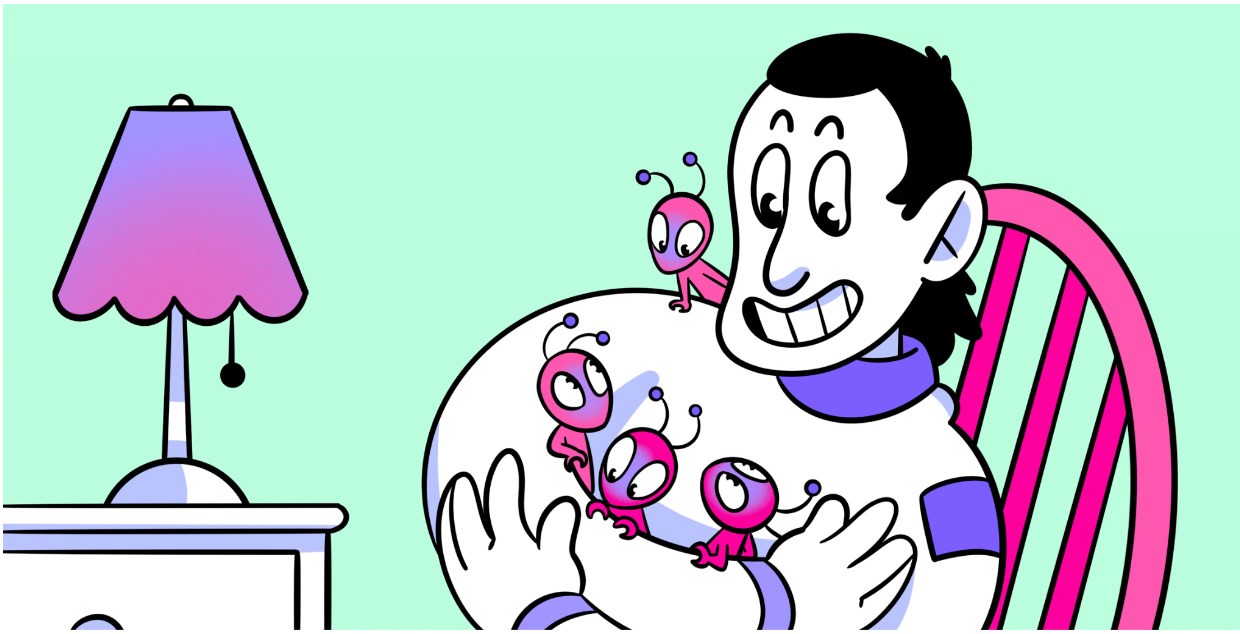
Helio Guides

Custom List

OCTOBER 2022



Introduction to the Custom List Method

Imagine having a direct line of communication with all of your customers that gives you everything they think about your business and product. Now imagine you can **instantly** collect all this information into patterns that provide insight into your customer's wants and needs!

This is the superpower Helio can give you by introducing Your Participants to the platform. Even when you know your product from front to back, customers will be the first to tell you something outrageous about how they're using it. It's no longer feasible to make assumptions about how your audience will react. That's old school. We need to learn from them in their spaces, by borrowing a moment of their time for quick feedback when you need it. We need to meet them where they're at, not where we are.

Gathering all of your user's thoughts into one place is easier than it sounds with Helio's data reporting tools. On top of the data graphs used to visualize all of the answers to your questions, you can segment and filter responses, create shareable observations from important data points, and send individual replies to participants when you want them to expand on certain ideas. Our Helio Advocates can also help pull the whole process together and produce executive summary decks for easy sharing around your team!

Once you start this feedback loop with your customers, you'll be creating constant insights for your team to build off of. When you give your users a voice, they love to share their thoughts—whether you asked for them or not. This creates a continuous flow of information that can impact your entire business, regardless of what project you're working on. But be ready; as you start sharing feedback that impacts other teams, they'll start hounding you for this data too!

This continuous feedback loop involving your team and your end-users is part of what we call Advocacy. Once you get this custom list method up & running, you'll see that it becomes a fortuitous cycle that benefits both you and your customers. **The best part?!** All of this can be started by simply getting your list of participants into Helio and asking a few questions. This guide provides a breakdown of how you can start a custom list so your team and your customers can start reaping the rewards!

CUSTOM LIST PROPERTIES

Building a continuous feedback loop requires some moving parts:

- **Participants**
- **Upload**
- **Screener**
- **Segments**
- **Surveys**
- **Answers**
- **Data report**
- **Pokes**
- **Replies**
- **Hearts**
- **Observations**

Participants

Anyone you can get in touch with! This can be current users of your product that you're already in touch with, or potential customers who have volunteered their feedback. Regardless, if you have the list drawn up or need to help pulling it together, Helio has the tools for you.

Upload

Use an Upload for a group of participants that you've already collected and who have been primed to provide feedback. When you already have a list of participants primed and ready-to-go, we suggest using a CSV upload to place that list into Helio. You just need each participant's name and email address!

Screener

Use a Screener to collect a group of your participants who have volunteered their feedback. When you have access to a group of participants, but need more information or permission before you start sending them surveys, a screener is a powerful tool. In Helio, screeners come in two forms: a landing page or a modal.

Segments

The groups you divide your list into when you want to compare answers across your participants. You can create segments by asking questions on your Screener forms or including separate columns of attributes in your CSV Upload.

Surveys

The vehicle you will use to gather feedback from your audience! Helio gives you 12 question types to create your surveys, from free response and multiple choice to rank order questions and prototype directives.

Answers

A response from one of your participants to a question in a survey. Your account will be set up with a certain number of answers to use based on your subscription, and each survey sent to Our Participants or Your Participants through Helio will deduct answers from your account.

Data report

Helio's provides a full data breakdown of surveys you send to all participants, complete with data graphs and multiple filtering options. These data reports can be easily shared with your team without the need for adding them to your account!

Pokes

A tool for engaging your audience and getting more value from your answers, found in the data report. Pokes give you the option to send a follow-up survey invite to your participants who have not yet responded without using any additional answers on the platform. Just enter your email invite copy and hit send for free.

Replies

A tool for engaging your audience and getting more value from your answers, found in the data report. A Reply gives you the chance to ask a deeper question of a participant who has answered your survey. Replies are great for when you think a participant has something interesting to say and you want them to expand on their initial comments.

Hearts

A tool for engaging your audience and getting more value from your answers, found in the data report. Hearting a participant's response is a simple way of letting your audience know you care. This feature sends a quick email to your participant letting them know you appreciate their answer.

Observations

Notes that you can take in the data report, which can be linked to a specific data point and shared with anyone on your team. Observations are often linked in other deliverables, like executive summary decks, to quickly refer back to the important data that led to a decision.

SETTING UP YOUR CUSTOM LIST

Ready, set, GO! Start getting feedback from your own users right away by taking advantage of Helio's ability to test Your Participants. Send branded surveys to your list and collect the data in Helio so that you can comb through it with an array of data filtering tools.

