



JIM KALBACH



HEAD OF CUSTOMER  
EXPERIENCE

MURAL

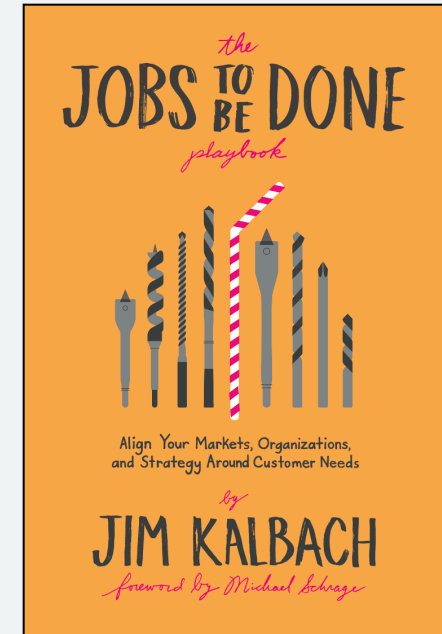
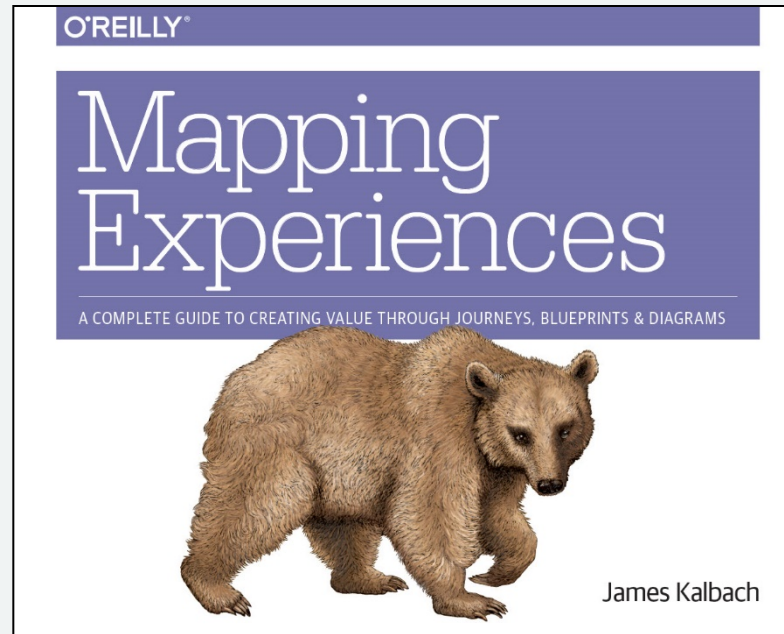
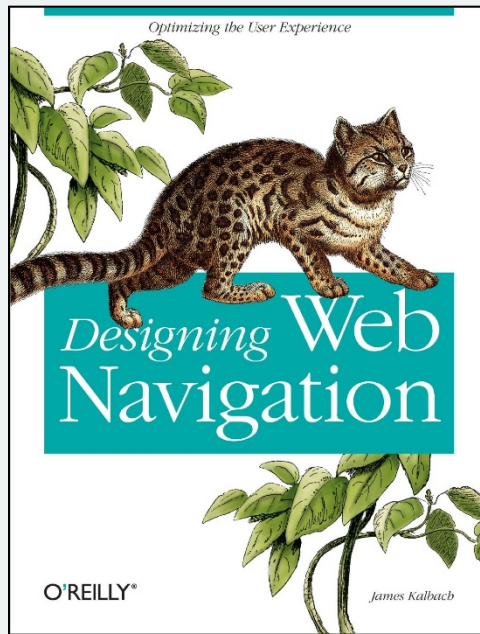
Jobs to be Done  
*Strategy in Customer Success*

