

The end of web forms: the evolution of customer data collection methods



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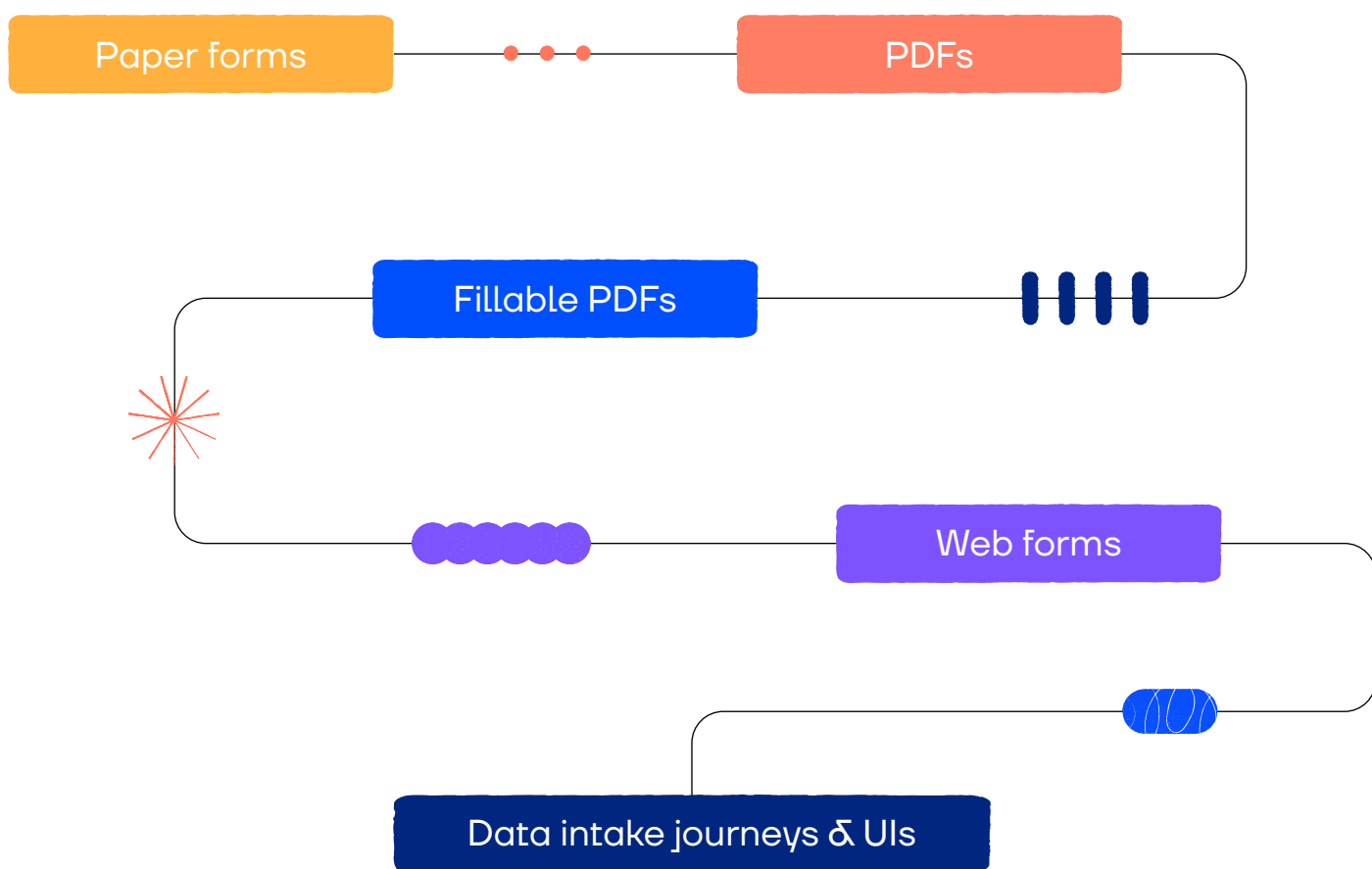
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Introduction

For many businesses, customer data collection methods have evolved from paper forms to PDF forms to fillable PDFs to web forms. However, web forms are not always the best option for collecting customer data, especially in industries such as insurance and banking.