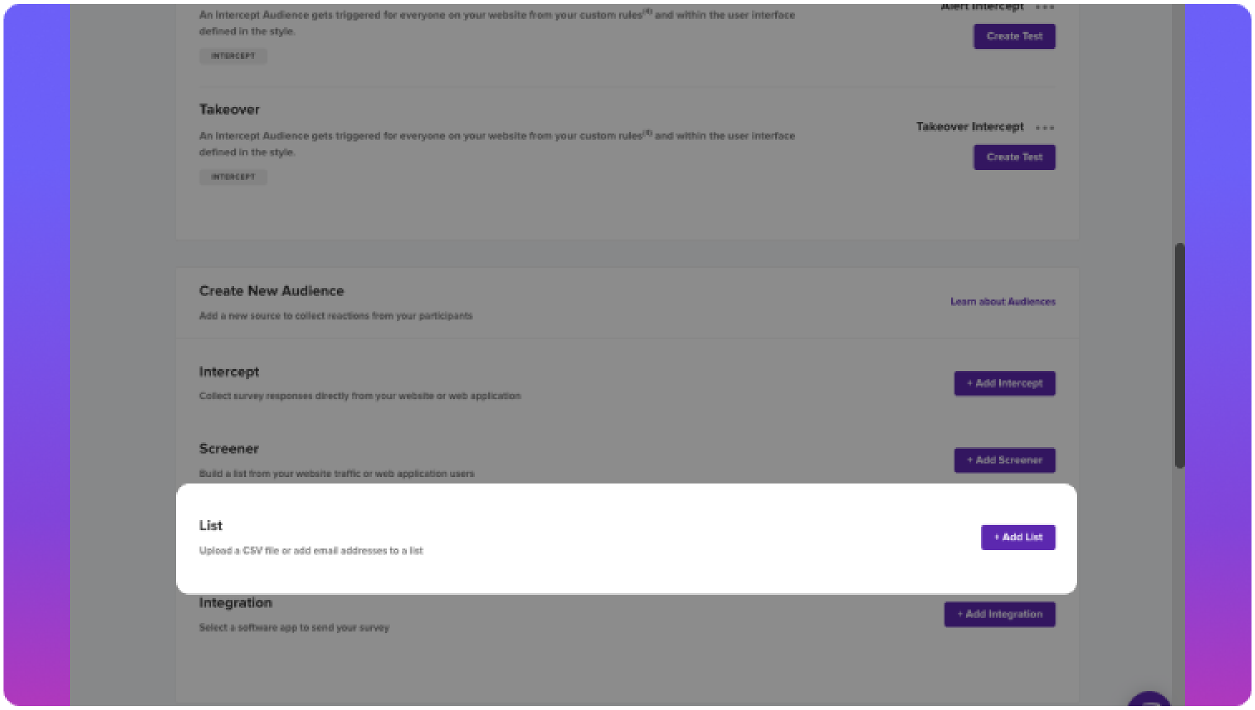
1. Get your participants into Helio
2. Segment your list
3. Send surveys to your list
4. Grow the list
5. Keep your audience engaged

Get your participants into Helio

On the Audiences page of your account, you'll find options to test with Our Participants and Your Participants. Under the Your Participants tab, you'll find the option to add a new List or Screener to your account.

Upload a CSV List

When you already have a list of participants ready to go, use a CSV to upload your list into Helio. You just need the name and email of each participant. If you go this route, you can start sending your audience survey invites right away, though we suggest priming your audience with a message beforehand to get the best engagement. A screener landing page works as a good way to prime your audience and get initial information, and we've seen companies simply send out an email notification letting participants know to expect their first surveys soon.

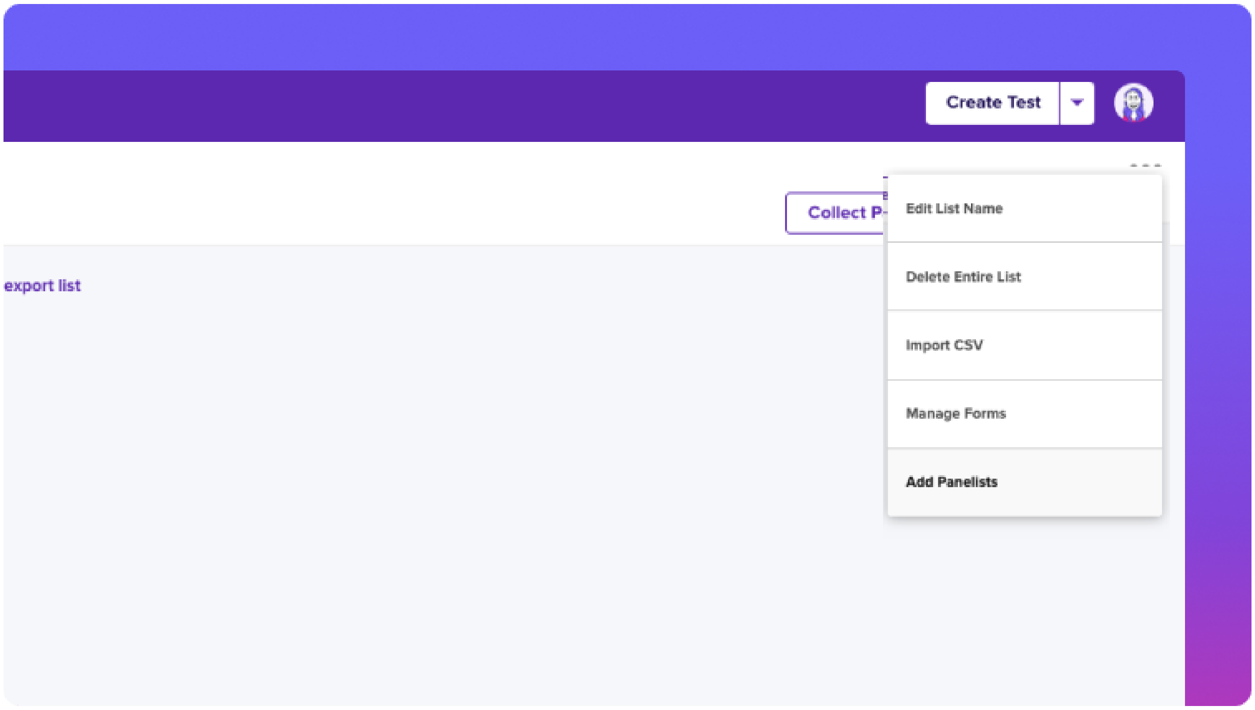


You can also include additional identifying information in the CSV that can be used to segment the list before sending them surveys. Just include the additional information in another column in the CSV, and you'll find it in your List view once the document is uploaded. Check out our [example CSV](#) to see how this upload should be formatted.

