Member Questionnaire

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PLUS ⓘ *Member Questionnaire requires a Heylo Plus subscription. Learn more here.*

Member Questionnaires empower group leaders to capture the exact details they need from every member at the moment they join. Enable ready-made fields like email, address, or date of birth, or create custom questions to match your community's workflow—all from the admin settings panel.

Every response is automatically stored in the member's profile, visible to all group admins in Heylo, and exportable to CSV for deeper analysis or outreach. By gathering essential information up front, you can personalize communication, streamline liability processes, and make data-driven decisions without chasing paperwork.

Setting up private info (admins only)

To add fields of private info to collect, navigate to admin settings and tap "Member Questionnaire". Default fields that an admin can toggle include:
- Email
- Address
- Gender
- Birthdate
- Mailing address
- Phone number

In addition, admins can add their own custom field. Press the "check" to save, and then publish. Members can complete the field with any text input.

Collecting private info via the member questionnaire provides a time from new members. After 3 fields, new member churn during onboarding decreases significantly. To maintain high new member conversion, admins are recommended to only request required info instead of maximizing as much info as possible.

‹ Member Questionnaire

New members must complete info before joining. Responses only visible to admins.

Email
collected by default

Emergency contact
Their name, number, relationship

Mailing address
Street, City, State, Zip

Gender
Male, Female, Non-binary

Birthday
In date format; determines age

Phone Number
Phone Number

How long have you been leading…
Text response

+ Add Custom Field

Save

Accessing private info (admins only)

Admins can access private info at any time by navigating to the profile of the member and then to "member insights". Additionally, private info is available via CSV export as well.

Editing private info

Anyone can edit their private information from the "Group" tab at any point after joining the group, or by pressing their name at the top of the members tab. Any new edits made will be saved immediately.

Note, the information collected from the member questionnaire is only visible to admins, and new members must submit private info before they join. And unlike an event sign-up question, it only needs to be collected once.

Editing, disabling, or removing a question

An admin can edit, disable, or remove a question from the member questionnaire admin setting screen anytime. For default questions, toggling off the question results in prior answers stay saved but do not show in member insights or exports. If the question is later toggled back on, all the past responses will automatically reappear. Custom questions, however, permanently delete along with all prior responses.