Where the enquiry stops.

Follow the evidence from the first visit to the next decision. One bottleneck, proposed treatments and three tests.

600
FORM ENTRANTS

180
SUBMISSIONS

Invented data. No live business was audited. No experiment was run. This excerpt demonstrates the method; it is not a client case study.

PREPARED BY CLEYMAND MGIBA / 17 NOVEMBER 2026

01 / THE DECISION

Investigate the form before a wider redesign.

Investigate the enquiry form before committing to a wider redesign.

In the example cohort, 600 people start the form and 180 submit it. Mobile completion is 20%. Desktop completion is 50%. This makes form friction a useful investigative priority.

The pattern identifies where to investigate. It does not prove why people leave. People may also leave because the offer is unsuitable or they need more time.

The proposed next step is to verify the measurement and submission mechanics. Then evaluate a clearer explanation of the next step, a shorter form and a guided form layout. Assess qualified enquiries as well as submissions.

Evidence confidence: high for the arithmetic within the invented dataset. Low for explanations of the behaviour. No confidence estimate here comes from a real audit.

JOURNEY

Follow the whole journey.

Journey under review

Offer page	10,000	Entry cohort
Enquiry CTA	1,200	12.0%
Form started	600	50.0%
Enquiry submitted	180	30.0%
Enquiry qualified	108	60.0%
Customer confirmed	54	50.0%
Customer activated	45	83.3%

The business conversion is a confirmed customer. Activation is the agreed post-conversion endpoint. The form submission is a supporting conversion.

This journey can apply across industries. Its enquiry-based structure is an illustrative buying route, not a requirement for all Cleymand clients.

Cohort definition

10,000 unique people enter during an example 30-day window. Observe their downstream outcomes for 90 further days after that window closes. Each later stage is a subset of the same entry cohort.

Assume persistent IDs join website and CRM records. Attribute device at first form entry. Each person counts once per stage. Real audits must validate these assumptions.

CALCULATIONS

Find the investigative priority.

Stage calculations

Stage reached	Unique people	Conversion from previous stage	People not reaching this stage
Offer page	10,000	Entry cohort	–
Enquiry CTA clicked	1,200	12.0%	8,800
Form started	600	50.0%	600
Enquiry submitted	180	30.0%	420
Enquiry qualified	108	60.0%	72
Customer confirmed	54	50.0%	54
Customer activated	45	83.3%	9

Formula: stage conversion = people reaching the stage / people reaching the preceding stage.

Overall visitor-to-customer conversion: 54 / 10,000 = **0.54%**.
Visitor-to-activation conversion: 45 / 10,000 = **0.45%**.

The 8,800 visitors who do not click are not automatically lost customers. The largest drop-off does not establish the highest-value intervention. Intent, feasibility and downstream quality also matter.

DEVICE EVIDENCE

Mobile completion is lower. The cause is still open.

Form completion by device

First form-entry device	Form entrants	Submissions	Completion	Qualified enquiries
Mobile	400	80	20.0%	48
Desktop	200	100	50.0%	60
Total	600	180	30.0%	108

The mobile-desktop difference is **30 percentage points**. This is an association in the synthetic cohort. It is not a causal estimate or a forecast of recoverable sales.

DIAGNOSIS

Separate evidence from explanation.

Priority: investigate first within this excerpt. **Business concern:** people abandon the enquiry before the business can assess fit. **Confidence in the cause:** low. **Status:** hypothesis requiring validation.

Evidence register — all records are synthetic

ID	Example record	What it supports	What it cannot establish
S1	Invented event export, defined by the counting rules above	Form completion and the device split	Why people leave
S2	Invented CRM export linked to S1	Qualification and downstream counts	Whether future extra submissions would have the same quality
S3	Invented desktop and mobile form inspection	Eight mandatory fields and no visible explanation of follow-up	Whether either feature causes abandonment
S4	No real performance trace, session replay or user test is supplied	An explicit gap in the investigation	Submission reliability, performance or visitor motivation

Observations within the fictional scenario

• The form requires name, email, phone, company, job title, team size, budget and requirements.

• The form has no visible explanation of what happens after submission.

• The current heading is “Take the next step.” The submit label is “Send enquiry.”

• Mobile accounts for two-thirds of form entrants. It has lower completion than desktop.

VALIDATION

Check the alternatives first.

Competing explanations

• **Effort:** visitors may resist providing eight answers before knowing whether the offer fits.

• **Uncertainty:** visitors may hesitate because they cannot tell whether submission triggers a sales call or another commitment.