Advent Custom List

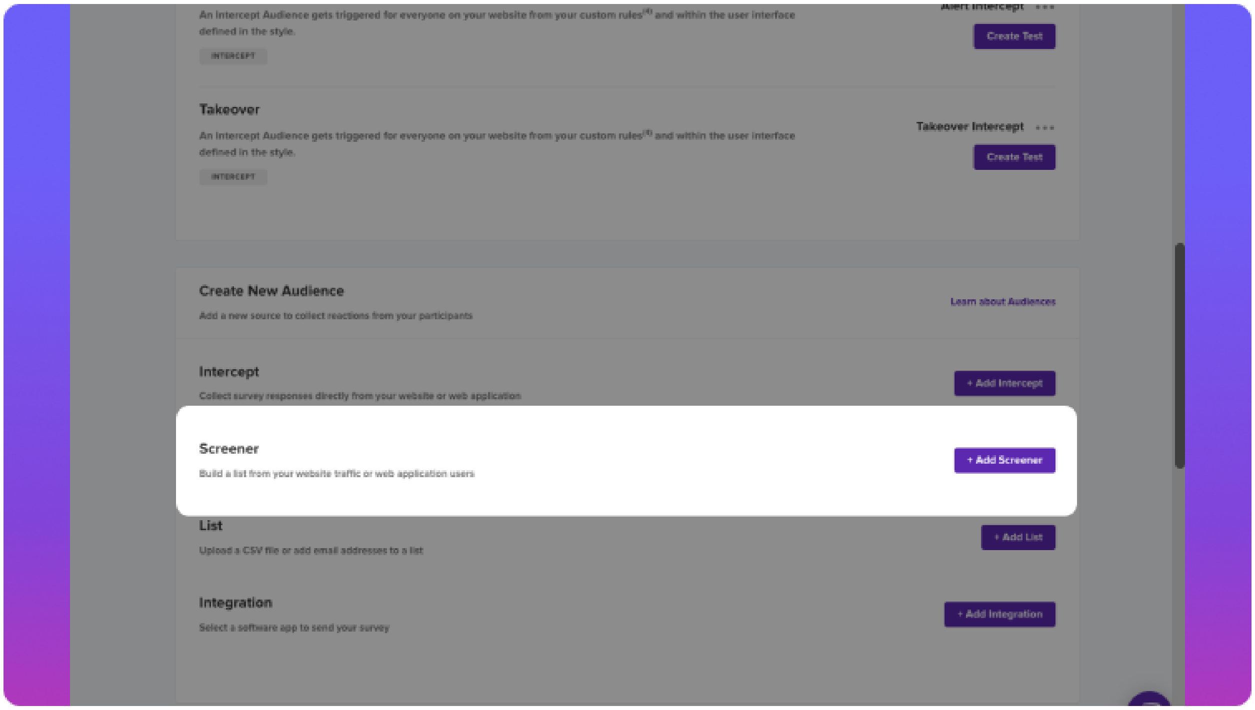
email	Name
lou.ferrigno@example.com	Lou Ferrigno
arnold@example.com	Arnold Han
bob.paris@example.com	Bob Paris
tony.atlas@example.com	Tony Atlas
mickey.hargitay@example.com	Mickey Hargitay
ronnie.coleman@example.com	Ronnie Coleman
franco.columbo@example.com	Franco Columbu

If you only have a few participants to place into a list (maybe for a small internal team), you can also add participants one at a time. Just enter their name and email address using the ‘Add Panelists’ modal and that group will be ready to test with!



Screeners

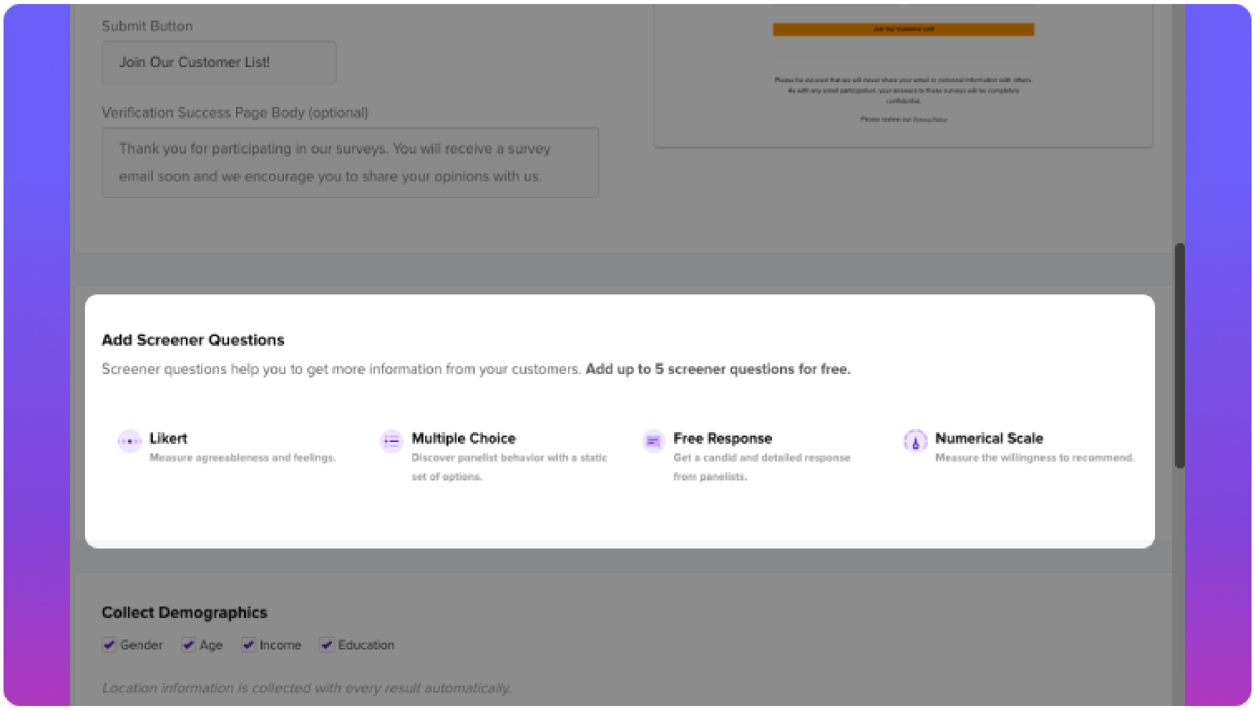
When you need to build a group of participants to test with, use a Screener to collect some information from participants and get them to volunteer their feedback. Screeners can be used to collect participants who you have never been in contact with, or prime a group of participants who want to opt-in to your list.



In Helio, screeners come in two forms: a landing page or a modal.