Let's take a look at the evolution of customer data collection methods and how digital data intake journeys are superior to web forms.





Paper forms

Paper forms were the standard for customer data collection until the early 2000s. They were often used to collect customer information such as contact details, policy numbers, and dates of birth.

Despite their popularity, paper forms had several disadvantages. For one, they could be easily lost or misplaced. Moreover, data entry was error-prone, as it was easy to misread or mistype information.

Illegible handwriting could make data entry difficult. And if a customer made a mistake on their paper form, they often had to start from scratch.

The language used on paper forms was often complex and confusing, which made it difficult for customers to understand. This often led to customer frustration and decreased customer satisfaction.

Collecting data involved additional costs, as businesses had to pay for paper, printing, and postage. Finally, paper forms could take weeks or even months to arrive at the customer's home, which delayed the data collection process.

Mistakes on customer data collection forms had to be corrected manually, which was time-consuming and required lengthy back-and-forth communication between the customer and the business.



The advent of PDF forms

In the early 2000s, PDF forms replaced paper forms as the standard for customer data collection. PDF forms were the digital equivalent of the age-old paper form. They were often used to collect customer information, such as contact information, policy numbers, and dates of birth. The main advantage of PDF forms was that they could be sent electronically, eliminating the need for paper and postage. In addition, PDF forms could be emailed or downloaded from a website, which made them more accessible to customers.

However, PDF forms had several disadvantages. For one, in the early days of PDFs, the forms had to be printed out, filled out by hand, and scanned or faxed back to the company. This was better than postage of paper forms via snail-mail, but still was often a cumbersome and time-consuming process for customers.

Another disadvantage of PDF forms was that they still required manual data entry and were prone to errors. Like paper forms, PDF forms had several disadvantages. In many ways, they resembled their predecessor, the humble paper form. For example, the language used on PDF forms was often complex and confusing, making it difficult for customers to understand.

In addition, PDF forms had their own set of unique problems. For example, they could not be easily edited or customized. It was difficult to keep PDF forms up-to-date with the latest customer information.



The rise of fillable PDF forms

Fillable PDFs were introduced in the early 2010s and quickly became the new standard for customer data collection. Fillable PDFs are digital forms that can be completed electronically.

Customers no longer had to print out the form, fill it out by hand, nor did they need to scan or fax it back to the company. Instead, they could simply complete the form electronically and submit it instantly.

This was a huge advantage for customers, saving them time and hassle.

Another advantage of fillable PDFs is that they allow for electronic signatures. This means that customers can sign forms electronically, without having to print them out and sign them by hand.

This is not only more convenient for customers, but it also eliminates the risk of lost or misplaced forms. In addition, electronic signatures are legally binding in many jurisdictions.

