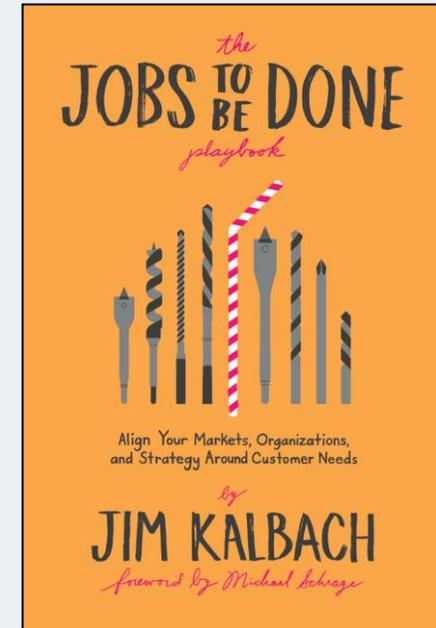
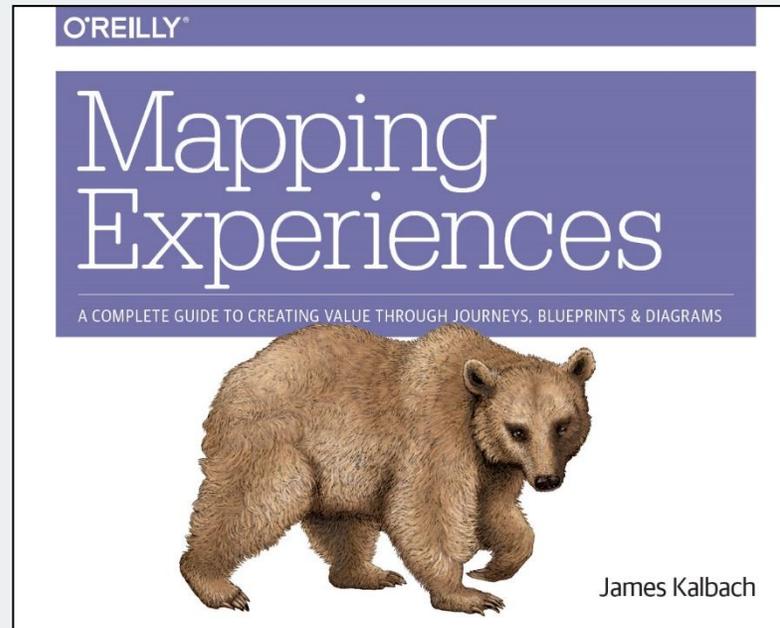
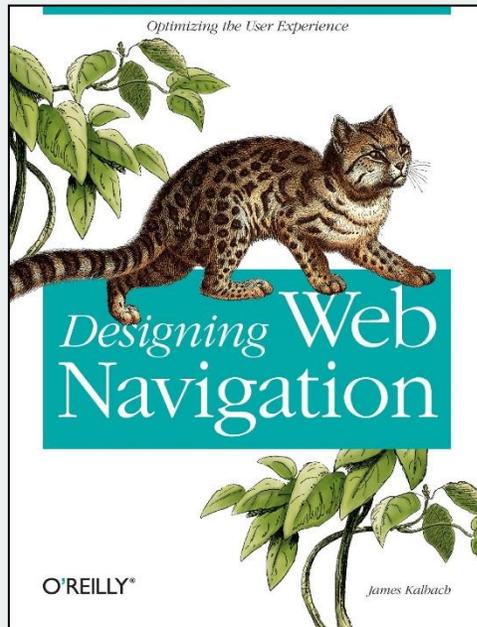


Jobs To Be Done

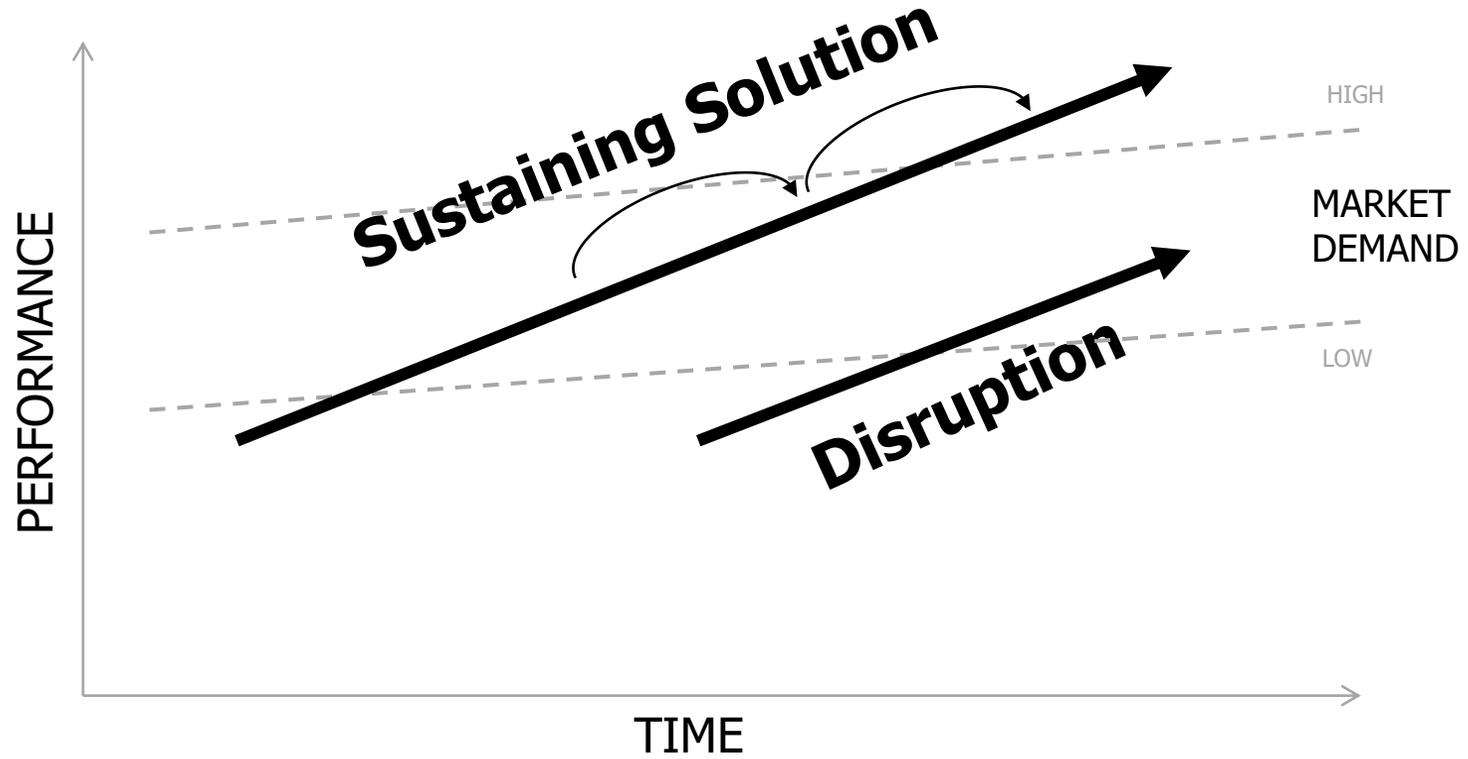
For User Research

@JimKalbach

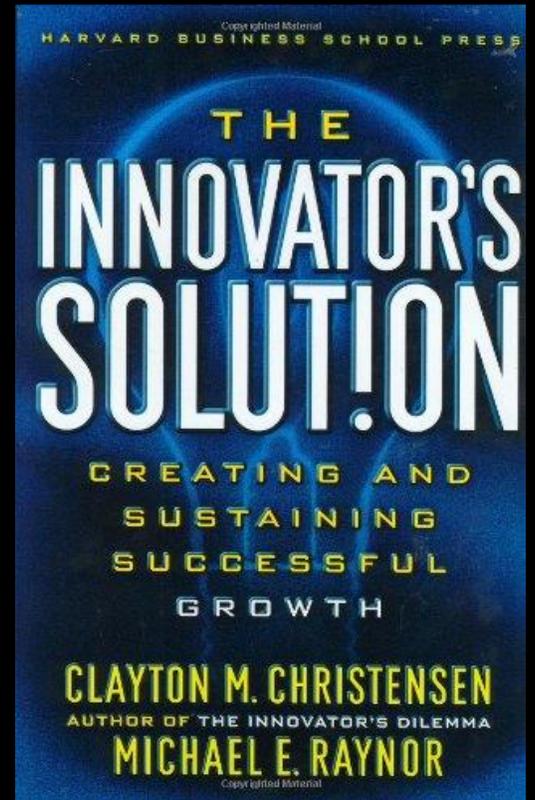
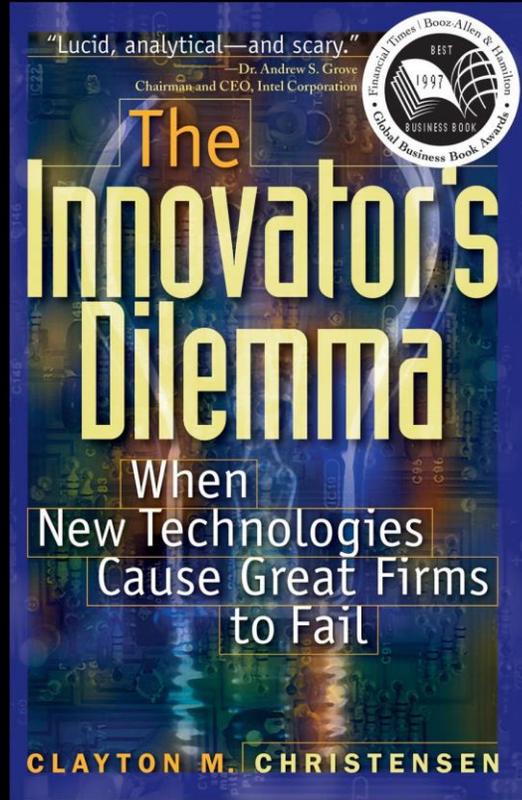
M U R A L



DISRUPTION



Encyclopedias	Wikipedia
Book stores	Amazon
CDs	MP3
Film photography	Digital photography
Premium airlines	Budget airlines
Rental cars	Car sharing
Telephone	VOIP



JOBS TO BE DONE (JTBD)

Process of reaching an objective under given circumstances

- Not demographics
- Not solutions or brands

> Why people “hire“

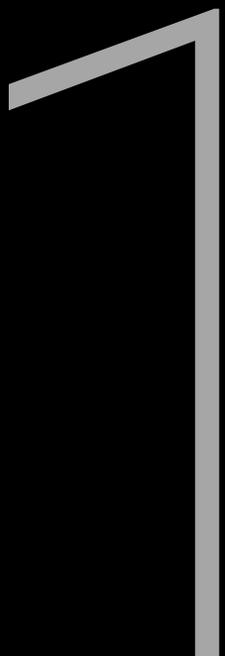


JTBD = technology independent and stable over time



Listen to music

Strategy	Defining company direction based on market needs
Marketing	Development campaigns relevant to customers
Sales	Enhancing discovery of most impactful issues
Product	Prioritizing capabilities around user needs
Customer Success	Planning accounts based on desired outcomes
Support	Resolving deeper customers issues
HR	Organizing teams around JTBD
...	



