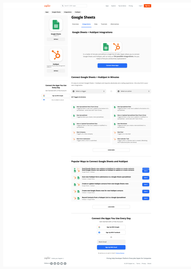
Existing content & concepts

OLD HOMEPAGE

- Zapier (>5)
- app (>5)
- Zap (>5)
- automate (>5)
- tool (1)
- task (4)
- workflow (>5)
- trigger (2)
- connect (4)
- action (2)
- tool (3)
- built-in app (2)
- integrate (2)
- step (2)
- innovate (1)
- busywork (1)
- save time (1)
- simple setup (1)

NEW HOMEPAGE

- Zapier (>5)
- software (4)
- event (1)
- automatically (4)
- business application (2)
- work (1)
- connect (3)
- tool (1)
- work together (2)
- automate (1)
- solution (1)
- busywork (1)

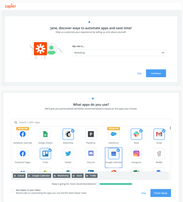


APP DIRECTORY

- connect (>5)
- app (3)
- trigger (2)
- Zapier (1)
- action (2)
- integrate (2)
- productivity (1)

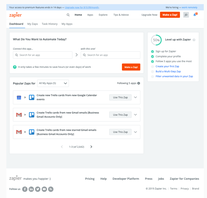
SIGN UP

- Zapier (1)
- work (1)
- automate (1)
- easy setup (1)



ONBOARDING

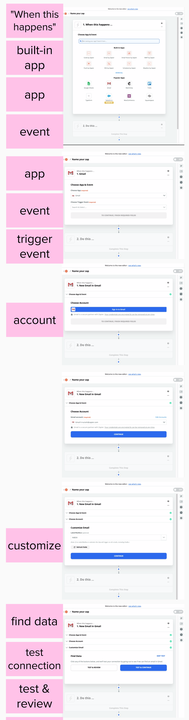
- automate (2)
- app (4)
- workflow (1)
- save time (1)



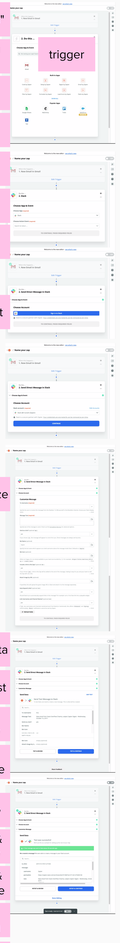
DASHBOARD

- automate (1)
- app (>5)
- Zap (>5)
- connect (1)
- save time (1)

EDITOR



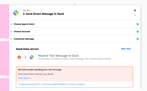
- "When this happens"
- built-in app
- app
- event
- app
- event
- trigger event
- account
- customize
- find data
- test connection
- test & review
- test & continue



- "Do this"
- built-in app
- app
- event
- app
- event
- action event
- account
- customize
- send data
- send test
- test & review
- test & continue
- sample
- retest & review
- retest & continue
- done editing
- turn Zap on

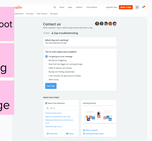
- turn Zap on
- my Zaps
- Zap run

EDITOR

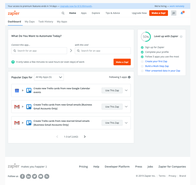


- error
- trouble
- troubleshoot
- problem

CONTACT FORM



- troubleshoot
- isn't working
- error message



DASHBOARD

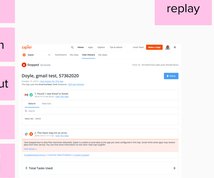
- automate
- app
- Zap
- connect
- save time

MY ZAPS

- My Zaps
- on/off

TASK HISTORY

- Task History
- Zap
- status
- autoreplay



- Task History
- Zap
- replay
- data in
- data out
- error
- tasks used

Stage

AWARENESS

Job story

- "When I want to integrate/connect my apps, I research my options so I can find the best solution"
- "When I want to automate my workflow, I research my options so I can find the best solution"
- *"When I first hear about Zapier from a friend or colleague, I want to find out what Zapier is, so I know if it can help me"*

Goal/ Task

- Find a platform that can connect my apps
- Find a workflow automation tool
- Find out what Zapier is

Information needed

Learning objective (Current gaps)

Mental model

SIGN UP

Job story

- "When I first land on Zapier's app directory, I want to find out if it can integrate the apps I want, so I know if it's a potential solution."
- "When I first land on Zapier's homepage, I want to find out what Zapier is, so I know if it's a potential solution"
- "When I am considering signing up for Zapier, I want to find out if it can solve my specific problem, so I can decide if I should sign up."
- "When I have decided that Zapier may be helpful for me, I want to sign up for an account, so I can get started."

