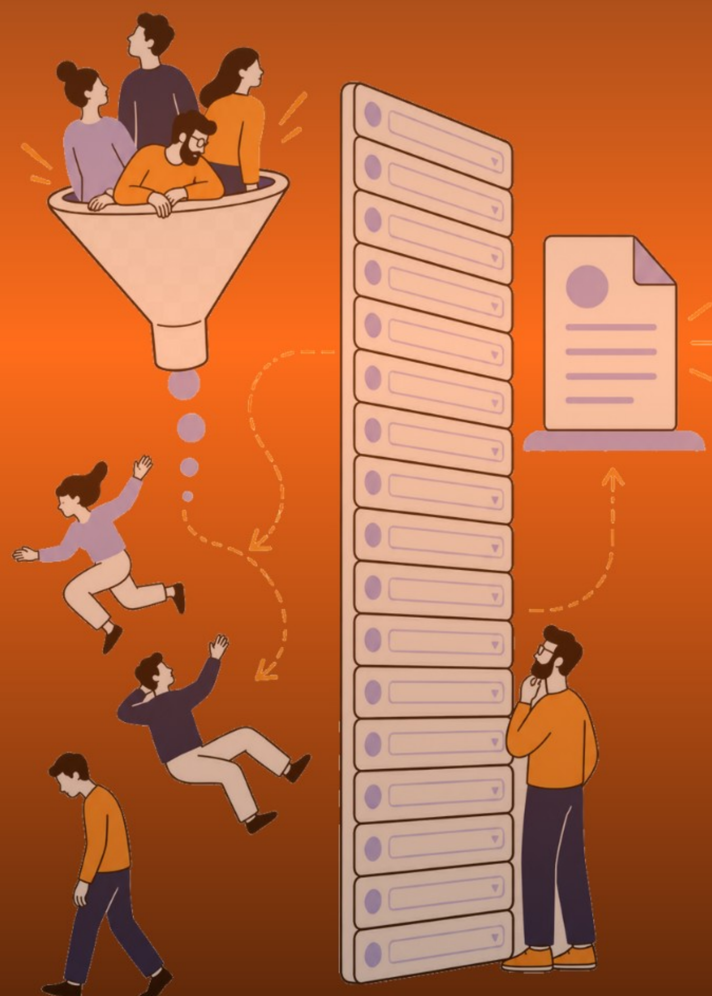
THE DECISION SEQUENCE

MARKETING BUILT AROUND HOW PEOPLE DECIDE

The form is costing you readers



How to design a download form

What each additional field costs at the moment of least commitment

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What each additional field costs at the moment of least commitment

Gates. Relevance: no. Credibility: no. Proof: no. Safety: secondary. **Access: primary.**

Every field you add to a download form reduces the number of people who claim it. Friction has to be earned by how much commitment you're asking for. Top-of-funnel material caps at name and email.

The symptom

The guide took six weeks. Somebody wrote it, somebody else argued about the second half, a designer laid it out, and the finished thing is good.

In front of it sits a form asking for name, email, phone, company, job title and company size.

Forty downloads.

Sales has been through the list and says the leads are bad. So the meeting is about the leads. Wrong traffic, wrong audience, wrong topic, maybe the promotion was too thin. Somebody suggests a webinar instead.

Nobody in that room asks about the form. The form isn't content and it isn't traffic, and the two people who own content and traffic are the only two people in the room.

Why it keeps happening

Every one of those six fields was put there by somebody with a legitimate need.

Sales wants the phone number, because calling beats emailing and they're right about that. Marketing wants company size because the scoring model needs somewhere to sort. Somebody in operations wants job title so the routing rules know which inbox the record lands in. None of those requests is unreasonable on its own. No one added a field out of laziness.

What makes it durable is the shape of the trade. Each addition costs a fraction of a percent of the people who would have claimed the asset, and that fraction never appears anywhere. It doesn't show up in a report, because the people it describes didn't arrive and therefore didn't get counted. What does show up is the field, populated, in a column somebody named out loud in a meeting. One side of the trade is visible in the export. The other side is a stranger who closed the tab.