• **Technical friction:** slow loading, keyboard behaviour or validation may obstruct mobile visitors.

• **Intent:** the mobile cohort may contain more early-stage or unsuitable visitors.

The first two explanations inform the proposed treatments. The last two remain material alternatives.

Validation before testing

• Reconcile form-entry and successful-submission events against server-side receipt and CRM creation. Confirm that client-side errors do not masquerade as success.

• Check supported mobile devices, submission errors, keyboard behaviour and page performance.

• Compare acquisition source, intent and returning status across devices where the data supports it.

• Ask recent enquirers and abandoning visitors about effort and next-step expectations. Keep the invitation appropriate to consent and context.

• Confirm which fields the business needs before qualification. Define qualification rules before changing the form.

Repair a confirmed submission defect for everyone. Do not keep a broken experience as a test control. If measurement remains unreliable, collect sufficient evidence before claiming an experiment result.

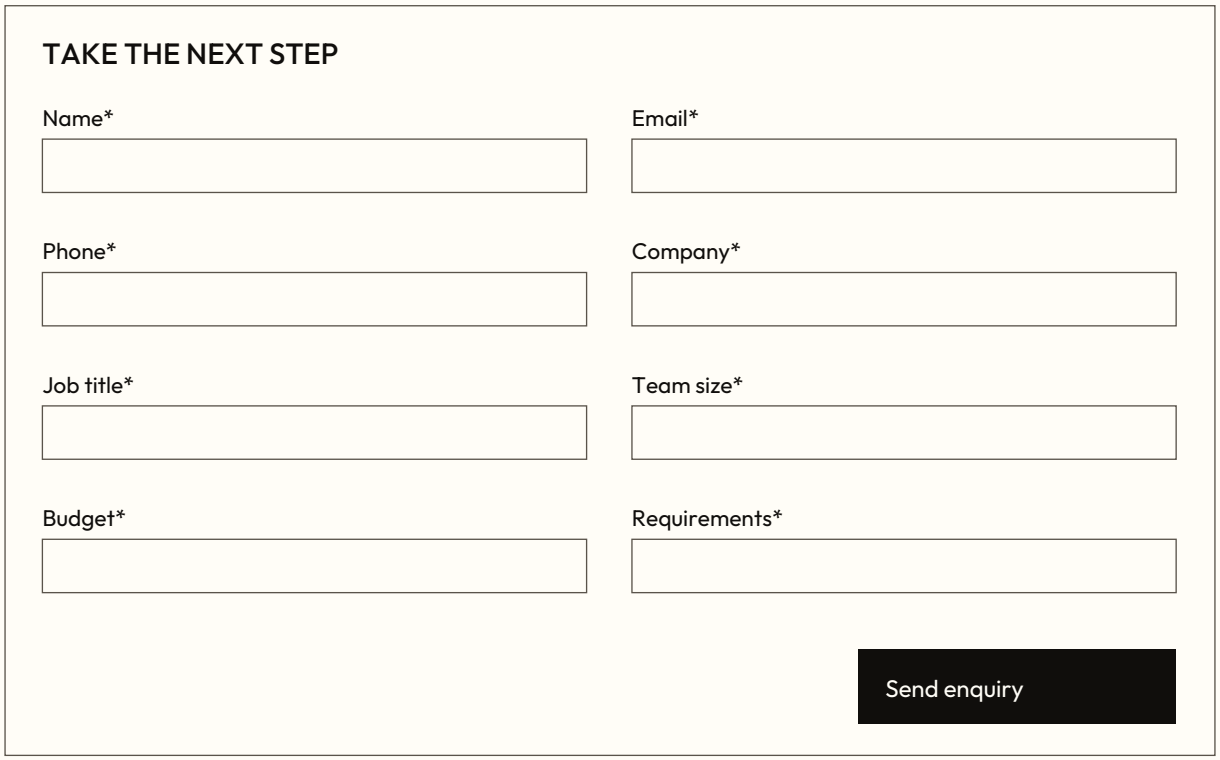
TREATMENT

Make the next step clear.

These are annotated wireframes. They show content hierarchy and behaviour. They are not finished visual designs or a production specification.

The composite concept below combines three ideas to explain the intended direction. Experiments E01–E03 isolate those ideas. Do not test this whole composite and then attribute its result to one component.

Current desktop — fictional reconstruction



DESKTOP TREATMENT

Explain the next step. Reduce the work to begin.

Proposed desktop — composite concept

[A] What happens next

Tell us what you need.
We review your request
and email you about fit
and next steps.

