THE COMPLETE TOOLKIT TO

JOBS TO BE DONE

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About this Toolkit

We've put this toolkit together to help you plan your next steps towards more innovative initiatives using the Jobs to be Done theory. The toolkit provides all the actionable tools and templates to help you go from theory to practice in a few simple steps.

This presentation will walk you through the key parts, but for a more structured and detailed take on the topic, please read our article **The Ultimate Guide to Jobs to be Done Theory.**

How to use it

You can use the content in any way you want, as long as you credit all materials and concepts to Viima and other cited sources. So, feel free to **share this Toolkit with your co-workers,** or anyone else you'd like to engage in the process.

PLEASE NOTE: This Toolkit is a starting point.
Getting results will always take time and effort, so trust the process, be patient, put in the work, and the results will come.

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Jobs to be Done

JTBD explains **how and why customers "hire" or pull certain products or services into their life**. It's not about a specific task or activity that triggers their action, but it uncovers **the customers' desire to make progress**, in given circumstances.

Jobs To Be Done supports innovation by looking into **why and how someone decides to hire a product or service** and creates the setting to find better fitted solutions that create value for customers.

Jobs to be Done Canvas

Using the canvas

This JTBD canvas is a simplified version of the canvas from the Outcome-Driven Innovation process developed by Strategyn.

The canvas can be used to sort observations into actionable categories, and it can help you better understand the market you're in and the job you want to solve for. When working on the canvas you will go through the following steps:

1. **Job statement**: consider the context and the circumstances. What is the story behind the job?

2. **Deconstruct the job** in the 8 steps on the job map. Think of each step as a job inside the main job.

3. **Job roles**. What other roles does the job fulfil: functional emotional social?

4. **Progress forces.** What could motivate customers to switch from one solution to another or what is keeping them from using a different solution.

What aspects can the canvas help clarify?

1. Your target group

2. The job customers are trying to get done

3. The steps they take to get the job done

4. The associated roles of the job: like functional, emotional or social

5. The forces that influence their behaviour

Tips and best practice:

- When defining the job avoid using adjectives or adverbs

- When working on the canvas consider that the executor is not necessarily the buyer

- This is just a step in your work with JTBD so take the time to refine your internal process along the way.

The Jobs To Be Done Canvas

Job executor (who's your end user):

Version:

Project:

Job statement (Verb + object + context)

Job map

1. Define	2. Locate	3. Prepare	4. Confirm
5. Execute	6. Monitor	7. Modify	8. Conclude

Job roles

Emotional

Functional

Social

Forces of progress

Problem ↗

Progress ↗

Habits ↙

Anxiety ↙

The Job Map

The Job Map

The job map is a visual representation developed by Tony Ulwick that deconstructs a jobs into eight different steps in order to explain what the customer is trying to achieve. The job map is meant to be used as a practical tool to apply Jobs to be Done to drive innovation.

Deconstructing any job into these eight steps will make it easier to uncover further opportunities to innovate and differentiate yourself. The goal is to identify what customers want to accomplish in each step, not what they are already doing or how they are doing it.