Landing Page Screener

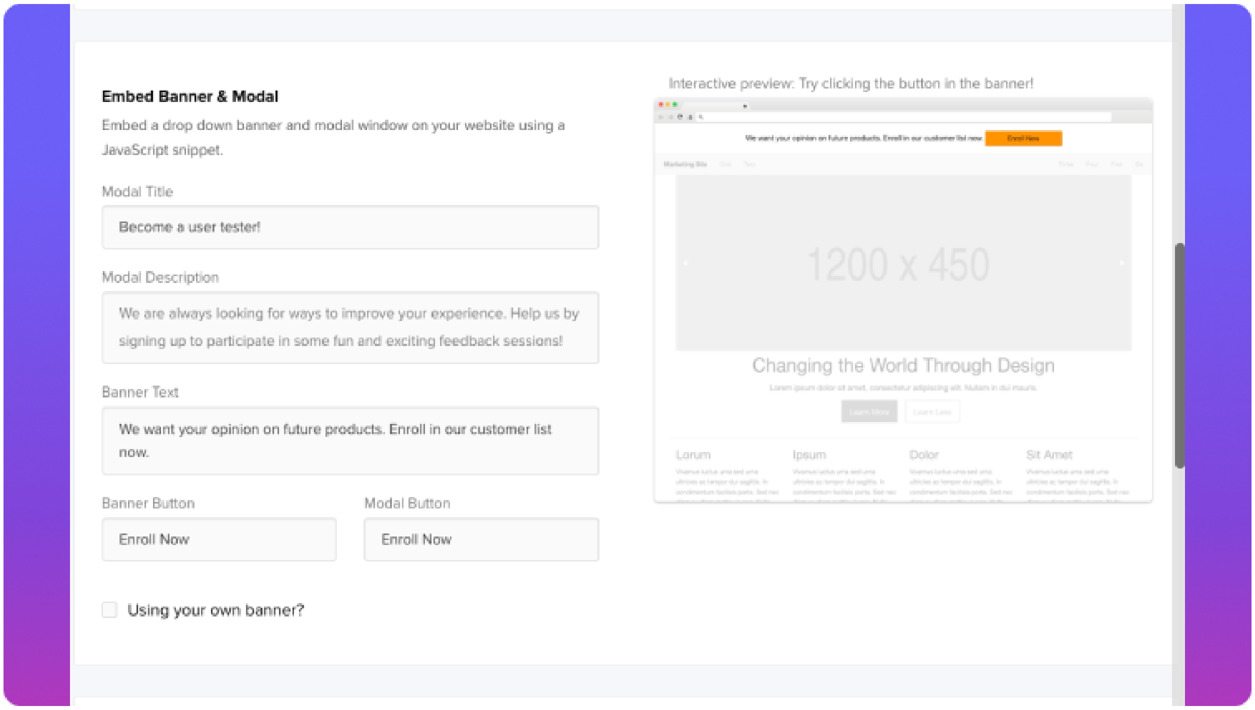
If you have the contact information for a list of participants, send them a link to a screener landing page to prime your audience and ask them to volunteer their time. The landing page is set up to ask for the participant's name and email by default, and then you can introduce up to 5 segmenting questions or opt-in checkboxes for the participants to provide additional information.



Once a participant submits their information, they will be sent a confirmation email that will allow them to officially verify themselves and be added to your list in Helio. All of these pieces can of course be branded with your company's own logos and colors so you can maintain the trust and confidence you already have with your users!

Modal Embed Screener

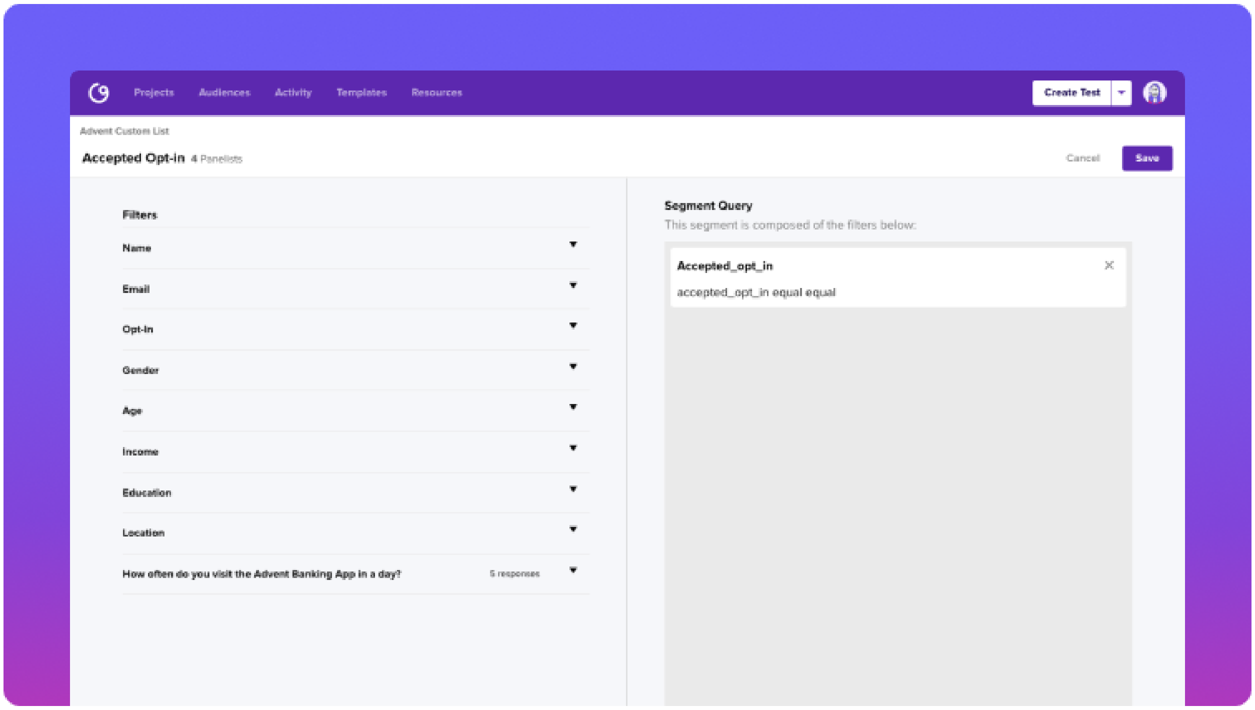
Get the contact information of new and existing clients by building an embedded screener directly on your site. This screener will show a banner on your platform that brings up a modal when clicked on. The modal will collect your participants' contact information so they can be added to your list.



Like the landing page screener, the banner & modal can reflect your company's brand elements, and you can set up the form to present 5 segmenting questions or opt-in checkboxes. After submitting their information, they will go through the same email verification process before being added to your list in Helio.

