Push the benefit here or use your creativity to bring attention to the form**
- **Speak to the visitor directly: "Get actionable tips to hack your business growth"**
- **Use power words like 'Now', 'Fast', 'Secret' or 'Best': "Get our secret strategies in your inbox today".**
- **As always, be creative with your language to make your promise stand out: "Take this on your way out! We created this neat SEO cheat sheet for your business, let us drop it at your doorstep!"**
- **Add social proof to trigger conversions: "Over 10,000 people have already used the cheatsheet to optimize their website!"**

In light of these suggestions, let's have a look at Sleeknote's opt-in copy.



Right off the bat, we see their opt-in 'promise' in bold. And of course, we want the 'Proven' (power word) marketing strategies.

They've leveraged their social proof to trigger conversions. The CTA is personal and highlights exactly what the headline promises.

Visuals

Opt-ins don't convert if they don't attract attention. But if they're begging for attention, you might end up with frustrated visitors who can't wait to leave your site.

With visuals, it's crucial to strike the right balance between conspicuous and flashy. You don't want to put off your visitors

Here are guidelines on opt-in visuals:

- **Choose colors that stand out and steal attention but are also easy on the eyes.**
- **Use contrasting colors on the form to direct visitors to your CTA.**
- **If you're using popups, place an overlay on the rest of the page.**
- **If you're using a lead magnet, provide a preview or sneak peek. Add relevant images or gifs otherwise but stick to only one picture.**

Calls to action

CTAs are your opt-in end goal. That's where you want your users to click and essentially act.

As with all aspects of your form, the CTA needs to be equally captivating, if not more. This is why we're discussing it independently in this ebook.

CTA copy

With 'Sign up' and 'Submit' as standard phrases, marketers don't experiment with the most important part of their opt-in form.

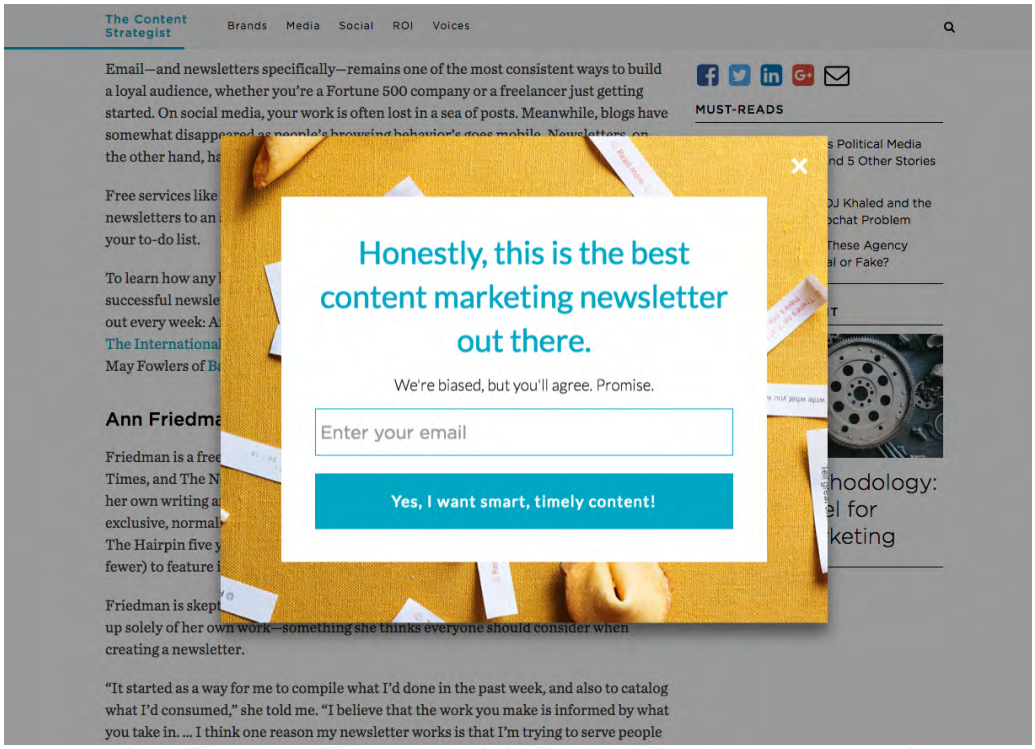
You want visitors to click on a piece of text. That's only going to happen if it's exciting and actionable.

- Write actionable yet creative copy that makes people stop and think.

- Try making CTAs more personal. **An experiment by Oli Garnder** demonstrated a 90% increase in conversions from a one-word change: replace 'Your' with 'My.'
- Make it more specific. The more details you offer, the more your visitors are likely to buy into the value you're offering. "Start Trial" won't pull in visitors like "Start My Free 30-Day Trial" will.

Here are some recommended alternatives you can try and use on your CTAs:

- **I want in**: conveys exclusivity
- **Grab your insights**: makes use of the more actionable 'grab' instead of get
- **Hand-deliver me tips**: implies that you're doing the visitor a favor
- **Send me fresh insights**: pushes the attractive offer of new and current information
- **Sweet! Sign me up**: takes a different spin on CTA copy and hence, catches the eye



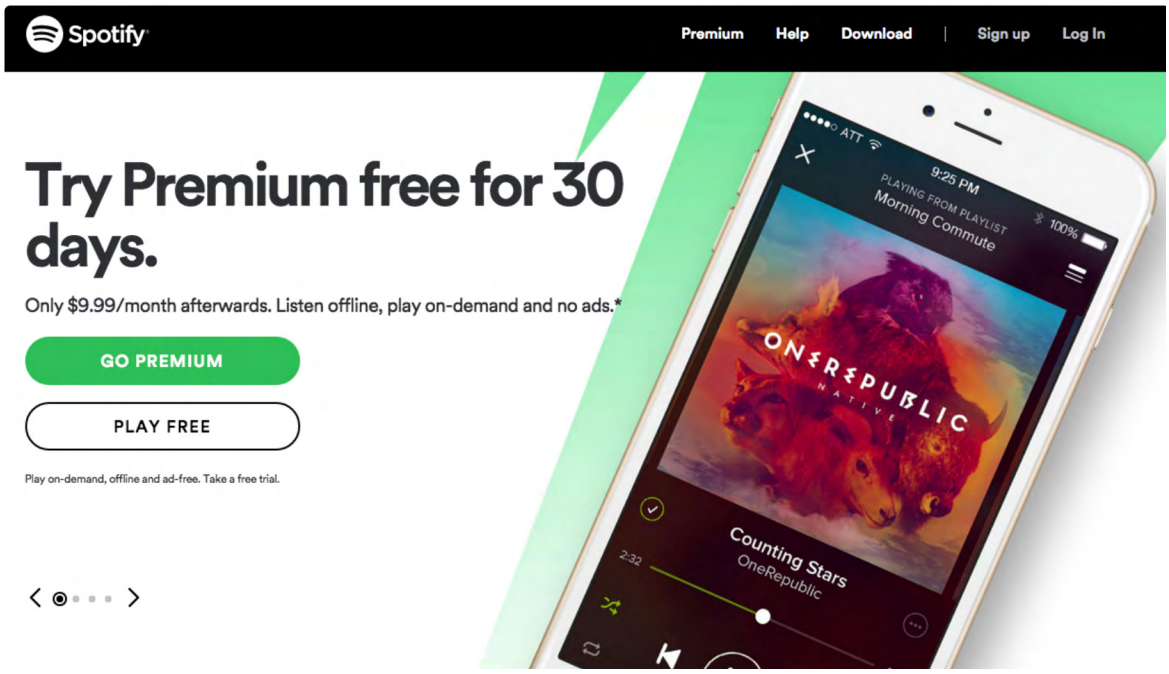
Contently's CTA copy is worth mentioning here. It's not your traditional "Subscribe" but more actionable, benefit-focused, and attention-grabbing.

- The use of the power word 'Yes' makes visitors more likely to comply
- The benefit-focused copy increases the perceived value
- The exclamation at the end evokes excitement

CTA button design

Again, the button design plays a critical role in people finding their way to your email list.

- Your CTA color should complement your branding and overall website theme.
- Use contrasting colors here so all visitor focus zeroes in on the CTA button.
- Ensure the text stands out against the button background.
- Round the corners to give a friendlier feel to the button.
- Use a sans-serif font for the CTA text since basic typefaces bring more attention to the message.



