Online form planning worksheet

Plan any online form on paper before you build it. Seven short steps, about 20 minutes, one worksheet per form.

How to use this worksheet

1. Fill in one worksheet for each form. Work from top to bottom: the purpose comes first.
2. The grey rows are a filled-in example (a contact form for a small design studio). Cross them out or write over them.
3. Keep the worksheet next to you while you build the form, then use the test log in step 7 before you share the link.
4. The steps match the guide at hornetforms.com/blog/how-to-create-an-online-form.

Step 1: What the form is for

Form name

In one sentence, what is this form for?

Example: Let people ask for a quote, so we can reply with a price within one working day.

Who fills it in? (customers, parents, staff, volunteers...)

What will you do with each response? Who reads it, and how fast?

How will you know it worked? (for example: 20 sign-ups by Friday)

Step 2: The questions (one for each thing you need)

First list what you need to know, then turn each item into one question. If you can't say why you need an answer, or you won't use it, cross the row out.

#	What I need to know	Question, as people will read it	Why I need it	Must answer?
1	*How to reply*	*What's your email address?*	*To send the quote*	*Yes*
2	*What they need*	*What can we help you with?*	*To pick the right person*	*Yes*
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

Step 3: Question types

Pick the type from the answer you want back. Choices are quicker to answer than a blank box, so use a choice question wherever you can list the likely answers.

If you want...	Use this question type
One answer from a short list	Multiple choice (a dropdown for long lists)
Several answers from a list	Checkboxes
A name, a short phrase	Short text
A story, a description, feedback	Long text
An email address, phone number or link	Email, phone or URL
A date or a time	Date or time
A number you will add up or compare	Number
A score or an opinion	Rating, or a linear scale with labels on both ends
Several statements on the same scale	Matrix
A photo, a CV, a document	File upload
A booked call or a time slot	Scheduling (Calendly or Cal.com)
A signature	Signature

#	Question type	Choices, scale or format	Hint text (if needed)
1	*Email*	*One email address*	*We reply within one working day*
2	*Multiple choice*	*New website, Logo, Something else*	
3			
4			
5			
6			
7			
8			

Step 4: Logic (so people skip what doesn't apply)

Write one rule per row. In HornetForms a rule can show, hide, require, jump, calculate, hide the submit button or redirect.

If someone answers...	Then...	Which question, page or ending
Q2 is "Something else"	*Show*	*Q3 "Tell us a bit more"*

Step 5: What happens after someone presses submit

Tick everything you will set up.

[ ] Thank-you message [ ] Different endings for different answers [ ] Send people to a page (redirect)

[ ] Confirmation email to the person who answered [ ] Close date [ ] Response limit

Thank-you message: what happens next, and when?

Example: Thanks! We'll email you a quote by the end of the next working day.

Redirect address (if any)

Confirmation email: subject line, and which email question holds the address

Close date or response limit (if any)

Step 6: Where the answers go

Pick the places your team already checks. The email to yourself starts switched off, so turn it on if you want one for each new response.

Destination	Use it?	Who watches it	Done?
Email to yourself for each new response	*Yes*	*Sam*	*Yes*
Google Sheets (one row per response)			
Slack or Discord channel			
Notion database			
CSV export (any time, from the responses table)			
Zapier or a webhook			

Everyone you add to your HornetForms workspace can read every response in it. Add only the people who should see the answers.

Step 7: Test log, then share

Run every test before you share the link. Write what happened and tick it when it works.

#	Test	What happened	Works?
1	Preview it in the desktop view and the mobile view		
2	Fill it in on your own phone, start to finish		
3	Fill it in on a computer		
4	Skip a required question: is the message clear?		
5	Mistype an email, phone or URL: is the message clear?		
6	Try each logic rule from step 4		
7	Check the thank-you message, ending or redirect		
8	Check the email to yourself arrived		
9	Check the answers arrived in Sheets, Slack or Notion		
10	Check the confirmation email arrived (if you set one up)		
11	Ask one person who has never seen it to fill it in		

Where you will share it

Share the same link everywhere, or one link per place if you want to know which one worked.

Where	How (link, QR code, embed)	Date shared
Website contact page	*Inline embed*	*3 March*

Before you press share

The form says who is asking and what happens next. Every question has a reason. The test log is all ticked. You know who reads new responses, and how fast.