Discovering user needs with JTBD

MOZE

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Jobs-to-be-done (JTBD) has enabled us to interpret with a fresh look users' needs and help our customers develop targeted and valuable solutions.

In this guide we will share Moze's journey with this methodology and we will introduce the key steps for putting it into practice effectively.

Indice

1. Getting to know JTBD

How to build the right product?

Since we started designing digital products, we have always wondered how we can help our clients build the right product, that is, a product that meets people's real needs.

We have often found that clients unknowingly want to start developing the product without having done enough research. At other times, they want to develop a lot of features without yet having a clear idea of how to deliver value to users. In addition, when we focus too much on the product, we may overlook the importance of branding and marketing.

After experimenting with different approaches to address these challenges, we came into contact with the Jobs-to-be-done framework, a User Research methodology that helps to focus first on customer problems in order to be able to subsequently design solutions most appropriate.

After reading many books on the subject, we were fortunate enough to attend a workshop given by Jillian Wells, Product Researcher at Intercom, one of the first companies to apply JTBD to the development of digital products.

Since then we have studied, experimented a lot, to the point of integrating this approach into the way we do User Research and interpret people's needs.

What is JTBD?

The concept of Jobs-to-be-done originated in the fields of innovation and business strategy. This theory, introduced by Clayton Christensen, a professor at Harvard Business School in the 1990s, aims to understand what really drives customers to buy and use specific products or services.

JTBD proposes an alternative view to conventional marketing and innovation practices, which focus only on product features or demographics.

According to JTBD, customers are not interested in a product simply on the basis of certain characteristics or because they belong to a certain age group, but they "hire" products or services to perform specific "jobs," i.e., tasks or goals that they wish to complete under certain circumstances.

The essence of JTBD is thus to focus on people's goals, regardless of the solutions or means used to achieve them.

Let's give an example
To illustrate the concept, take for example the question, "What do you do in the morning to get energized before going to work?"

There are several solutions, such as waking up early, drinking water, exercising, taking a shower, eating breakfast, meditating or listening to music, that can help us get energy in the morning.

The important thing is to focus on the task at hand, which is to obtain energy, regardless of the specific solutions adopted.

Every day we engage in achieving numerous "jobs." In the morning we drink coffee to "get energy."

Afterwards we head to a parking lot and take the train to "get to work." In the office we collaborate with colleagues to "complete a project" or "present a proposal" to a new client.

All of these activities represent jobs-to-be-done, or tasks or goals that we wish to accomplish.

This shift in perspective on people's needs allows us to take a step back and not assume that people are automatically interested in our product.

On the contrary, JTBD helps us understand how our product can fit into people's experience, adding value and helping them to achieve their goals.

What are the advantages?

Here are the main advantages of this methodology:

Longevity

Insights gathered through the JTBD methodology are independent of specific solutions or technologies and retain their validity over time.

For example, 75 years ago people filled out tax returns using pen and paper for all calculations and documents. Later, they switched to pocket calculators to facilitate numerical calculations.

Today, tax returns are processed through sophisticated online software, which was impossible 50 years ago.

Despite changes in technology the fundamental "job" remains the same: filing tax returns.

Transversality

Because JTBD separates problems from solutions, the insights gained from this methodology can be applied across all business departments, from marketing to design to business development, creating a common language for designing and devising solutions for the company's users or customers.

This potential allows the team to be united in a unified vision, generating real cultural transformation within the company, just like it has happened to us and many others.

Predictability

Focusing on understanding people's fundamental goals and needs helps to gain more focused insights from the outset, making analysis more predictable and repeatable.

Unlike approaches based on hard-to-measure and predictable aspects such as empathy, as in Design Thinking, JTBD provides a more defined unit of analysis, namely the "job" as the objective.

Compatibility

Finally, because JTBD simply offers a new and more focused way of looking at user needs without imposing specific operational approaches, it is a methodology that is easily compatible with other methodologies such as Design Thinking, Agile development or any other operational approach.