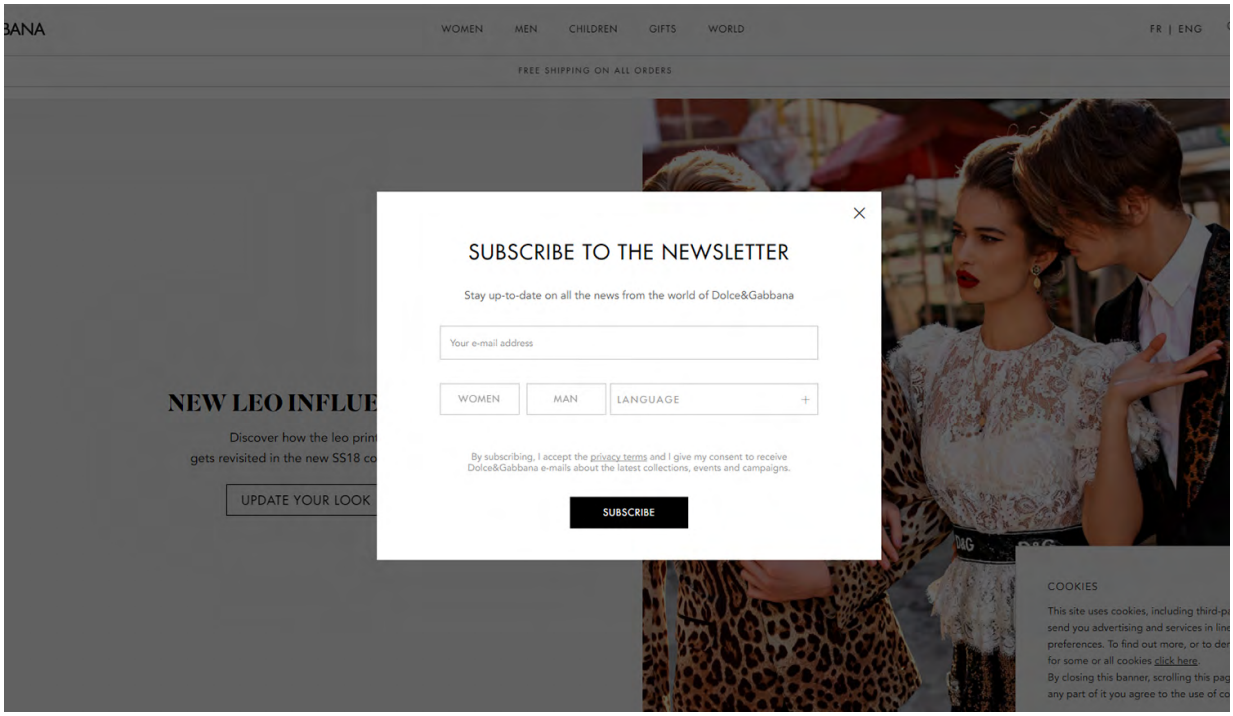
Spotify's green "Go premium" button uses an exact copy, but it shines against the white background. The sans-serif font in all caps and rounded corners, make the button easy on the eyes and more compelling.

Ease of exit

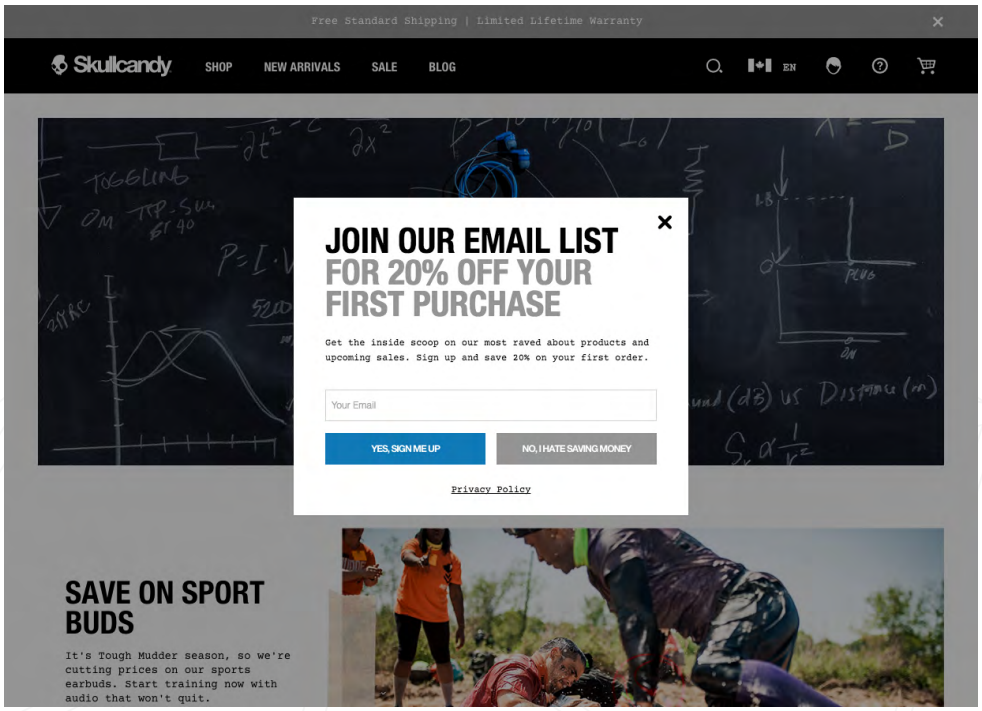
Ease of exit can be the difference between a quality lead entering your marketing funnel and an interested prospect getting frustrated by your brand's very thought.

When you're using high intrusion opt-in forms like popups, Site Covers, or massive slide-ins, there's a significant risk involved in visitors bouncing from the page. Yet, people use these opt-ins because of how well they convert.

To cushion the impact, make your forms easy to exit. For example, Dolce & Gabanna's pop-up form has a clear cancel button, contrasting with the background so visitors can easily spot it.



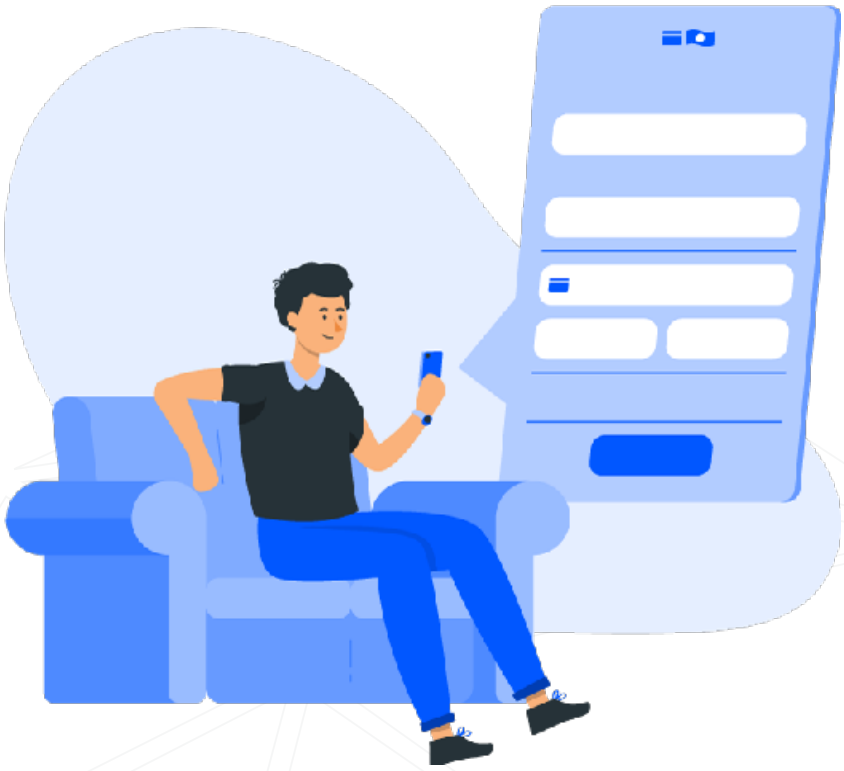
You can also add an exit button under your CTA. This works even better since you have the option to customize the copy and still push users towards the CTA. How do you do this? By making prospects realize what they're missing out on.



Let's have a look at SkullCandy's opt-in form. The exit button here is faded in comparison with your main CTA, which attracts the most attention. The copy read, "No, I hate saving money" and really, no one hates saving money. And they're reiterating the promise of their original CTA. All this coerces readers to sign up for the discount.

With the optimization tips covered in this section, you'll be able to ensure that your form is performing at maximum efficiency. Do remember that testing is a critical aspect of optimization, so keep on switching things up to see what changes bring you the most sign-ups.

While these tips cover the 'nature' of an opt-in form, the next chapter considers how you can use your forms, according to visitor behavior and intent, to maximize your forms' impact.



7. When and where to place opt-in forms

Each of the five opt-in forms we've mentioned in this book is different in its design and function. To make the most of each type of form, you should know which form works in which situation, and how you can alter form behavior to attract more subscribers.

Popup

A popup's behavior is such that it appears as a small lightbox in the center of the screen. It interrupts scrolling and can be triggered when a user lands on the page, scrolls down, or is about to leave. On one hand, it's hard to miss, but on the other, it's easy to exit. This makes it a safe choice for new businesses that are skeptical of experimenting with opt-ins and want quick results. The popup's appearance and behavior makes it useful in some situations and distracting in others.