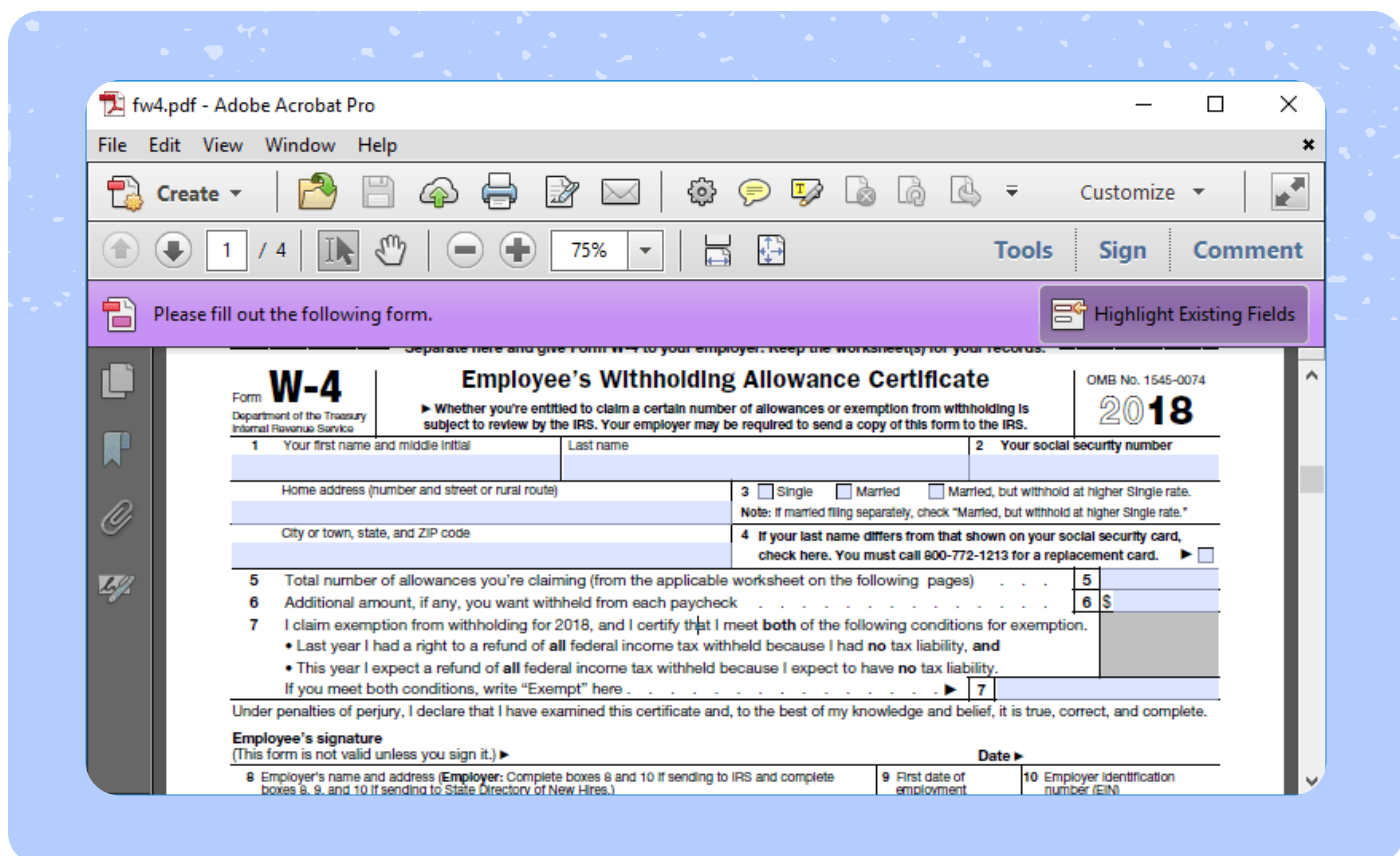
Today, fillable PDF forms are still a popular choice for customer data collection. However, they have a few disadvantages.

First, fillable PDFs leave much to be desired regarding customer experience. The filling experience on desktop is clunky and nearly impossible on mobile. The customer has to zoom in and out to fill in the form, which is often frustrating and time-consuming.

Data cannot be validated, leading to missing or mistaken data and signatures, which can cause problems down the line.

In addition, PDFs are not well-suited for collecting sensitive customer information, such as credit card numbers or social security numbers. This is because PDF forms are not encrypted, meaning that customer data is vulnerable to being hacked.

Finally, fillable PDFs are not easy to update or change. As customer needs evolve, businesses often have to create new PDF forms from scratch – a time-consuming and tedious process.





The rise of web forms

In the late 2000s, web forms began to replace PDF forms as the standard for customer data collection. Web forms offered several advantages over their predecessors.

For one, web forms empowered data collection in a digital-first format, enabling integration with internal systems and CRMs directly, eliminating the need for manual data entry.

In addition, web forms were more user-friendly than PDF forms. They could be completed on any device, making them accessible to customers anytime, anywhere. The UI could be made responsive, so that it adapted to the customer's device automatically.

Web forms also offered more flexibility in terms of design and functionality. They could be easily customized and updated to meet changing customer needs. And, because they were built on web technologies, they could be easily integrated with other systems.

Finally, web forms offered businesses a way to collect customer information securely. Web forms could be encrypted, ensuring that customer data was safe from being hacked.

Despite these advantages, web forms are not well-suited for complex customer data collection.

