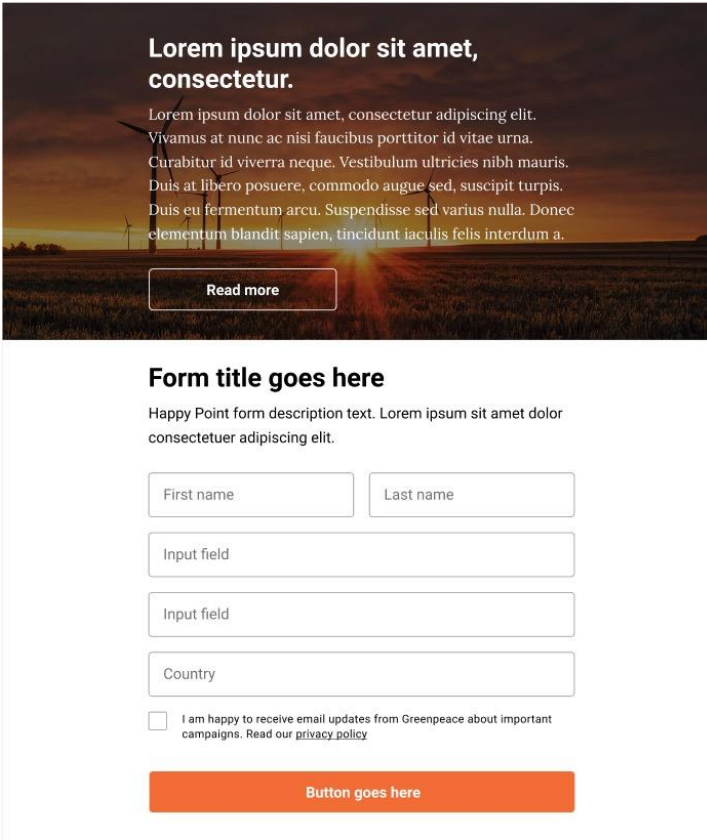


PLANET 4

FORM BUILDER

Taking user engagement to the next level

By suzi grishpul, Planet 4 Product Manager



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Read more

Form title goes here

Happy Point form description text. Lorem ipsum sit amet dolor consectetur adipiscing elit.

First name

Last name

Input field

Input field

Country

I am happy to receive email updates from Greenpeace about important campaigns. [Read our privacy policy](#)

Button goes here

OVERVIEW

1. **Background**
2. **Problems / opportunities / current solutions**
3. **Highlights of user survey / needs assessment**
4. **Options considered & proposed solution**
5. **Scope of P4 Form Builder**
6. **Potential limitations / risks**
7. **Next Steps**

Background

The current context

BACKGROUND

Greenpeace staff use forms to **collect and process all kinds of data from their supporters**. Forms that are currently in use across our systems include:

- **Actions**
 - Petitions
 - Pledges
 - Email To Target
 - Event RSVP
 - Join local groups
- **Join GP / Lead generation**
 - Donations
 - Email list signup

- **Content-based**
 - Quizzes/Polls
 - Content generation ('share your story')
 - Comment on posts
- **Get in touch with GP**
 - Contact
 - Feedback

Many of these forms **require data to flow to a different system**. For example, in order for a supporter to subscribe to an e-newsletter, they need to fill out a form that will add them to the appropriate marketing platform.

BACKGROUND, cont.

Planet 4 currently supports the following types of forms:

- Engaging Networks ([EN form block](#))
- Embed-an-iframe-form ([Happy point block](#))
- Comments on posts (native Wordpress comments)

And our team has started to investigate/implement forms to enable the following functions:

- Send data to HubSpot (email signups)
- Send data to ControlShift (sign petitions, rsvp for events)
- Quizzes
- Contact Form

As of right now, each of these forms on Planet 4 **work in different ways.**

The **designs are inconsistent**, as are the user journeys to **create and maintain them.** Most importantly, they're each solving a specific form need, which means that the Planet 4 Product Team would need to **continue creating these solutions in a piecemeal fashion.**

PROBLEMS

- Inconsistent designs
- Inconsistent way of creating forms
- Limits to data integrations (Have to be using global systems like Engaging Networks, HubSpot)
- No way to create other types of forms

OPPORTUNITIES

- Create a solution that scales, both as offices' needs evolve and as global solutions come and go
- Create a solution that offices can build their own integrations on top of (by finding plugins, hiring agencies, or in-house)

EXISTING SOLUTIONS

Jobs-to-be-done	Current Solutions
Collect supporter's contact info and add them to an email list.	HubSpot plugin, Engaging Networks block, Happy point block
Give supporters a way to sign an online petition.	HubSpot plugin, Engaging Networks block
Give supporters a way to submit feedback.	Gravity Forms*, Typeform**, others?
Give supporters a way to publicly comment on content.	Wordpress comments feature
Give supporters a way to contact our staff.	Gravity Forms*, Typeform**, others?
Create a quiz as a fun, engaging way to consume content.	Leadfamily**, Custom-built quiz tools*
Ask supporters to submit stories, artwork, videos, etc.	Google Forms, others?