Pros

- Demands attention
- Good for lead generation

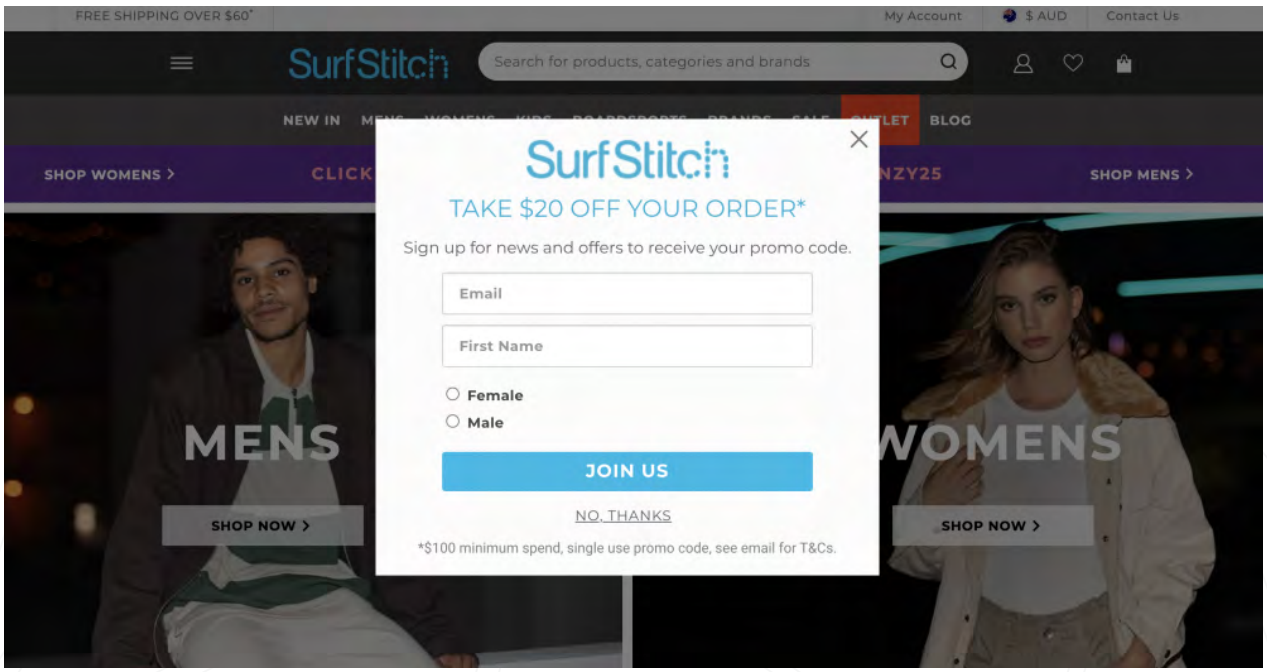
Cons

- Interrupts reading

Usage

- Primary lead generation, promotions, exit-intent strategy, resources

Here's **SurfStitch's** popup form in action. It's triggered after 10 seconds of engagement.



Site cover

The latest in opt-in technology, a site-cover is almost like a bigger, much bigger popup. It covers the site, as the name suggests, bringing instant attention to it. This form disrupts user scrolling and might appear aggressive at times so marketers should use it with caution. However, there's no chance of missing it, so that it could generate a lot of leads.



Pros

- Grabs the most attention of any opt-in form
- Great for tasks that require instant action
- Extra real estate allows for more creative options
- Works well with all visitor types, new and returning



Cons

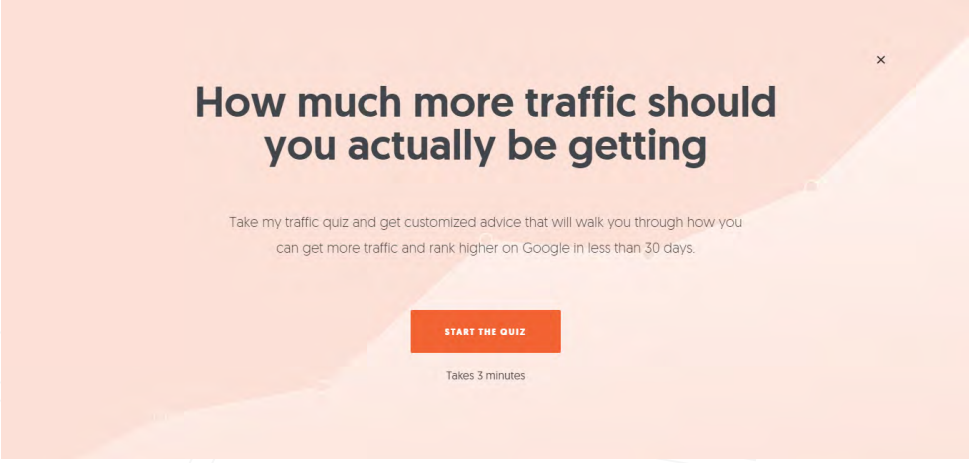
- Can seem like a nuisance because of its aggressive nature



Usage

- Primary lead generation, promotions, flash sales, limited time offers

Again, here we have Neil Patel's example. He's cleverly used a quiz that any marketer would instantly want to take. The incentive here is gaining stats about the true potential of your site.



Using a great lead magnet with an attention-grabbing opt-in form makes his offer irresistible.

Top bar

Top bars or floating bars stick to the top of your page. They appear as a small ribbon at the top that doesn't hinder the user experience and quietly sticks around until exited. They're also implemented site-wide, ensuring that every kind of visitor will be able to notice them.

A top bar also works great for long landing pages with at least two full-screen scrolls where the call-to-action may be hard to find as you go down. This opt-in encourages users to convert only when they're ready since it stays around no matter where the user may be on the page.



Pros

- Subtle and passive, doesn't interrupt user scrolling
- Good at targeting loyal customers, leading to more profit (80% of your future profit will come from just 20% of your existing customers).



Cons

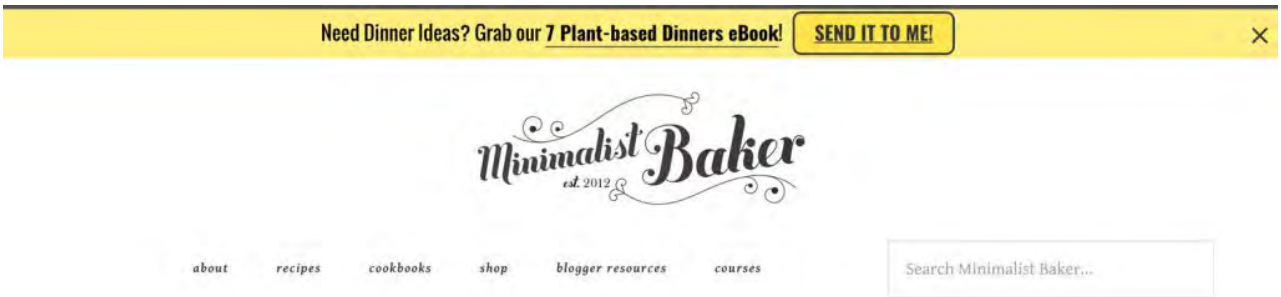
- Hard to notice so new visitors might ignore it
- Not meant for primary lead generation



Usage

- Latest offers, sales, updates, resources, and content upgrades

Here's an example of a non-invasive floating bar from Minimalist Baker.



Embedded form

Opt-in forms can also be embedded within a page. This subtle variant of opt-in forms is placed in a post or on a landing page, making it most visible to visitors that successfully engage with your content.

An embedded form has many placement options; top of the page, side panels, middle of the content, or the footer. You can choose where to embed it, depending on your goal. For instance, content upgrades usually appear in the middle of a post, so users get the option to download a more comprehensive version of what they're already reading.



Pros

- Smooth user experience, doesn't interrupt readers
- Re-engage visitors who are losing interest



Cons

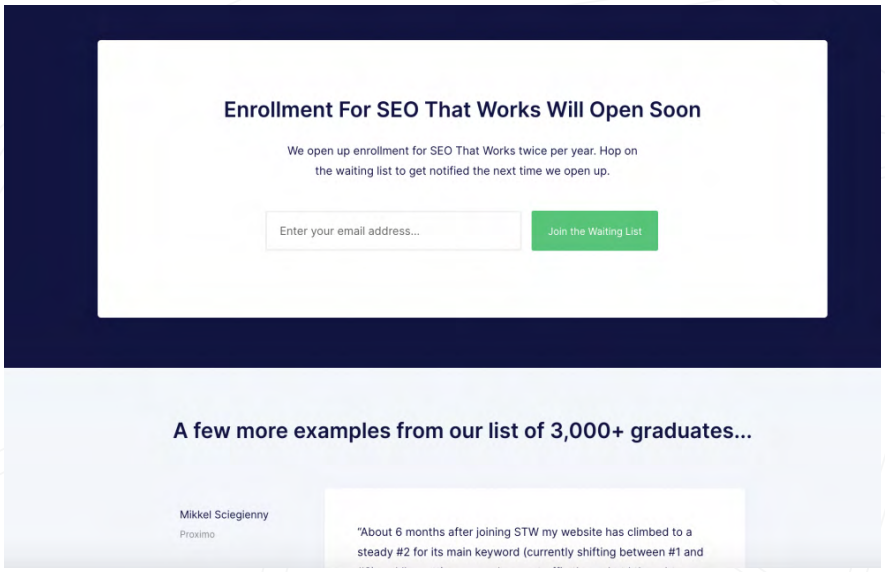
- Not ideal for primary lead generation



Usage

- Secondary lead generation, content upgrades, resources

Have a look at one of Backlinko's landing pages that shows an opt-in towards the end of the page, only after establishing interest in the services.



Slidebox

A slidebox strikes the perfect balance between high conversion and user-friendliness. It has good conversion rates on average, despite not being overly disruptive to the user experience. Its popularity stems from its ability to attract eyeballs without interrupting user scrolling. It slides in from the left or right side of the page, usually after a time delay to ensure visitor engagement.

The great thing about slide boxes is that they aren't as interruptive as popups or site covers but still attract sufficient attention because of the sudden movement on the form.