The majority of web forms are still based on paper forms from the past—useless leftovers of system-centric UIs.

Despite the fact that forms can be designed in a user-friendly manner, most customer data is collected in a way that's optimized for business processes, not customer experience.

This results in customer frustration and a high form abandonment rate—the number of people who start filling out a form but don't finish it.

The customer journey is disrupted, causing customer effort to spike. In fact, most organizations do not follow best UX practices when designing web forms.

They follow a linear, one-dimensional path that is not customer-centric. This leads to customer frustration and, ultimately, customer churn.

Despite countless books, studies, articles, and whitepapers from UX industry gurus such as The Nielsen Norman Group, Baymard Institute (eCommerce) and Luke Wroblewski, many organizations don't follow web form UX design best practices. As a result, most web forms today—whether desktop or mobile—are simply terrible user experiences.

One reason for this is that UX is often an afterthought in the web form development process. The focus is on building and launching the form quickly, with little regard for customer experience. This need for speed often leads to forms that are designed primarily for business needs rather than customer needs.

The second reason is that organizations are focusing on their core business, not customer experience. They view customer experience as a "nice to have", not a "must have". As a result, they are not willing to invest the time and resources necessary to create truly customer-centric web forms.

The third reason is that many organizations lack the necessary UX expertise. They do not have the in-house resources necessary to design customer-centric web forms. And, even if they did, they would not know where to start.

The fourth reason is that customer data collection is seen as a cost center, not a revenue generator. As a result, organizations are not willing to invest the time and resources necessary to create customer-centric web forms.

The fifth reason is that customer data collection is seen as a compliance issue, not a customer experience issue. This leads to a focus on ensuring that the form meets all the regulatory requirements, with little regard for customer experience.

As a result of these five reasons, most web forms today are terrible user experiences.

Collection of customer data via a call center

A common way to collect customer data is via a call center. This customer data collection method has a few advantages.

First, it's a personal interaction, which can help build trust and rapport with the customer.

Second, call center agents can help guide customers through the process, answer questions, and clarify information.

Third, call center customer data collection is relatively quick and easy.

Fourth, customer data can be captured in real-time, so there's no need to worry about lost or forgotten paper forms.

However, call center customer data collection also has a few disadvantages.

First, it's an interruption in the customer's day. Second, it's a time-consuming process—both for the customer and the call center agent.

Third, it is costly, as businesses need to staff a call center and pay for customer service agents.

Fourth, customer data collected via a call center is often of lower quality, as customer details are often captured incorrectly or incompletely.



Digital data intake journeys

Digital data intake journeys are the latest innovation in customer data collection.

A digital data intake journey is a customer-centric process that captures customer information digitally, from start to finish.

What is a data intake journey?

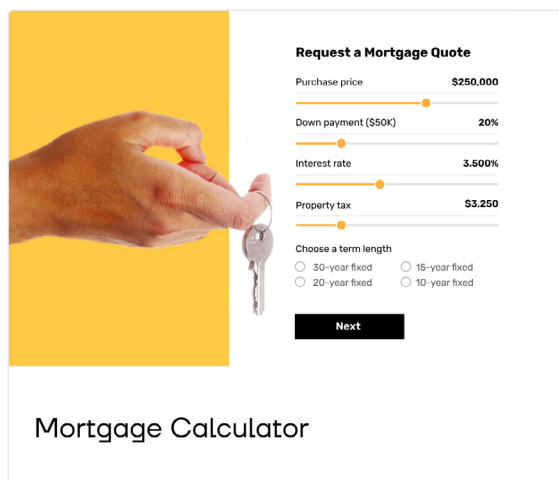
A digital data intake journey is a guided process that takes the customer through a series of steps, such as inputting their data, uploading documents, and signing paperwork.

Because digital data intake journeys collect customer data through a series of interactive steps, rather than a complex form, they are more user-friendly and efficient than web forms. Digital journeys can also dynamically adapt to customer input, which further improves the customer experience.

A digital customer data intake journey is a customer-centric alternative to web forms and calls center customer data collection.