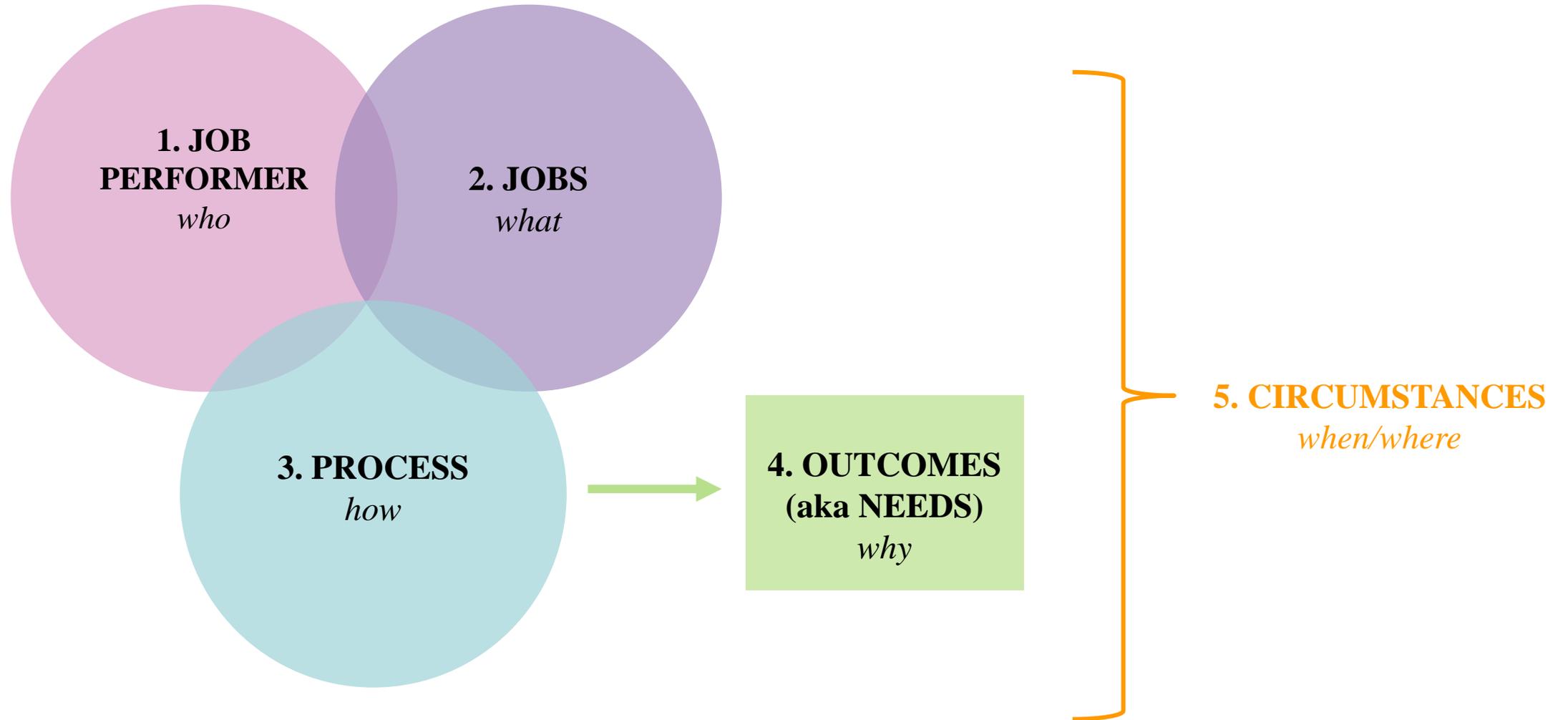
JTBD is not a design method.

**It's a way of seeing your entire
business from the outside-in,
from the customers perspective.**

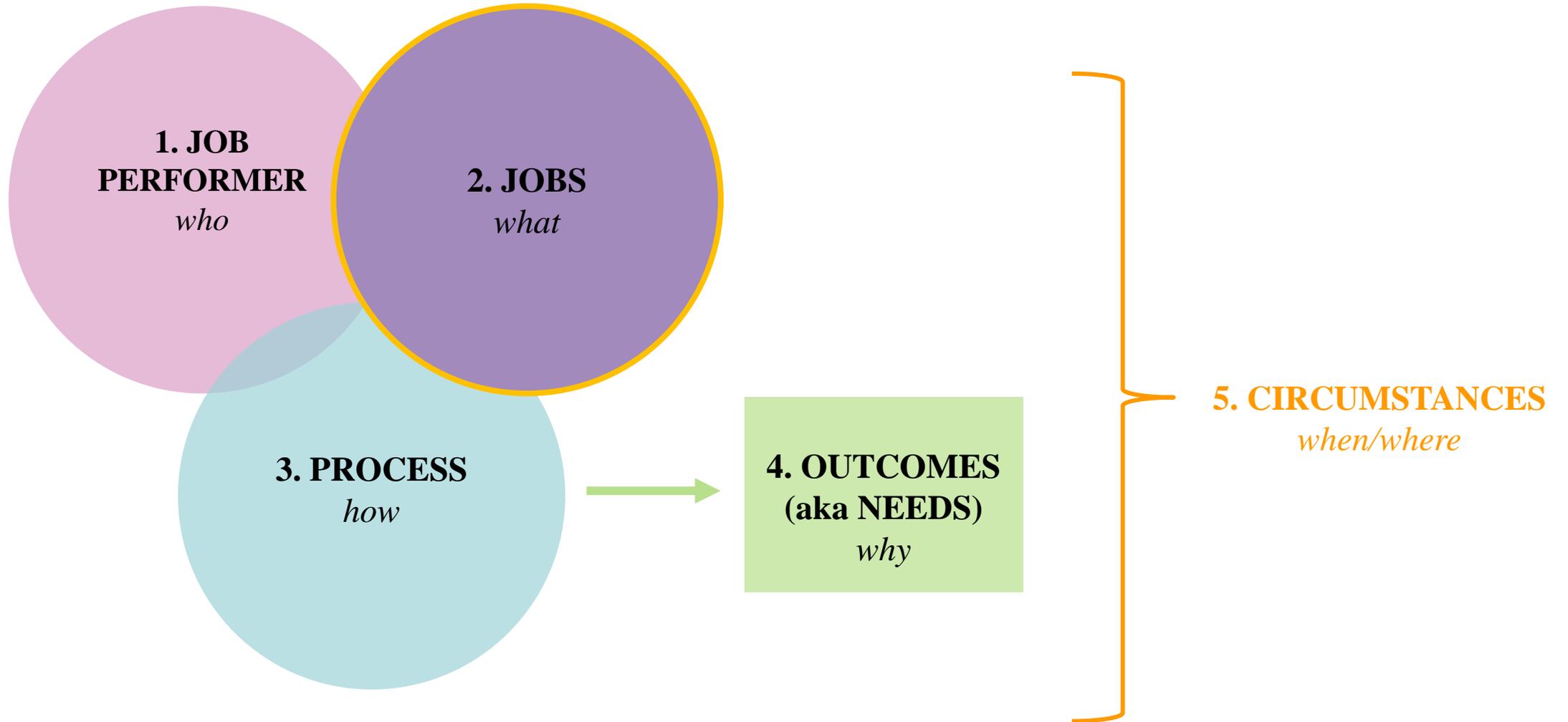
#HumanCenteredBusiness #jtbd

@JimKalbach

ELEMENTS OF JTBD



ELEMENTS OF JTBD



RULES FOR FORMULATING JTBD

DON'Ts

- ✗ Reference **technology, solutions** or **methods**
- ✗ Don't include **outcomes**
- ✗ Don't use **AND** or **OR**

DOs

- ✓ Start with a **verb**
- ✓ Represent **user's perspective**
- ✓ Focus on the **objective**
- ✓ Qualify with **circumstances**

RULES FOR FORMULATING JTBD

INCORRECT	ISSUE	CORRECT
1. Search by keyword for documents in the database	Includes specific methods and technology	
2. Find the cheapest airfares quickly	Includes outcomes (cheap and quick)	
3. I need to research and plan a vacation that my partner and children will enjoy	Doesn't begin with a verb Includes compound topics	

RULES FOR FORMULATING JTBD

INCORRECT	ISSUE	CORRECT
1. Search by keyword for documents in the database	Includes specific methods and technology	Retrieve content online
2. Find the cheapest airfares quickly	Includes outcomes (cheap and quick)	
3. I need to research and plan a vacation that my partner and children will enjoy	Doesn't begin with a verb Includes compound topics	

