Trigger test step: User findings

Background: the following quotes are taken from 8 interviews with new users who walked through setting up a Zap in the "Why do users fail" research study

1. Users are confused by the concepts of "Find Data", "Test & Review", "samples", which lack context and aren't explained

- "I don't really understand what this [Find Data] step is... I skipped the test because I tried these [*Test & Review* and *Test & Continue*] and they didn't work." —Alex [8:01]
- "Just state what it [this step] will do. It will go through my emails and find if there are some emails that already match my searching criteria? Explain it as if I was little sillier." — Alex [10:01]
- "This is confusing to me. I don't know what this is. It feels like I'm in math class. Event A, pulled in 3 minutes ago? What the f*** is Event A?" — Stephanie [16:21]
- "I'm going to "Test & Review", because to me that communicates "test it, and then if it's not right you can adjust it", as opposed to "Test & Continue", which is kind of a weird option to me, so it's like run a test and we're going to move forward regardless? Which sounds kind of strange to me." — Laura [51:37]

i. 2 users were further confused by seemingly unrelated concepts being shown together

- **"Find data" vs "Test":** "I wasn't entirely sure what "find data" meant, but then the word "test" appears four times. So I was like, ok, this is a test." — Laura [51:00]
- **"Sample" vs "recent trigger":** "[Reading help doc] "This will either be a sample data app or a very recent trigger that happened on your app. For example, if the trigger is Typeform new entry, the trigger test will bring in a recent submission." Okay, got it. That still doesn't make sense though. If I'm picking a sample and it just told me this, testing your. I understand what this is saying, but it's not telling me about the sample. Then now I'm lost, and then I give up." — Nicole [42:19]

2. Users don't know why there are 3 sample data options, and which one they should choose

- "I think that I'm looking at these samples to find one that's coming from where I want it to? [...] I'm not exactly sure what I'm looking at here [...] [reads help doc] I'm honestly not sure what I'm looking at still, and why I'm choosing one of these." — Stefanie [48:50]
- "But then I didn't really understand from there... like what is this? This is where I got stuck, and stopped using it. 'Email Matching Search A', what does this mean? This is an email I just got, but what am I supposed to do with that?" — Rachel [3:32]

i. 1 user thought that the 3 samples meant there were 3 emails in his inbox that matched the trigger criteria

- "So it means that I have three emails in my inbox that have a subject with "test" on it, right?" — Alex [9:26]

3. Users are overwhelmed by the amount and complexity of sample data information

- "And then these samples to me, it's just gibberish, so that's not helpful." — Stephanie [24:05]
- "I'm seeing that there's three emails, but I'm not sure what the differences are as to why I'm choosing one over the other. I'm seeing slight differences as to how they're categorized [...] it looks like there's a lot of mumbo-jumbo, so it's hard to know why I want to pick one over the other." — Stefanie [51:14]

- "And this looks like code to me... I understand that it returned something, but I don't understand what it has returned. I can kind of parse this [...] but everything else is like coding meta data to me that doesn't make a lot of sense." — Laura [52:00]

4. Users don't know how the sample data relates to the Zap action (2)

- "Because I haven't seen a Zap play out yet, I'm wondering if this [sample data] is what's going to be emailed to me. If so, that's actually not that helpful for me [...] I would want to edit out most of this stuff. For example, if i'm using it to compile a newsletter of interesting stuff that had happened in Slack that week, then I would just want to know the channel, person, and message text. Everything else, I would not be interested in." — Laura [55:15]
- "And how does this [inaudible]... using it in the sheets? Where is the step, or where does it tell me how this integrates with the email pulling it into the sheets." — Rachel [3:32]

> Summary quote: "It needs to be more specific and easier to use at the same time. I wouldn't mind putting in all the information and the work, if I knew exactly what each thing was. And I think a lot of it is the copy. I just need to know what's going on more."