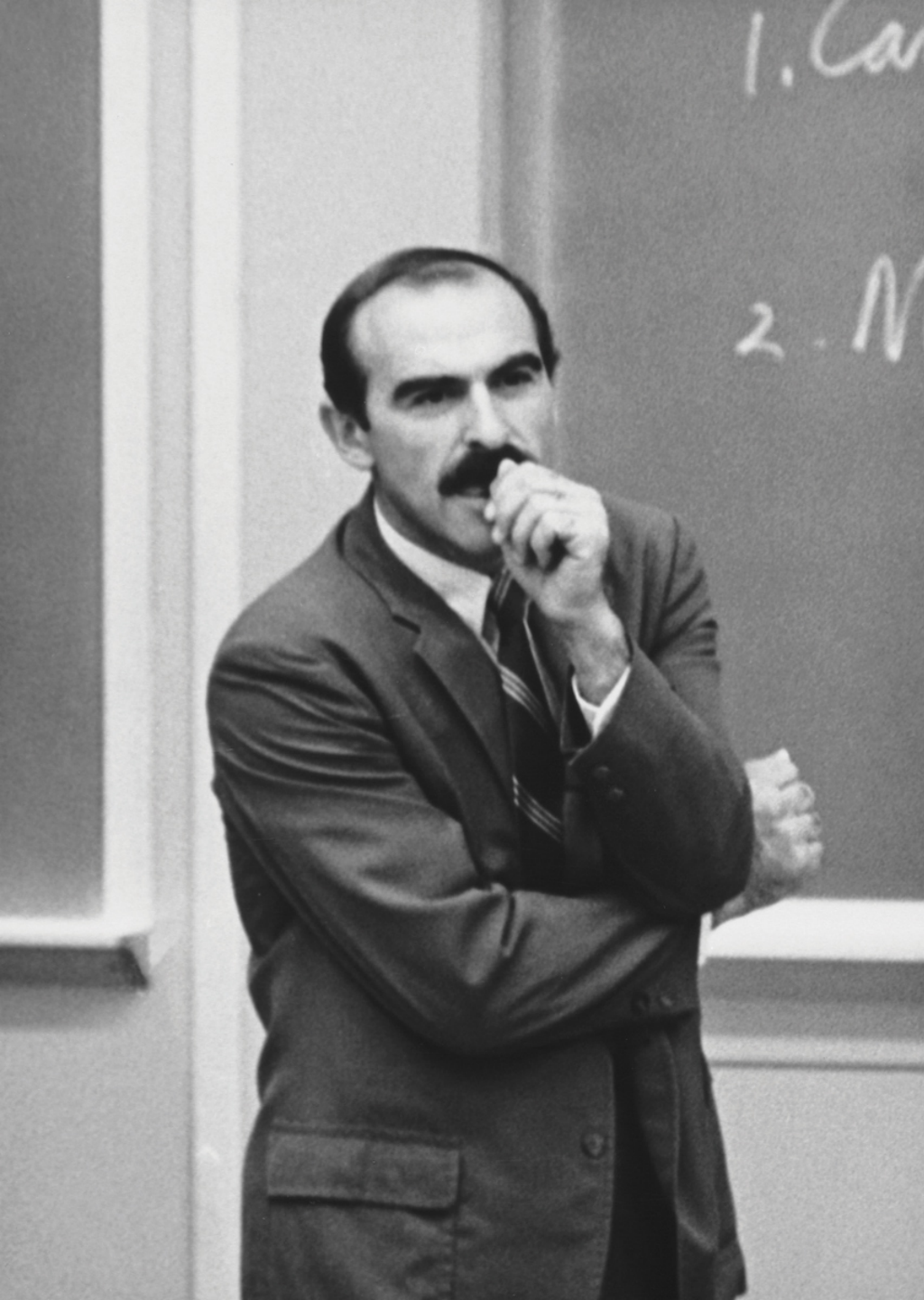


Practical Jobs To Be Done  
*A Way Of Seeing Success*

@JimKalbach

M U R A L





**“People don’t want a  
quarter-inch drill, they  
want a quarter-inch hole.”**

**THEODORE LEVITT**



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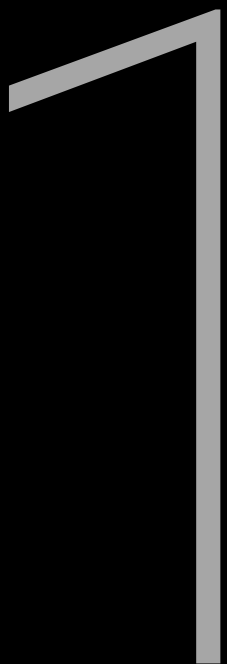