[C] Requirements
then contact details

[B] Your enquiry

Name*

Email*

Requirements*

Phone (optional)

Send enquiry

[D] Privacy

Phone is optional in this composite concept. Privacy information remains visible. Experiments isolate each change rather than testing the composite as one explanation.

TREATMENT

Guide the mobile experience.

Proposed mobile — composite concept

[A] What happens next

Tell us what you need.
We review your request
and email you about fit
and next steps.

[C] Step 1 of 2

Your requirements

What do you need help with?*

Continue

Step 2 of 2

Contact details

Back

Name*

Email*

Phone (optional)

Send enquiry

[D] Privacy information

TREATMENT NOTES

What changes, and why.

Treatment annotations

Marker	Change	Rationale	Requirement
A	Explain follow-up beside the form and above it on mobile	Reduce uncertainty about the next action	Business confirms that email review is the actual process. No invented response-time promise
B	Keep three required fields and make phone optional. Remove four qualification fields from initial capture	Reduce effort before the first conversation	Validate qualification can continue from the remaining answers and subsequent follow-up
C	Use requirements, then contact details, with visible progress	Make the task easier to navigate	E03 keeps the control's fields and requirements. The shortened composite illustrates a later combination only
D	Keep privacy and applicable consent requirements visible	Preserve informed submission	Confirm the actual policy and requirements. This sample does not provide legal text

For mobile, use a single column with visible labels. Keep entered values when navigating back. Preserve keyboard focus and give accessible error messages. Define all states before production build.

EXPERIMENT DESIGN

Measure qualified enquiries.

Run these as sequential alternatives against a documented control. Each proposal concerns B01. Do not split this example's modest traffic across three simultaneous tests.

Shared measurement contract

• **Assignment:** randomise eligible people 50/50 at first form entry, before showing the treatment. Persist their assignment across returns.

• **Population:** all eligible mobile and desktop form entrants. Predefine exclusions for staff and automated traffic.

• **Primary measure:** people who produce an enquiry meeting the fixed qualification rules within 14 days / all assigned form entrants.

• **Secondary measure:** successful submissions / all assigned form entrants.

• **Guardrails:** submission failures, duplicate or spam enquiries, sales handling time and customer conversion within 90 days. Log device groups for diagnostic analysis.

• **Baseline illustration:** 108 qualified enquiries / 600 form entrants = 18%.

• **Analysis:** intent-to-treat. Include assigned people who abandon. Keep qualification criteria stable and mask assignment from qualification reviewers where practical.

The 14-day qualification window is a proposed test rule. Recalculate the baseline for that exact window before sizing a live test. The synthetic cohort's 108 qualifications are assumed to occur within 14 days for this planning illustration.

Sequence

E01 explains follow-up. E02 reduces initial data collection. E03 tests a guided layout. Run them sequentially. If an earlier change becomes the control, refresh the baseline and sample-size calculation.

The composite wireframe shows the intended direction. A single experiment isolates its specified change.

EXPERIMENT

Explain the commitment.

E01 — explain what happens after submission

Hypothesis: clear follow-up expectations increase qualified enquiries by reducing uncertainty about the commitment.

Control: the current form with the “Take the next step” heading and eight mandatory fields.

Treatment: add the next-step explanation from annotation A. Place it beside the form on desktop and above it on mobile. Keep the fields, submit label and follow-up process unchanged.

Primary measure: 14-day qualified-enquiry rate per assigned form entrant.

Guardrail emphasis: inappropriate expectations or complaints about follow-up. Confirm the copy matches operations before launch.

Decision: consider rollout if the primary result clears the predefined practical and statistical thresholds without material guardrail harm. More submissions alone do not establish success.

Before launch

Agree the primary hypothesis, qualification rule, practical effect threshold, sample size and stopping rule. Define guardrail tolerances and owners. Check tracking and submission behaviour in both arms.

A proposal is not a measured improvement. Evaluate the assigned population, including people who abandon.

EXPERIMENT

Reduce the initial effort.

E02 — collect fewer details before the first review

Hypothesis: a shorter initial form increases qualified enquiries enough to outweigh the extra qualification work.

Control: the documented current form. If an earlier experiment changes the control, recalculate the baseline and sample size.

Treatment: require name, email and requirements. Make phone optional. Remove company, job title, team size and budget from initial capture. Keep the heading, submit label, layout and explanatory copy equal between arms.

Primary measure: 14-day qualified-enquiry rate per assigned form entrant.

Guardrail emphasis: spam, qualification workload and downstream customer conversion. Apply the same qualification criteria using follow-up when necessary. Provide enough handling capacity to prevent the extra volume from degrading response quality.