DEFINE → LOCATE → PREPARE → CONFIRM → EXECUTE → MONITOR → MODIFY → CONCLUDE

The Job Map

DEFINE

Plan, Select, Determine

LOCATE

Gather, Access, Retrieve

PREPARE

Setup, Organize, Examine

CONFIRM

Validate, Prioritize, Decide

EXECUTE

Perform, Transact, Administer

MONITOR

Verify, Track, Check

MODIFY

Update, Adjust, Maintain

CONCLUDE

Store, Finish, Close
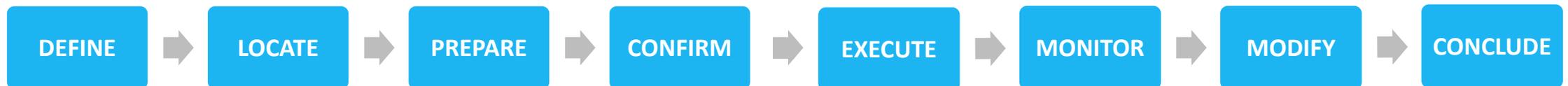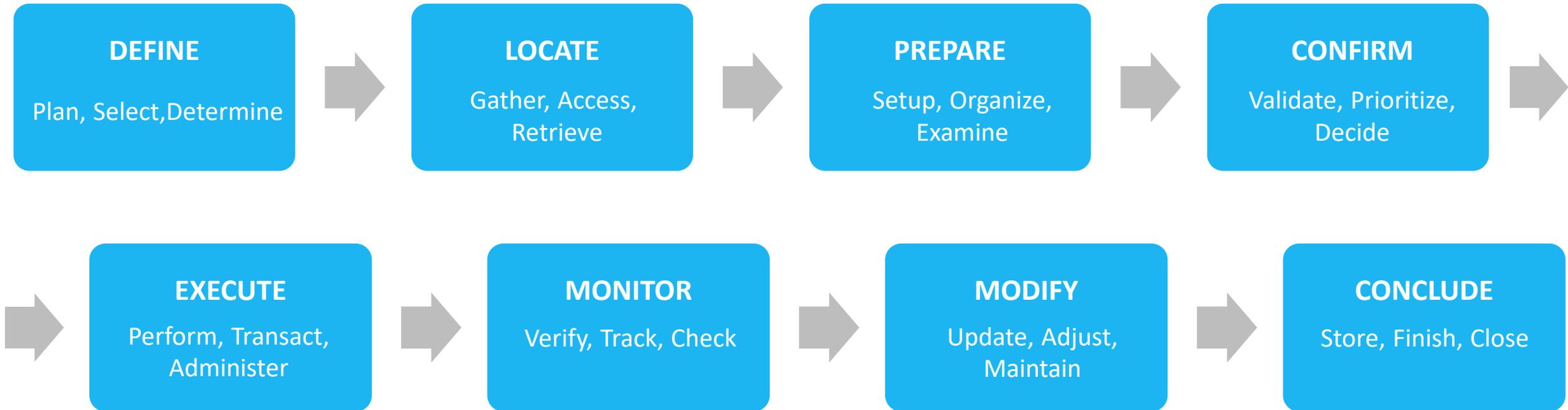
The Job Map

DEFINE — Find customers' goals and think of how you can help by simplifying their planning.

LOCATE — When customers gather information on how to perform the job you can make their search easier.

PREPARE — When they prepare the environment for the job, you can help by providing guides for proper set-up.

CONFIRM — Support customers when they want to check their readiness by providing information that can assess and confirm it.

EXECUTE — When customers carry out a job you can offer a solution that ensures smooth execution & prevents problems.

MONITOR — Ensure a smooth and successful execution by providing monitoring solutions.

MODIFY — Alterations are hard to avoid. Help reduce the need or number of alterations & improve the bottom line.

CONCLUDE — Simplify the process of finalizing the job and create solutions that prepare to repeat it.

Interview Templates

Using the templates

- In the following slides you will find templates that can be used as the basis for your interviews.

- There are [bolded placeholders] to modify the content to match the messaging of your organization.

- Remember, these templates are simple examples for getting you started. You'll most likely have to to modify them and add more, according to your context.

- We recommend you spend some time testing and tweaking these templates to better match your specific situation, and then use those insights to finalize your JTBD plan.

Qualitative research: interviews

To uncover the jobs to be done you need to start with qualitative research. Get to know your customers, select the job performers and conduct open interviews.

Create an environment where they can openly discuss about the context, the process and the needs that lead to hire a product or service. Use these results on a job map or for a more detailed analysis, on the JTBD canvas to develop and improve your solution.

Here are some tips to prepare for your interviews. We also provide examples for email invitations for interviews, scripts and possible questions to include.

- Secure around 20 interviews so you get enough data that reveals patterns, common answers and a complete overview of circumstances.

- Each interview should last between 30 to 120 minutes, depending on each person.

- You can use incentives to get people involved

- Set the stage and expectations

- Include exclusion criteria so you can spot if someone is not a job performer.

- Create a schedule for the interviews

Example email for interview invitation

Hi [name],

I am [name] and I am reaching out from the [company] team. We are continuously working on improving, so we want to better understand how you use [product / service].

If you are willing, I'd love to hear your thoughts in a [x minutes] short call. The conversation is a starting point for us to learn how we can serve you better.