Segment your list

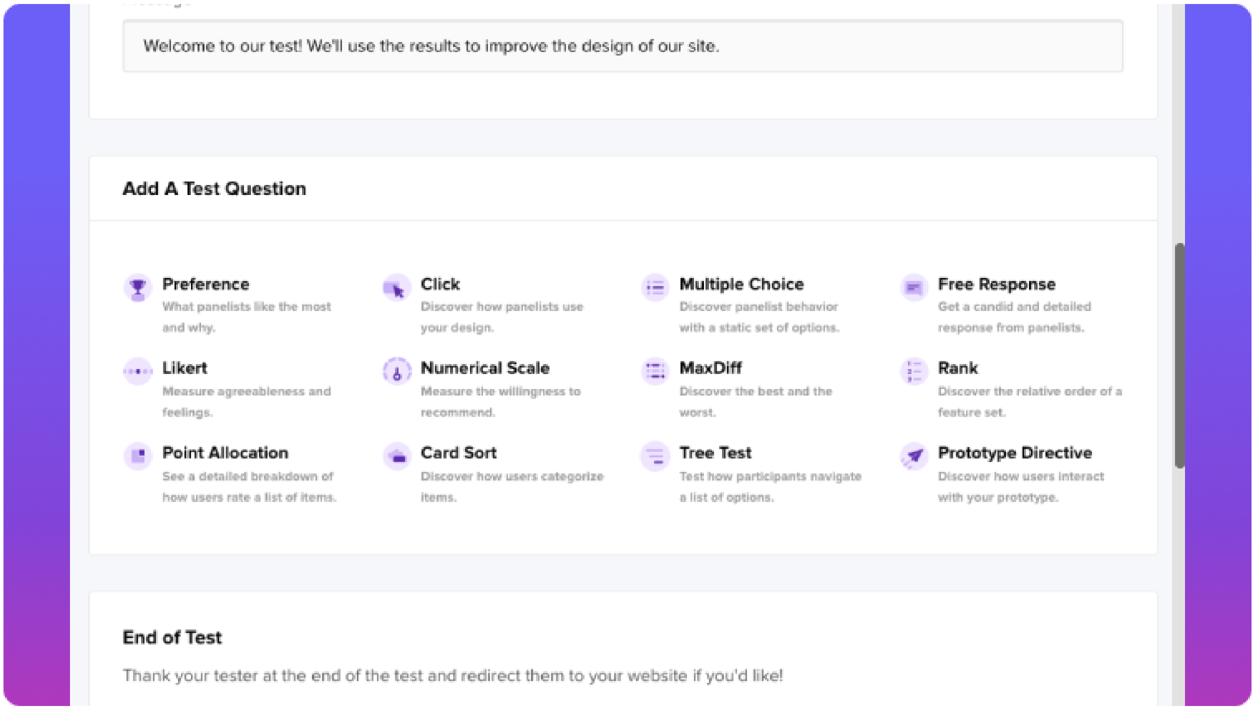
Once you've collected participants onto your list, you can segment them to create even more specific groups for your testing. All of the information provided on the CSV upload, or collected through one of our screener forms, can be used to place your participants into different segments. We've seen our users segment their list by what type of a relationship they have to the company (product end-user or supplier), recency of their last purchase, or simply by what device they prefer to access the platform on (Apple or Android).



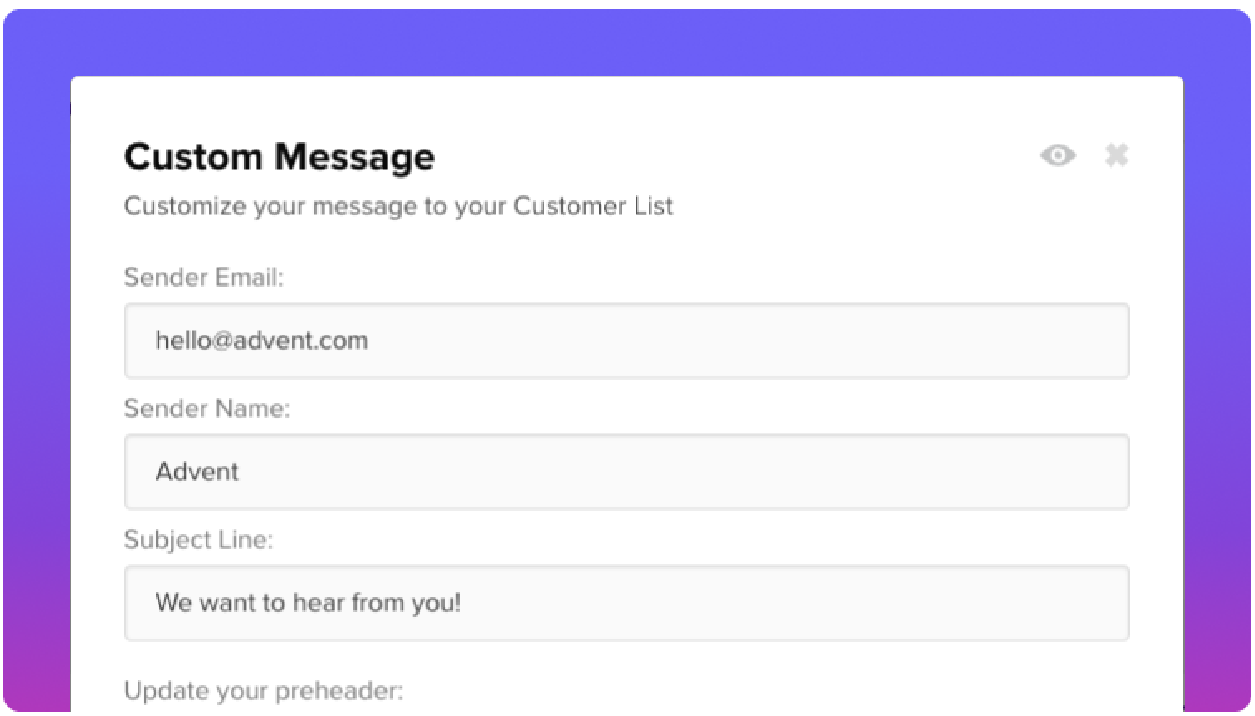
Send surveys to your list

When you're confident you have a good group of participants to test with, you can tap into Helio's built-in survey builder and data report to get feedback from your list. The first step will be to create a burndown list of topics that your team wants to test. Make sure to involve different departments across your organization, as the sales team will have much different needs from the marketing or dev teams.

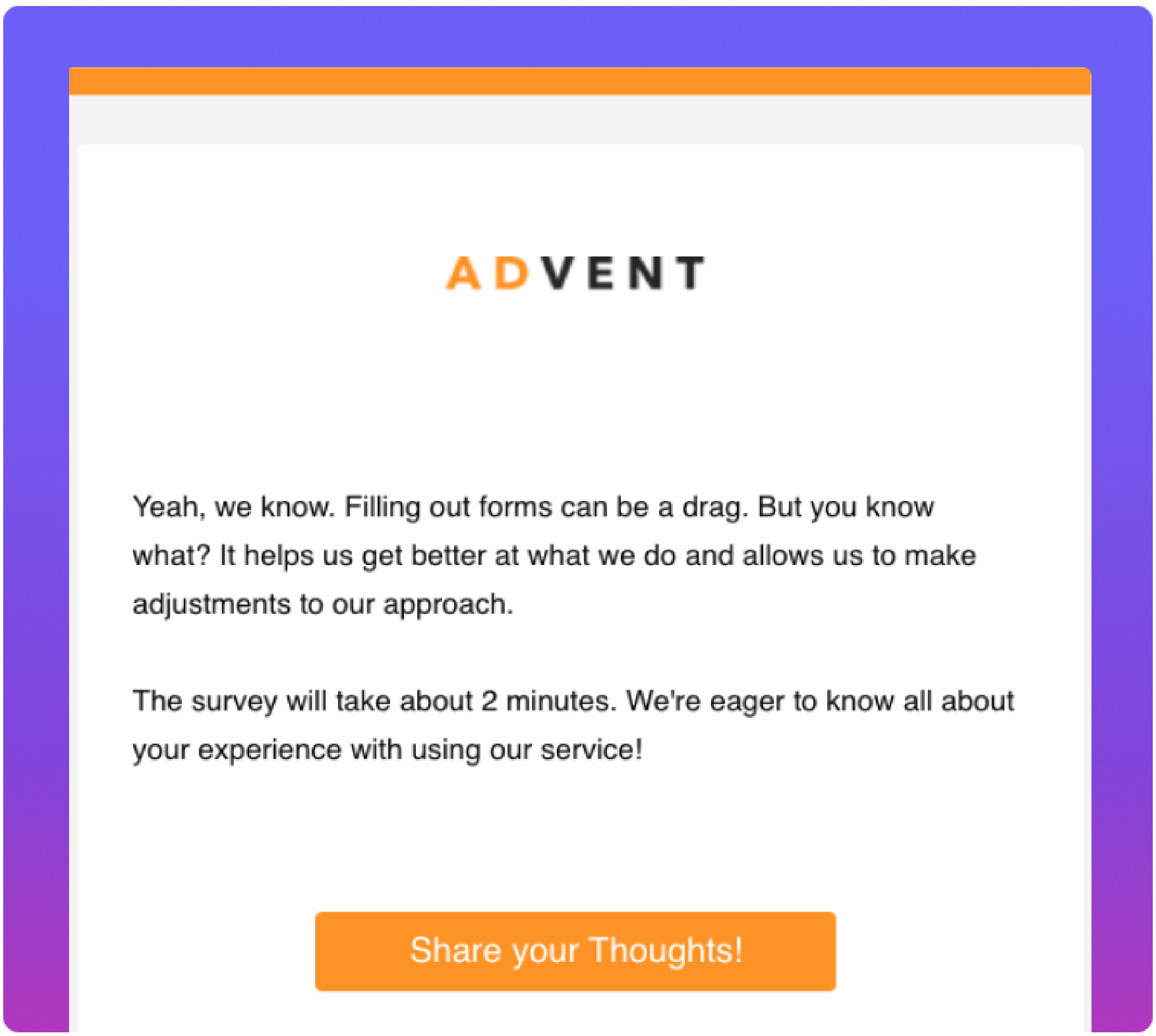
Once you have the list of survey topics, you can easily set up a survey in Helio and get feedback from your team on how to best ask your questions. Get your survey in front of your team members that are closest to the problem to understand what their hunches are and how you might be able to test them. We even have [quick templates for you to use] when looking at specific use cases, like competitor analysis or feature findability.