Pros

- Minimal disruption to user experience while still being attention-grabbing



Cons

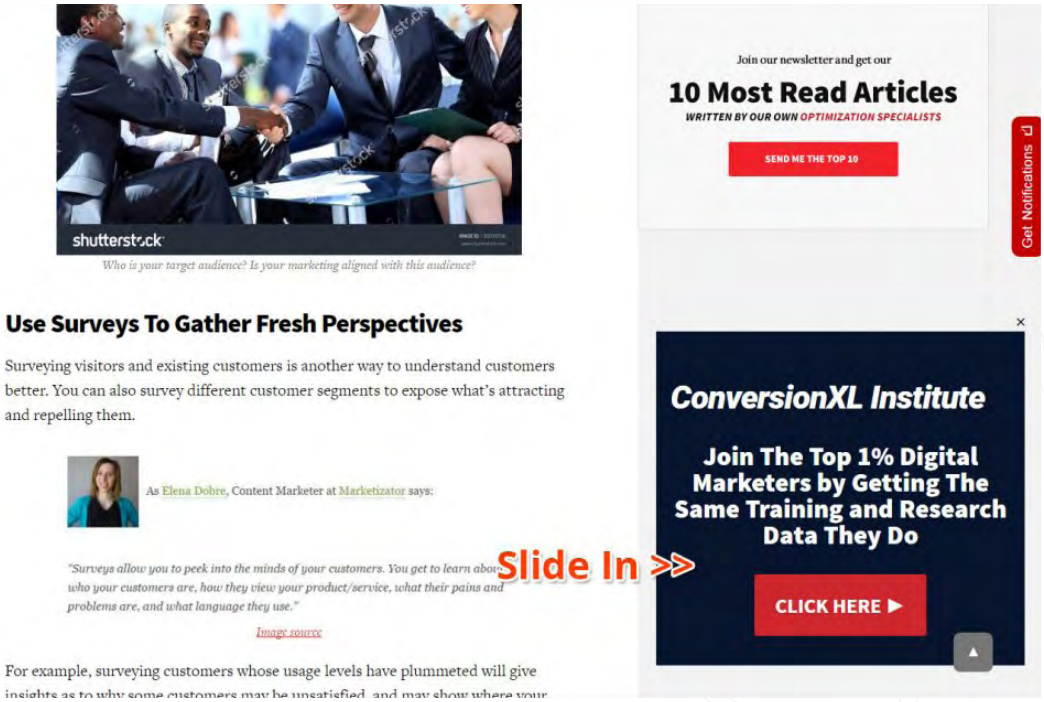
- Tricky in terms of timing the delay



Usage

- Secondary lead generation, resources

Here's an example from Conversionxl.

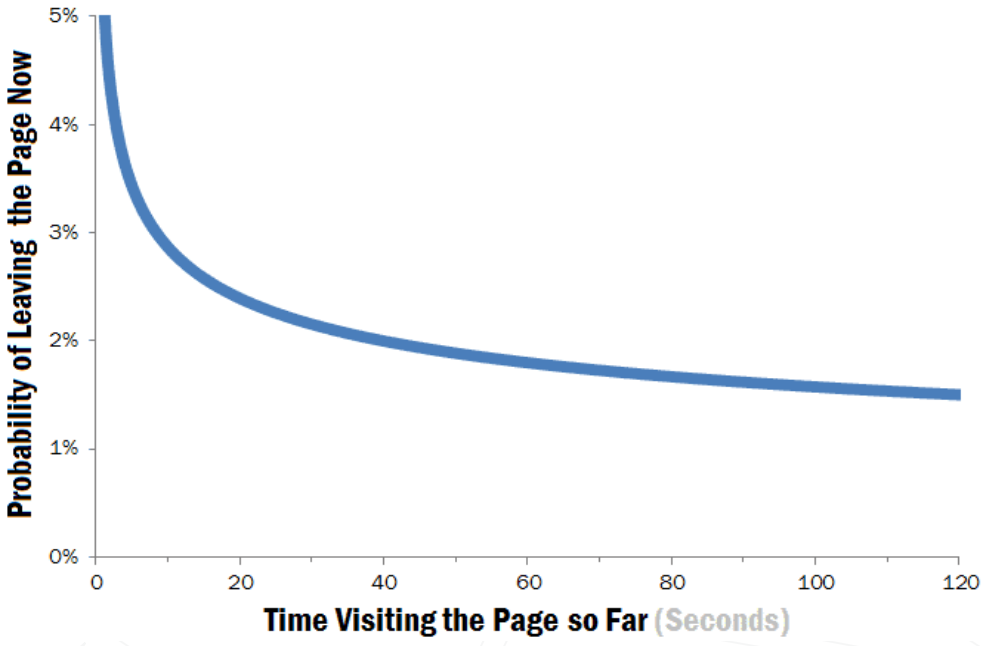


How you can use form behavior to optimize conversions

Most forms have levels of functionality that allow you to control how they are displayed. For example, with popups, you can choose pages they load on, how often they load, and what user actions trigger them.

If your popup is the very first thing that greets a visitor before they even have a chance to look around your site at all, chances are they'll be annoyed and quickly dismiss the popup. They might even leave the site altogether.

According to research by the Nielsen Norman Group, the first 10 seconds on a website are crucial; if a visitor stays longer than 10 seconds, odds are they'll stick around for a while to read and explore the page.



*Source: **NNG***

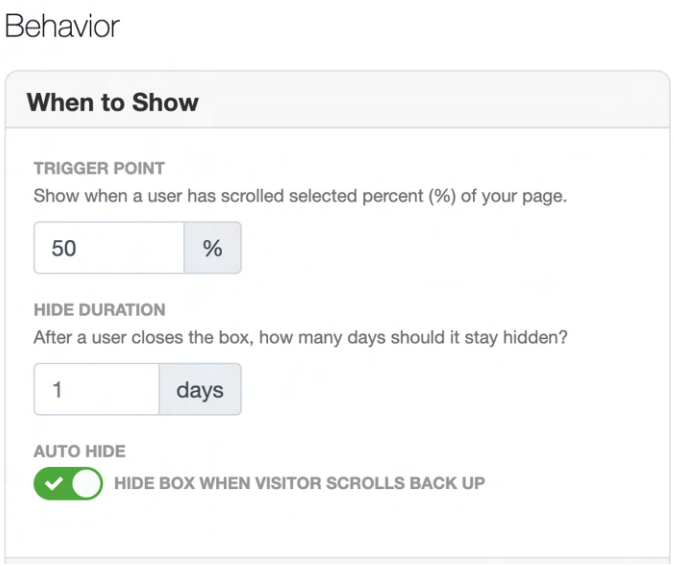
The research also suggests that displaying a popup right after a user lands on a page will give them more motivation to exit quickly. By holding off the popup for a little while, you allow the visitor to get to know you and what you're offering before you ask them for something.

But you can't wait too long. If your popup is timed to display too late (say, after two minutes), you could miss out on visitors who've already navigated to a different page on your site or left for a different site altogether.

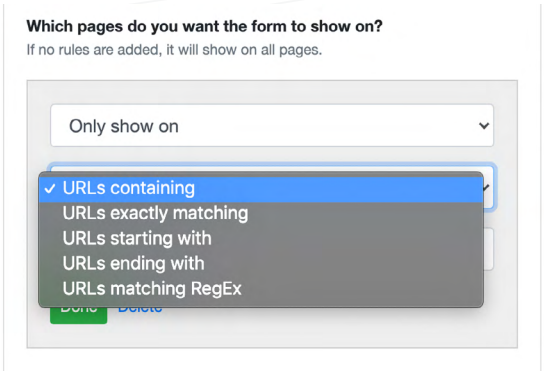
It's best to find a middle ground. Discover through your analytics the average time people spend on a page and time your popup to display half-way through that average time. Similar options are also available with Site Covers.

We wrote an article on **what makes an opt-in form great** with a section on popup timing and placement to help you find the sweet spot.

Scrollbox forms also let you customize the behavior of your form. You can choose to trigger your form based on the percentage scrolled. Just like with popups, you can display a scrollbox form when you know a user is hooked to your content.



All form types also offer display rules. You can choose for forms to appear on specific pages and exclude them from others.



This is useful when you want to display, for example, a Christmas lead magnet only on pages that have Christmas related products or articles. You can ensure that your forms match the content of your page to make them more relevant and enticing for visitors.

Opt-in forms for different funnel stages

There is a lot of diversity to be found in opt-in forms. While you can experiment with multiple types and design possibilities, you can also employ opt-ins for different use cases and goals.

To get the most benefit from your forms, use them across the marketing funnel to increase the number of touchpoints during the customer journey. This will help you get leads, no matter how close they are to converting.

Awareness

Awareness is where it all starts. Prospects in the awareness stage know that they have a problem and are looking for a solution. However, they aren't aware of your brand or how you can solve the problem for them.

The goal of an opt-in form here is to acquaint prospects with your business. Opt-in forms for this stage need to offer educational content that doesn't outright promote your brand but offers it as a possible solution.

Our recommended opt-in types: Popups OR site covers to sign up new prospects to your email list with the promise of actionable tips

Our recommended lead magnet: Ebooks, video courses, infographics.

Interest

At the middle of the funnel, we have the interest stage where prospects have learned about your brand and are interested in the solution you offer. However, they are evaluating other offerings and still deliberating whether you are the right choice for them.

The goal of an opt-in at this stage is to convince prospects that you offer the best solution to their problem.

Our recommended opt-in types: Timed popups based on number of page views OR embedded content upgrades

Our recommended lead magnet: Free templates, checklists or cheat sheets

Decision

At the bottom of the funnel, we have the Decision stage where prospects finally decide to go with your offering and make a purchase.

The goal of an opt-in here is to push prospects to purchase. Here, free trials and discount coupons work great as lead magnets.

Our recommended opt-in type: a floating bar that stays in front of the prospect throughout the session OR an embedded form close to the bottom of your pages.