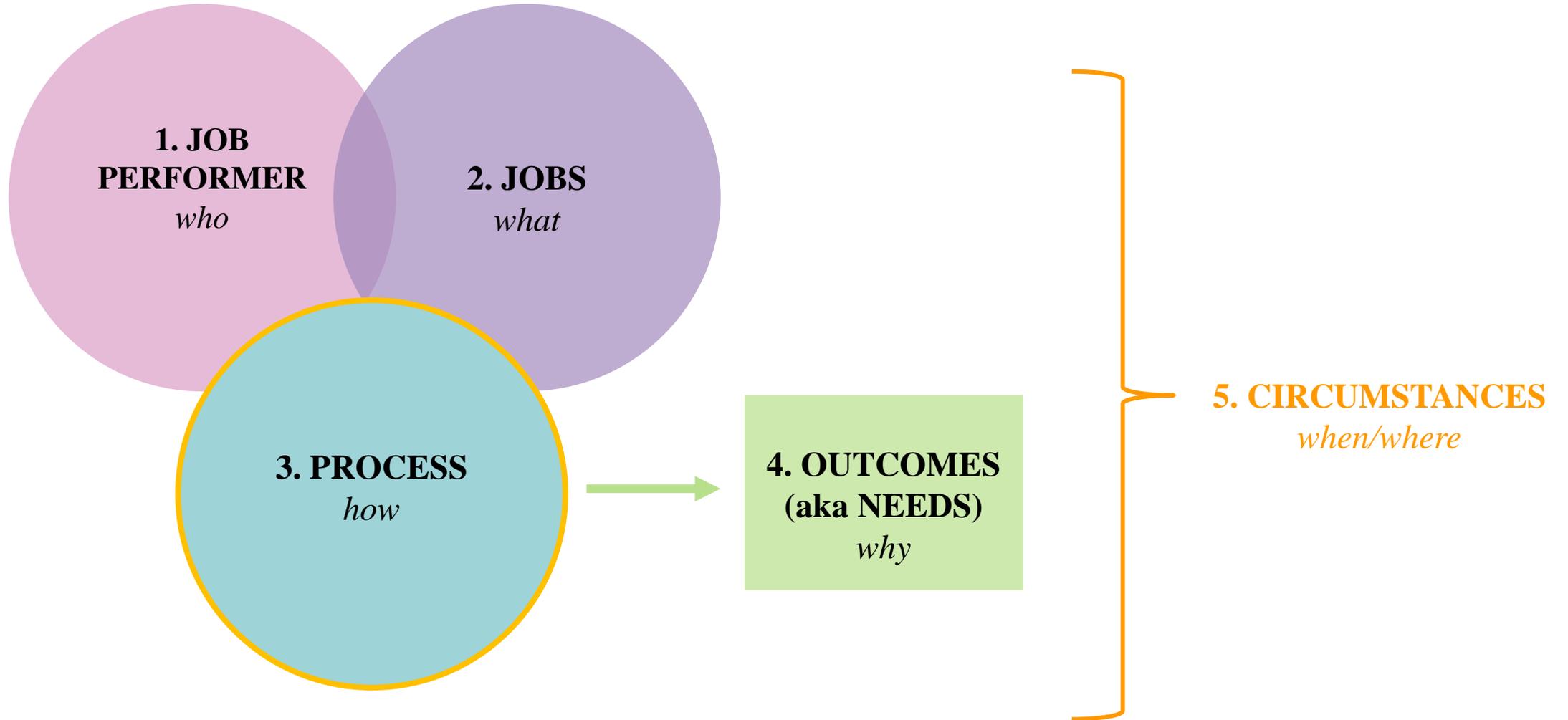
RULES FOR FORMULATING JTBD

INCORRECT	ISSUE	CORRECT
1. Search by keyword for documents in the database	Includes specific methods and technology	Retrieve content online
2. Find the cheapest airfares quickly	Includes outcomes (cheap and quick)	Find airfares
3. I need to research and plan a vacation that my partner and children will enjoy	Doesn't begin with a verb Includes compound topics	

RULES FOR FORMULATING JTBD

INCORRECT	ISSUE	CORRECT
1. Search by keyword for documents in the database	Includes specific methods and technology	Retrieve content online
2. Find the cheapest airfares quickly	Includes outcomes (cheap and quick)	Find airfares
3. I need to research and plan a vacation that my partner and children will enjoy	Doesn't begin with a verb Includes compound topics	Plan family vacation

ELEMENTS OF JTBD



Why did the chicken cross the road?

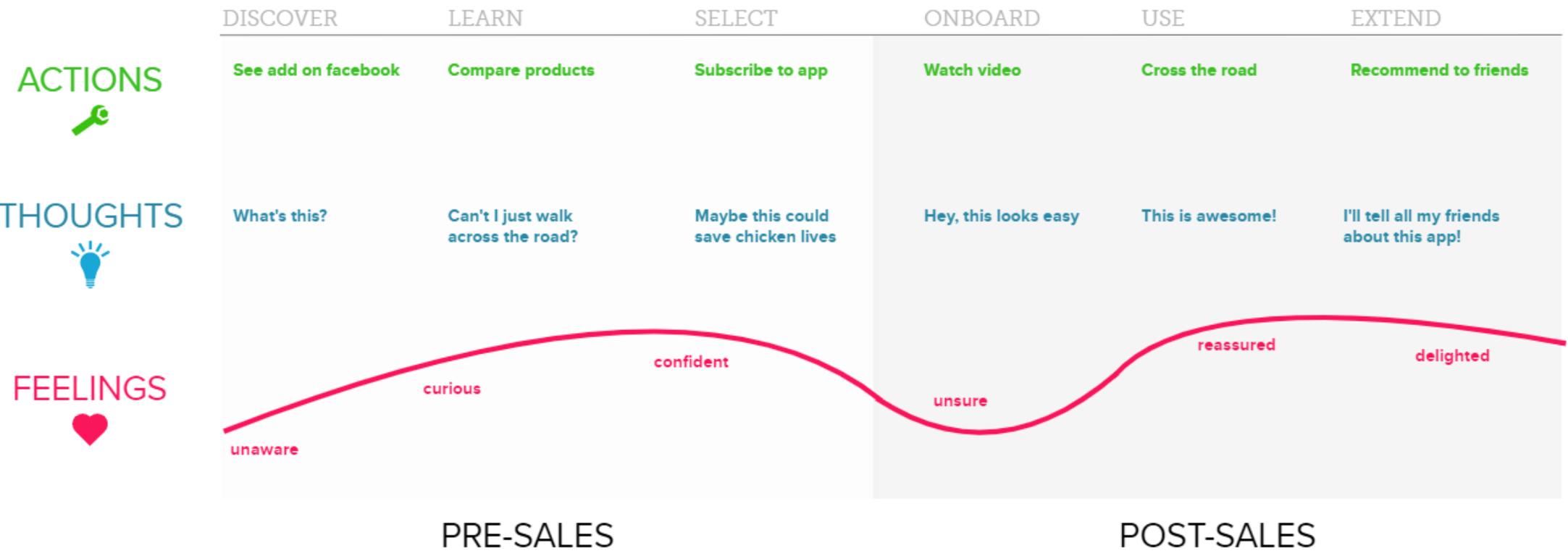
CUSTOMER JOURNEY MAP



Chucky the Chicken
- 1 year old
- Lives on farm in Montana
- Spends most of day eating corn

ACME
RoadCrossr

 Become a better chicken on the other side of the road, safely and quickly



SERVICE BLUEPRINT



Chucky the Chicken
 - Tech savvy user
 - Lives on farm in rural area
 - Concerned about safety

ACME
RoadCrossr

📱 Become a better chicken on the other side of the road, safely and quickly

PHYSICAL EVIDENCE

Signal indicator on mobile Log in function Location selector on map feature Traffic timer feature Oncoming traffic In-app alert

ACTIONS

Check signal on mobile device > Open app and log in > Get suggestion where to cross > Time traffic when to cross > Start crossing road > Get alert to changes in traffic > Reach the other side

FRONT STAGE

Display user profile Show map, weather conditions and recommendation Start timer count down Sound alert: audio beep, vibration and flash screen Display congratulations screen

BACK STAGE

Check signal strength and GPS allowed Authenticate, remember credentials Look up ideal conditions for crossing Monitor traffic and crossing speed

SUPPORT

GPS location systems 3rd party authentication Map service, Weather service Real-time traffic services GPS location systems

JOB MAP



JOB PERFORMER



Cross a thoroughfare

MAIN JOB

DEFINE

Decide to cross

**Determine which
thoroughfare to
cross**

LOCATE

**Select a point
to cross**

PREPARE

**Determine
when to cross**

Assess traffic

**Wait for
absence of
traffic**

PREPARE

**Confirm
absence traffic**

EXECUTE

**Cross
thoroughfare**

MONITOR

**Observe changes
in traffic while
crossing**

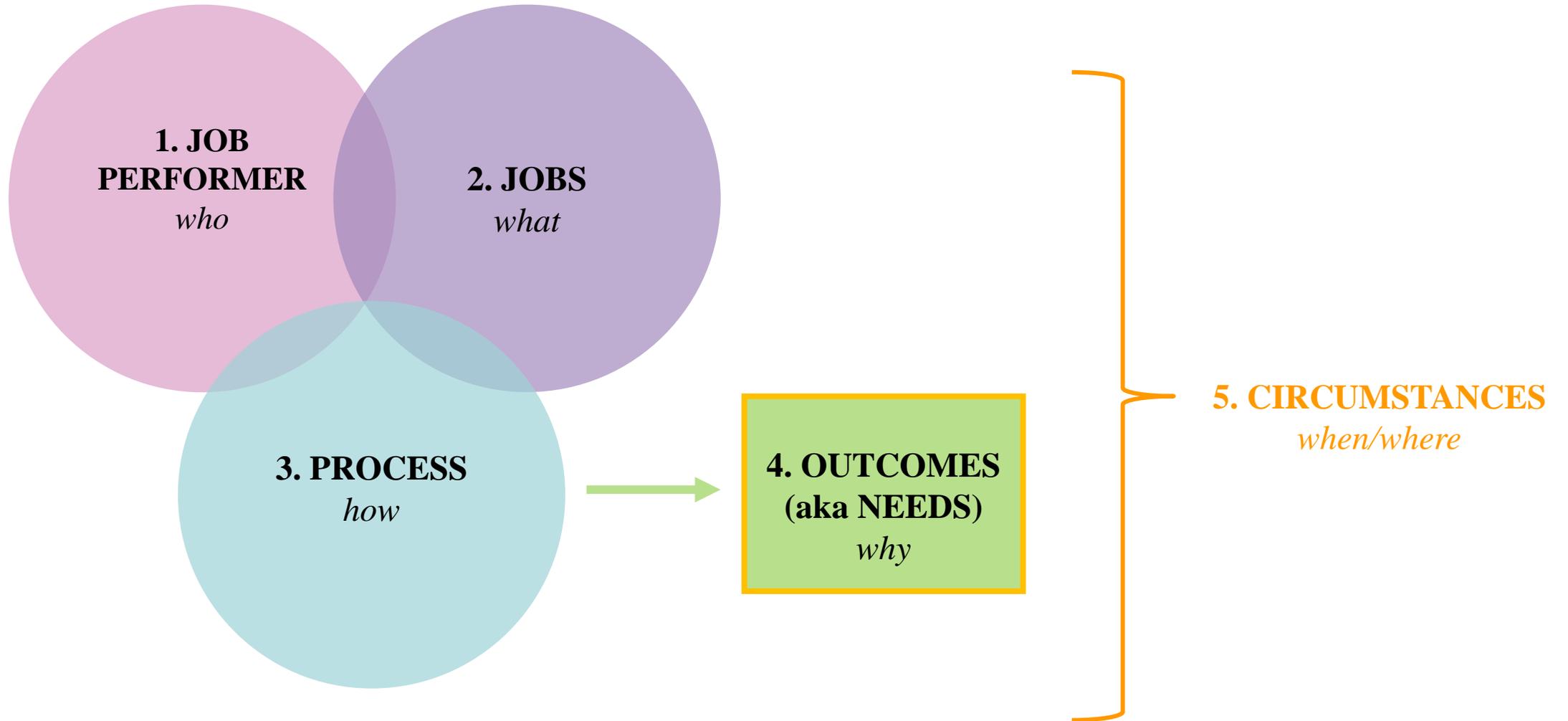
MODIFY

**Adjust speed (if
needed)**

CONCLUDE

**Reach other
side**

ELEMENTS OF JTBD



DESIRED OUTCOME STATEMENTS

Minimize the time it takes to transcribe workshop content

↑
DIRECTION

↑
UNIT

QUALIFIER

Minimize
Reduce
Lower

Time
Ability
Effort
Chances
Likelihood

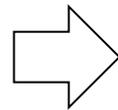
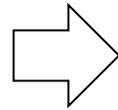
Maximize
Increase
Raise

CUSTOMER OUTCOME STATEMENTS

Pain

“Remote teams aren’t on the same page and don’t know what’s going on in their projects.”

