

Resources:

<http://www.whencoffeeandkalecompete.com/> - download a free ebook pdf here. The most recent and most comprehensive explanation of the jobs-to-be-done framework and also walks through conducting interviews and analyzing the information you collect.

<https://jtbd.info/> A ton of articles on the subject here

People to follow:

Alan Klement - one of the more recent contributors in the Jobs-to-be-done space. His recent book <http://www.whencoffeeandkalecompete.com/> is great resource for anyone to get started.

Bob Moesta, Chris Spiek and the re-wired group - founders of the re-wired group and masters of the JTBD universe. <http://jobstobedone.org/>

Watch his 7 min “milkshake” video to help understand what JTBD is and how it’s helpful : <https://www.youtube.com/watch?v=Q63PZR7mG70>

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Brief overview for interviewing:

The intent is to gather data about **why** the old way wasn’t working, **why** the new way was so appealing, and **how** the transition happened.

What are some examples of behavior changes to investigate? Anything that you suspect as a special cause of variation should be investigated. Examples of where you can look for them include when someone

- purchases a product
- begins to use a new product
- stops using a product
- suddenly uses a product more or suddenly uses a product less.

Your interview process is all about unpacking why and how. Why did the customer feel the need to change? What happened in their lives that caused them to start looking for a better way to do things? How did that change happen?

When the buyer and user are different people:

What matters to us is:

- do multiple people have varying degrees of influence on the decision?
- what kind of progress is everyone trying to make with a particular product? – regardless if they are using it, buying it or both.

Here are the parts of their switching story and can help you form a timeline building up to the switch:

- **Old habit.** This is the way the customer used to behave or operate.
- **Change-inducing events.** These are anything related to encouraging the customer to change behavior by prompting them to reevaluate a JTBD. Customers rethink their struggle and how they imagine their lives being better. Sometimes, there's only one change-inducing event; sometimes, I find many.
- **Job analysis.** The customer engages in sensemaking. He does his best to understand what his problem is and the progress he is trying to make. He also starts to think about how life might be better once he has the right solution.
- **Solution analysis.** The customer has decided to make a change, investigating options and the trade-offs associated with each solution.
- **Commit to change.** The customer makes the change to try something new. It may or may not stick.
- **Expectation matching.** The customer tried something new. How did it work out? Did the desired effect arrive? Does the customer need more or less of the effect? Has the mental picture changed of how life will be better?
- **Passive evaluation.** The solution is still fairly new to the customer. Maybe he hasn't yet used the product in all anticipated ways. There is no habit regarding the product quite yet, but the customer is becoming comfortable with it.
- **New habit.** If the customer makes it through all the stages, a new habit forms. The customer's brain starts to forget all the sense-making that had to be done up until that point.

JTBD Interview Script

INTRO

Hi [name], thanks for joining us today. As we said in the email, we're looking to talk with you today to learn the story of how you made the transition to using HubSpot.

A few things about this phone call:

- *This should take about 45 mins and if you need to end early for any reason, just let us know.*
- *The format of this call is going to be an interview, we have some questions prepared, but basically we're just going to have a conversation*
- *There's no right or wrong here, we're only looking for **YOUR story in YOUR words** so there's nothing you can say that's wrong*
- *We're just doing some research, we're not here to sell you anything :)*
- *We'll be leaving some time at the end to hear your thoughts and feedback on the product*
- *Lastly, would you mind if we record this call for note-taking purposes?*

BASIC COMPANY INFO

Name	•
Company + 1min pitch	•
Role/Responsibilities	•
Experience level in role/responsibilities	•
Team / Company size	•
Tools using	

WORLD VIEW (How/what they think about something)

Talk to me about what you do/how you think about []	•
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INTERVIEW QUESTIONS

When did you purchase/start using [the current solution]? • Were you part of that purchase decision? If not you, who actually purchased? • <i>Commitment to change</i>	•
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• <i>Roles/Influencers: Buyer, Buyer/Player, Player</i>	
Before you began using [the current solution], what did you use and do before? • Was it just you/your department that was using it the solution(s)? • How well was that working for you/your team? • Were there any workarounds you needed to create? • <i><= Habits/Allegiances of old</i> • <i>Competitors - What did they switch away from?</i>	•
When did you realize you needed something better? • Can you tell us some specific examples/scenarios? • What were doing/trying to do at that time? • How were you feeling at the time? • Was anyone else in the picture or involved? • <i>PUSH => of the situation.</i> • <i>Struggle - What did they struggle with, and in what situations?</i> • <i>Change-inducing events</i> • <i>Job Analysis</i>	•
Once you figured out you needed or wanted a new solution, what alternatives did you consider before using [the solution]? • What was, or looked, good or bad about each of those? • Did you have any anxiety about the purchase? Did you hear something about the product that made you	•

nervous? What was it? Why did it make you nervous? • Did you try anything else before deciding? • How did you go about learning about them? • Anyone else involved in the research? • <i>PULL => of new</i> • <i><= Habits/Allegiances of old</i> • <i>ANXIETY</i> • <i>Job Analysis</i> • <i>Solution Analysis</i> ○ <i>Consideration Set</i> ○ <i>Hiring Criteria</i>	
What was the hardest part about figuring out what solution to use? • Was there any point where you got stuck? • <i>Solution Analysis</i> • <i>Friction points</i>	•
Was there a deadline or something else you needed to be ready for that made you purchase when you did? • Why switch then, and not before or after? • <i>PUSH => of the situation via Change-inducing events</i>	•
How did you imagine your life improving with a better solution? • What did you imagine it helping you do? • How did you imagine feeling with the new solution in place? • What are the consequences of not achieving your outcome • <i>Job Analysis</i>	•

