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Jobs To Be Done: Email Invite Template & Interview Questions

WHAT YOU'LL FIND IN THIS DOC

- [Email template for inviting customers to interviews](#)
- [25+ questions to ask during a JTBD interview](#)
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EMAIL TEMPLATE FOR INVITING CUSTOMERS TO INTERVIEWS

Hey there {{Name}},

I'm reaching out to a few of our power users to get a stronger sense for how people like you are using {{product}}.

Any chance you'd be up for sharing your experiences using {{product}}? It'd be an easy 30-minute chat. No trick questions :)

If so, feel welcome to name the easiest time here {{insert link to your scheduling tool, if you're using one}}, and I'll give you a call then.

Thank you so much!

{{Your Name}}

{{Your Title}}

{{Your Company}}

25+ QUESTIONS TO ASK IN A JTBD INTERVIEW

Ready to conduct marketing research on your best customers? Time to get on the phone and interview them.

Here's the list of questions Claire uses as the foundation of every marketing research interview -- feel welcome to swipe 'em :)

We'd also recommend checking out this handy guide to [using open-ended vs. close-ended questions](#), to get a sense of what questions to *avoid*.

***Note:** these questions are written for conducting research on B2B products -- but can easily be adapted to fit B2C, as well.

1. What's your job title - and beyond that, your role at your company?
2. What are the most important success metrics you're measured on?
3. How does {{product}} fit into the work you do?
4. Walk me through your most common workflows. Where within them is {{product}} used?
5. With which other products / platforms?
6. So, let's take a step back. What tools were you using to {{do whatever the product does for them}} before {{product}}?
7. If you weren't using any other tools, how did you typically {{get this job done}}?
8. Tell me about that. What worked well, and what didn't?
9. What was going on in your world that compelled you to look for something different?
10. Once you figured out you wanted to make a change, how much research did you do to find the right solution for {{Company}}?
11. What were some of the other tools you tried?
12. Do you recall how you found them?
13. How did {{product}} come into the picture?
14. What made you interested in trying it?
15. Were you the only one on your team looking for something else at the time?
16. What happened when you tried {{product}} that convinced you it was the right choice?
17. What were you skeptical of / concerned about during the trial process?
18. What would have made you say "No, this isn't for us"?
19. Now that you're using {{product}} regularly, what are you able to do that you weren't before?
20. What features could you not live without?
21. How do those features make your life better?

22. Tell me about a time when you got surprising results or found unexpected value.
23. As {{job title / role}}, how has {{product}} changed the way your team works?
24. How has that impacted your team's goals or performance?
25. Can you think of any concrete examples of times this has happened?
26. What's the big problem it solves?

5 KEY QUESTIONS TO ASK IN A JTBD SURVEY

Need a higher *volume* of customer responses?

Consider sending out a **survey** to complement your interview insights. While surveys won't provide the in-depth *detail* you'll get during interviews, you should see a higher *number* of customers complete them. This will help you identify which details from your interviews stand out as *actual patterns* across a larger percentage of customers.

1. Before {{product}}, what tools were you using to {{do the thing your product does}}?
2. When did you realize you needed a tool like ours? What was going on in your world that caused you to start looking for one?
3. How did you find out about {{product}}, and what stood out / made you interested in trying us?
4. When you tried {{product}}, what happened that made you feel certain it was the right choice?
5. Now that you're using {{product}} regularly, what's the #1 thing you're able to do that you weren't before?