Goal/ Task

- Find out what Zapier is
- Find out if Zapier can integrate/connect my apps
- Find out if Zapier can solve my specific problem
- Sign up for Zapier

Information needed

- What is Zapier
- What apps can Zapier connect
- (What Zapier isn't)
- Sign up instructions
- What is a Zap

Learning objective

- I know that Zapier allows me to connect apps I use to automate repetitive tasks
- I know if Zapier can connect the apps I want and in the way I want
- I know that a Zap is an automated workflow with a trigger and one or more actions
- I know that a Zap is a linear, one-way workflow from a trigger to action, not a two-way sync between apps
- I know that every time a Zap performs a successful action, it's counted as a task

Mental model

- Build a simple, foundational mental model of Zapier
- Set expectations of what Zapier is/isn't and what Zaps can/can't do
- Understand what the unit of work a Zap performs is

ONBOARDING / DISCOVER USE CASES

Job story

- "When I have signed up for a new Zapier account, I want to learn the basics, so I know what to expect from this process"
- "When I have learned the basics, I want to identify relevant potential uses, so I can get ideas on how to use Zapier"
- "When I have learned the basics, I want to know how other users similar to me are using Zapier, so I can get ideas on how to use Zapier."
- "When I have learned the basics and have two or more apps I want to connect, I want to select my apps, so I can use them in a Zap"

Goal/ Task

- Learn how to use Zapier
- Identify potential uses for Zapier
- Find out how similar users are using Zapier
- Select trigger app
- Connect app account
- Select action app
- Connect app account

Information needed

- Tutorial/guided intro to Zapier
- Relevant use cases for Zaps
- What similar users are doing with Zapier
- List of apps
- Suggested trigger events
- Suggested action events

Learning objective

- I know that I must choose a trigger app & event and action app & event in my Zap
- I know that every time a Zap performs a successful action, it's counted as a task
- I know what kind of Zaps will help me solve my problem/ save my time/ increase my productivity
- I know what trigger app and action app I want to use in my first Zap
- I know that I must connect my trigger and action app accounts to Zapier
- I have an idea of what trigger event and action event I want to use in my first Zap

Mental model

- Build a stronger, more comprehensive mental model of Zapier
- Set expectations of what is involved in creating a Zap
- Frame Zapier in terms of results, allow users to visualize a clear objective of a Zap
- Avoid cognitive overload by chunking the process of creating a Zap. Remove "sandbox" element of the editor for new users

SET UP ZAP

Job story

- "When I have a trigger in mind, I want to set it up, so I can use it in my Zap"
- "When I have an action in mind, I want to set it up, so I can use it in my Zap"
- "When I have set up my trigger and action, I want to turn on my Zap, so I can start automating tasks between them"

Goal/ Task

- Set up trigger
- Select event
- Customize trigger
- Find trigger sample data
- Set up action
- Select event
- Customize action
- Map trigger data to action fields
- Test action
- Turn on Zap

Information needed

- Explanation/example of trigger sample
- Explanation/example of field mapping
- Review of Zap trigger and action
- Count of tasks the Zap will use when it runs

Learning objective

- I know what trigger event I want to use in my Zap
- I know what data I want to pull in from my trigger
- I know what a trigger sample is and how it's used in a Zap
- I know what action event I want to use in my Zap
- I know what field mapping is and how to use it to set up my action
- I know what testing my action will do
- I know what my Zap will do when I turn it on
- I know the number of tasks my Zap will use every time it runs successfully

Mental model

- Understand all the information needed to set up a complete trigger in a Zap
- Understand all the information needed to set up a complete action in a Zap
- Understand what the Zap will do when it is on and how many tasks it will use when it runs

TROUBLESHOOT ZAP

Job story

- "When I can't get my Zap to work the way I want, I want help with setting it up, so I can get it to work properly"
- "When my Zap encounters an error, I want to fix it, so I can continue setting up my Zap"

Goal/ Task

- Get help with creating Zap
- Read help doc to resolve issue
- Go to Community
- Contact support
- Fix Zap error
- Use error message to fix error
- Read help doc to fix error
- Contact support

Information needed

- Description of error and steps to fix it

Learning objective

- I know how to get help if I can't set up my Zap the way I want
- I know how to fix my error to continue setting up my Zap

Mental model

- Get a deeper understanding of how to set up a Zap and what it can/cannot do
- Learn why an error occurred and how to fix it as easily as possible

MANAGE ZAP

Job story

- "When my Zap is running, I want to see a quick overview of my Zap's metrics, so I know how it's performing"
- *"When I have more than one Zap set up, I want to visually track and analyze key metrics for my Zaps to monitor them at a glance"*
- "When my Zap is running, I want to see what specific tasks the Zap has performed, so I know if it is working as intended"
- "When tasks fail in my Zap, I want to find out why they failed and what I need to do, so I can get them to work"

Goal/ Task

- See overview of individual Zap metrics
- Track and analyze key overall Zap metrics
- View detailed Zap history
- Find out which tasks failed in a Zap and why, and what needs to be done
- Fix and replay failed tasks

Information needed

Learning objective

- I know what the status of my Zap is (on/off), how many tasks it's completed, and how many were successful/failed/held
- I know how all my Zaps are performing at a glance
- I know which tasks my Zap has performed and what data is associated with them
- I know which tasks failed in my Zap, why they failed, and what action I need to take to resolve them
- I know what autoreplay is and what types of tasks it will reattempt
- I know which failed tasks to manually fix and replay and how to do it

Mental model

- Learn what different Zap and task statuses are
- Learn how to track and analyze overall performance of Zaps
- View task usage per Zap, by month
- Get a deeper understanding of the types of data that go in and out of a Zap
- Learn why a Zap task may fail, and what outcomes and actions may be needed to resolve it