If you hadn't or couldn't switch to using the HubSpot CRM, what would happen? • What would you worry about?	•
Now that you've been using [the solution], what can you do that you couldn't do before? • <i>Expectation matching</i> • <i>Passive evaluation</i>	•
What have you stopped doing or using since using [current solution]? • <i>Competitors for the JTBD</i>	•
What other changes did you have to make to integrate [the solution] into your world? •	•

Analyzing/Synthesizing interview data

Fill out the "Forces" diagram based on you interview

There are forces at play in everyone's lives that are divided into two groups:

- **Forces that promote new choice.** Deciding to find a new way of doing things and use a new product/service to help get there:
 - The **push** of the current situation: What problems in their current lives and solutions are pushing them to seek a new way of doing things?
 - The **pull** of the new solution: What is it about the new solution that pulls, or attracts them to it? What sounds appealing about the new products?
- **Forces that block change** - Deciding to stick with the way things are, and stick with what tools I have today:
 - The **anxieties** around the new solution: What uncertainty around the new solution is causing them to resist adoption? Are there concerns about learning curves and not being able to accomplish their goals with the new solutions?

- The **habits** in place from the present solution: What about the current solution is keeping them from seeking a better way? What things do they really like about the current product? What are they worried about missing?

When interviewing, we want to look for information that helps us understand these forces and also understand how powerful they are. The simple fact is that in order for people to decide to switch to a new product or service, the push of their situation and/or the pull of the new solution need to be more powerful than their current habits and anxieties around switching.

• • PUSH	• • PULL
• • HABITS	• • ANXIETIES

Job Statements and Job Stories

The emphasis on a struggle for progress is why this JTBD model often makes use of phrases such as *give me*, *help me*, *make the*, *take away*, *free me*, or *equip me*. These phrases remind us that success comes from the customers using the product to make progress. It also helps you think about how your product fits in between where they are now and where they want to be.

What were their struggles? - The Job(s) they want to get done What were the different moments/situations they struggled in? - The WHEN of job stories	•
How do they imagine life being better when they have the right solution? - The Job is DONE when...[]	•

JOB STORIES CONNECT CUSTOMERS TO THEIR JTBD

The previous chapter offered a way to describe a JTBD as a major part of the system of progress. The Job Story, on the other hand, is a tool for understanding a specific struggling moment. We can think of Job Stories as microstruggles or microjobs. These are the individual situations that prompt a customer to seek a solution for a JTBD.

Job Stories help in various ways. In a previous case study, Omer Yariv described how Job Stories were helpful to him. For me, they help me create marketing copy, unpack the context around the higher-level JTBD, design features for products, and communicate with other members of a team.

Two helpful formats for a Job Story are:

When _____, I want to _____, so I can _____. When _____, I want _____, so that _____.

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Job Stories

Job Stories answer questions. I find it helpful to think of Job Stories as addressing three questions:

1. The customer goes about life as usual, and then a problem arises. What is the trigger or situation?
2. Customers create mental pictures of effects that the solution should and shouldn't have as they use it. What are these effects?
3. Once customers do find a solution and use it, how has life changed for the better? What can they do now that they couldn't do before?

Where do Job Stories come from? Before designing a feature or new product, you must talk with real people and uncover all the anxieties and contexts that were in play when they used your product or a competitor's product. Then, you write your Job Story.

A JOB STORY IN ACTION

Tor Løvskogen Bollingmo is an experienced innovator, designer, and JTBD practitioner. Here's a Job Story that he wrote:

When I'm presenting my visual design and I'm worried that people will reject its merits, I want something objective to back it up so that people will see and discuss the design with less subjective bias.

When we break down the Job Story, we see that it offers answers for the three important questions:

Q: The customer goes about life as usual, and then a problem arises. What is the trigger or situation?

A: "When I'm presenting my visual design and I'm worried that people will reject its merits..."

Q: Customers create mental pictures of the effects that the solution should and shouldn't have as they use it. What are these effects?

A: "I want something objective to back it up."

Q: Once customers do find a solution and use it, how has life changed for the better? What can they do now that they couldn't do before?

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Job Stories

A: "So that people will see and discuss the design with less subjective bias."

I find that the best way to think about and write Job Stories is to look for answers to the three questions.