



# Members

03/25/2024 3:23 pm PDT


Aug  
15

**Cave Exploration**  
10:00 AM – 12:30 PM





**Black Women Who Kayak**


Hosting

Tanya

Going (6)

Jasmine

Maegen

Debra

Everyone on Heylo gets a profile. The profile is the place to share background info and communicate who you are. Profiles help everyone in the group get to know each other.

Profiles support up to 6 photos, a bio, interests, and a link. Members have used links to share their business like <https://heylo.co/> (!), or a social media site such as Instagram or LinkedIn.

Profiles are only visible to others in the group, not anyone on Heylo. Profile basics, such as name, photo, about, interests, and a link are shared across all groups. [Icebreakers](#) and [private info](#), however, are specific to that group. While profile completeness is encouraged, only a name is required for a profile.

## Roles

Roles help organize, incentivize, and empower group members. Use roles to grant access or controls to certain members.

With roles, leaders can:

- **Recognize key members.** Roles are displayed on profiles and at prioritized at the top of the members tab.
- **Grant some admin permissions, but not all** Use roles to give specific permissions to co-

leaders.

- **Give paying members something extra.** Membership plans can now grant roles to unlock discounts and private topics.

## Roles in action

Leaders are using roles to disseminate information, manage co-leaders, and reward contributors.

- [Skate Hunnies Los Angeles](#) uses roles to reward volunteers with membership benefits and exclusive events.
- [Central Park Track Club](#) uses roles to sort members and help connect them in topics, like Track, or Masters.
- [The Early Birds](#) uses roles to reward paid members with exclusive access to partner discount codes.
- [Midnight Runners](#) uses roles to celebrate attendance on members' profiles.

## How roles work

1. **Create a Role:** Create a role with a name, icon, and description. Only [admins](#) can create and edit roles.
2. **Add access.** Use the role to grant access to topics, events, and benefits.
3. **Grant permissions.** Give the role controls over managing the group.
4. **Assign Members:** Add members to the role.

Roles are flexible. Add members at any time, and adjust access and permissions as the needs of the group change.

## Roles help groups scale

As the group grows, access can be managed by role. New [topics](#), [events](#), and [benefits](#) can be all limited by roles. Furthermore, new roles can support new initiatives. Use a role to help kick-start a new event series, or build a welcoming committee.

Roles are designed to be easy to add and manage. One tap adds members to a role and grants them all the role attributes instantaneously. Another tap removes a member from the role and the reverse applies.

## Financial sustainability with roles

Roles can incentivize supporting memberships by offering exclusive perks. Use roles to encourage more members to contribute financially to the group with Heylo [payments](#).

## Member directory

Every group on Heylo has a member directory. A member directory is a collection of [profiles](#) from people in the group. It is automatically created and updated with no incremental work from admins. The member directory allows both admins and members to easily find and connect with other members within a group. It's a comprehensive list of all the members in the group, along with their profile information. It is also searchable across all fields. For example, if a member is a teacher, another member can search "teacher" from the members tab. Member directories on Heylo have helped real estate agents find new clients, musicians find a band to play with, and travelers get tips from locals.

The members tab is automatically sorted as follows:

1. Your name and profile
2. New members who joined in the last 7 days
3. Recent profile updates in the last 7 days
4. [Top attendees](#) in the past month
5. The group [leadership team](#) with titles
6. All members, by first and last name

The member's directory includes all members active in the last 30 days in your group. Active is defined as visiting the Heylo group.

Whether looking for a specific person or simply want to explore the group's members, the member directory on Heylo provides a convenient way to discover and connect with other group members.

## Profile update

Members can update their Heylo profile anytime through account settings from the top right of Heylo.

To edit private info or group-specific icebreakers, tap your name at the top of the members screen. Alternatively, members can access group-specific private info from the group tab as well.

## Private info

Admins can collect private information from their members. Private info is saved to a member's profile when they join the group, and any admin can access the info as needed. Unlike an [event sign-up question](#), it only needs to be collected once.

Note, private info is only visible to admins, and new members must submit private info before they join.

### **Setting up private info (admins only)**

To add fields of private info to collect, navigate to admin settings and tap "Private info". Default fields that an admin can toggle include:

- Email
- Address
- Gender
- Birthdate
- Mailing address
- Phone number

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

Collecting private info provides a significant time commitment from new members. After 3 fields, new member churn during onboarding decreases significantly. To maintain high new member conversion, we recommend admins request only truly required info instead of maximizing as much info as possible.