“Traveling to the same location for workshops takes a lot of energy and time.”



Outcome

Increase transparency of project status across remote teams

Reduce the time required to deliver workshops

As measured by...

The number of remote collaboration sessions per quarter with 2 or people on the same team

Total time for in-person workshops in a quarter compared to time for remote workshops

EXAMPLE: GoToWebinar

1. Discover Job Process & Outcomes (Interviews)
2. Validate Outcomes



KATHRYN PAPADOPOULOS

NEED STATEMENT	P1	P2	P3	P4	P5	P6
Plan						
Increase ability to demonstrate value of webinar back to the organization				1		
Maximize reach to the widest audience			1		1	1
Maximize reach to qualified leads	1		1	1	1	
Maximize the number of people that attend			1	1	-1	1
Increase the likelihood that a high number of qualified leads attend	1		1		1	1
Maximize the information collected about attendees	1		1	-1	1	1
Maximize professional appearance	1			1	1	1
Reduce chance of in-session errors	1				1	1
Increase the ease in coordinating with other contributors		1	1	1		1
Increase the customization of communications with attendees		1	1		1	
Maximize personalization of communication with attendees	1	1		1	1	
Run						
Increase the likelihood of a smooth start	1		1	1	1	1
Increase the ability to troubleshoot technical issues	1		1	1	1	1
Increase the ease with which attendees can join the session			1		1	1
Reduce the chance of things going wrong		1	1	1	1	1
Maximize utilization of time while not "onstage"	1					
Increase the ability to communicate behind-the-scenes			1	1		1
Increase the likelihood that attendees have a positive experience	1	1	1	1	1	1
Maximize audience engagement	1	1		1	1	1
Reduce the likelihood that attendees get distracted or lost		1				1
Increase attendee feeling of participation			1	1	1	1
Maximize overall attendee satisfaction		1	1	1	1	1
Increase attendees' understanding of topic		1	1	1	1	1
Increase understanding of problems attendees might be having		1	1		1	1

EXAMPLE: GoToWebinar

3. Prioritize Outcomes (Survey)

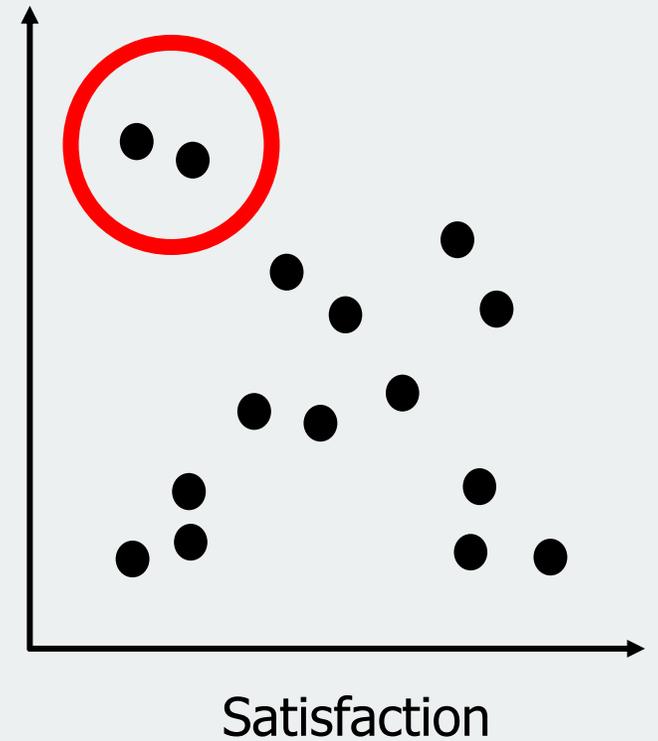
Example question:

Maximize audience engagement during the webinar.

How important is this to you? 1 2 3 4 5 6 7 8 9 10

How well is this currently being satisfied? 1 2 3 4 5 6 7 8 9 10

Importance



See Tony Ulwick's "Outcome-Driven Innovation" for more

EXAMPLE: GoToWebinar

4. Make It Actionable

- Informed product roadmap
- Guided marketing language
- Contributed to pricing

- Reduce the chance of in-session errors.
- Increase the likelihood of a smooth start.
- Increase the ease with which attendees can join the session.
- Increase the ability to troubleshoot technical issues.
- Maximize the number of people who attend.

“The JTBD research and findings were a big help in shaping the offering. It gave us confidence that we were relevant to our customers’ needs and provided concrete guidance.”

– OFFERING LEAD, G2W

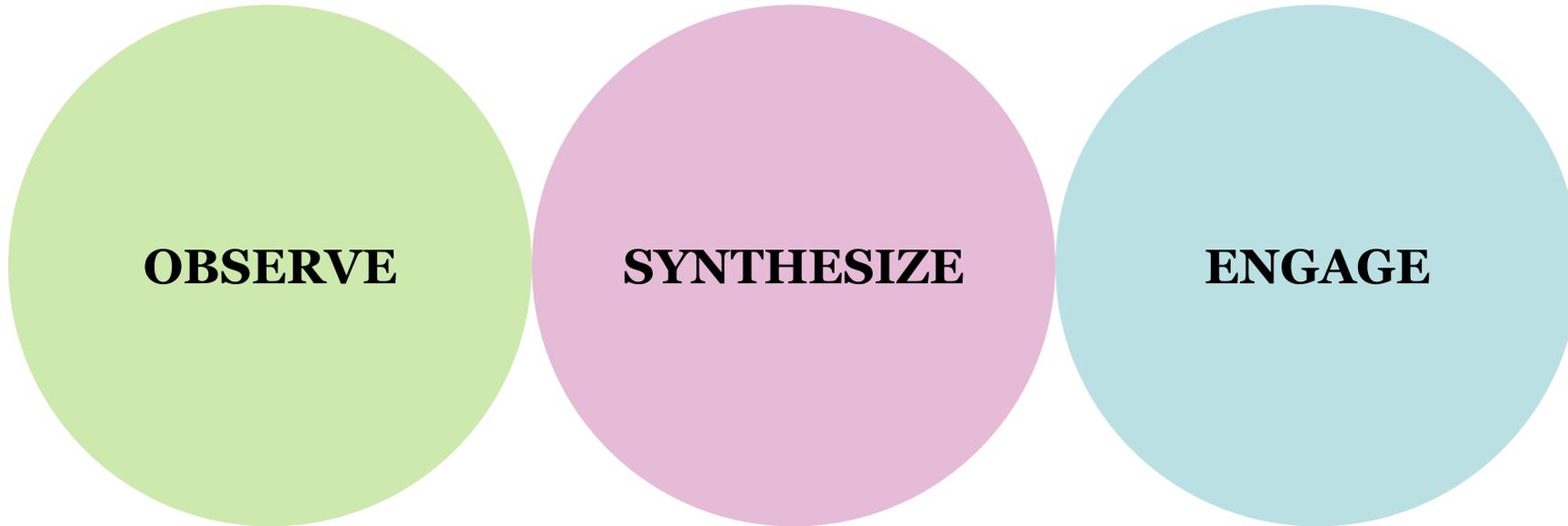
2

**JTBD techniques offer a structured,
common language for understanding
market needs across teams
and departmental lines.**

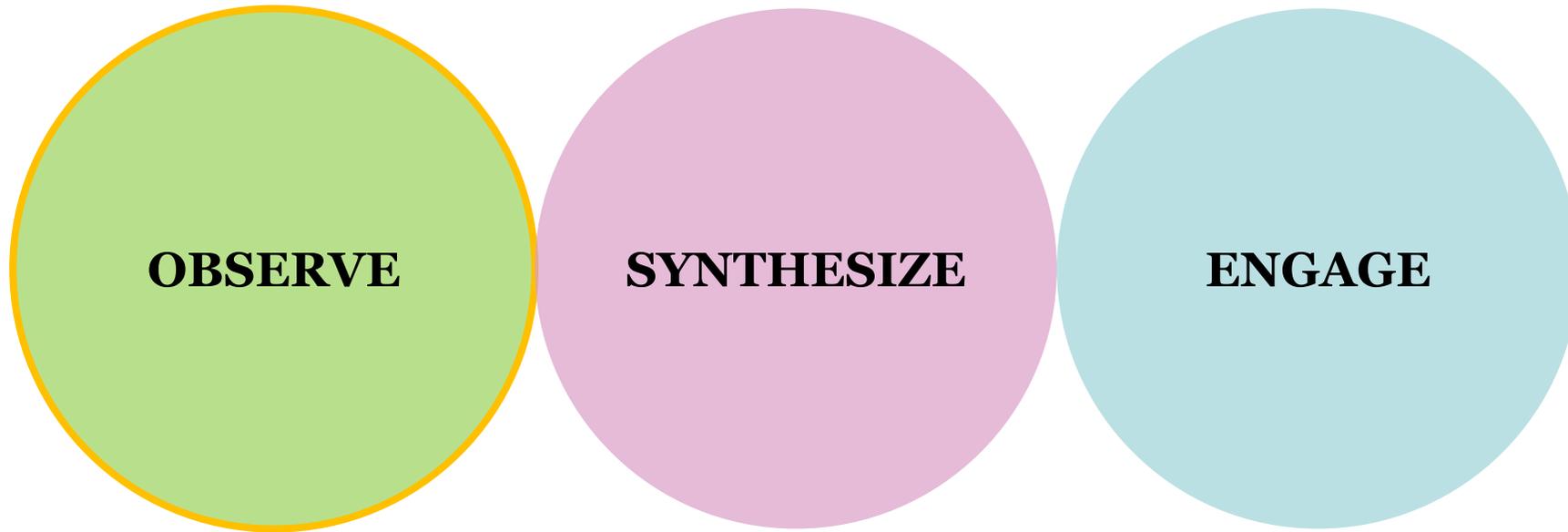
#jobsthinking #collaboration #outcomes

@JimKalbach

USER RESEARCH



USER RESEARCH



OBSERVE: JOBS INTERVIEWS

Qualitative interviews

Open questioning focused on process

- How do you get started?
- What's the next step? After that?