*Custom development currently maintained by NROs or external agencies, not P4 core team

** Third-party solutions

HIGHLIGHTS OF USER SURVEY / NEEDS ASSESSMENT

Major pain points/missed opportunities

- Embedded forms aren't great for capturing analytics data
- Limited design options with third-party tools
- Losing ETT functionality by moving off of Engaging Networks
- Third party tools are either too limited or too complicated
- Embedded forms don't look great in P4
- Sometimes no embeddable option
- Not enough control over post-action behavior

[\(See full list of survey responses here\)](#)

Key requirements

- Design options - different layouts and themes
- Basic and advanced field types
- File upload field
- Ability to pass data along to other systems
- Works well with Google Analytics
- Field validation
- Conditional logic
- GDPR compliance
- Good documentation for both users and developers
- Easily extensible by developers

[\(See full list of requirements here\)](#)

HIGHLIGHTS OF USER SURVEY / NEEDS ASSESSMENT

Most popular types of forms currently used on P4

- Email Signup
- Petition

Most popular types of forms desired on P4

1. Quiz/Poll
2. Join/Start a local group
3. Email-to-target
4. Feedback
5. Pledge
6. Contact
7. Event RSVP
8. User-submitted content

WORDPRESS FORM PLUGINS EVALUATED

Plugin	General Impression
Gravity Forms	Meets pretty much all of our needs, extensible (webhooks and API), well-supported, good user and developer documentation, a lot of offices have used it and were pretty happy with it
Formidable Forms	Meets most of our needs, but lacks a few things when it comes to user-friendliness (for example, some features have a complex setup, like quiz)
Ninja Forms	Pretty comparable feature set to Gravity, but documentation is outdated and lacking, does not inspire confidence in support.
WP Forms	Couldn't even get it to load on a P4 test instance :(

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Scope

What the P4 team will and won't provide

SUPPORTED FORM TYPES

These form types will be officially provided and supported by the P4 teams part of the Form Builder

- Quiz
- Poll
- Petition
- Email Signup
- Email-to-Target
- Contact
- Content/Contest Submission
- Survey

NON-SUPPORTED FORM TYPES

These form types will NOT be provided and supported by the P4 team at this time

- Advanced Event RSVP (Calendar feature, ticketing, etc.)
- Donations
- Dynamically displayed user-generated content (showing UGC on the front-end of the site)
- Comments (will continue to use the default Wordpress comments system)

(... but fear not! Because we are using Gravity Forms, offices with the capacity to do so are welcome to build your own additional functionality, and Gravity Forms can be used for many of these form types)

TBD SUPPORTED FORM TYPES

These form types will need to be scoped out further to determine if they will be provided and supported by the P4 team

- Join or start a local group
- Pledge

DATA PIPELINES



Data pipelines will be officially provided and supported for Greenpeace's globally supported systems

- HubSpot (MVP)
- ControlShift (MVP)
- Universe
- (possibly) Open Social / Greenwire

Gravity Forms can be easily extended to send data to other systems. It has a supported integration with [Zapier](#), so many data pipelines can be set up with minimal-to-no developer capacity (e.g. Marketing Cloud, Smoove, etc). And, as always, we encourage offices to share solutions they've built with the P4 community.

POTENTIAL LIMITATIONS / RISKS

- **Design customization** seems pretty flexible, but our Design and Dev teams will have to try it out to see what we need to do to have **different layouts and styling options** for site admins
- Need to dig deeper into GDPR / **consent requirements**
- **Data security requirements**
- Need to dig deeper into what we can do to **customize the post-action experience**, both inline and using a page redirect
- (anything else?)

We will assess these potential limitations as we work through the pilot phase and report back our learnings to the broader community.

NEXT STEPS

IDENTIFY PILOT OFFICES

September 2021

Identify 2-3 offices willing to participate in developing implementation plan and test the Form Builder along the way

DEFINE IMPLEMENTATION PLAN

Mid-Q3 to Early Q4 2021

Establish an implementation plan and general timeline

EXECUTE!

Q1 2022

Begin implementation, including any new design work that needs to be done

**THANK
YOU!**