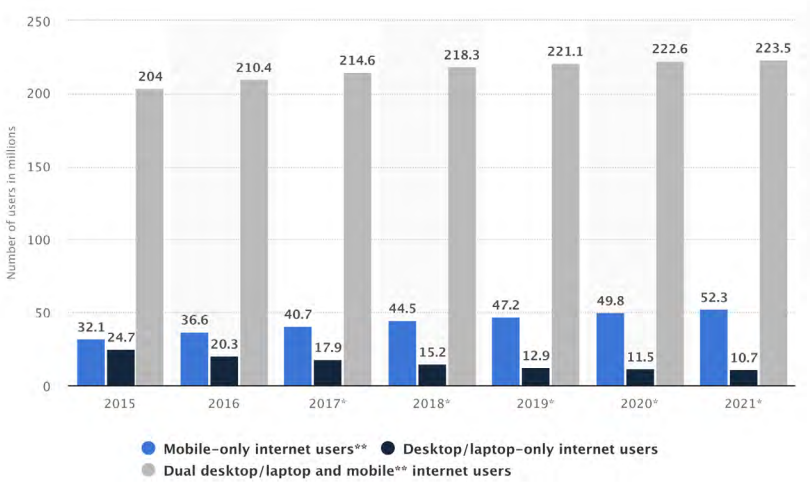
Our recommended lead magnet: a free trial or discount coupon

When it comes to converting visitors into leads, most of your targets will be in the first two sales funnel stages. It is recommended to employ lead magnets such as cheat sheets. Ebooks, discounts and promos to push for conversion in these stages.

8.
How to optimize for mobile

Internet users are scattered across multiple devices with desktops, mobiles, and tablets. To optimize your form for just one device might render it incorrectly on others, wreaking havoc with the user experience. And that's precisely what a lot of companies end up doing. By just optimizing for desktop, they end up losing out on mobile conversions.

Here's why that's concerning:



Source: Statcounter

With 52.3 million only mobile users, mobile now dominates internet browsing.

If your site isn't optimized for mobile, you're letting a massive chunk of leads simply walk past you.

Digital marketers believe that opt-in forms should have a mobile-first approach. So you must spend considerable time perfecting your opt-ins for mobile. Often this will require using completely different forms because of the stark difference between mobile and desktop UX.

Some lead generation applications, like MailMunch, will even let you edit the same form for both desktop and mobile so you can customize it according to the device type.

To optimize opt-in form design for mobile:

- Deploy mobile-friendly form types, like floating bars or embedded forms. These two are your safest bets because of their low intrusion level.
- Choose a font size of around 16 px. You need a larger font for mobile devices, given their small size.
- Opt for minimalistic designs and only ask for what's necessary. Try sticking to only one or two form fields. Anything more is much harder to fill on a mobile device as compared to a desktop.
- Stick to simple, clear, and concise CTAs.
- Auto-fill form fields to minimize friction and speed up the process.
- Additionally, collect phone numbers if you'd like to look into mobile marketing

Test whether your webpage is mobile-friendly with **Google's mobile-friendly test.**

So, we've covered all the opt-in form design and placement recommendations. But is our lead generation machine ready?

Not quite. Every business has a unique reader base, so there is no one-size-fits-all for opt-ins. These strategies are merely recommendations and don't guarantee success. This is why testing them for your website is so crucial.

9. Testing your lead-gen forms

Opt-in forms are best tested by running A/B or split tests. These use two or more different variations of the same form. You can test every single element of the form in this manner.

To run an A/B test:

- Make two variations of the same form. Only test one element at a time, like two different variations of the CTA button.
- Place both variants on your site but display each to two different sets of visitors
- Measure conversion rate for each form over at least a minimum of 7 days, until data is statistically substantial.
- Compare both conversion rates and choose your winner.

In this way, you can continue experimenting with CTAs, visuals, copy, and even lead magnets. Once you have a form that outperforms all the others, place that on your website for all visitors to see.

Now that we have the basics out of the way, let's explore some A/B tests you can experiment with different options.

1. Form placement

Test out different placements on your website, like above the fold or below the fold. While most marketers consider above the fold their holy grail, it doesn't always result in the most conversions.

Try placing your form below the fold and measure the conversion rate.

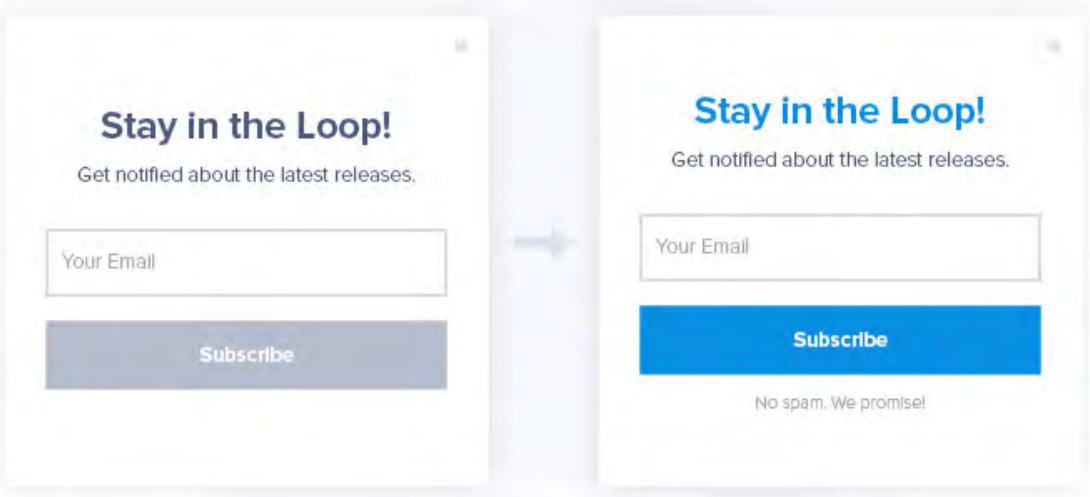
Experts believe that opt-in forms work best below the fold when the offer is complex and require prior engagement to attract visitors.



Source: convertverse

2. Form color

Experiment with form colors to see which ones stand out the most without being hard on the eyes. Try out different variations that contrast your theme and run the tests.

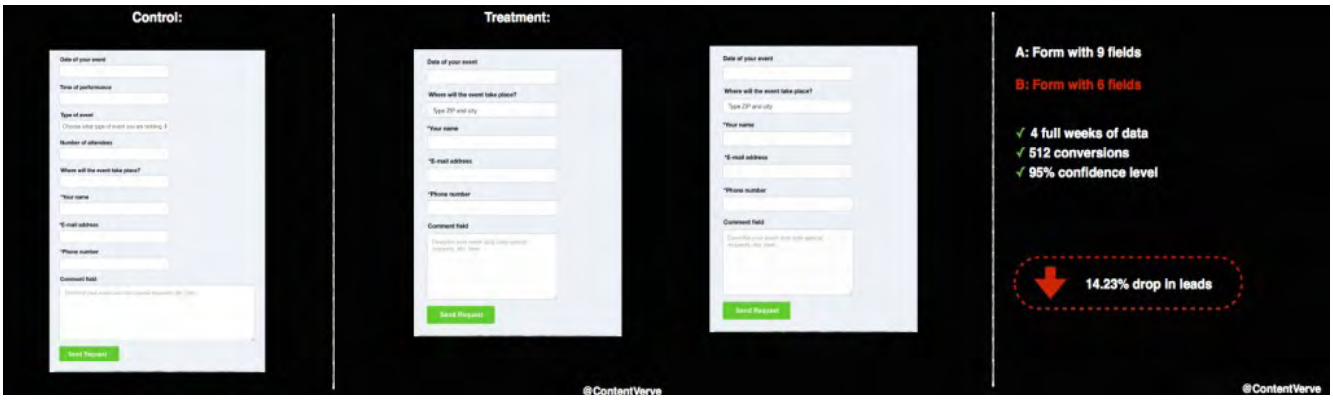


*Source: **mailoptin***

3. The number of form fields

While we've discussed the best practices, it's worthwhile to align the depth of information you require with your form length. Email addresses are usually the only piece of data you need from your leads but if you'd like to personalize your campaign or qualify leads before pitching to them, you should add more fields.

All of this can be validated with A/B tests.



ContentVerve's case study demonstrates how shorter forms aren't always ideal for lead conversion.

When the form went from 9 to 6 form fields, the conversion rate actually dropped by 14%.

You can **consult our in-depth guide** to learn more about how form length affects conversions rates.



Testing is the last (and highly important) bit of the whole process of using opt-in forms to grow your email lists.