Uncover needs

- Pain points, workarounds
- Feelings while executing job

Critical incident technique

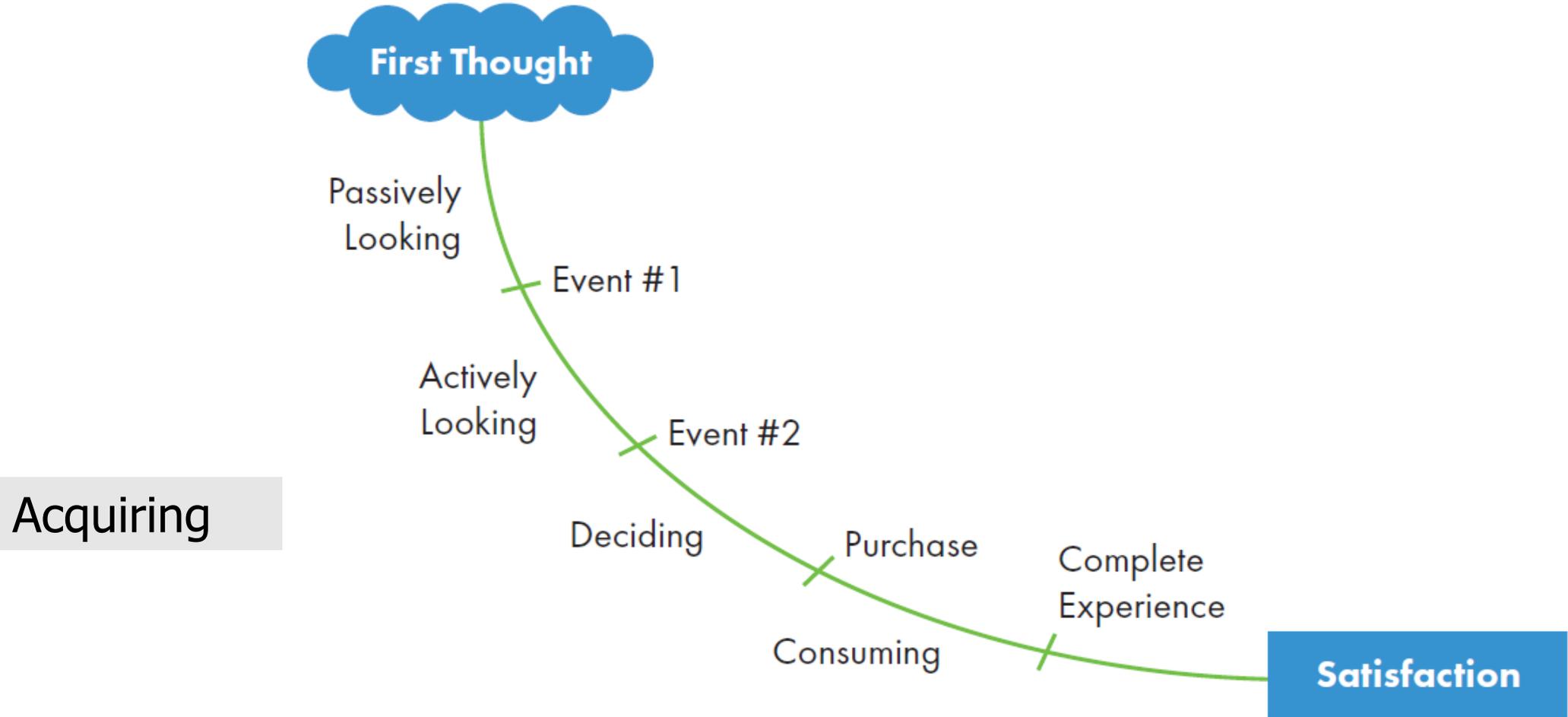


OBSERVE: JOBS INTERVIEWS

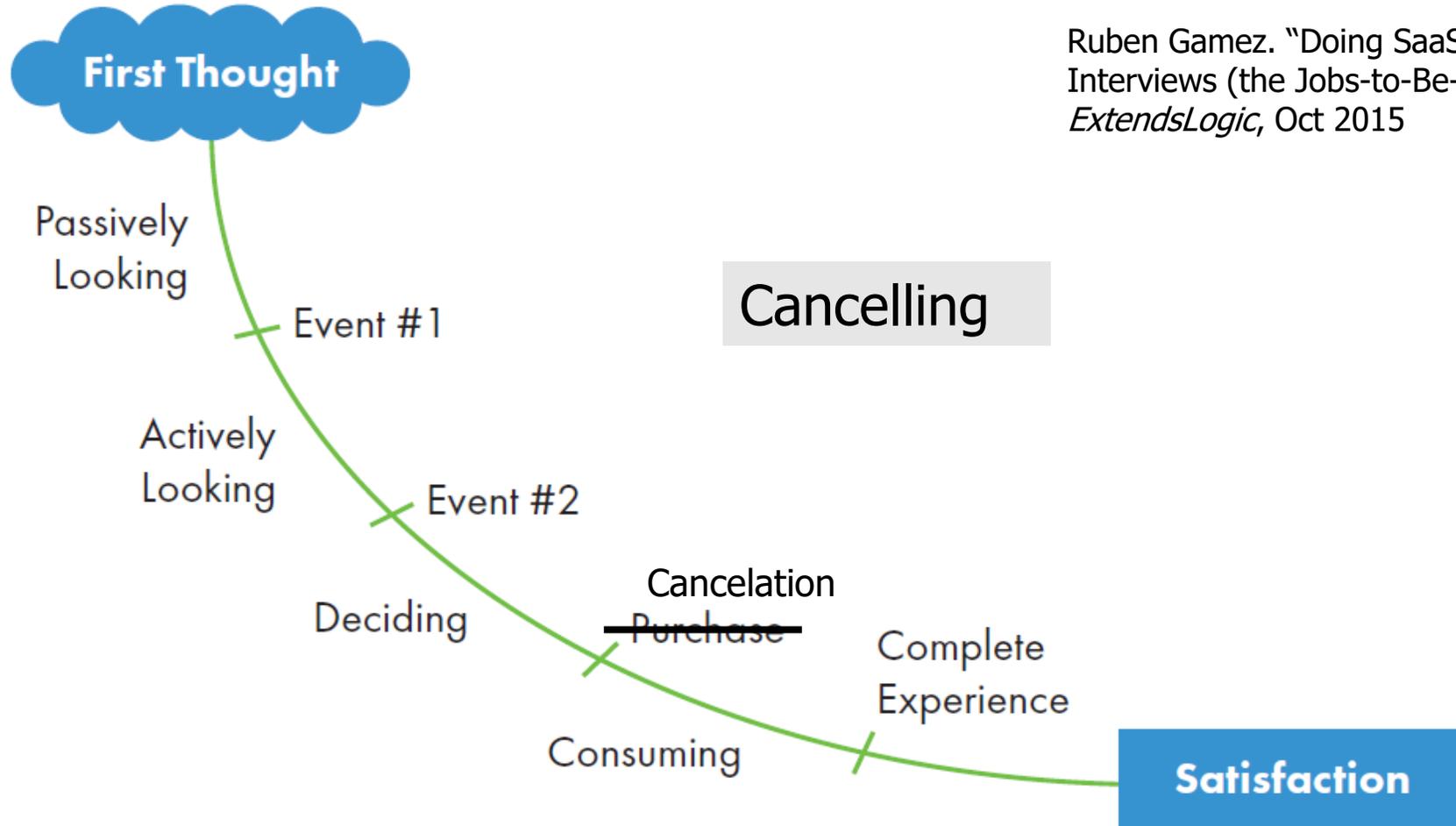
Critical Incident Technique

1. Specific past incident that was particularly good or bad
2. What happened? Describe the steps and flow
3. What did you expect? What should have happened?