After completing and saving your survey, you will be given the option to create a custom email message and survey invite once you press the Send button. Customizable input fields include the subject line of the email, the email preheader, the body copy, CTA, and subtext. There is also a dropdown selector for you to choose what brand elements you would like the survey to have. Check out our Help Center article on setting up a brand style to see what your custom branding options look like!



The tone in your invite emails should be light hearted and conversational to start building trust with your list. Quickly explain the topic of the survey and information like how long the survey might take, and make sure to drive home the value that your participants will get from participating in your surveys. Stay away from stale or overly marketing jargon as users will just skim over the email like the last email campaign they opened and closed. Participants know you're asking for their time, so being straightforward about your ask and how you will use their feedback to affect their product experience is key.

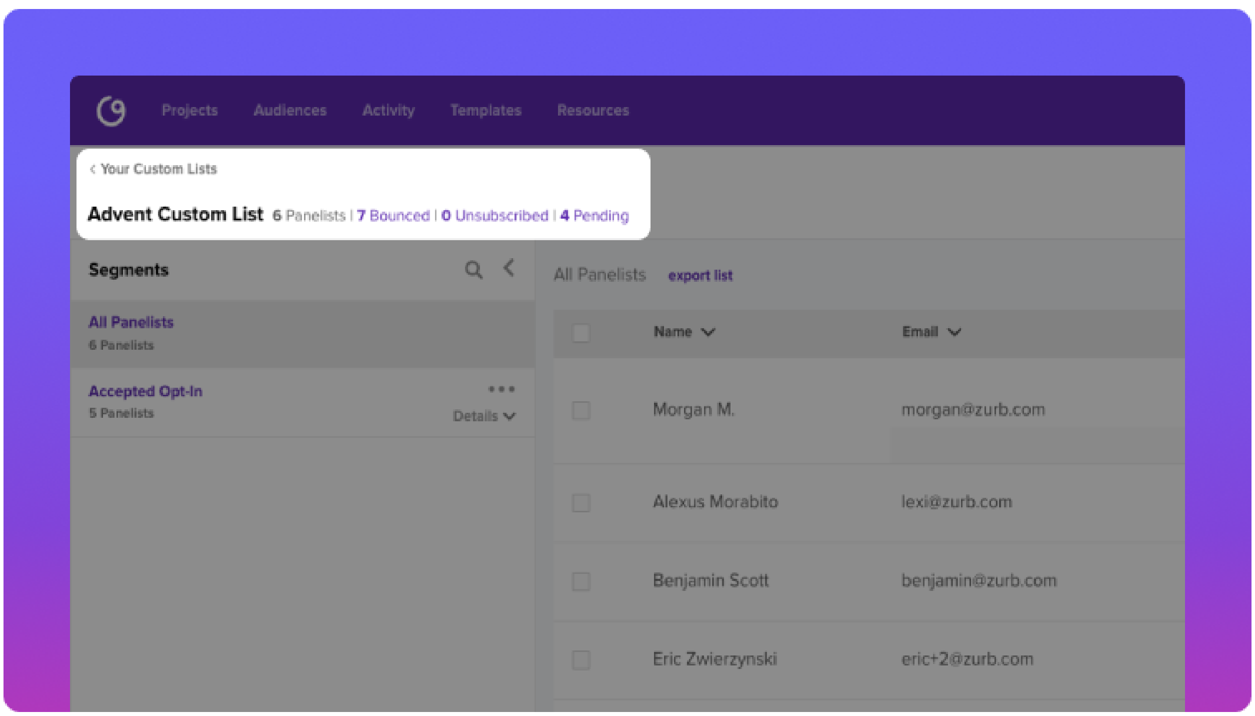


Grow the List

Once you've collected participants into a Helio List, you'll begin sending surveys and getting feedback from your newly created audience. At the same time, it is important to maintain a second track of focus: maintaining and growing the list you already have.

An embedded modal on your platform will continue to collect participants over time so that you should collect more participants as you continue testing. Make sure to switch up the language of your banner and modal, as potential participants who see the same message over & over are more likely to ignore the request on each new occasion.

If you've collected participants through a screener landing page, the simplest way to continue growing your list is to resend the landing page link. You can start by looking into your pending and bounced list in Helio, which you can pull up by clicking on the labels at the top of your list. Participants that are under the pending list haven't verified their email. Their verification email might be in spam or maybe they just overlooked the email. Whatever the case might be, try personally reaching out to these people as they have already expressed that they want to join your feedback list. Participants within the bounced list provided the wrong email, so try checking if there is a simple mistake - like .con - that you can fix before reaching out again.



We’ve also seen clients have great success building their by trying some out-of-the-box methods. One of our favorites was the use of a custom QR code during in-person training sessions that participants could scan to bring up the landing page screener and submit their information on the spot.