This customer data collection method is based on the customer's needs, not only the business's processes. It captures customer data in a way that is convenient for the customer—at a time and place that is convenient for them. Because data is collected in digital-first format, there is no manual data entry involved, and data is integrated directly into the company's systems.

Digital customer data intake journeys are customer-centric, efficient, and accurate—and they are the future of customer data collection.



The screenshot shows a digital mortgage calculator interface. On the left, there is a yellow background with a hand holding a key. The main content area is white and contains the following fields:

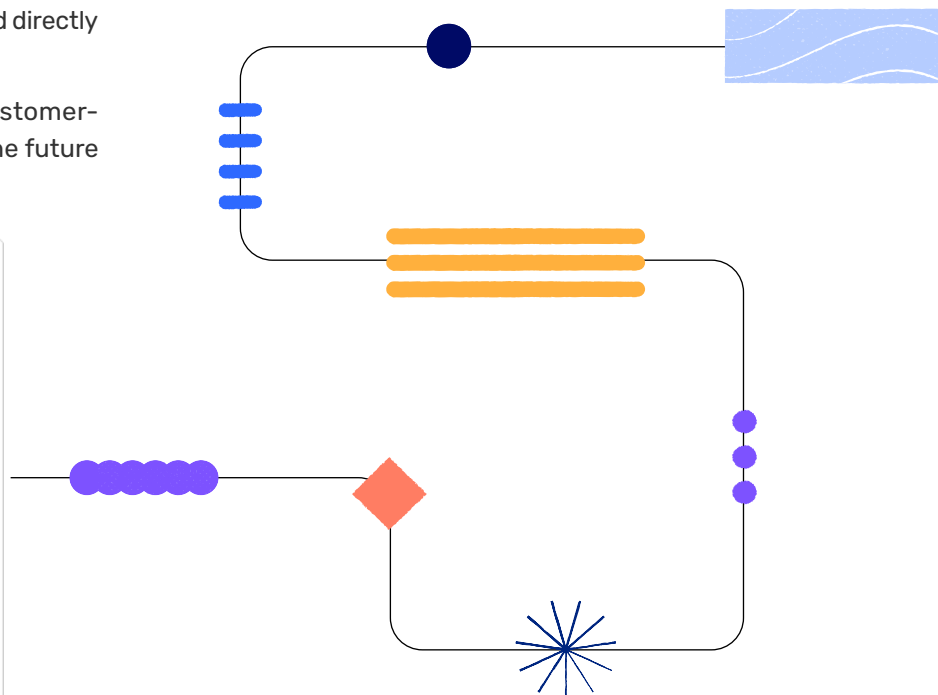
- Request a Mortgage Quote**
- Purchase price: \$250,000
- Down payment (\$50k): 20%
- Interest rate: 3.500%
- Property tax: \$3,250
- Choose a term length:
 - 30-year fixed
 - 15-year fixed
 - 20-year fixed
 - 10-year fixed
- Next** button

Mortgage Calculator

Advantages of digital customer data intake journeys

There are many advantages to using digital customer data intake journeys.

- **Customer-centric:** The customer's needs are always at the forefront, which results in a better customer experience.
- **Efficient:** They eliminate manual data entry and integrate customer data directly into the company's systems.
- **Accurate:** There is no room for error, as customer data is captured in a digital format and is validated at the point of entry.
- **Convenient:** They can be completed at the customer's convenience, whether that's on their own time or during business hours.
- **Personalized:** They can be adapted to the customer's individual needs, so each customer has a unique experience.
- **Secure:** Customer data is collected and stored securely, so businesses can have peace of mind that their customer data is protected.



Creating user-friendly data collection UIs with no-code platforms

The goal of customer data collection is to gather customer information accurately and efficiently. However, many customer data collection methods, such as web forms, are not user-friendly and can result in customer frustration.

Digital customer data intake journeys are different—they are designed to be user-friendly, so customers can input their data easily and without frustration.

No-code platforms allow businesses to create digital customer data intake journeys without the need for coding resources or UX/UI expertise. This means that businesses of all sizes can create customer-centric experiences without the barriers of traditional web form development.



Digital customer data intake journeys are the future of customer data collection—and no-code platforms are the key to making them a reality for businesses of all sizes.