OBSERVE: SWITCH

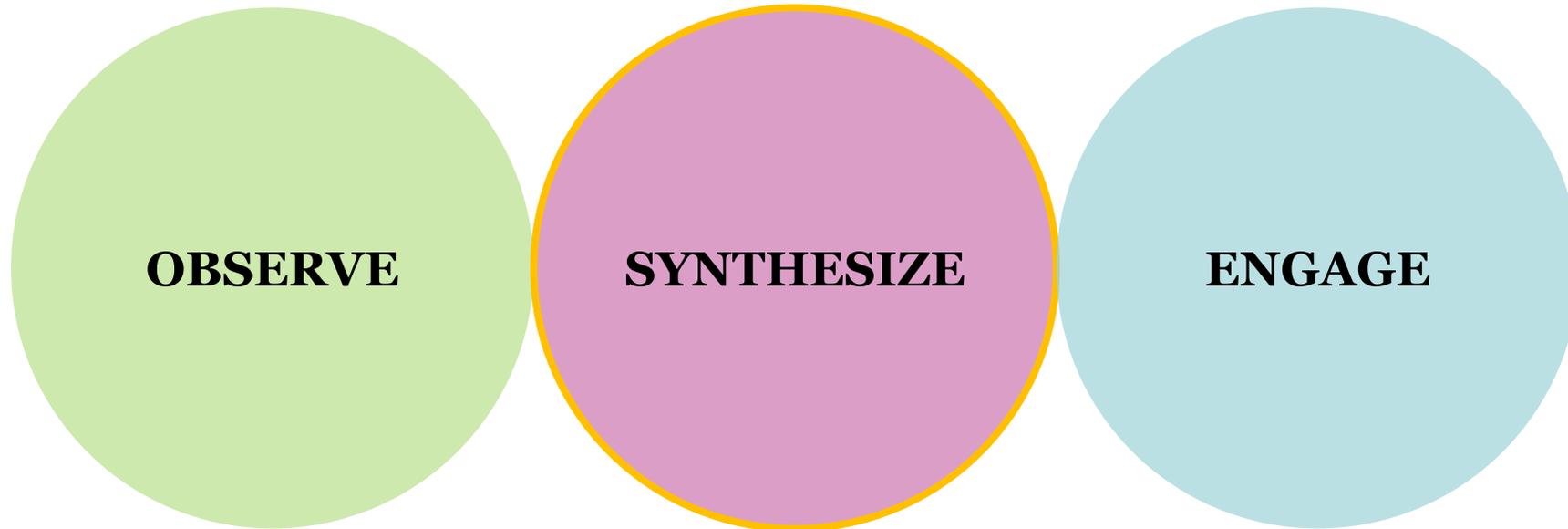


OBSERVE: SWITCH

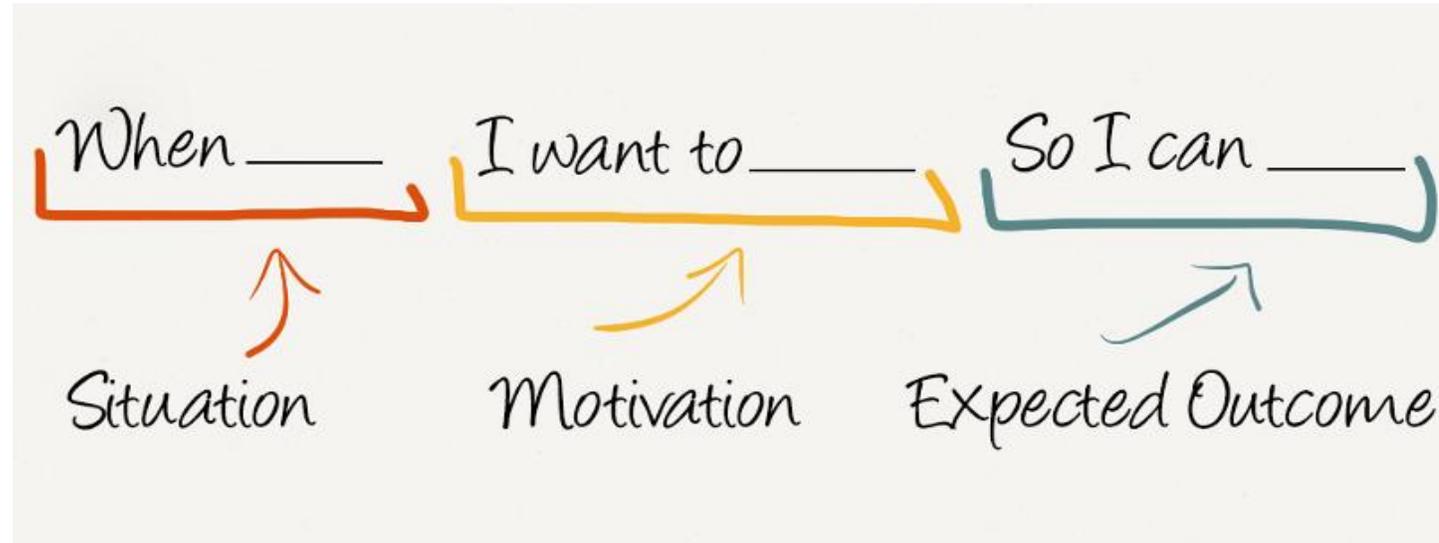


Ruben Gamez. "Doing SaaS Cancellation Interviews (the Jobs-to-Be-Done Way)"
ExtendsLogic, Oct 2015

USER RESEARCH



SYNTHESIZE: JOB STORIES



Step +
Circumstances

Product/Service
Requirement

Desired
Outcome

EXAMPLE: JOB STORIES

MAIN JOB

Run a Workshop

JOB PERFORMER

Workshop Facilitator

JOB STORY

When I'm **setting up** workshops under **time pressure**,

I want to be sure that content is **up-to-date**,

So that we can build on past experiences in order to improve the **speed** and **quality** of our delivery and facilitation.

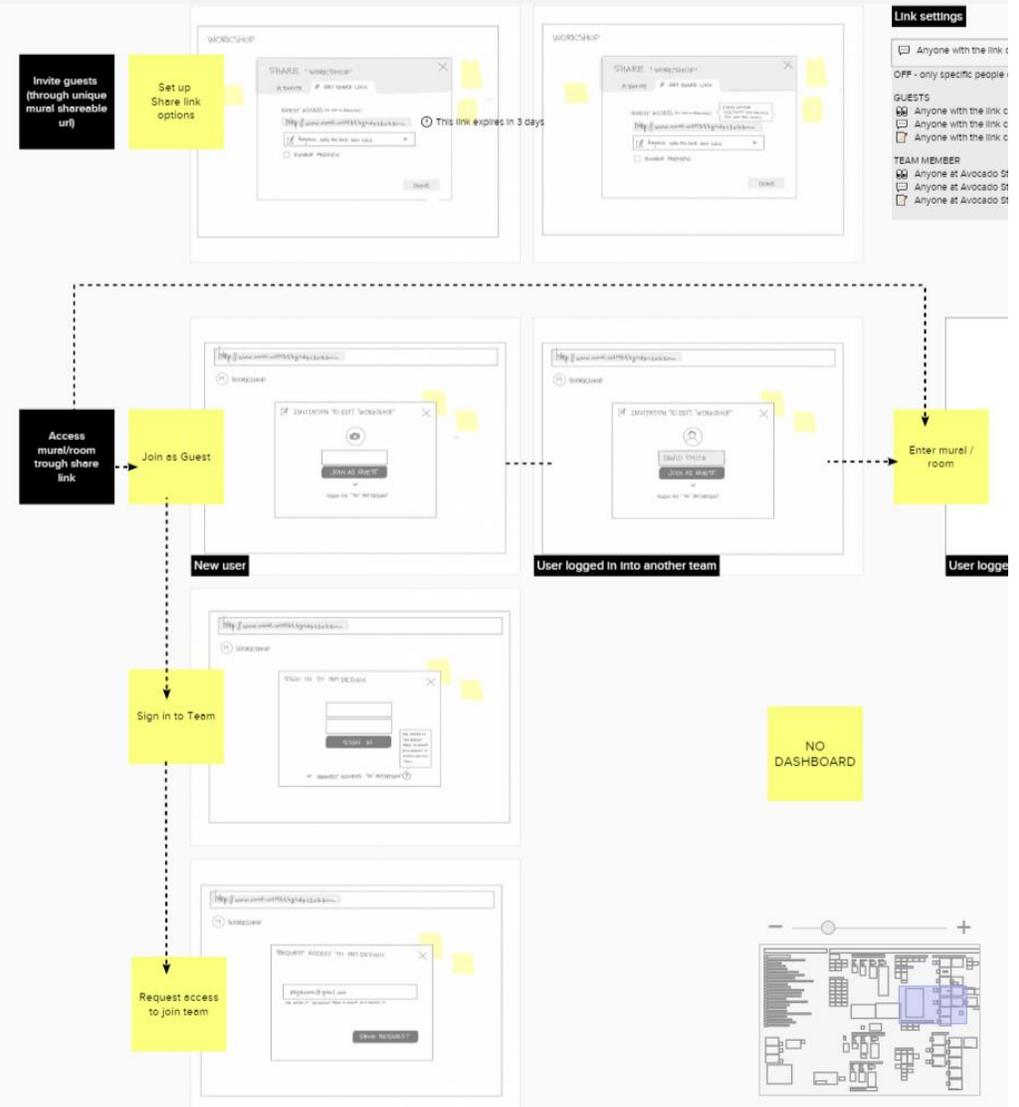
EXAMPLE: JOB STORIES

JOBS TO BE DONE

When	I want	So I can
When I need to drive consensus around design decisions my team makes along the creative process	I want to be able to include a stakeholder easily (without asking him/her to create an account or pay for it)	So I can easily engage him/her, obtain input/feedback and move forward
When I need to make a demo of my methods to a client	I want to be able to include my client in an activity without friction	So I can engage her by focusing on the value
When I finish a session with a lot of people	I don't want them in my account	So I don't need to pay for them
When I need a big amount of people to add contributions to a session	I want to have them easily connect and allow them to add content quickly	So that there is no friction and I can take out the best of the session
When I plan workshops with different people pretty frequently	I want to have a flexible plan that allows to invite people to collaborate easily	So that I can forget about extra administration tasks after each workshop
When I'm about to start a brainstorming with my team	I want to be able to invite everyone quickly	So that everyone can start adding ideas right away

KEY CHARACTERISTICS

- Roles for simplifying access management AND Billing
- GUESTS (or RESTRICTED) USERS have a limited access
- NON-VERIFIED USERS can access and edit to onboard users quickly



Link settings

- Anyone with the link can access
- OFF - only specific people

GUESTS

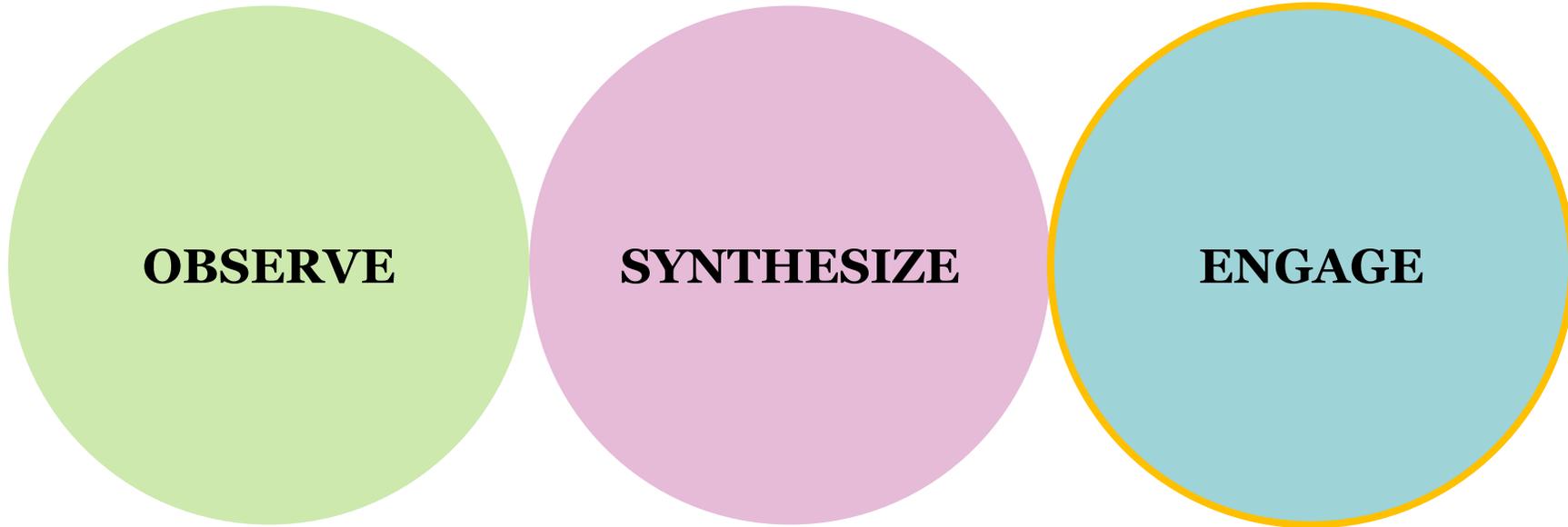
- Anyone with the link can access
- Anyone with the link can access
- Anyone with the link can access

