

Member Questionnaire

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PLUS ⓘ *Member Questionnaire requires a Heylo Plus subscription. [Learn more here.](#)*

Admins can collect private information from their members with a member questionnaire. There are default questions like address, or custom questions that can be configured by the group admin. Responses are saved to a member's profile when they join the group, and any admin can access the info as needed directly in Heylo or [exported to CSV](#).

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	<input checked="" type="checkbox"/>
Emergency contact Their name, number, relationship	<input type="checkbox"/>
Mailing address Street, City, State, Zip	<input checked="" type="checkbox"/>
Gender Male, Female, Non-binary	<input type="checkbox"/>
Birthday In date format; determines age	<input type="checkbox"/>
Phone Number Phone Number	<input type="checkbox"/>
How long have you been leading... Text response	<input type="text"/> <input type="text"/>

+ 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.

Group profile fields

Help others get to know you! Your responses can only be seen by members of Heylo Team

When did you join the group?

Nov 2018 ▼

Private Info For Admins

[Edit your private info](#)

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.