Putting Jobs-to-be-done into practice

Starting from the theory behind Jobs-to-be-done, different personalities over the years have developed various practical and operational approaches, and there are different schools of thought on how to effectively harness this tool.

To learn about and explore these different approaches, I recommend that you read Jim Kalbach's latest book, entitled "The Jobs to Be Done Playbook." It is a comprehensive guide to JTBD and is the book I used as the basis for writing this guide.
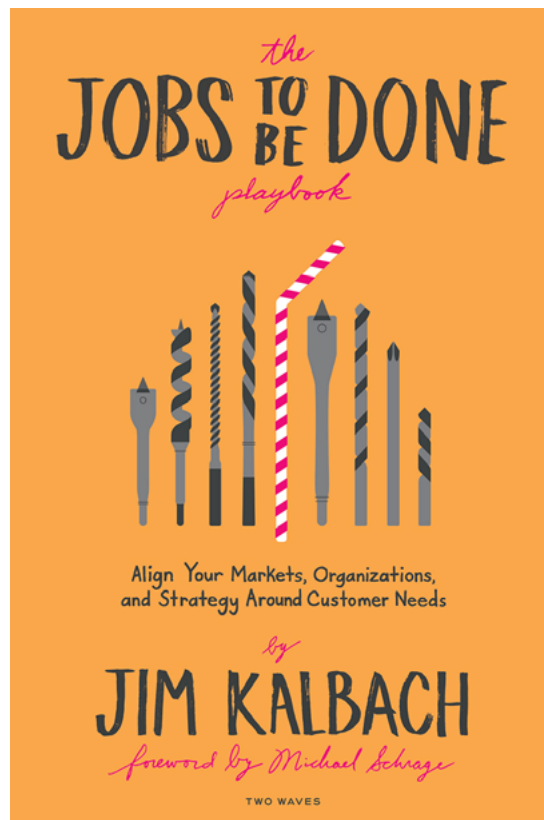
The Jobs to Be Done Playbook: Align Your Markets, Organizations, and Strategy Around Customer Needs, Jim Kalbach, 2020

Having made this premise, in order to start putting JTBD into practice, it is useful to start with some basic elements, namely:

- **Job Performer (Who):** Represents the main Job Performer, the end user of the product or service. For example, in the context of buying and selling used items, sellers and buyers are the Job Performers.

- **Jobs (What):** This refers to the goals of the Job Performer, what he or she is trying to achieve. In our example, the seller's main Job might be "sell a used item," while for the buyer it might be "buy a used item."

- **Circumstances (When/Where):** Refers to the context around the execution of the Job, including time, place and other relevant factors. For example, the seller may need to sell his old sofa before a move, while the buyer may wish to purchase a sofa close to home to save on transportation.

- **Process (How):** Represents the necessary steps the Job Performer must take to achieve their goal, regardless of the specific solution he or she chooses. For example, in the context of buying and selling used items, the process might include steps such as understanding how to buy or sell, handling the transaction, and delivering or receiving the item.

Starting with this overview of the basic "ingredients" of JTBD, let's take a step-by-step look at how to put them together.

1. Identify the Job Performer

The first crucial step in JTBD is to identify the Job Performer, i.e., the person who is to perform the Job. For example, in the context of buying and selling used items, the Job Performer might be the buyer of the used item.

It is essential to distinguish the Job Performer from other actors involved in Job completion, such as buyers or other business roles.

In the B2C context, often the same person takes on both roles, but in B2B contexts, the roles may be separate, for example, with an office procurement purchasing materials on behalf of others in the company.

Priority to Job Performer

JTBD urges us to prioritize the Job Performer over other stakeholders, such as buyers or managers. For example, if procurement buys our office chairs because they are cheap, they may soon be replaced if they break easily or are uncomfortable, thus not fulfilling the Job Performer's Job of "doing office work." Therefore, it is crucial to prioritize the Job Performer's needs when designing solutions.

2. Identify the Main Job

The second step is to identify the Jobs that the Job Performer wishes to perform.

