Google Forms planning worksheet

Plan your Google Form on paper before you build it. About 15 minutes, one worksheet per form.

How to use this worksheet

1. Fill in one worksheet for each form. Start with the purpose: it decides which questions belong.
2. The grey rows are a filled-in example (a short customer survey for a small cafe). Cross them out or write over them.
3. Button and setting names on this worksheet are Google's own labels. Google changes its menus from time to time, so check Google Docs Editors Help if a label has moved.
4. The steps match the guide at hornetforms.com/blog/how-to-make-a-google-form.

Step 1: What the form is for

Form name (you type it after you click Blank form)

In one sentence: this form lets [who] tell us [what], so we can [do what next]

Example: This form lets cafe customers tell us how their visit went, so we can fix one thing each week.

Who fills it in, and where will they see the link? (email, a poster, a website)

Who reads the answers, and how often?

When should it stop taking answers? (a date and time, a number of responses, or never)

Step 2: Questions and question types

One row per question. Pick the type from the answer you want back: Short answer, Paragraph, Multiple choice, Checkboxes, Dropdown, File upload, Linear scale, Rating, Multiple choice grid, Checkbox grid, Date or Time.

#	Question, as people will read it	Google Forms type	Choices, scale or format	Required ?
1	*How often do you visit?*	*Multiple choice*	*First time, A few times a month, Every week*	*Yes*
2	*What did you order?*	*Checkboxes*	*Coffee, Tea, Pastry, Lunch, Other*	*No*
3	*Overall, how satisfied were you?*	*Linear scale*	*1 to 5, labels: Not at all, Very*	*Yes*
4	*Would you like to tell us more?*	*Multiple choice*	*Yes, No*	*Yes*
5				
6				
7				
8				
9				
10				
11				
12				

Turn on Required only for answers you truly need. Every required question is one more reason to stop halfway.

Step 3: Sections (and who skips what)

Add a section with Add Section. To send people to a section based on their answer, use Go to section based on answer on a Multiple choice or Dropdown question. Submit form sends them to the end.

Section	Questions in it	If someone answers...	Go to
1. About your visit	*Q1 to Q4*	*Q4 is Yes*	*Section 2*
		Q4 is No	*Submit form*
2. Tell us more	*What's one thing we should change?* *Your email, if you'd like a reply*		*Submit form*

Step 4: Theme

Open Customize theme. Note what you will change.

Theme color and background color (under "Color")

Header image: your logo or a photo (under "Header", Choose image)

Fonts for headers, questions and text (under "Text")

Step 5: Settings to check before you send

Open Settings at the top of the form. Tick the ones you will turn on.

[ ] Limit to 1 response [ ] Allow response editing

[ ] View results summary [ ] Collect email addresses: Verified or Responder input

Google's help notes that a results summary is visible to anyone who can respond to the form.

Confirmation message: what happens next, and when?

Example: Thanks! We read every answer each Monday.

Step 6: Publish and send

Publish comes first: click Publish at the top right. Then pick how people get it.

How	Where to find it	Where or who	Done?
Link	*Share, then Copy responder link (tick Shorten URL if you like)*	*Receipt and a card by the register*	*Yes*
Email	Share, enter names, tick Notify People, then Send		
Embed on a website or blog	More menu, then Embed HTML, then Copy		
QR code	Turn the responder link into a code		

Step 7: Where the answers go

Answers show under Responses (Summary by question, Individual by person). Tick where else they should go.

[ ] Link to Sheets [ ] Select destination for responses: a new or an existing spreadsheet

[ ] Download responses (.csv) [ ] Get email notifications for new responses

Who else can see the linked spreadsheet? (form collaborators get access to a new one)

Step 8: Closing time

In a published form, click Published, then Set close date or response limit under "Accepting responses".

[ ] On a date (Choose date and time) [ ] After a number of responses [ ] Close it by hand

Close date and time, or the maximum number of responses

Message people see when it's closed (who to contact if they missed it)

Test log: before you send it

#	Check	What happened	Works?
1	Open Preview and answer the form start to finish		
2	Answer it again on your phone		
3	Skip a required question: is the message clear?		
4	Try every Go to section based on answer path		
5	Check the confirmation message reads well		
6	Check the form is published and the link opens for someone else		
7	Check your test answer shows under Responses		
8	Check it arrived in the linked spreadsheet (if you linked one)		
9	Check the closing date or response limit is right		
10	Ask one person who has never seen it to fill it in		

Before you send it: the form says who is asking and why, every question has a reason, the test log is all ticked, and you know who reads the answers and when the form closes.