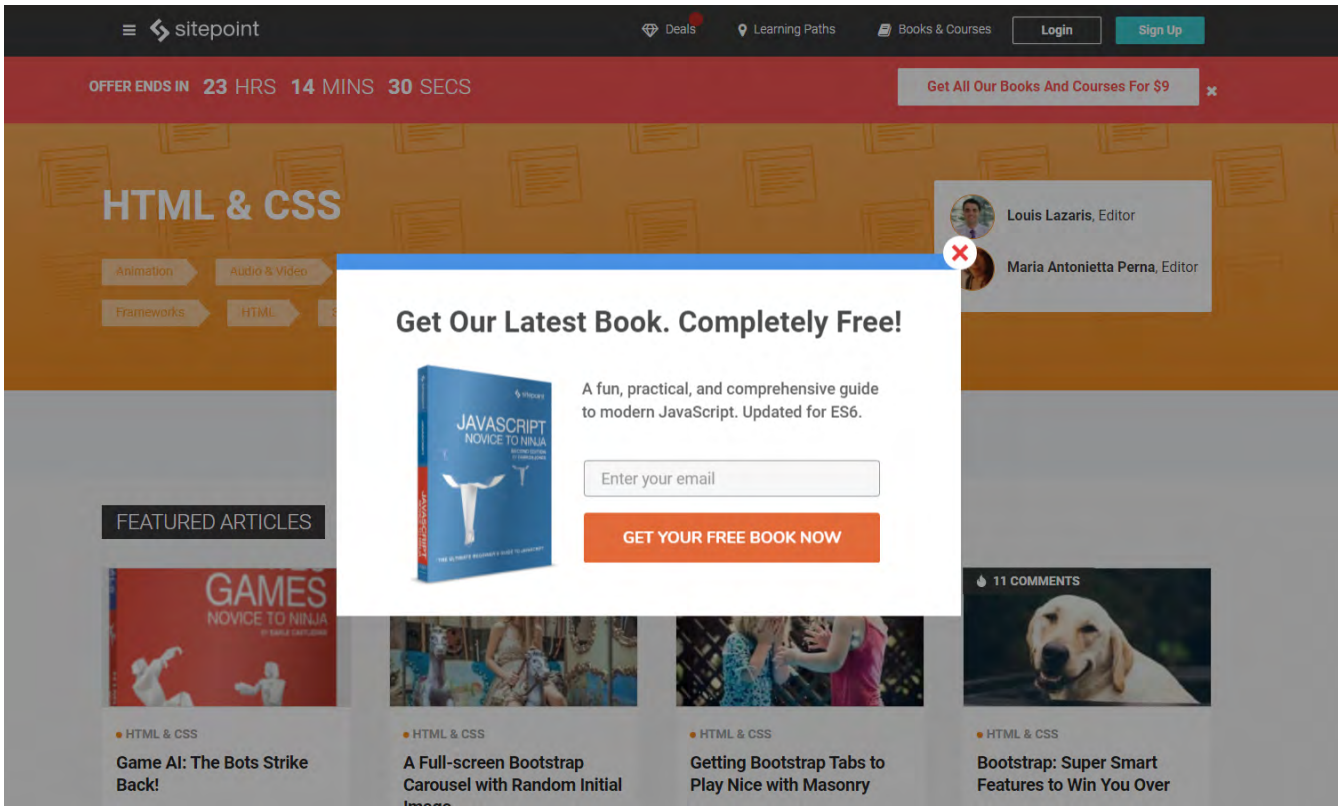
Now that you know how the conversion process works from start to finish using opt-in forms, this book will leave you with a few examples that employ the theory and methods mentioned we've described.

10. Opt-in form examples for inspiration

Use these examples to get inspired and better understand how various websites use opt-in forms to boost their lead generation.

Popup examples

#1 Sitepoint



This example serves as a standard and commonly used popup.

- The headline touts a free lead magnet (Ebook)
- The subheading that describes the benefit of the lead magnet (comprehensive guide to JavaScript).
- The accompanying graphic offers a tempting preview of the lead magnet
- The CTA button's orange stands out on the form and makes use of 'Free' and 'Now' as power words.

#2 Sulky

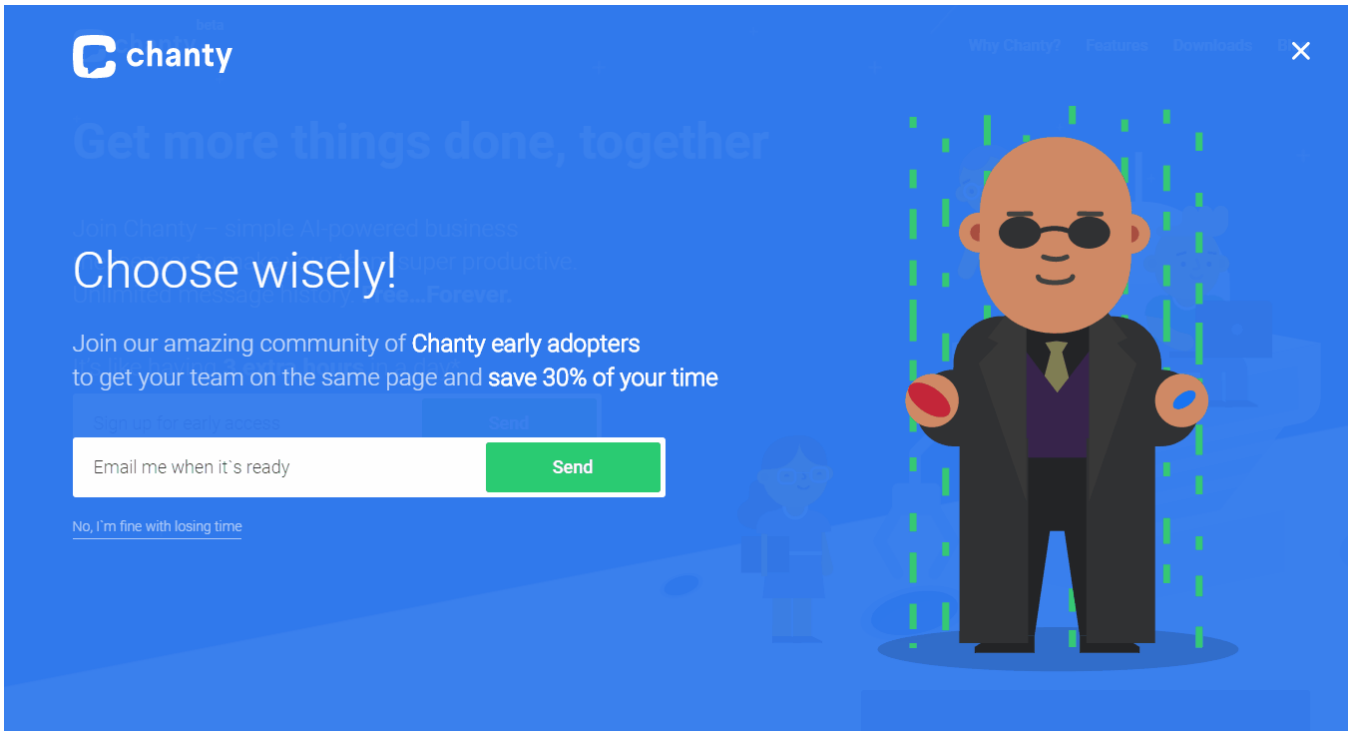


This is a well-crafted popup that stands out on its merit of attractive graphics and witty copy.

- All the essential information is highlighted in a strong yellow, such as the headline, the main 15% off offer, and the CTA.
- True to the offer, the language employs endearing variants of words to highlight the subject of the offer: Cats.
- The pleasant graphic with cat paws appeals to cat lovers

Site Cover examples

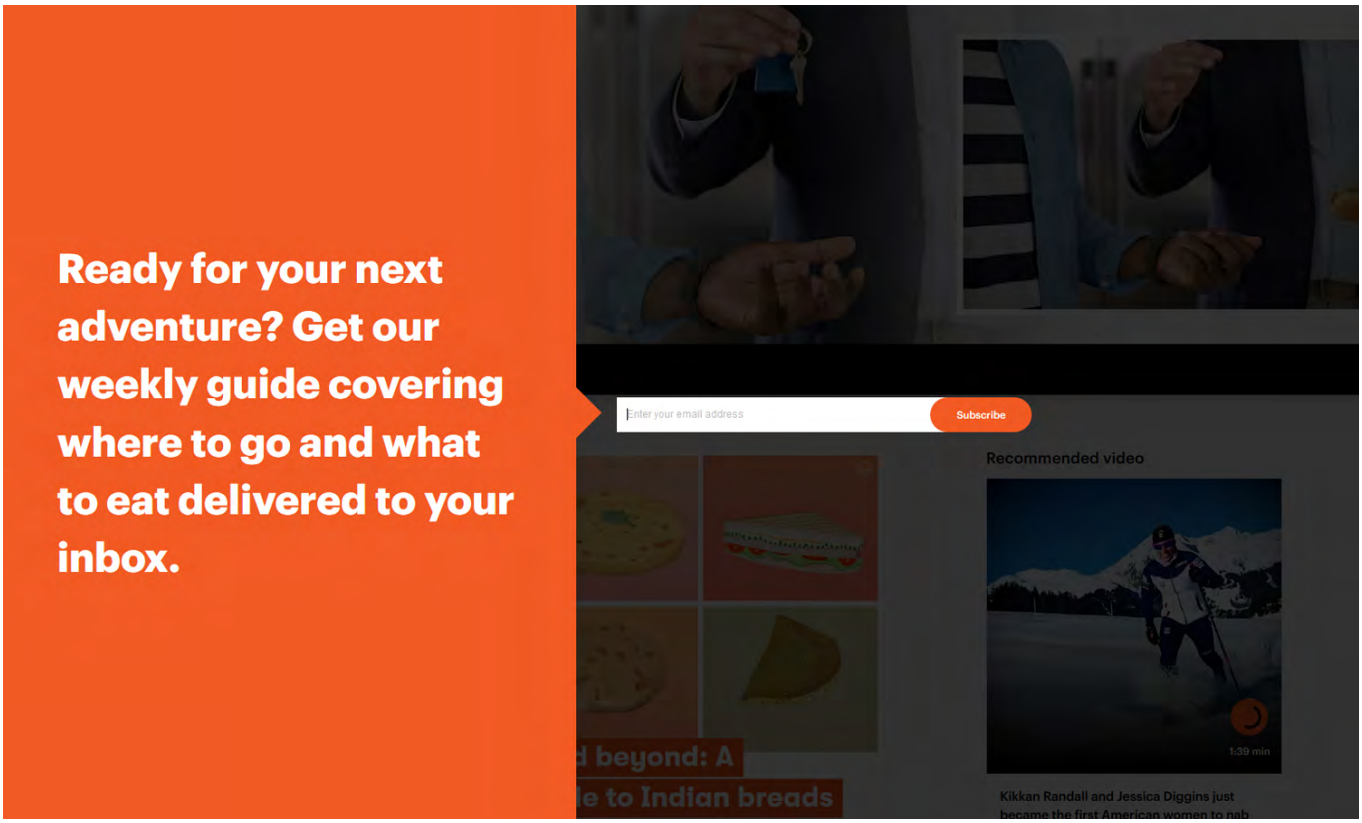
#1 Chanty



This is a brilliant Site Cover from Chanty that makes smart use of the extra space.