Decision: use the rate per assigned entrant to assess gain. Examine qualified share among submissions and handling time to understand the trade-off. An increase in incomplete or unsuitable submissions is not sufficient reason to roll out.

Before launch

Agree the primary hypothesis, qualification rule, practical effect threshold, sample size and stopping rule. Define guardrail tolerances and owners. Check tracking and submission behaviour in both arms.

A proposal is not a measured improvement. Evaluate the assigned population, including people who abandon.

EXPERIMENT

Test a guided layout.

E03 — guide people through the form in two steps

Hypothesis: a clearer task sequence increases qualified enquiries by reducing the perceived burden of the form.

Control: the documented single-step form.

Treatment: retain the same eight mandatory fields and copy. Split the fields into requirements and contact details. Show “Step 1 of 2” and “Step 2 of 2.” Preserve answers on back navigation. Keep responsive behaviour accessible.

Primary measure: 14-day qualified-enquiry rate per assigned form entrant.

Guardrail emphasis: step-navigation errors, abandonment between steps and total completion time. Confirm both arms submit through the same back-end process.

Decision: prefer the guided layout only if the primary result meets the decision rules. A progress indicator adds an interaction and may reduce completion. This is a testable proposal, not an assumed improvement.

Before launch

Agree the primary hypothesis, qualification rule, practical effect threshold, sample size and stopping rule. Define guardrail tolerances and owners. Check tracking and submission behaviour in both arms.

A proposal is not a measured improvement. Evaluate the assigned population, including people who abandon.

EVALUATION

Allow time for evidence.

Sizing and stopping — planning illustration

For one experiment, assume an 18% primary baseline and a minimum detectable change to 24%. That is a six-percentage-point absolute change, or about 33% relative. This is a sizing assumption, not an expected lift.

A conventional two-sided comparison at 5% significance and 80% power needs approximately **723 people per arm** using a normal approximation. Round up to **750 per arm** for planning. A live design needs its own validated calculation and allowance for unresolved outcomes and data quality.

At 600 eligible form entrants per 30 days, enrolling 1,500 people takes about **75 days**. Allow another 14 days for the final qualification outcomes. These figures apply to each sequential experiment under the stated assumptions. Testing only mobile would take longer.

Pre-register one primary hypothesis per experiment. Set the sample size, full-week coverage and stopping rule before launch. Do not stop when a result first appears significant. Guardrail incidents can justify an operational stop under predefined rules.

Control the family-wise false-positive rate if treating E01–E03 as one family of confirmatory tests. The 750-per-arm illustration does not include that adjustment. Recalculate the required sample or label later tests exploratory.

If the primary result is inconclusive, report that uncertainty. User tests and monitored releases can inform a decision at lower traffic. They do not provide the same causal evidence as a sufficiently powered randomised test.

HANDOVER

Agree the next decision.

Recommended sequence

• Verify the data and submission mechanics. Repair confirmed failures.

• Confirm the actual follow-up process and required qualification information.

• Choose one experiment. E01 is the proposed first candidate because it changes the message while preserving the form mechanics.

• Assign an implementation owner and a measurement owner. Agree on guardrail thresholds and the test design.

• Build, check and run the chosen treatment under a separate implementation scope.

• Review qualified enquiries and mature downstream outcomes before deciding whether to retain the change.

What this excerpt establishes

The invented figures demonstrate the calculations. The evidence register demonstrates how a report separates observations from hypotheses. The wireframes show proposed changes. The briefs show how to test them.

What remains open

The cause of abandonment, the validity of a real business's tracking and the performance of every treatment remain unverified. No revenue recovery or conversion lift is claimed.

Audit-to-implementation boundary

The audit delivers the analysis, priorities, experiment briefs and agreed treatments. Implementation requires a separate scope covering final design states, development, tracking changes, quality checks and test operation.

Workshop question: do we have enough evidence to commission the first treatment, or should we collect more evidence first?

METHOD

About this sample.

Method reference: the local Kantan archive study informs journey analysis, measurement checks, prioritisation and proposed experiments. Oddit informs the use of visible treatments and report previews. Neither is the source of this fictional dataset. This sample does not reproduce a client report or claim either author's endorsement.

Evidence status

All figures, records and observations in this sample are invented. No live business was audited. No experiment was run. Treatments are untested.

This is an excerpt illustrating one bottleneck. A commissioned audit covers the agreed journey and develops at least three experiment proposals for each major bottleneck. This is not the complete 25+ page client report.

Prepared by Cleymand Mgiba · 17 November 2026