JTBD = technology independent and stable over time



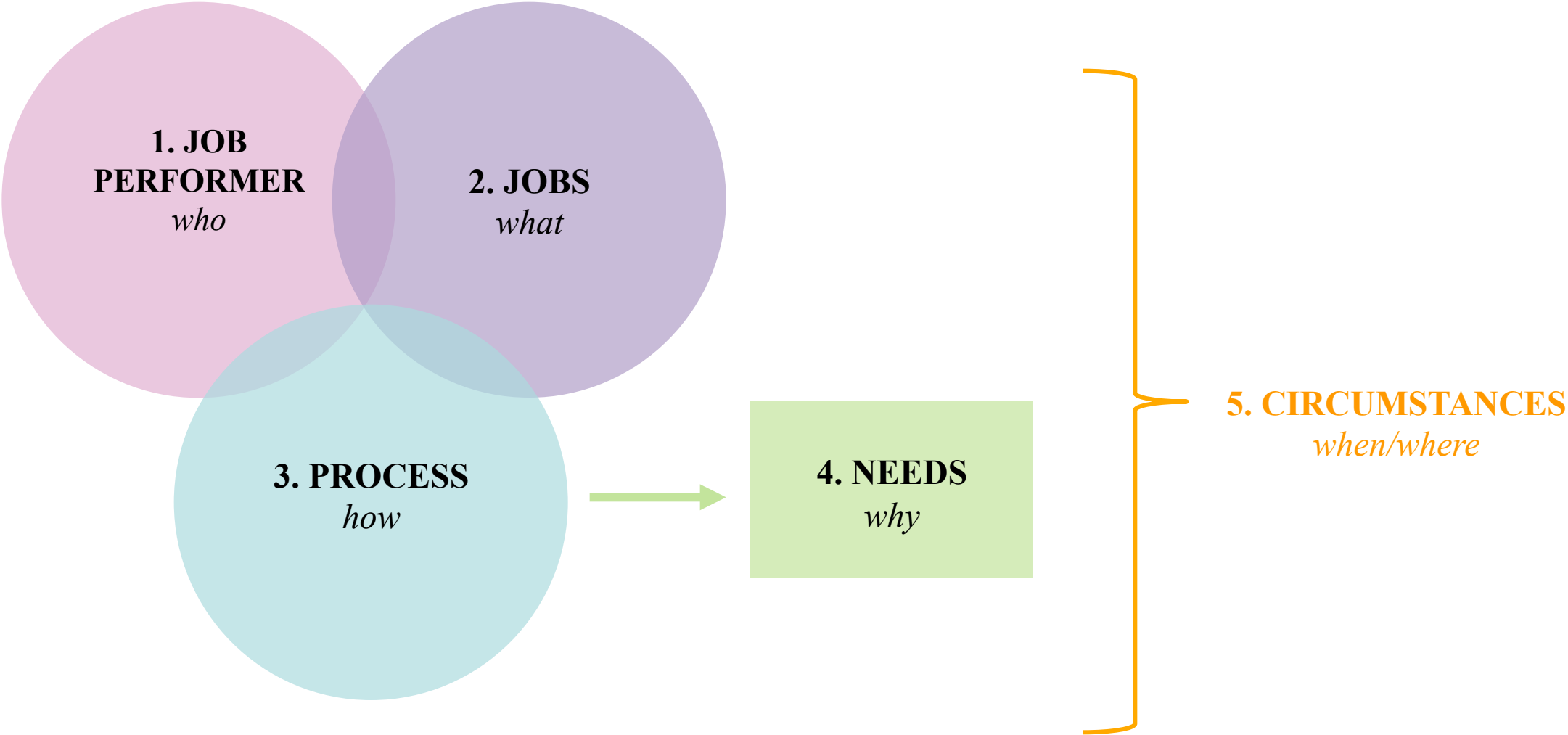
*Listen to music*



**Using your product is not a JTBD.  
Instead, JTBD provides a lens for  
seeing your business from outside-in,  
from the customer perspective**



# ELEMENTS OF JTBD



# ***PROCESS: JOB MAP***

*Beginning*

*Middle*

*End*

Define

Locate

Prepare

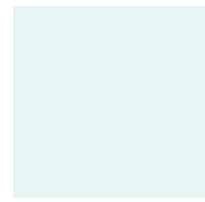
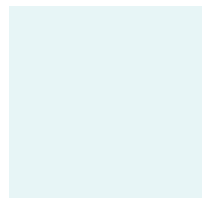
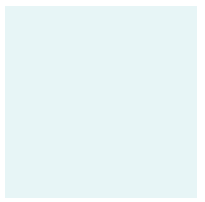
Confirm