Would be great to connect with you at your convenience. Your help is greatly appreciated and to thank you for your time, we're offering you [an incentive like subscription, free access to the product, exclusive deal etc.]

Please use my calendar to book a time slot that works for you.

Thanks, and looking forward to our chat!

Kind regards,

[name]

Interview script example

Hi [name],

Thank you for taking the time to speak with me today. The goal of our conversation today is to have a better understanding of your experience with [product / service]. I am interested in hearing your story with [product / service] so for the next [x minutes] I will ask a series of questions.

As we speak, I will take notes and if that's ok with you I will record the conversation which will remain anonymous and confidential. The recording it's for my own use, for more accurate data transcript.

To paint a clear picture, I will ask some general question which will later lead to more in-depth analysis and questions. Every detail is important so everything you can remember is useful information. The goal for each question is to set the context and to also help you remember as many details as possible.

Let's get started!

Interview questions example

- How was you life before (our solution). How did you (perform the task) before this solution?
- What did you like about the previous solution?
- What you disliked about the previous solution?
  - Was there something missing?
  - Were you struggling with something?
- When did you last use (the old solution)?
- When did you first realize you (needed something to solve your problem)?
  - Where were you?
  - Who was with you?
  - What were you doing, or trying to do?

- What was happening on in your life when you started lookig for an alternative?
  - What events led up to that moment?
  - What made you think you should find (a new solution)?
  - Where were you?
  - Who was with you?

- How did you first start looking for solution to (problem).
  - What other solutions did you try?
  - Whas there somethig you considered but haven't tried? If yes, what and why?
  - What were the alternatives?

- What led you to us?

Interview questions example

- When you found (our product/service) what made you choose us?
  - What convinced you to use (our soution)?
- Was there something or someone that influenced your decision?
- What were you pondering over before deciding to (purchase, sign up, subscribe)?
- What was happening the very moment you purchased / decided to get the paid subscription for (our solution)?
  - When did you purchase (our solution)?
  - Where were you?
  - What time of the day? (daytime/ nighttime)
  - What was the weather like?
  - Were you alone or with someone else at the time?

- How did you purchase (the product / solution)?
- Did you ask for someone's opinion about the purchase you were about to make?
  - What were their arguments?
- Was this the only purchase you made at that moment?
- Were you concerned in any way about the purchase?
  - Did you hear something about the (solution) that made you feel nervous?
  - What was it?
  - Why did it make you nervous?
- Was there something that almost stopped you from buying?
- What was the decisive factor for the purchase?

Discovery-driven planning

Discovery-driven planning

A tool that can be used to develop new ventures with lower risk. Discovery-driven planning includes the following steps:

1. **Define success** – what success will look like for you in concrete terms. At this step you create a reverse income statement

2. **Benchmarking** to assess if your plan is realistic

3. **Define operational requirements**. Lay out required resources and be critical about what it takes to realize the goals.

4. **Document assumptions.** List all the assumptions behind your profit, revenue and costs calculations.

5. **Plan to key checkpoints**. Layout your plan and include checkpoints where you'll determine if assumptions are holding or have to be redefined.