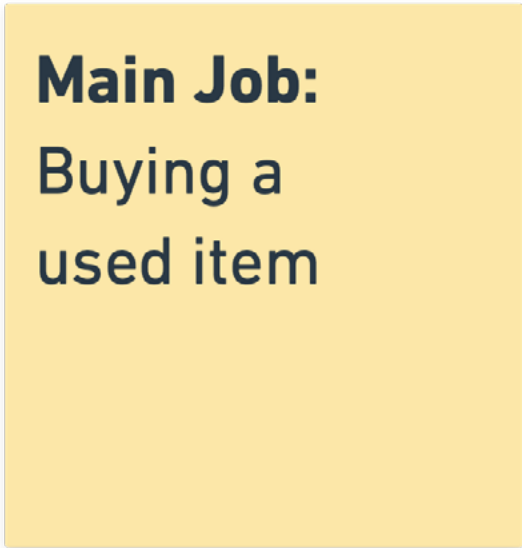Among the different Jobs identified, it is crucial to identify the Main Job, i.e., the main objective of the Job Performer, distinguishing it from the Related Jobs, i.e., the other Jobs related to but distinct from the main one.

Accurately defining the Main Job is crucial, especially if it is to be shared with the team, as it will influence the entire area of inquiry and define the space in which it is possible to innovate.

To properly define the Main Job, it must be expressed in functional terms, that is, as an action with a clear purpose that can be completed with an equally clear final outcome.

Example:

"Buying a used item" can be identified as the Main Job of the Job Performer "Buyer" in the context of the buying and selling of used objects.
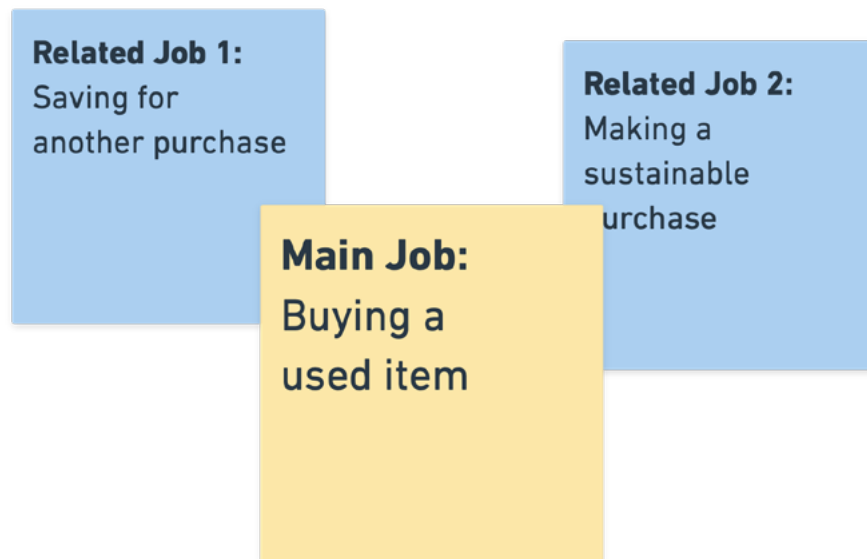
Main Job:
Buying a
used item

3. Identify Related Jobs

In addition to the Main Job, it is necessary to identify Related Jobs, the ones that are not directly related to the completion of the Main Job, but which help to put it into better context.

In the context of buying a used item, Related Jobs might include "saving for another purchase" or "making a sustainable purchase".

It is important to consider that Related Jobs can also compete with each other, as people constantly reassess their goals, trying to balance different priorities.

