

Opt-in Form Checklist

When creating your email signup process, you want to keep it as easy as possible for the subscriber. There are a few things to keep in mind when building your sign-up form. Use this checklist to guide you as you create your opt-in forms.

- ☐ Determine what type of sign-up form you will be using:
 - ☐ pop-up
 - ☐ Embedded/ inline form
 - ☐ Landing page
 - ☐ Exit pop-up

- ☐ Pop-ups triggers
 - ☐ On page view
 - ☐ At a certain point on the page
 - ☐ Exit pop-up when the visitor starts to leave the page
 - ☐ After so many seconds

- ☐ Determine the information you will collect - email address, name, etc. You want to keep it simple, don't make the subscriber feel like you are invading their privacy

- ☐ Set up double opt-in email to comply with GDPR and to ensure you have the right email address

- ☐ Place your embedded form in the upper part of your website. This is above the fold and will be seen as soon as the reader lands on the page

- ☐ Tell the visitor why they should subscribe, what's in it for them

- ☐ Offer them a reason to sign up: your incentive offer

- ☐ Include social proof

- ☐ Use a teasing call-to-action that is easy to see.

- Respect their privacy by letting them know how you plan to use their information
- Use compelling copy that highlights the value/ benefits of the offer
- Determine how you will drive traffic to the form