

Jobs to be Done (JTBD) - User Interview Script

(interview examples: [example 1](#), [example 2](#))

INTERNAL NOTE:

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

When should/can I apply this JTBD interview?

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? How did that change happen?

Here are the parts of their switching story:

- **Old habit.** This is the way the customer used to behave.
- **Change-inducing events.** These are anything related to encouraging the customer to change behavior by prompting him to reevaluate a JTBD. Customers rethink their struggle and how they imagine their lives being better. Sometimes, I find 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.

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INTRODUCTION

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

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 a conversation, we have some questions prepared, but basically we're trying to understand how you came to start using [HubSpot/Specific Feature]*
- *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 always like to leave a few minutes at the end to hear your feedback on our tools, so we'll make sure to get to that after our conversation.***
- *We're just doing some research, we're not here to sell you anything :)*
- *Lastly, would you mind if we record this call for note-taking purposes?*

BASIC INFO

Name	•
Company + "pitch"	•
Role/Responsibilities Who shares those with you, if anyone?	•

Experience level in role	•
Team / Company size	•
Tools using (add to this from conversation, <u>don't just ask outright up front</u>)	•

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> • <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? •	•
Feature requests (this is the catch-all for the inevitable requests.)	•

Forces Diagram

PUSH •	PULL •
HABITS •	ANXIETIES •

TAKEAWAYS FOR JOB STATEMENTS + 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...[]	•