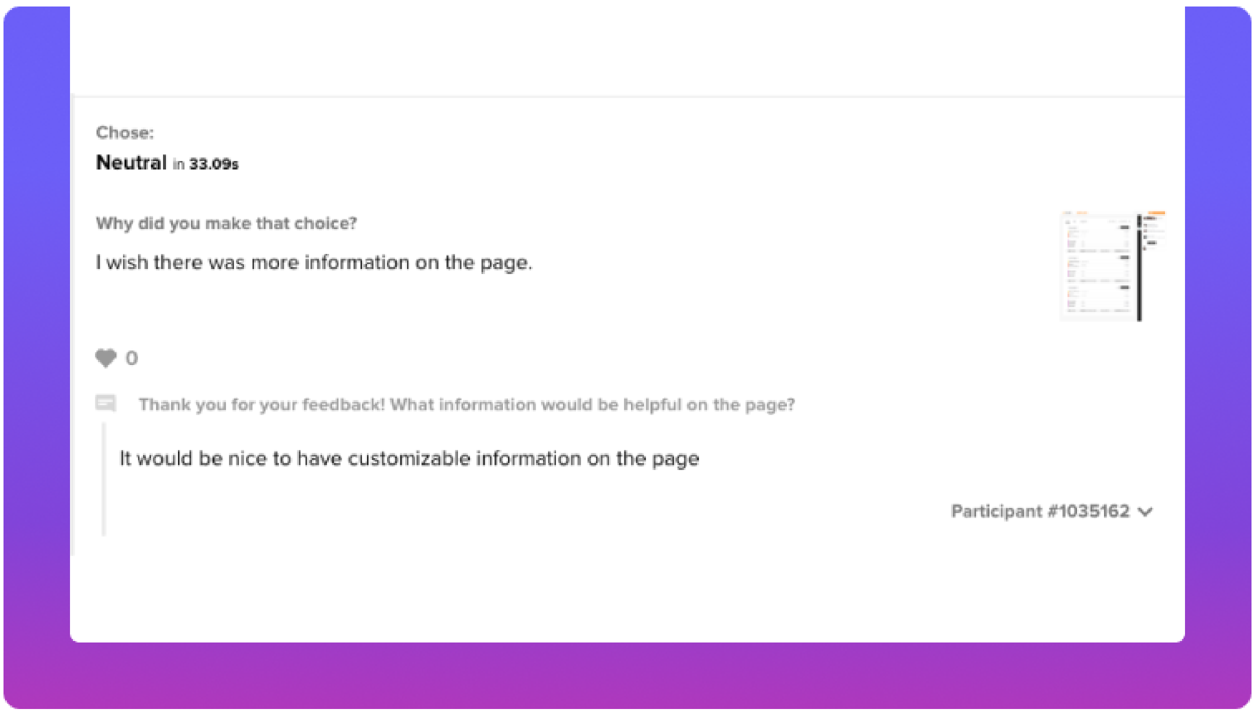
If you find a way that works for you, share it with us! We love to hear how companies keep their list growing!

Keep your audience engaged

Like all things in communication between two groups, consistency is key. We find that our Helio users see the best response rate from their list when they clearly communicate the expectation to their participants. Building a cadence is helpful, so that participants know when to keep an eye out for the next survey. We also suggest not to overload your list at first, with no more than 2 survey invites per week until you’ve gauged the receptiveness of your audience. This includes new survey invites as well as survey Pokes, which allow you to send a free follow-up email to all participants who have not taken the test yet.

Other ways of capturing the attention of your list is to reward their efforts, whether it be through small affirmations and messages or larger gift and loyalty programs. The latter can be achieved through Helio with our Reply and Heart feature.

On each data report produced from your surveys, you'll see the Heart and Reply features whenever a participant gives a written response. The Reply feature lets you reach out to individual participants with a single message relating to their previous answer. This gives you a quick back-and-forth with your customers to learn more about what they're thinking. Replies are often used as a way to get clarification or more detailed feedback about an idea a participant has provided.



Next to the Reply feature will also be the Heart feature, which is a way for you to 'favorite' and categorize the responses in your data report. By clicking the Heart on a response, you can later segment all responses by just those you have Hearted, and the survey participants receive a short email thanking them for their feedback and insights they've provided. Words of affirmation is a love language we can all get behind!

We also encourage you to plan for a more substantial reward system to provide participants with tangible gifts for their efforts. Just introducing the idea of rewards will work to get your list excited; it doesn't have to be a widespread gift that costs your company thousands of dollars. The anticipation of random awards to various participants is often enough to get the majority of your audience engaged. To ease yourself into this new practice, start with something easy & virtual: telling your audience that you'll be selecting 5 random people to receive Amazon gift cards is a great way to see increased returns on your next survey.

Once you're growing your list and engaging your list in unison, you'll have a feedback loop that provides non-stop insights for your company!

CUSTOM LIST METHOD TEMPLATE

This template provides a page where you can track and plan the questions you will ask of your custom list. Use the example provided in this guide to see how one of these documents are used in action.

- Tips on how to format CSV
- Including segmenting information in CSV
- Format example for a custom list

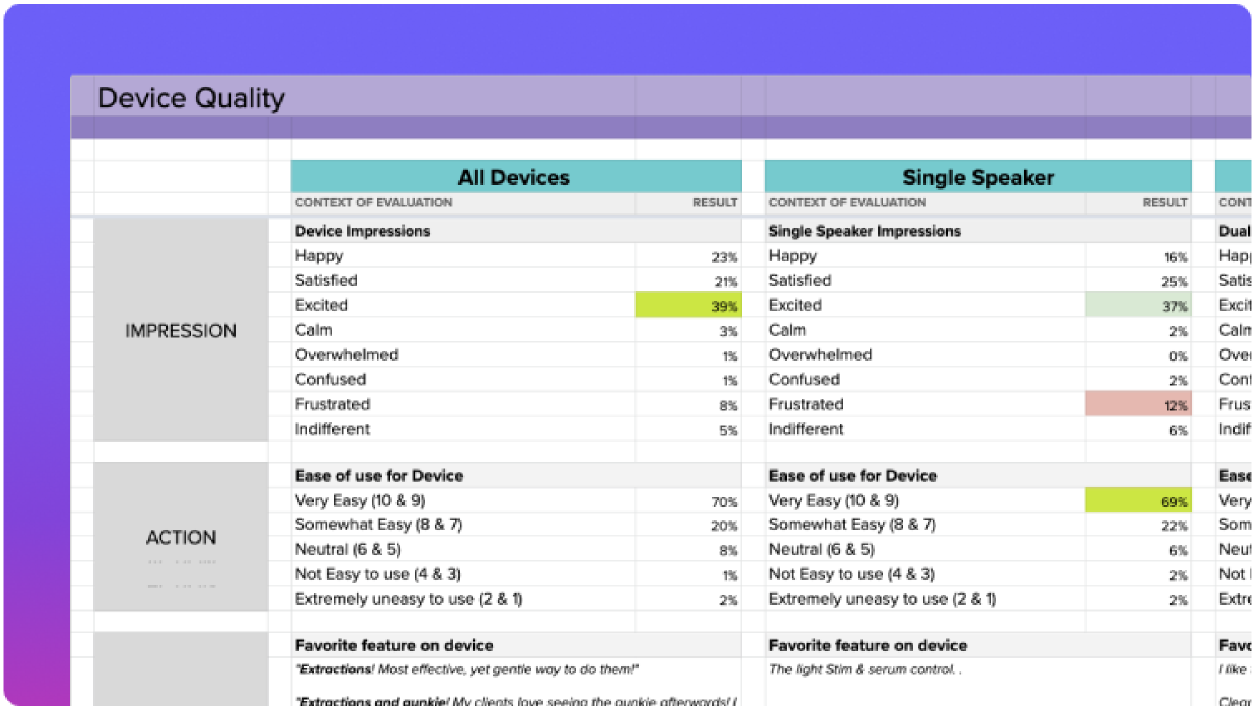
INTERPRETING THE RESULTS

Not all your participants will want to talk to you at first. Even for companies that have off-the-charts brand loyalty, we can only expect the typical 2-5% engagement you might see on a live site feature. Your users won't think this is anything special until you show them how valuable their feedback can be.