Define success

Do a benchmark

Define operational requirements

Document assumptions

Plan to key checkpoints

Discovery-driven planning
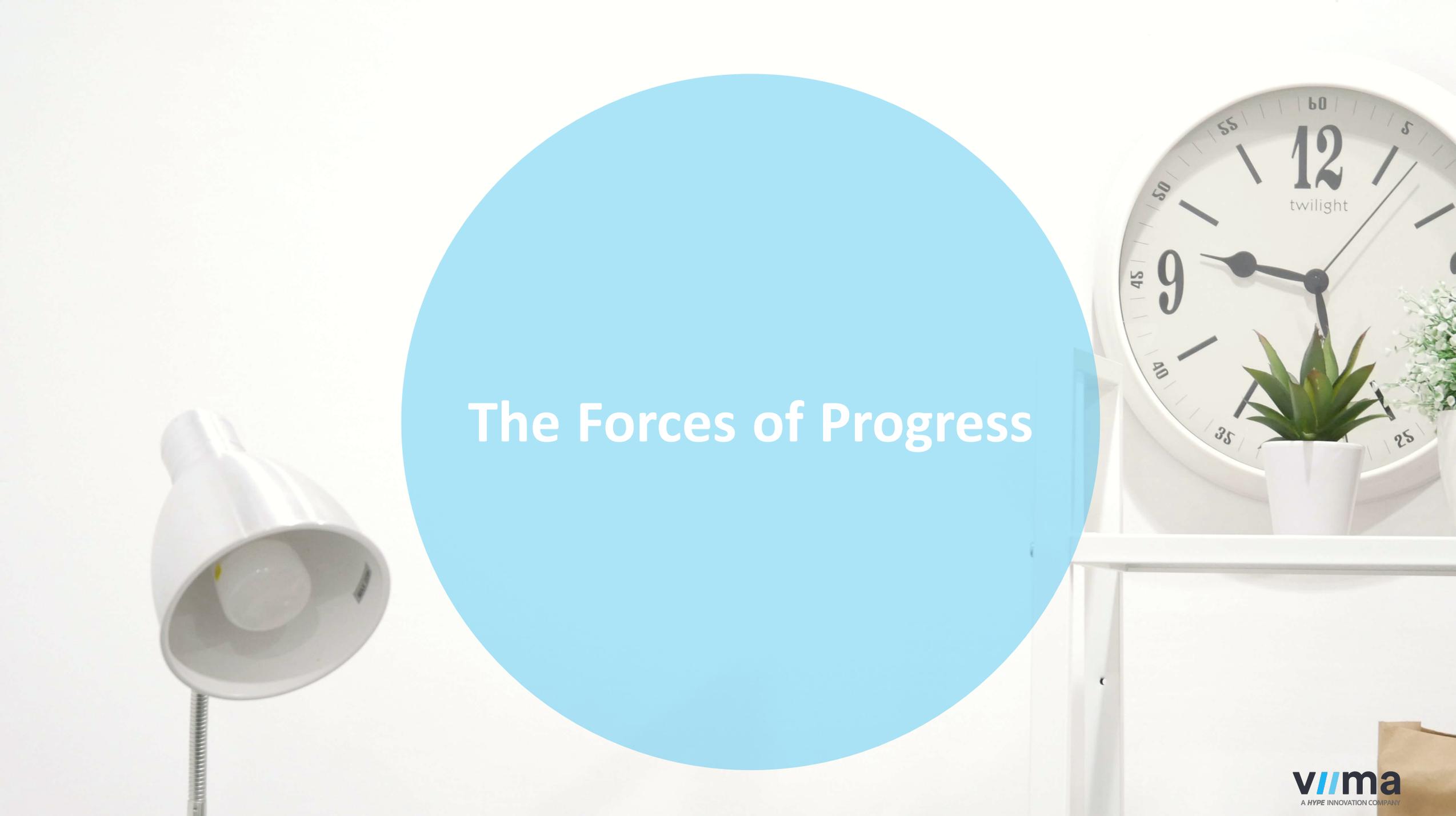
The Forces of Progress

The Forces of Progress

**The Pull forces** (moving away from an old solution to a new one)

- The struggles or limitations associated with a current solution

- They might be attracted by something new, other benefits or they are early adopters

The Push forces (what makes customer stick to their old solution and what pushes them away from you)