TEAM MEMBER

- Anyone at Avocado St
- Anyone at Avocado St
- Anyone at Avocado St

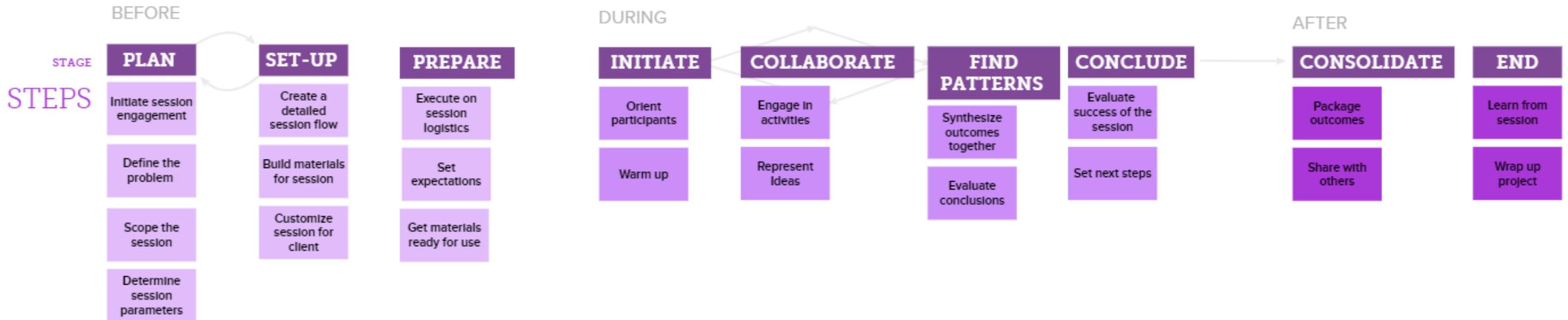


USER RESEARCH



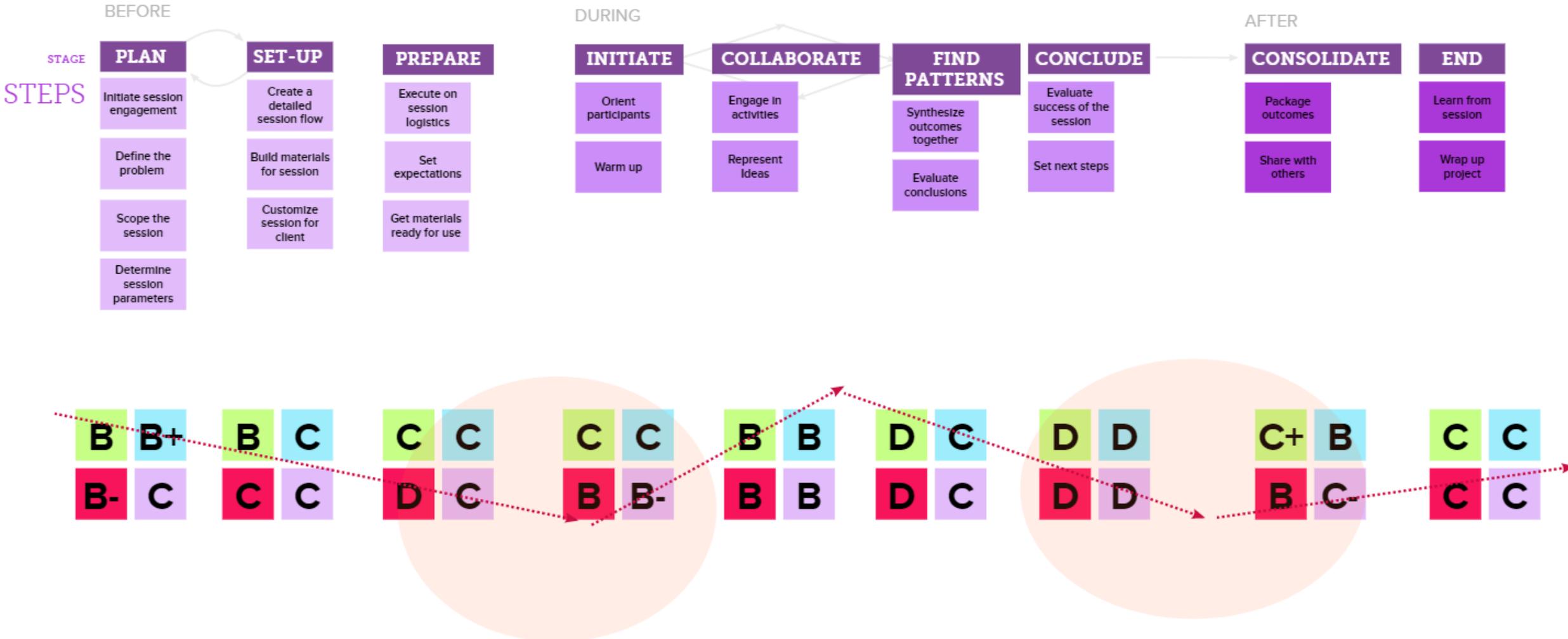
EXAMPLE JOB MAP

Conduct a working session with a client

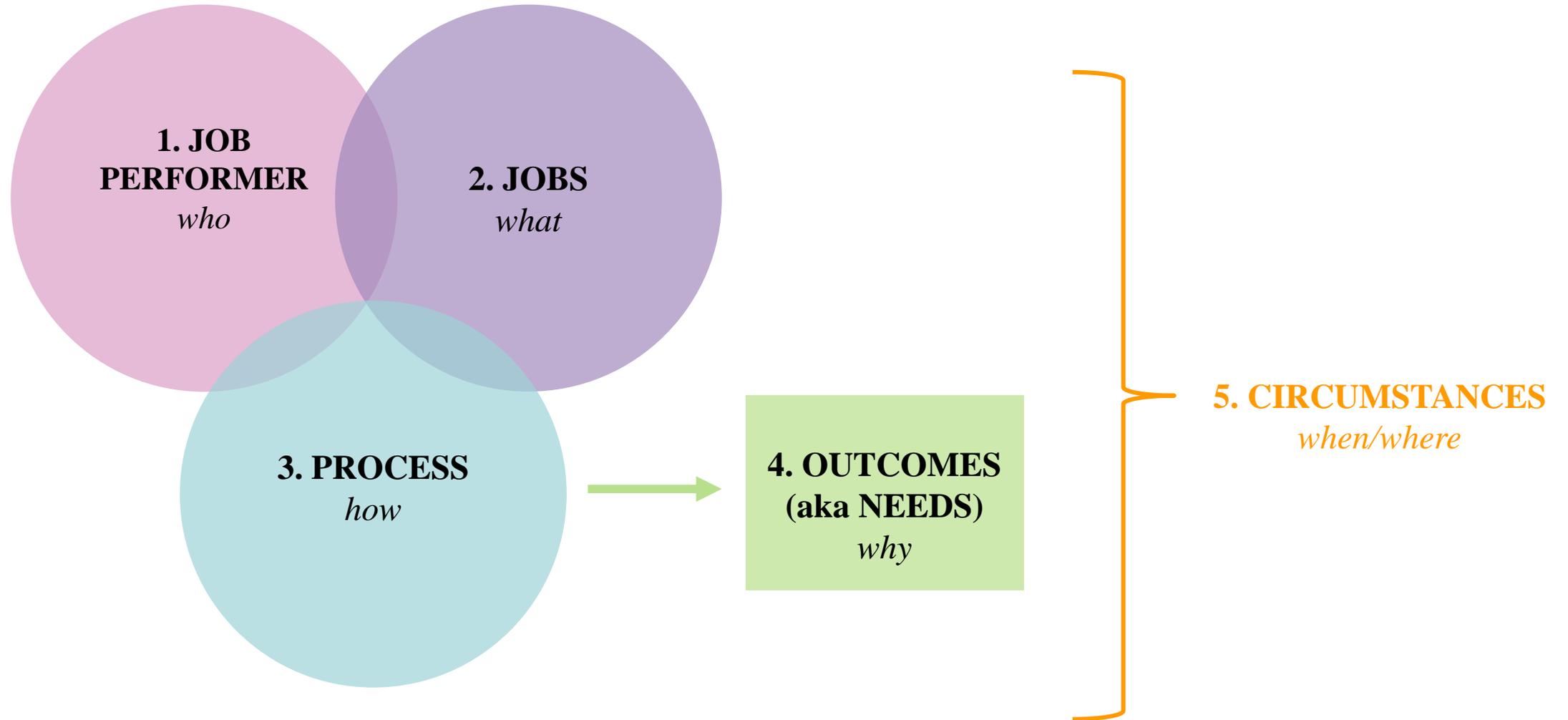


EXAMPLE JOB MAP

Conduct a working session with a client



ELEMENTS OF JTBD



3

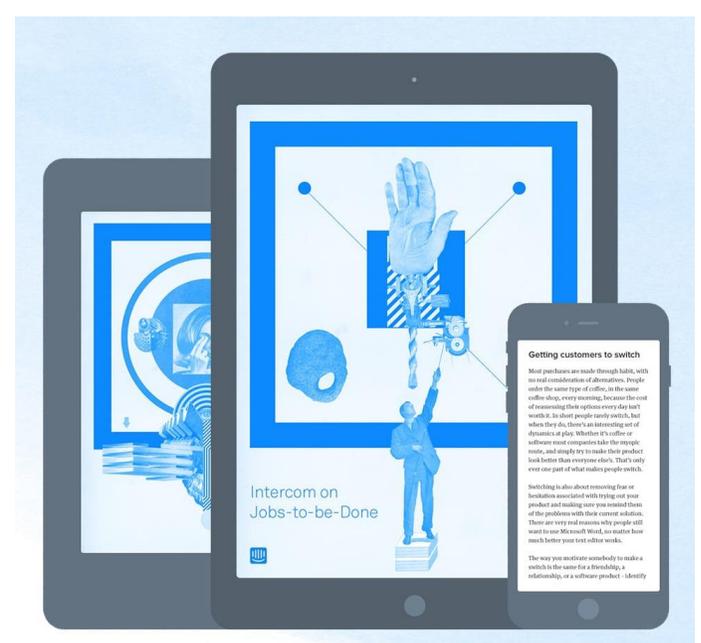
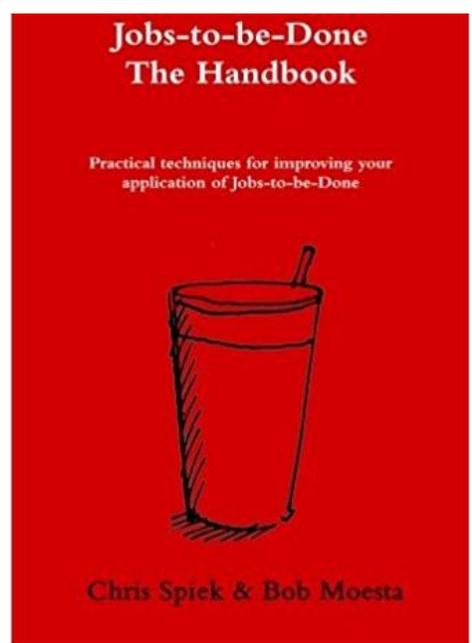
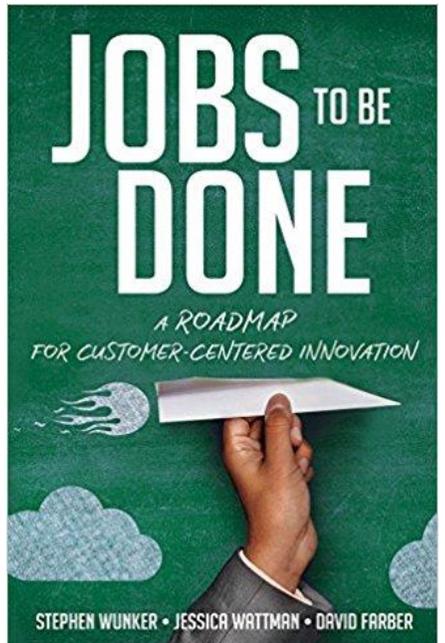
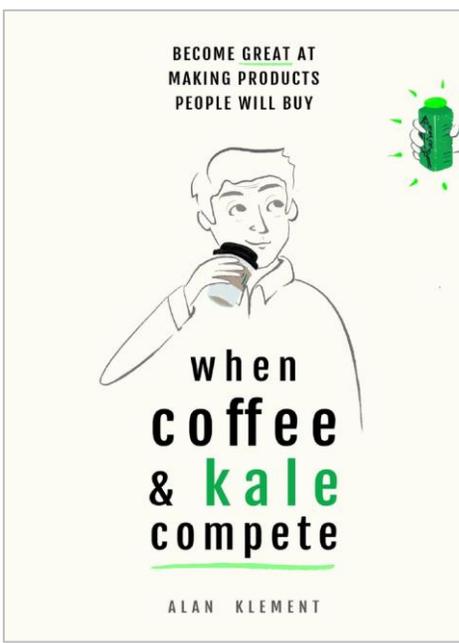
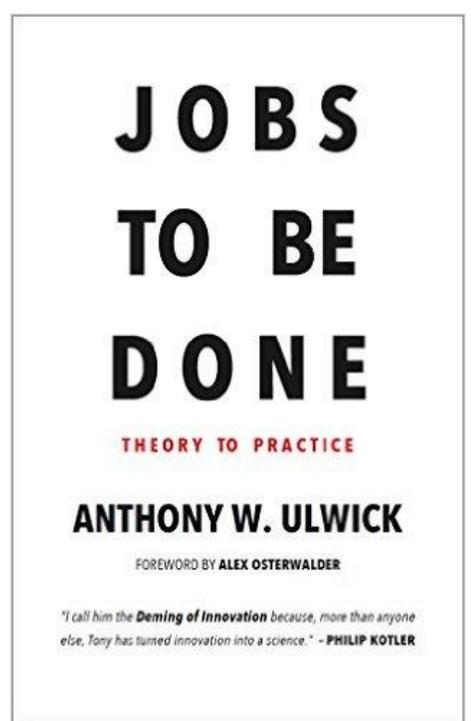
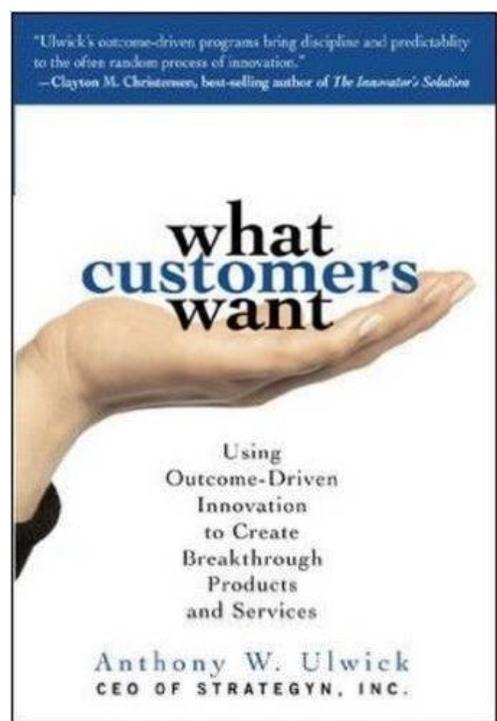
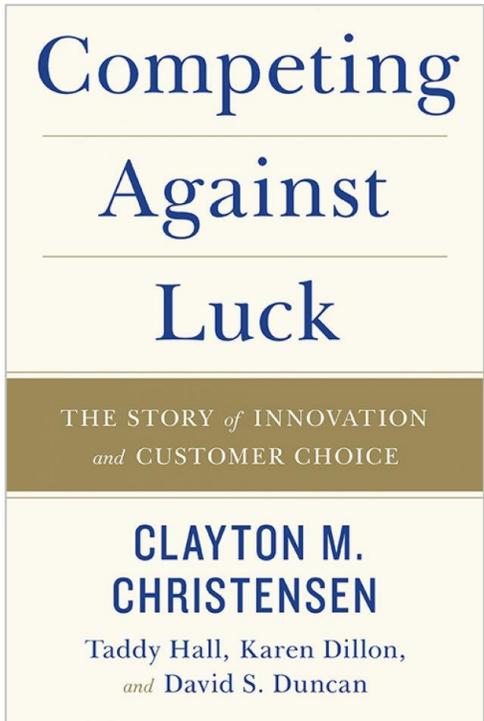
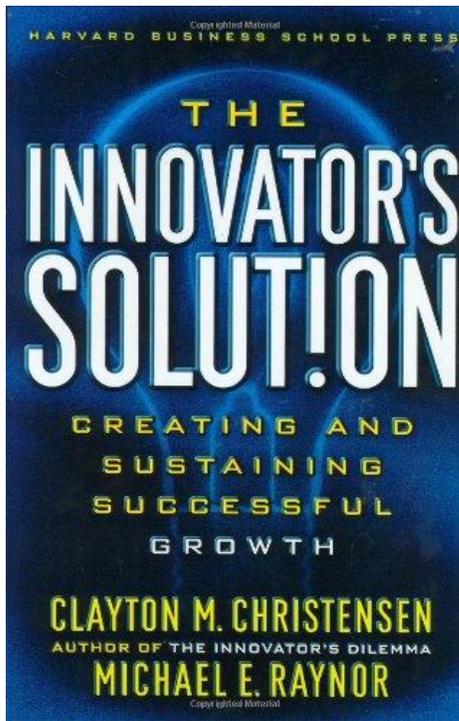
JTBD is a broad field with many approaches that overlap with existing techniques, but amplify and extend user research in new ways.

#jtbd #uxresearch #jobsresearch

@JimKalbach

PRINCIPLES

1. People want to get their job done, not to interact with your brand.
2. Jobs are stable over time, even as technology changes.
3. People seek services to get more of their job done, quicker and easier.
4. Making the job the unit of analysis focuses user research on outcomes.
5. JTBD isn't limited to one discipline: it can be applied across an organization.



Jobs to be Done Institute

IDEAS, INSIGHTS & BEST PRACTICES on JOBS TO BE DONE (#JTBD)

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CLASSIC ARTICLES

(Read these first)