< Private Member Info

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

Test custom filed

Text response

New test field

✓

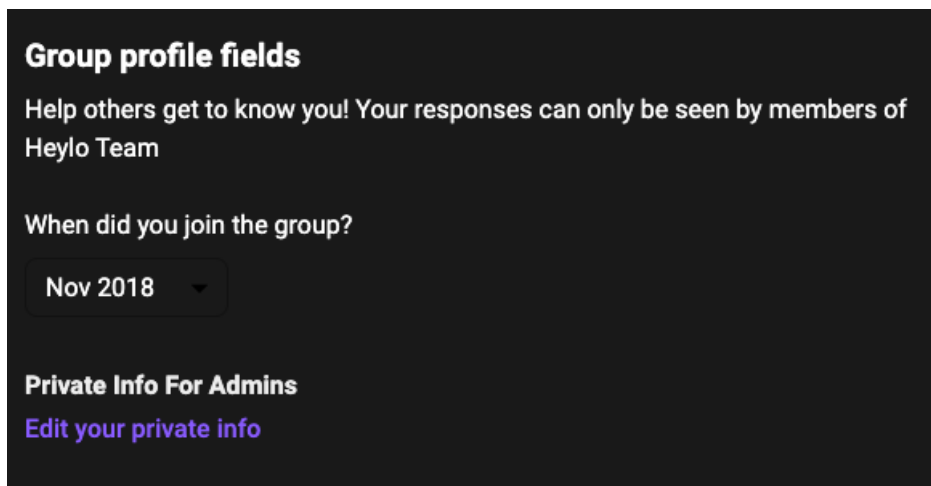
+ Add Custom Field

### 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.

A screenshot of a dark-themed user interface for a group profile. At the top, the text 'Group profile fields' is displayed in white. Below it, a message reads 'Help others get to know you! Your responses can only be seen by members of Heylo Team'. A question 'When did you join the group?' is followed by a dropdown menu showing 'Nov 2018'. At the bottom, the section 'Private Info For Admins' is shown with a link 'Edit your private info' in purple.

**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](#)

## Icebreakers

Icebreakers on Heylo are interactive prompts or questions designed to initiate conversations and engage members within a group. They serve as conversation starters and help break the initial barriers in connecting with others. Icebreakers aim to create a friendly and welcoming environment where members can share their thoughts, experiences, and interests.

A [group admin](#) on Heylo can set icebreakers for their group from admin settings. Up to six icebreakers can be selected. Responses are private to the group - only other group members and admins can see icebreaker responses. Completing an icebreaker is recommended and promoted, but not required.

A member can complete their icebreakers by navigating to the members tab and selecting their name from the top left. All responses are visible to other members of the group and searchable in the member directory.

Icebreakers are structured as prompts instead of questions to keep responses succinct. Instead of asking, "Where is your hometown?", just prompt, "Hometown". Here are a few examples of icebreakers for a hiking group:

- Hometown
- Occupation
- Favorite hike
- Current gear
- Dream destination

Icebreakers promote a more interactive and inclusive group environment, which allows members to get to know each other better and build stronger relationships.

## Leadership titles

Titles recognize the leaders of the group. They are a powerful way to incentivize people to step up and support the group.

An [admin](#) can grant a title to anyone in the group, whether they are a member or an admin. Everyone with a title is prioritized on the top of the members tab and receives the title next to their name on their [profile](#).

To grant a leadership title, navigate to the member's profile and press "manage member" under the three-dot menu.

## Export member info

Admins can export their member info into a CSV file from Heylo, anytime. The CSV file can be opened in Google Sheets, Microsoft Excel, or any other spreadsheet software.

When selecting the export option, admins will receive an email with all member's info. The info includes:

- Member name
- Join date
- [Profile](#) details
- [Icebreaker](#) responses
- [Email](#)
- [Waiver](#) signature date
- [Event attendance](#)
- Private info
- Last active date, or the last time they visited your group

Note, member passwords and payment information are encrypted and not available for export.

If an admin needs a custom report, [get in touch with the Heylo team](#), and we'll see if we can help!

## Event check-ins and host counts

[Checked-in event attendees](#) and [hosts](#) get added to the member or admin's profile. They are tallied across all attended events on Heylo, and viewable by all other members of the group. Check-ins and host counts are automatically added to the [profile](#) once the event finishes.

Every month an attendance board is automatically created and the top attendees are displayed at the top of the member directory. Top attendees are the total number of check-ins for that month.

If prior check-in data needs to be imported, [get in touch with the Heylo Team](#).

## Welcome message

Admins can set a welcome message for new members. It is an additional screen during the group [onboarding experience](#) for new members to meet the leaders and learn how to get started.

A welcome message is populated by default; however, [admins](#) can edit the text and the sender at any time.

## Prospective members

Prospective members are people who have requested to join a [private group](#). When someone requests to join, they are prompted to complete their [profile](#), providing information that helps the admins get to know them better before granting approval.

Admins receive a badge indicating the presence of a pending member request on the members tab. Additionally, if opted-in for [push notifications](#), a notification is sent when a new request is submitted.

Any admin has the authority to either accept or reject membership requests. If a request is rejected, the prospective member can reapply at a later time if they wish to join the group.

Furthermore, admins have the option to engage in [direct messaging](#) with prospective members to ask follow-up questions or seek additional verification if needed. This allows admins to ensure the compatibility and suitability of potential members within the group.

By carefully considering membership requests and engaging in communication when necessary, admins can help maintain the integrity and quality of the group community.

## **Banned members**

Banning a member is a function available to all admins in the group. When a member is banned, they are permanently removed from the group and are unable to rejoin. It's important to note that bans are not reversible.

Admins have the authority to enforce group rules and maintain a positive and inclusive environment. If a member's behavior or actions warrant disciplinary action, such as repeated violations of group guidelines or disruptive behavior, an admin can choose to ban them from the group.

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