- Force of habit – being used with the old ways

- Resistance to change and anxiety when facing the unknown

The Forces of Progress

PUSH
Problem with
current solution

PULL
Attraction for
current solution

Progress-making forces.
Reasons to switch

Old
behaviour

New
behaviour

Habits and
Preferences
of the present

Anxiety and
uncertainty for
the new solution

Progress-hindering forces.
Reasons to stay

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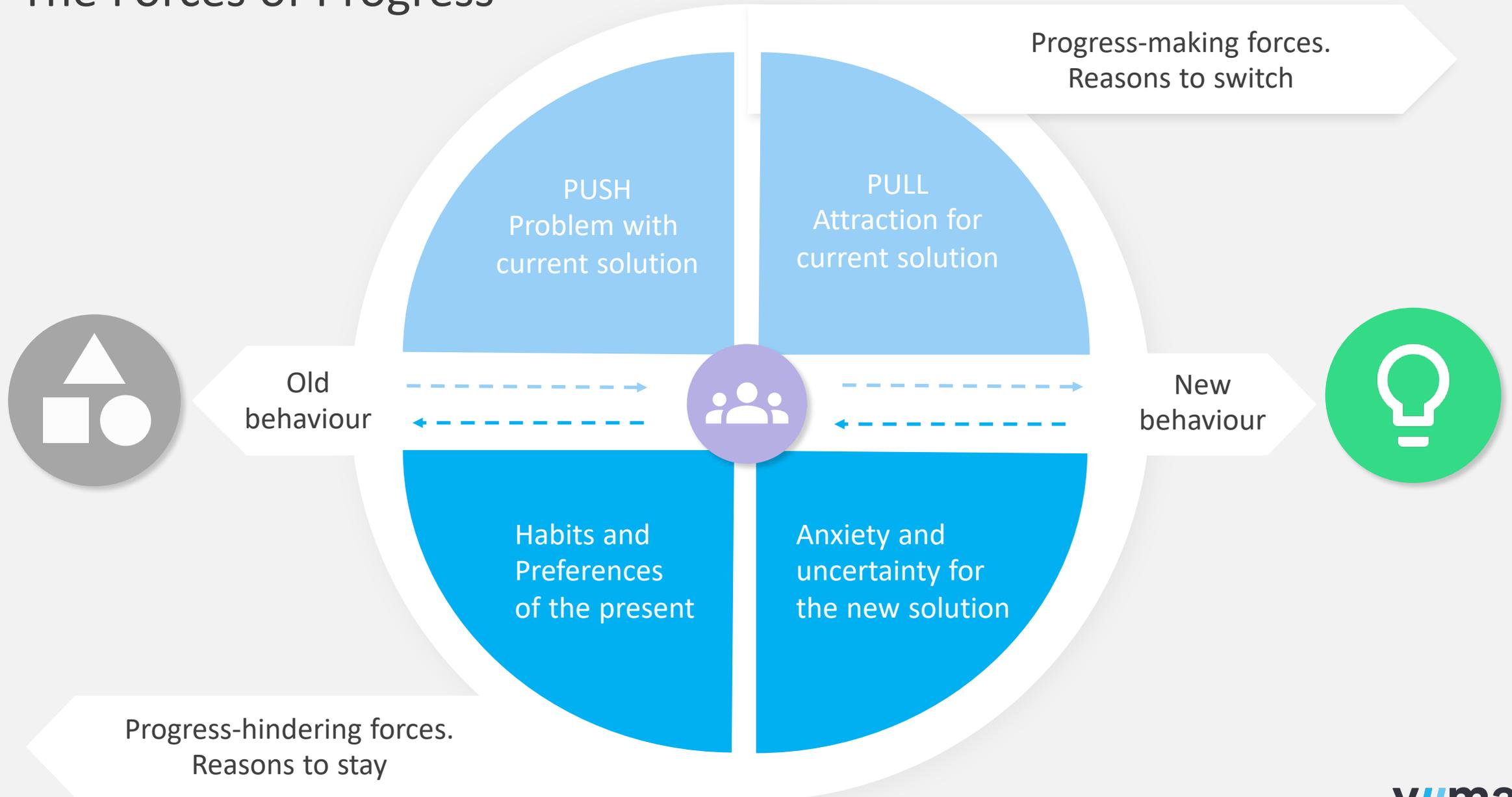
The Forces of Progress Canvas

1. PUSH

What are the problems with the current solution that might push them towards a new solution.

2. PULL

What is the attraction for the new solution.

3. HABITS

Old habits / familiarity (list the habits that hold your customer back)

4. ANXIETY

List the reasons of resistance to change, fears, anxieties and uncertainties.

About Viima

We're on a mission to help organizations make more innovation happen.

Viima is the all-in-one innovation platform that helps you go from ideas to innovations, every step of the way.

Getting started is fast and easy and the best part is that Viima is completely free for an unlimited number of users!

So, If you're looking for a tool that can help you **run and manage your innovation program with ease**, you can get started in as little as 5 minutes at viima.com.

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