Related Job 1:
Saving for
another purchase

Related Job 2:
Making a
sustainable
purchase

Main Job:
Buying a
used item

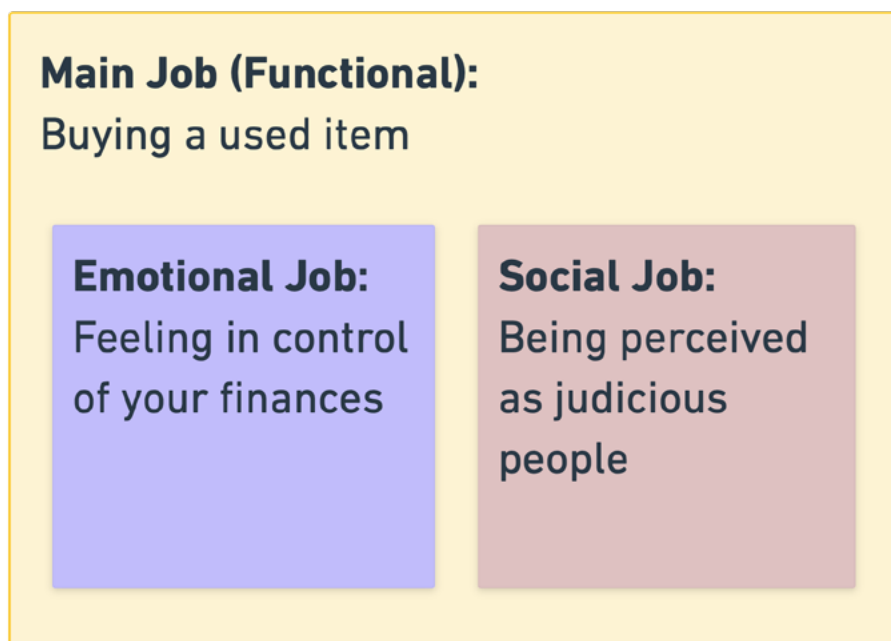# 4. Identify "Emotional" and "Social" Jobs

It is useful to distinguish between functional, emotional, and social Jobs. In our example, the Main Job of "buying a used object" represents a functional Job that reflects the practical purpose of the Job Performer.

Associated with this functional purpose, the Job Performer also completes emotional and social jobs.

Emotional jobs refer to emotions and feelings. An emotional job might be "feeling in control of one's finances": the Job Performer purchases a used item to gain a feeling of security and financial stability.

Social Jobs, on the other hand, are about belonging and social recognition. A social Job might be "being perceived as judicious people".

In our example, the Job Performer also purchases a used item to try to create a positive self-image in the eyes of others.

Main Job (Functional):
Buying a used item

Emotional Job:
Feeling in control of your finances

Social Job:
Being perceived as judicious people

Priority to Functional Jobs

According to JTBD, the correct approach is to prioritize identifying and satisfying the functional aspects before the emotional and social ones.

Prioritizing emotional and social aspects opens the way for countless solutions and makes collaboration chaotic.

On the contrary, prioritizing functional aspects helps to focus on concrete and feasible solutions, without neglecting the emotional and social aspects.

JTBD Interviews

Although qualitative interviews are the fundamental starting point in order to learn about and interpret users' needs using Jobs-to-be-done, our experience has taught us that before diving into interviews, it is essential to fully understand the fundamental concepts of JTBD theory.

Conversely, once the fundamental concepts have been properly assimilated and internalized, it will be possible to learn JTBD interview techniques more quickly and effectively.

To begin familiarizing yourself with the theory, it may be sufficient to build on your knowledge of the users or customers of our product or service.

2. Job Statements

Once the fundamental concepts behind JTBD are understood, the next step in putting this methodology into practice is to learn how to clearly describe the Jobs that people want to complete in a structured and repeatable way, using Job Statements.

There are different approaches and formats for properly formulating Job Statements: it is advisable to explore and experiment with different options. However, the format proposed by Jim Kalbach in his book offers a simple and effective starting point.

The format "verb+object+circumstance"

The format suggested by Kalbach is as follows: verb + object + circumstance. In this format, the circumstance represents an additional element that provides further details about the specific context in which the Job is to be completed.

Take, for example, the statement "Visiting family on special occasions." In this case, the verb is "visit," the object is "the family," and the circumstance is "on special occasions." This format helps us better understand the goal people wish to achieve and the context in which they they find themselves.

Here are other examples::

- Booking a trip before summer.
- Listening to music while running.
- Choosing a birthday gift.
- Learning to play a musical instrument.
- Organize a fundraiser by the end of the year.

It is important to note that these examples are only some possible Job Statement formulations and may vary depending on the product or service taken under consideration.

