

Jobs-to-Be-Done Card Template

Use this to turn real customer interviews into actionable insights your whole team can apply.

No. #. Job Title:	
Job Statement:	
Four Forces of Progress:	
Force	What We Heard
Push	
Pull	
Anxiety	
Habit	
User Quotes:	

1. Job Title: Provide a concise and descriptive name for the job that accurately reflects the customer's progress.

Example: "Prove Marketing ROI to Stakeholders"

2. Job Statement (In Plain English) Fill in the blanks using this format:

"When [situation], I want to [action], so I can [desired outcome]."

Example: "When I'm presenting at board meetings, I want marketing reports that demonstrate clear ROI, so I can defend our spend and keep our budget, without fumbling through messy spreadsheets or facing awkward questions I can't answer."

Bonus points for adding "without". That nails the struggle they're escaping.

3. The Four Forces of Progress: Map them out.

Force	What We Heard
Push	What frustration triggered the switching journey?
Pull	What drew them to our product or solution?

Force	What We Heard
Anxiety	What concerns or fears made them hesitate?
Habit	What made sticking with the status quo feel easier?

4. Struggling Moments (Quotes): Capture 1–3 direct quotes that describe the moment the customer realised something needed to change.

Example: “After the last board meeting where I got grilled on ROI, I knew I couldn’t walk in blind again.”

These are powerful hooks for messaging, product copy, and positioning.

Tips for Using This Card:

- Share it with product, marketing, sales, and customer success teams.
- Use it in campaign briefs, product sprints, or onboarding decks.
- Reference it when writing copy or prioritising features.

Need Help? Want a workshop to map your top Jobs-to-Be-Done and build these insight cards together? [Book a JTBD Discovery Session with Sid.](#)