From an audience of professionals, getting 50 responses on your surveys is a good start. This will provide your team with valuable qualitative and anecdotal insights that you can use to inform your decisions.

At 100 responses per survey, that's where you really start cookin'. Getting 100 responses is statistically significant for most professional and consumer audiences, which means you can start leaning into more quantitative approaches like Net Promoter Scores and user click data. Again, if you don't reach that number right away, don't fret! It takes time to build the trust and engagement with your audience, and in the meantime the qualitative responses you get will work as great anecdotal signals for your team to build off of.

When you've grown your list and have hundreds of responses coming in on each survey, we often start seeing the need to segment the audience for more specific feedback. Once the data is flowing from multiple different channels, we have methods of comparing this data across different segments of participants.



Device Quality

	All Devices		Single Speaker	
	CONTEXT OF EVALUATION	RESULT	CONTEXT OF EVALUATION	RESULT
IMPRESSION	**Device Impressions**		**Single Speaker Impressions**	
	Happy	23%	Happy	16%
	Satisfied	21%	Satisfied	25%
	Excited	39%	Excited	37%
	Calm	3%	Calm	2%
	Overwhelmed	1%	Overwhelmed	0%
	Confused	1%	Confused	2%
	Frustrated	8%	Frustrated	12%
	Indifferent	5%	Indifferent	6%
ACTION	**Ease of use for Device**		**Ease of use for Device**	
	Very Easy (10 & 9)	70%	Very Easy (10 & 9)	69%
	Somewhat Easy (8 & 7)	20%	Somewhat Easy (8 & 7)	22%
	Neutral (6 & 5)	8%	Neutral (6 & 5)	6%
	Not Easy to use (4 & 3)	1%	Not Easy to use (4 & 3)	2%
	Extremely uneasy to use (2 & 1)	2%	Extremely uneasy to use (2 & 1)	2%
	Favorite feature on device		**Favorite feature on device**	
	*"**Extractions**! Most effective, yet gentle way to do them!"*		*The light Stim & serum control. .*	
	*"**Extractions and gunkie**! My clients love seeing the gunkie afterwards! (*			

The Helio Team can help you test with your audience and synthesize results into deliverables like this, so you can be focused on sharing the insights with your team and planning the next steps for your business.

EXAMPLES OF THE METHOD

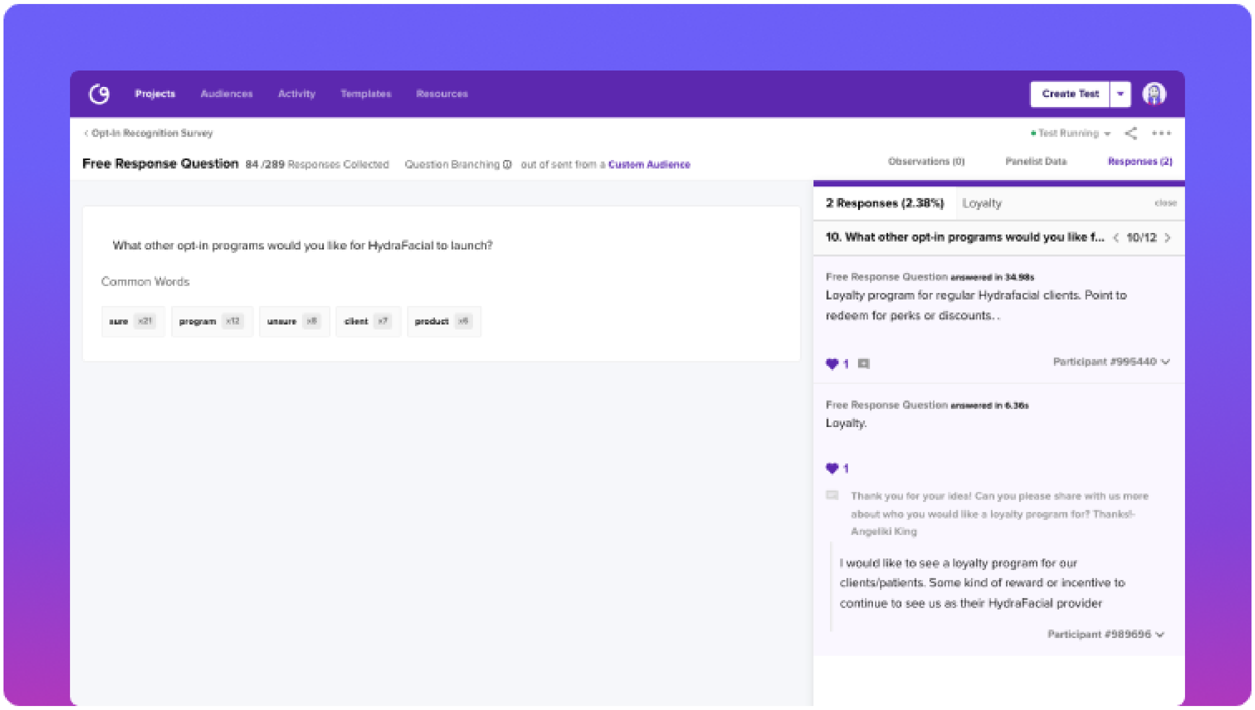
[Business-to-business example](#)
This deck shows the findings that can be pulled from an engagement with your own customer list.

SELLING IT TO YOUR TEAM

We promise they won't need much convincing. Once the first insights from your custom list testing start rolling in, and other teams see what kind of value you can get, they'll have their grubby hands all over your beautiful data in no time.

To share these insights with your team, we use executive summary decks that lay out the top-level signals revealed by the data. A quick summary of the data and a screenshot with each signal gives you a good 30,000-foot view, with a data link provided for anyone who wants to dive into the individual results. We've seen teams set up bi-weekly read-outs of their findings, which is a great way to invite other departments into the loop.

Once you start sharing these signals, your team will come to you for the answers they're seeking, and you'll even face the need to share information that they may not be prepared for. When you give your audience a platform, they like to use it to voice all of their personal concerns, even stuff that you haven't asked about. This can put you in a position where you now have valuable information about other team's work that you need to share with them. Use that power wisely!



When you can create this much value for your business, you can transform into a role that we refer to as an 'upside-down CEO'. Having the information about what users want and how to satisfy their needs can make you the center of information sharing on your team, and often the most important person on your team calls. If you don't like that much attention, just find a sociable teammate with a knack for talking who doesn't mind being the center of attention.

When selling this idea to your team, the goal is that the data does most of the talking here. Once you start showing the value of your custom list findings, your problem shouldn't be getting your team to engage, it should be organizing all of the ideas that they now want to test. That's always a good problem to have!

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