

MentalZap

Send notes, tasks, and events into one database that maps into one interactive view

Spec Status: Complete

Product Manager: Jaclyn Tran

Peer Reviewed by: Matthew Fay

Mentor Reviewed by: Desislava Danovska

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Summary

MentalZap is a product that allows users to stay organized by seamlessly sending notes, events, and tasks simply by reacting to a Slack message with the designated emojis. Each reacted message will be sent to MentalZap and will be shown as a card in an interactive Kanban view. Cards are automatically categorized into separate columns based on the emoji used. By providing users with one system that has the functionality of 3 systems combined will help drive better organization and productivity across users who use 2 or more systems.

Problem Background

Technology helped improve and advance our manual method of creating a task [to-do list](#)(1). The days of random sticky notes sitting on your desk are over! The overwhelming feeling of multiple unread messages on Slack is coming to an end! Events, notes, tasks, and project management systems can be as simple as the user wants, or it can be as complex based on the user preference. Based on the conducted user interviews, 100% of users utilize more than 2 systems to capture the specific feature needed from each solution.

The solutions can range from, automations, [card filing](#)(2), [collaborations](#)(3), [mind-mapping](#)(4), [second brain](#)(5), [task tracking](#)(6), [event planner](#)(7), etc, the possibilities are endless. All these systems were created with a user specific need in

mind. However, these are all great solutions, but when compared against each other, the features are all very similar. Which options you decide to go with, [depends on what problem you're trying to solve](#)(8). Users also monitor ad-hoc pings from [Slack](#)(9) from various projects they're involved with to action any one off action items. 50% of users expressed that most of their action items are derived from Slack channels. Users use more than 1 system because they haven't found a singular system that has all the features they need for their current workflows. Users would prefer if their current solutions had integration options so less time could be spent recreating specific tasks for each system.

While users could use [no code solutions](#)(10) such as Workato or Zapier, the general consensus was they wanted it to be an overall simple workflow and had no desire to learn another system just to make their current systems a *little* better.

Data collated from user interviews indicated 100% of users would like to use a singular system but have the capability of 3 systems functionality combined notes, projects, tasks, and events tracking all driven by [automations](#)(11).

Problem Statement

Slack users who are struggling to maintain their to-do lists in different systems need a way to automate their workflows to help reduce the usage of multiple systems.

User Stories

- As a user, I want to be able to create a card directly in the view, so that I can add tasks that are not from Slack.
- As a user, I want to be able to link related tasks into main tasks, so that I can see how many subtasks I had.
- As a user, I want to be able to automatically send important Slack messages, so that I can track them as I read them.
- As a user, I want to be able to label Slack messages before it gets sent to the database, so that I can categorize each message.
- As a user, I want to be able to receive alerts from calendar events, so that I can be reminded when the date is getting close.

- As a user, I want to be able to mark the status of my created cards, so that I can track the different statuses.

Goals

- GOAL #1: To provide users with an unified interactive view that categorizes their task types via automation
- GOAL #2: To provide users with a singular system that encompasses the necessary features they need from multiple systems

Success Criteria

Measurement	Metric	Goal
Usage	Monthly user sign ups	TBD
Usage	Average number of slack events sent to MentalZap per user	TBD
Adoption	Frequency of events sent to MentalZap by users on weekly basis	TBD

Solution Alignment

Key Features

1. Users will use 4 types of emojis ⚡, 🧠, 📅, 🔥 to label their message
2. Messages that are sent into database will be created into a card

- Based on the label of the message, MentalZap will categorize the cards into separate columns, Action Item, Mental Note, Event
- User will be able to create a many to one relationship for task labeled Action Item and Main Task
- Users will view created cards through a Kanban view
- Users can create cards manually using the same labels by clicking + button for each labeled column
- Users will get notification for cards labeled *Event Date* through a direct message from Slack 3 days prior to specified date

Slack Trigger	Label	Desire Outcome
	Main Task	Event Message will be labeled as <i>Main Task</i>
	Action Item	Event message will be labeled as <i>Action Item</i>
	Mental Note	Event message will be labeled as <i>Note</i>
	Event Date	Event message will be labeled as <i>Event Date</i>

As a user I want to...	Acceptance Criteria
As a user, I want to be able to react to a slack message using  to kickoff a MentalZap (main task)	Slack message event will create a main task record for other MentalZaps to be linked as subtasks
As a user, I want to be able to react to a slack message using  to send my event into MentalZap	Slack message event will be labeled as <i>Action Item</i> on the created card and categorized under the Action Item column
As a user, I want to be able to react to a slack message using  to send my event into MentalZap	Slack message event will be labeled as <i>Mental Note</i> on the created card and categorized under the Mental Note column
As a user, I want to be able to react to a slack message using  to send my event into MentalZap	Slack message event will be labeled as <i>Event Date</i> on the created card and categorized under the Important Date column
As a user, I want to be able to manually create a card using the same labels for	For the labeled columns Action Items, Mental Note, Event Date, additional cards