- The whole form's right side is covered by an animated version of Morpheus from Matrix, which brilliantly supports the headline 'Choose wisely!'.
- Even though the copy is only 2 lines, important parts of the form are formatted in bold to make them impossible to miss.
- A visitor immediately knows that by signing up they'll be a part of their early adopters' community and'll save 30% of their time.

#2 Mic

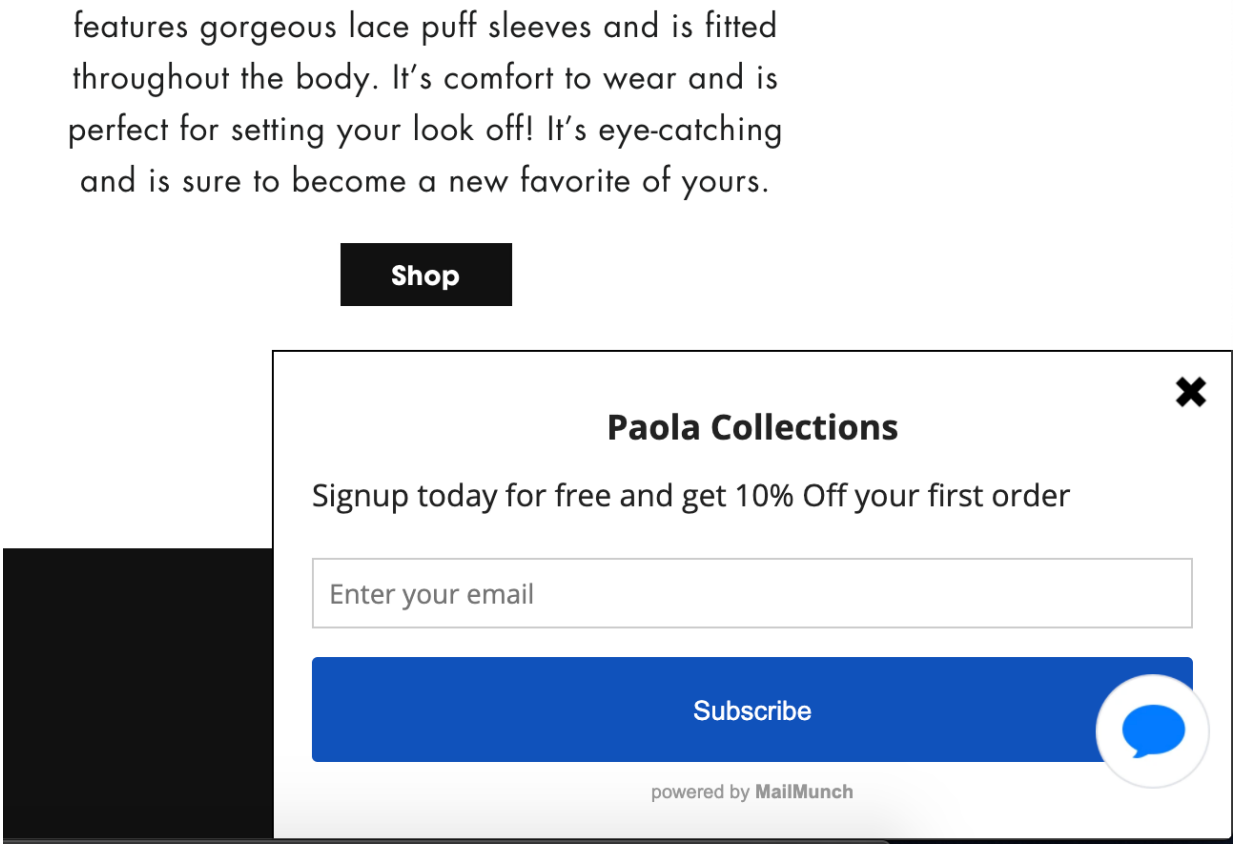


Mic has chosen to get rid of the conventional heading and images and instead bring all the attention to the copy and accompanying sign-up field. Creating cover forms that are minimal yet captivating can yield high conversions for a website.

- The bold text is difficult to miss and asks a visitor to sign up to receive information on travel tips.
- Minimalistic design ensures that the eye naturally falls on the sign-up field and CTA as there are no other distractions.

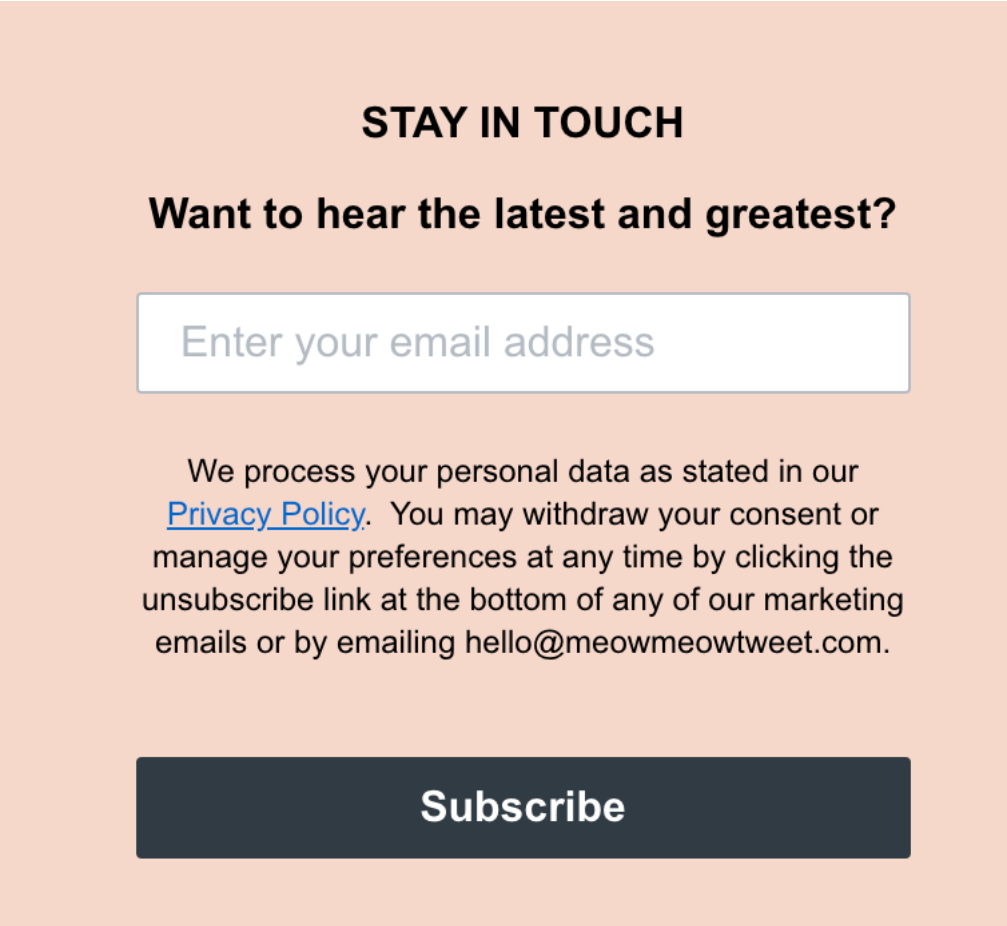
Scrollbox examples

#1 Paola Collections



Scrollboxes are meant to be friendly and inviting. This is precisely what this opt-in form from Paola is. It has a small headline but a big bold CTA. The offer is simple and the visitor is invited to sign-up in exchange for a 10% discount from their store.

#2 Meowmeow tweet

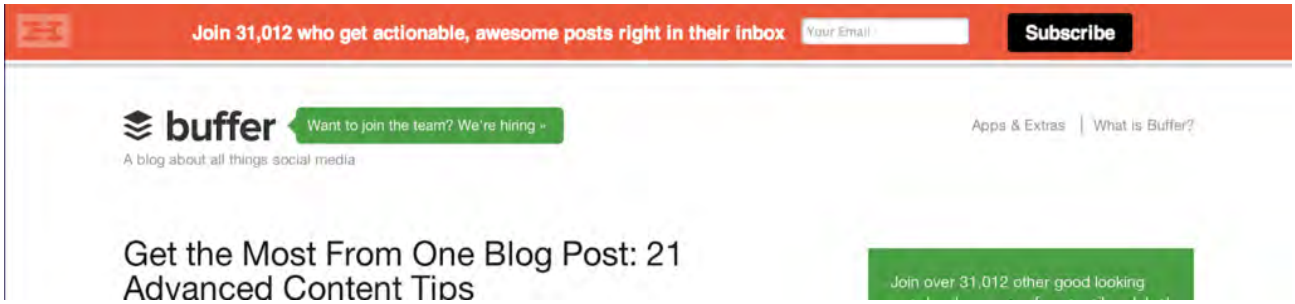


This is an excellent scrollbox, not only for its color scheme but because it does a great job of addressing many concerns a visitor may have before signing up.