[Turn Customer Input into Innovation](#)

by **Anthony W. Ulwick**
Harvard Business Review,
January 2002

[Marketing Malpractice: The Cause and the Cure](#)

by **Clayton M. Christensen, Scott Cook** and
Taddy Hall
Harvard Business Review,
December 2005

[Finding the Right Job For Your Product](#)

by **Clayton M. Christensen, Scott D. Anthony, Gerald Berstell** and **Denise Nitterhouse**
MIT Sloan Management Review,
April 2007

[Giving Customers a Fair Hearing](#)

by **Anthony W. Ulwick**
MIT Sloan Management Review,
April 2008

[The Customer-Centered Innovation Map](#)

RECENT

[Jobs-to-be-Done for Government](#) **NEW**

by **Anthony Ulwick**
AnthonyUlwick.com, April 2017

[Can We Get Beyond Customer Centricity?](#) **NEW**

by **David Slocum**
Forbes, April 2017

[AI and Jobs to be Done: The Future of Work](#) **NEW**

by **Anthony Ulwick**
Marketing Journal, April 2017

[How to improve #eCommerce using #JTBD](#) **NEW**

by **Mike Boysen**
CustomerThink, April 2017

[Bring Predictability to Innovation](#) **NEW**

by **Anthony Ulwick**
CustomerThink, April 2017

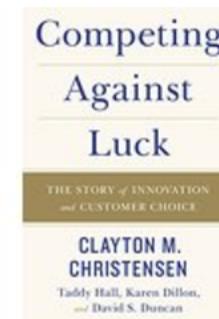
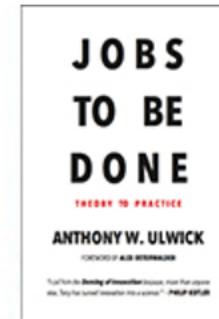
[Applying Jobs Theory to Micro-Moments](#) **NEW**

by **Anthony Ulwick**
CustomerThink, March 2017

[Define Markets Around the Job-to-be-Done](#) **NEW**

by **Anthony Ulwick**

BOOKS



UXResearch15

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