

Onboarding best practices and communications

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Onboarding your members onto Heylo is easy—and the more intentional you are, the better the results.

The biggest mistake groups make is trying to keep using multiple platforms and slowly transition to Heylo. That only creates confusion and dilutes engagement with your members. The best way to build momentum is to go all in on Heylo!

Here's a step-by-step plan to help your community make a smooth, successful transition:

1. Start by adding events

Events give members a reason to join your group on Heylo. Schedule a few in advance to populate your calendar, and make sure an RSVP is required.

[Learn more about event RSVPs →](#)

2. Post a welcome message

Set the tone and intention for your group with a warm, clear welcome post right in Heylo. Let members know what to expect and how to participate—this helps people feel grounded and excited.

3. Bring on a few key leaders

Before you share Heylo with your whole community, invite your leadership team or most engaged members first. Ask them to:

- Comment on the welcome post
- Engage in chats
- Share photos

This early activity warms up the space and encourages others to join in.

4. Empower your leaders

Assign roles and walk leaders through how Heylo works. Show them how to post, RSVP, chat, and add members so they can help drive engagement.

5. Set a hard transition date

Pick a date to fully move over to Heylo and announce it. Don't stretch out the process—it creates confusion. Here's how to prepare:

- **WhatsApp:** Turn on announcements-only. Share a final message that you're moving to Heylo

and add your link.

- **Meetup:** Create a final standing event with your Heylo link.
- **Facebook:** Add Heylo to your "About" section and post a final post about moving over.
- **Other tools:** Shut them down or stop using them. Be clear that all future activity happens on Heylo. Having multiple platforms dilutes engagement.

6. Add Heylo to your Instagram

First, add your Heylo link to your bio and your Linktree. Then, use one of [these Canva templates to create a post announcing your move to Heylo](#). Consider pinning it to your profile to make it easy for members to find and join.

7. Make announcements at your in-person events

Mention your move at your gatherings. Show members how to scan your QR code, or send the invite link in your follow-up.

8. Encourage leader engagement post-onboarding

Once your group is live, ask your leaders to:

- Post discussion prompts
- Share photos from events
- Welcome new members in chat

Sustained momentum leads to stronger connections!

Extra onboarding tools

Here are other Heylo features to help bring your group together:

- **Sign a waiver:** Collect liability releases automatically.
- **Share event photos:** Encourage members to share photos and videos.
- **Celebrate attendance:** Track milestones and award members.
- **Collect member info:** Gather important details like t-shirt sizes or emergency contacts.
- **Pay membership dues:** Set up recurring or one-time dues.

Need more help? Check out our sample FAQs to share with members below.

Sample FAQs

You can copy and paste these into your communications!

What's Heylo and why are we moving?

Heylo is a group platform that helps organize our events, communications, and benefits. It's the best way to see our full upcoming events calendar and connect with other members. Heylo is used by the top clubs and communities around the world.

Do I have to download an app?

Nope! You can use Heylo from your computer, mobile app or phone browser. We have our own dedicated space on Heylo, so you'll only get communications from our group.

How do I join?

You'll receive an email invitation to join our group on Heylo. It's a magic link with all info pre-loaded. Just accept the invitation via link, and join our group!

What if I already use Heylo?

No problem! If you accept the invitation, you'll be added to our group. You can use the same existing account without impact to your other groups on Heylo.

What happens to my paid membership?

Your membership renewal date has already been added to Heylo. When your date comes up, you can complete your renewal payment right in the Heylo platform. You can use major credit card or debit card, including Apple or Google Pay, from your phone or computer. You can get receipts or update your payment info anytime.

What if I have questions?

No problem! Every member of our group has a direct line of communication to the Heylo team. You can message a real person directly via Support Chat in Heylo or email at support@heylo.com.