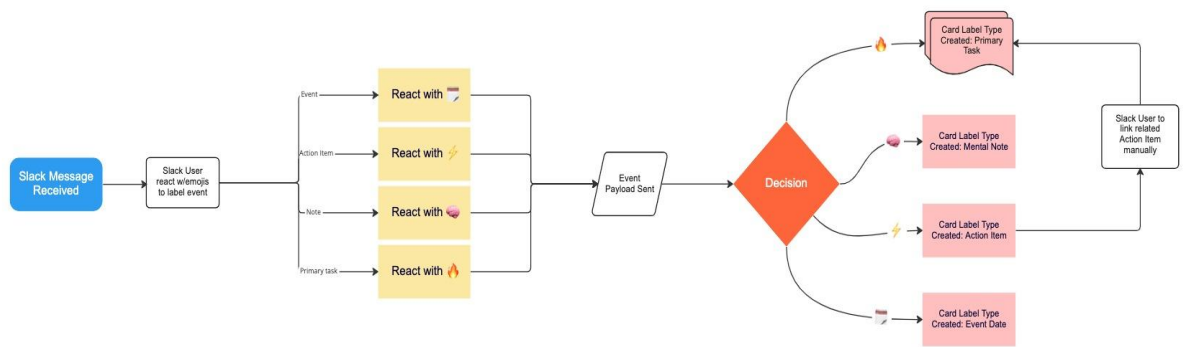
each labeled column	can be created by clicking on the + button under each column
As a user, I want to receive notification on cards labeled with <i>Event Date</i> 3 days before the event date	Slack bot will notify the user via direct message of the Event 3 days before the specified date
As a user, I want to manually link multiple subtask into a main task through a different view	Created cards with <i>Main Task</i> labeled will be filtered through another view called Main Task Overview and subtasks can be linked using the cards ID
As a user, I want to be able to add a status for each card using options such as <i>To Do</i> , <i>In Progress</i> , or <i>Completed</i>	Selected card will be assigned an appropriate status of <i>To Do</i> , <i>In Progress</i> or <i>Completed</i>

Future considerations (Out of Scope)

- Zapier Integration
 - Integrate into Google Calendar to send events to MentalZap
 - Integrate into Slack to automate events being sent to MentalZap

Key Flows

[MentalZap User Flow](#)



miro

Launch Plan (TBD)

Milestones

Tentative TARGET DATE	MILESTONE	DESCRIPTION
3/27/2023	M0	Discovery - task planning, technical design document, team prep/alignment
3/29/2023	M1	Align with ux designer and swe on lofi mockup
4/3/2023	M2	Conduct user interviews using lofi mockup w/ ux designer
4/5/2023	M3	Slack bot alpha w/ swe

Appendix

References:

1. <https://hbr.org/2022/01/why-we-continue-to-rely-on-and-love-to-do-lists>
2. <https://roamresearch.com/>
3. <https://www.notion.so/help/guides/what-is-notion>
4. <https://brainio.com/#/>
5. <https://obsidian.md/>
6. <https://asana.com/?noredirect>
7. <https://workspace.google.com/products/calendar/?hl=en-US>
8. <https://medium.com/dare-to-be-better/roam-research-notion-or-obsidian-8fcd786a3d4>
9. <https://slack.com/>
10. [TechTarget - No Code Solutions](#)
11. <https://www.techtarget.com/searchcontentmanagement/definition/workflow-automation>

Research Synthesis:

Affinity Mapping

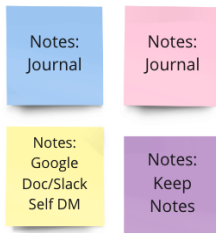
The data points collected during all 4 interviews were collated in order to find a recurring pattern. By categorizing similar data points together, the problem space was clearly defined and recognized. A solution can be derived from the pain points the users are experiencing.