Execute

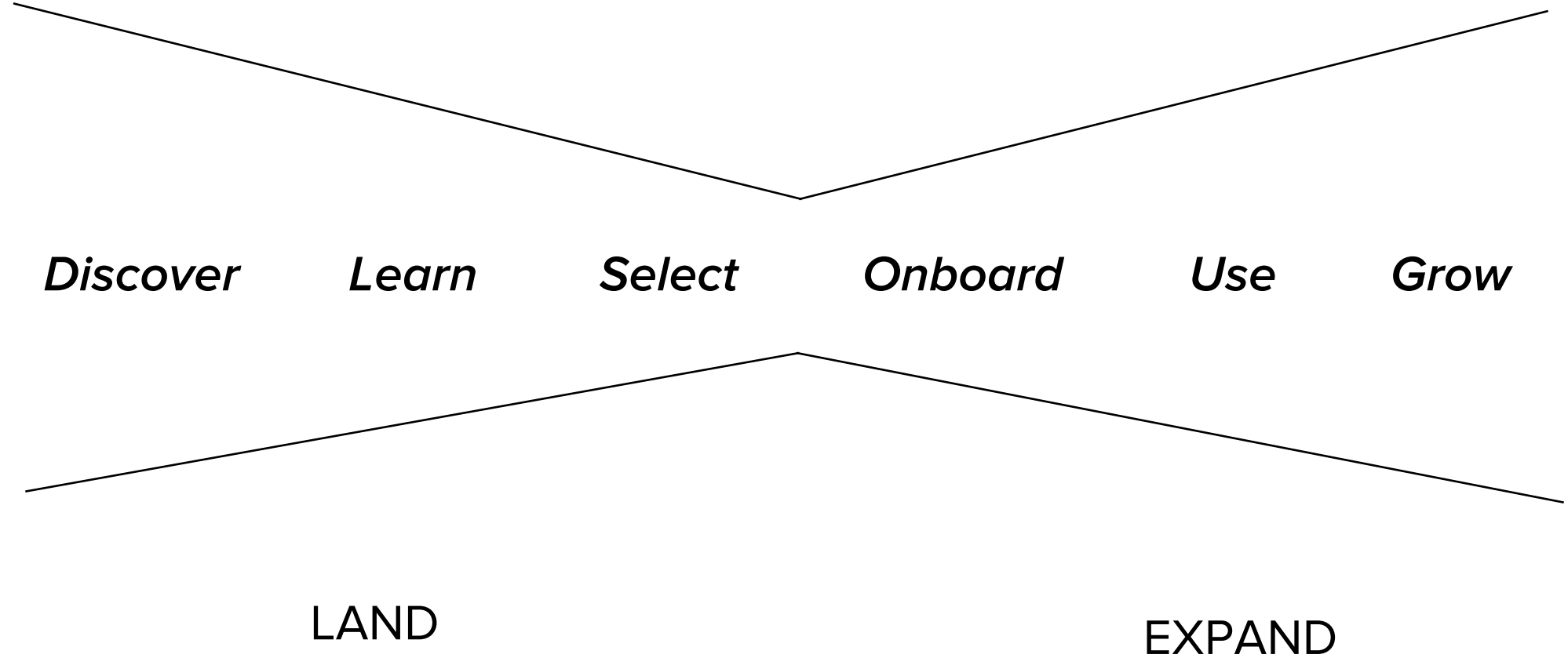
Monitor

Modify

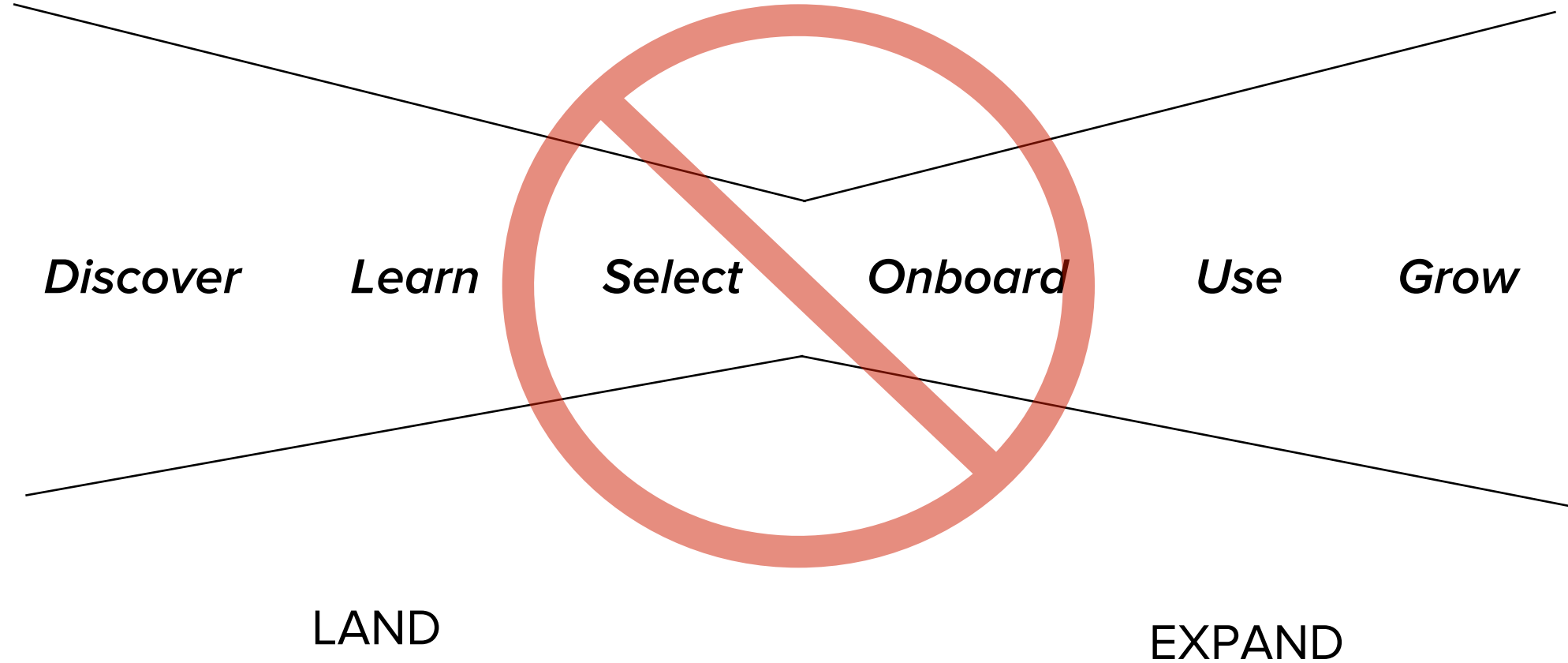