So the form grows, one reasonable request at a time, and by the time it has six fields there's no single decision anybody can point to as the mistake.

I’ve added a field because somebody senior asked for it, and I never went back to see what it cost. That’s the honest version of how most of these forms got built.

What the buyer is doing at the Access gate

Working out what the next proportional step is. Nothing more sophisticated than that.

A form is the place where proportionality stops being a metaphor and becomes arithmetic. The reader can see the price down to the keystroke before receiving anything at all. Six fields in front of an unopened PDF asks a stranger to identify themselves to a company they’re still evaluating, in exchange for a document they have no evidence is worth having. The exchange runs backward. The party with everything to prove is the one demanding the other go first.

The people who left priced the cost of finding out, having no way to inspect goods sitting behind a form, and walked away from the price rather than from the guide.

Then there’s the phone field, which is doing something more specific. A phone number required on a first download tells the reader exactly what happens next, and what happens next is a call they didn’t ask for from a firm they’ve never spoken to. Some proportion of that drop-off is people who read the offer perfectly and declined the terms.

The correction

Sort every gated asset you own by two things: what it asks of the reader, and what the reader has already invested by the time they get there.

First touch. No gate, or an email field by itself. This is the material a stranger meets before they know anything. Gated material also can’t be read by anything, so a firm’s best thinking behind a form is invisible to the layer now deciding which firms a buyer ever sees.

Second tier. The reader has come back, gone two clicks deeper, or read the first thing. Name and email are proportional here, because something has been established.

Live or one-to-one. A consultation, a seat at a webinar, an assessment. The value is already proven and a calendar is involved. The qualifying questions belong here and they’ll get answered here, because the reader wants the meeting to be useful.

Then run the field audit. For each field you currently collect, name two things: the person who uses it, and what that person did with it last quarter. Not what the field enables in principle. What somebody did with it. Any field where nobody can answer both comes off the form.

Say plainly what this costs you, because that’s the objection and it’s a fair one. Records will be thinner. Scoring models that key on company size will have gaps at first touch. Routing rules built on job title will need a default. Those are real costs and they’re worth naming before somebody names them for you, in a meeting, with an audience.

What you get back is the arithmetic on the other side, which nobody has been looking at.

Before and after

Before. *Download the report. Name, business email, phone, company, job title, company size. All fields required.*

After. *Download the report. Business email, so we know where to send it. That's the entire form.*

And on the piece two clicks deeper, where the reader has already spent twenty minutes on the site: *Name and email. We'll send the model and the worked example.*

The hard call

Somebody senior asked for the phone field. Removing it means telling that person their request cost more than it returned, and you'll be making that case without a clean number, because the people who left didn't leave a record. The cost of a field is invisible and the field itself is right there in the spreadsheet.

Value given freely, with no invoice attached, is the one proof of intent and competence a skeptic can't argue with. A form with six fields is an invoice.

Run this on your own material

Pull last quarter's downloads on your most-gated asset. Take the whole list, including the ones you already wrote off.

Now find out how many of those records a human being has looked at with the intention of doing something. Automated sequences don't count. A person, opening the record, deciding on a next step.

Then take the fields the form collected and check which ones appear anywhere in what that person did.

The answer is usually that almost nobody touched them...which is the finding, and it's also the argument you'll need when you propose taking the fields off.

Do it before the next asset goes behind a form, rather than after the next quarter of forty downloads.

Signals you've cleared it

Advance when downloads climb after fields come off and the sales complaint shifts from lead quality to follow-up volume. When every field on a live form traces to a named person who used it recently. When the second-tier assets, the ones that ask for more, convert better than the first-touch ones, which means the ladder is holding.

Hold when you can't say what happens to a field after it's collected. Hold when a phone number is required at first touch and no one can point to a call it produced that the buyer welcomed. Hold when the case for keeping a field is that removing it breaks a report nobody reads.

Where this connects

Story from the Field · *The Man Who Understood the Customer*, on giving before asking.

Research Library · Entry 07, small commitments and the ladder of yeses.

Next move · Go to *How to write a call to action*.