- This scrollbox informs a visitor how their data may be processed.
- Meowmoew tweet also clearly mentions how a visitor can withdraw the consent if they wish to. This makes visitors feel more comfortable and more likely to comply - and convert.

Topbar (sticky bar) examples

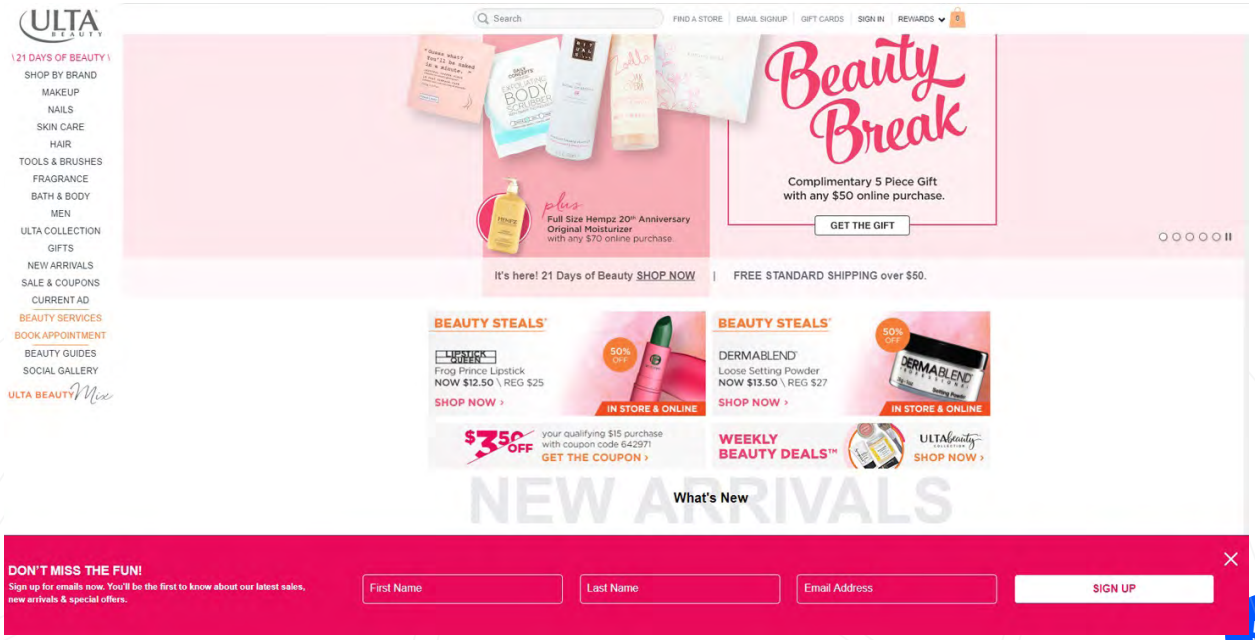
#1 Buffer



A topbar has minimal space so for them to be highly converting, Buffer relies on the power of copy.

- The copy employs social proof. By signing up, a visitor will join 31,012 who have taken a similar decision. The vast amount of sign-ups indicates that this is the right choice to make so a visitor becomes more likely to convert.
- The high-contrast white-on-black CTA is near impossible to miss!

#2 Ulta



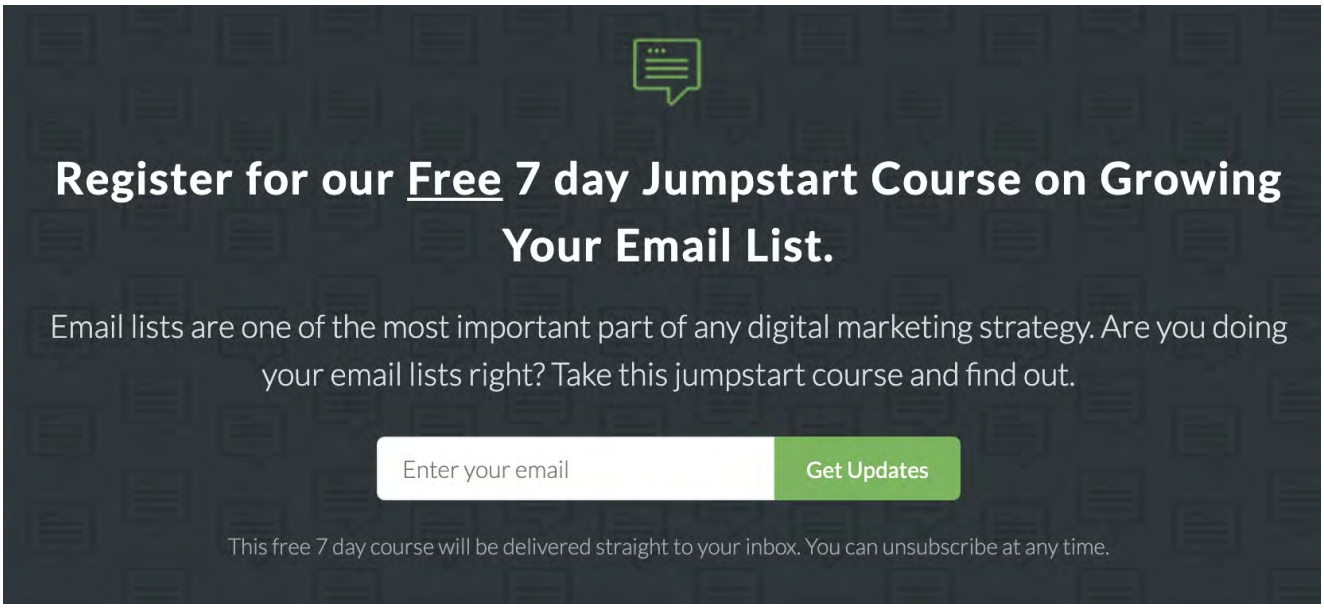
While this form displays at the bottom, topbars can technically be placed either at the top or bottom, they'll still have the same functionality. Placing a topbar at the bottom can have its own advantages. In Ulta's case, they want visitors to scan through their website before they see the form.

- "Don't miss the fun!" evokes the fear of missing out!
- Subtle design but a striking color makes the form user-friendly but easy to spot.
- The CTA stands out the loudest on the form.



Embedded Form examples

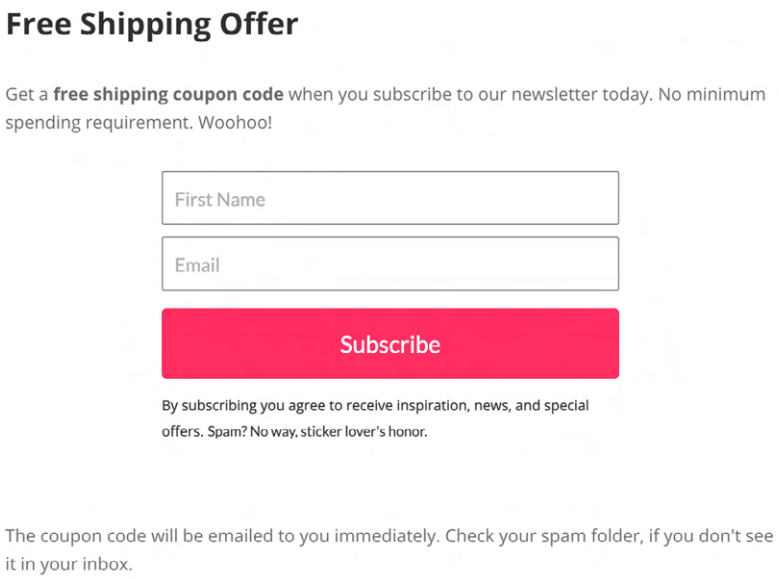
#1 Mailmunch



At Mailmunch, we use an embedded form in articles related to email marketing. This way, the offer is relevant to people scrolling through such articles and they become more likely to pay attention to the offer.

- The main benefit is right in the headline (a free 7-day course)
- The copy explains the need for the lead magnet, selling it to the visitor

#2 Eden Stickers



Eden stickers offer a free shipping embedded form on some of their product pages. Anyone browsing their catalog will be more likely to convert through this form because, well, who doesn't like free shipping?

- The promise is the highlight of this form. Straightforward "Free Shipping Offer" without any fancy words to decorate it.
- Prominent pink CTA pulls you in
- Disclaimer at the bottom eases the reader's doubt. No spam from us!

We hope this book provided you with valuable insights into creating opt-in forms, increasing conversions, and ultimately, growing your email list. Although each chapter in this book can be an Ebook in its own right, we wanted to provide you all the essential information you'll need to become a successful conversion pro yourself without flooding you with content.

The best way to grow your email lists to start creating opt-in forms by yourself.

Finally, we want to leave you with resources from our blog you can read to deepen your knowledge regarding opt-in forms and email marketing in general:

A Simple Guide To Using Opt-in Forms and Landing Pages

What Makes an Opt-in Form Great?

Convert Traffic & Increase Revenue: Effective Ways to Create Opt-in Forms

Opt-in Form Types: How to Choose the Best Form for Your Site

Your Conversion Rate Optimization Crash Course

Email Popup Strategies to Boost Opt-In Rates and Conversions

5 Most Common Mistakes in B2B Lead Generation and How to Fix Them

Lead Generation Software: Features, Types, Recommendations

Crank Up Your Lead Generation: 22 Strategies for 2020

The Beginner's Guide to a Sales Funnel

How to Grow Your Email List with an Instagram Giveaway

Professional Advice for Dividing Customers Between Multiple Email Lists

42 Proven Ways to Grow Your Email List

6 Reasons Why You Should Never Buy Email Lists

Contact Us

support@mailmunch.co