- User #1 - Pink
- User #2 - Yellow
- User #3 - Purple
- User #4 - Blue

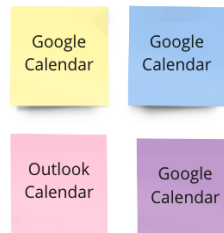
Category 1: **More than 1 system is used to track activities**

Users Use More than 1 Systems to Organize Daily Activities

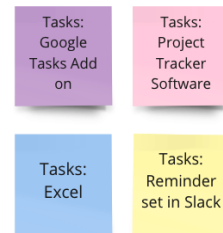
Notes System



Calendar for Meetings/Class



Task System



Category 2: **Basic interface decrease motivation**

Lack of innovative interface decreases motivation

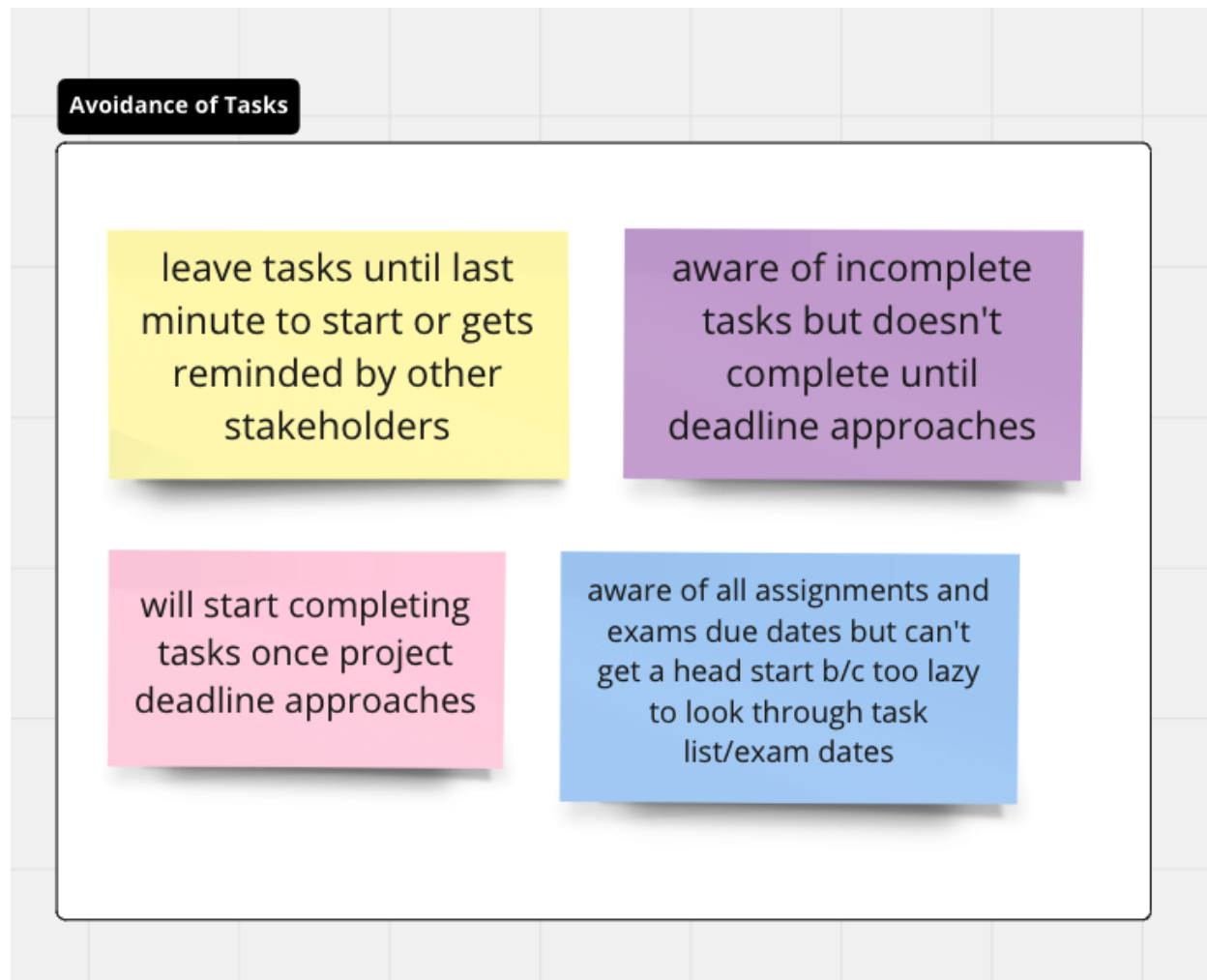
project tracker interface is very confusing, has to pin specific pages in order to see assigned tasks

leave schoolwork till last minute as current systems are very bland and heavily driven by self input

systems were too basic and never felt a sense of urgency to complete tasks

write notes in random places due to not feeling committed to any method

Category 3: **Users avoided tasks until last minute**



Category 4: **Users expressing system appeal drives motivation**

System Appeal increase Motivation

Very important to have colors and seamless functionality to continue usage of system

more productive and motivated when system is user friendly and pop of colors

feels demotivated due to current systems lack of appeal

It is very important to have an appealing system b/c it drives motivation

feels motivated and happy to complete mundane tasks when systems is functional and appealing