The goal is to create statements that reflect the goals of people in the context in which our product or service wants to create value, regardless of the specific solution.

Therefore during the formulation of Job Statements it is important to exclude any reference to solutions. The focus should be solely on understanding the needs and goals of the users.

Tip: To help us formulate Job Statements correctly, we can ask ourselves "how would people have completed the same Job fifty years ago?".

3. Job Map

The creation of a job map represents a fundamental tool for understanding the process that a Job Performer must go through to achieve his or her main goal and identify opportunities to devise new solutions.

What is a Job Map?

It is important to emphasize that the Job Map does not represent the Customer Journey, that is, the customer's journey through the interaction with a specific product or service. Instead, it focuses on the behavior and needs of people in their daily lives, regardless of the presence or absence of a specific solution.

The Job Map allows us to visualize the Main Job process by breaking down the main objective into a sequence of smaller Jobs. This approach allows us to consider each step in the sequence as a stand-alone Job necessary for the completion of the Main Job.

The creation of a job map can be initiated through the analysis of the insights gathered from user interviews or from in-depth knowledge of the target audience.

Here is a sample Job Map of the Main Job "selling a used item".

Main Job: Buying a used item

Stages	Preparing the sale	Promoting the object	Interacting with potential buyers	Complete the transaction	Conclude the sale
Steps	Researching the market	Creating the ad	Answering questions	Arrange payment	Confirm payment
	Evaluating the object	Promoting the ad	Arrange visits or trials	Arrange delivery	Close the ad
	Preparing the object		Negotiating a deal		

Emotional & Social

The main steps of the process are represented by purple post-its, below which we find yellow post-its representing the Job of second level.

In addition, Emotional and social jobs can also be identified, allowing for better contextualization and focus of the various functional jobs.

How to use the Job Map?

The Job Map obtained can serve as a solid starting point for the team in the area of innovation. It represents a powerful tool for visualizing customer goals and needs, and can be used by various departments within the company, such as product development, marketing and support.

Main Job: Buying a used item

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Emotional & Social

Opportunities

Using the Job Map, the product team of a thrift buying and selling platform can identify several opportunities to improve the user experience at each stage of the process. For example, at the "Preparing to Sell" stage, tools could be developed for evaluating the item to help users determine its value and guidance detailed on cleaning and preparation to optimize its saleability.

Similarly, the marketing team can use the Job Map to identify opportunities for improvement. For example, in the phase of "Promoting object," eye-catching ad templates can be developed to help users create effective ads or implemented programs of referrals to encourage sharing of ads on social media.

The use of the Job Map enables the identification of new opportunities that add value to the user or customer experience. Due to its flexible nature, it can be leveraged by various business departments to drive innovation and process optimization.

4. When to use JTBD?

After exploring and understanding the JTBD methodology, the question arises: when should we use it?

When the team regularly does User Research

A team that regularly conducts User Research can use JTBD explicitly, following the methodology we have described. In Moze, for example, we apply JTBD with clients who already know the value of this methodology: in those cases, we can use it directly, without having to introduce it.

When the team does NOT do User Research

If your team is not in the habit of conducting User Research or is approaching this practice for the first time, the explicit use of JTBD might seem too complex, according to its own advocates.

However, even when a client is approaching User Research for the first time, at Moze we still use JTBD as a lens through which you can observe the people's needs during research, presenting the insights that emerged in a traditional way. Thus, even in these cases, the JTBD methodology helps us effectively interpret user behavior.

Conclusions

JTBD can be used in different situations depending on the team's User Research habits. If the team regularly conducts User Research, JTBD can be applied explicitly, providing structured guidance for understanding user needs.

Conversely, even when the team is not accustomed to User Research, JTBD can be a valuable tool for interpreting user behavior effectively. In both cases, JTBD methodology offers an effective perspective for examining user needs and can help the team achieve meaningful results.

This guide is a summary of the workshop we held in June 2023 during Urca!, the first User Research conference in Italy, where we shared Moze's experience with the Jobs-to-be-done methodology.

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