Conclude



# ***JOB MAP != CJM***

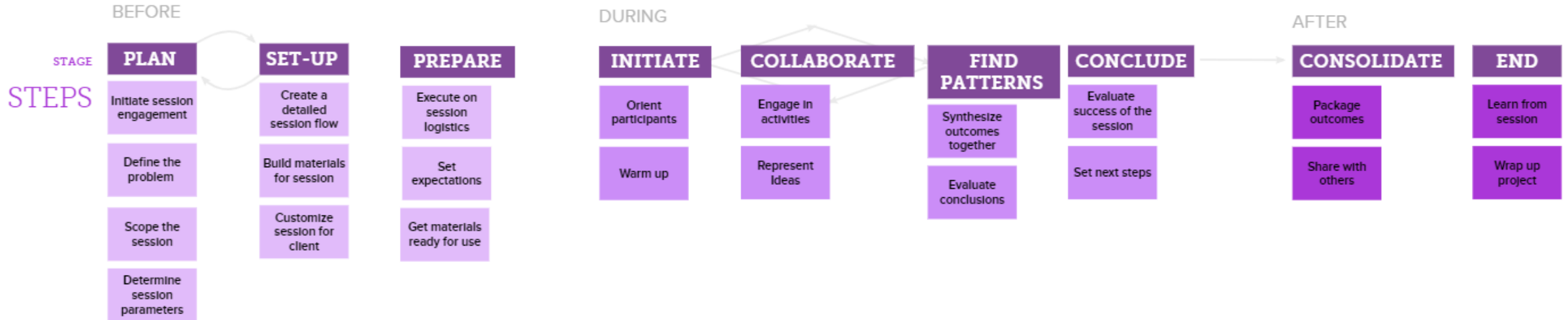


# ***JOB MAP != CJM***



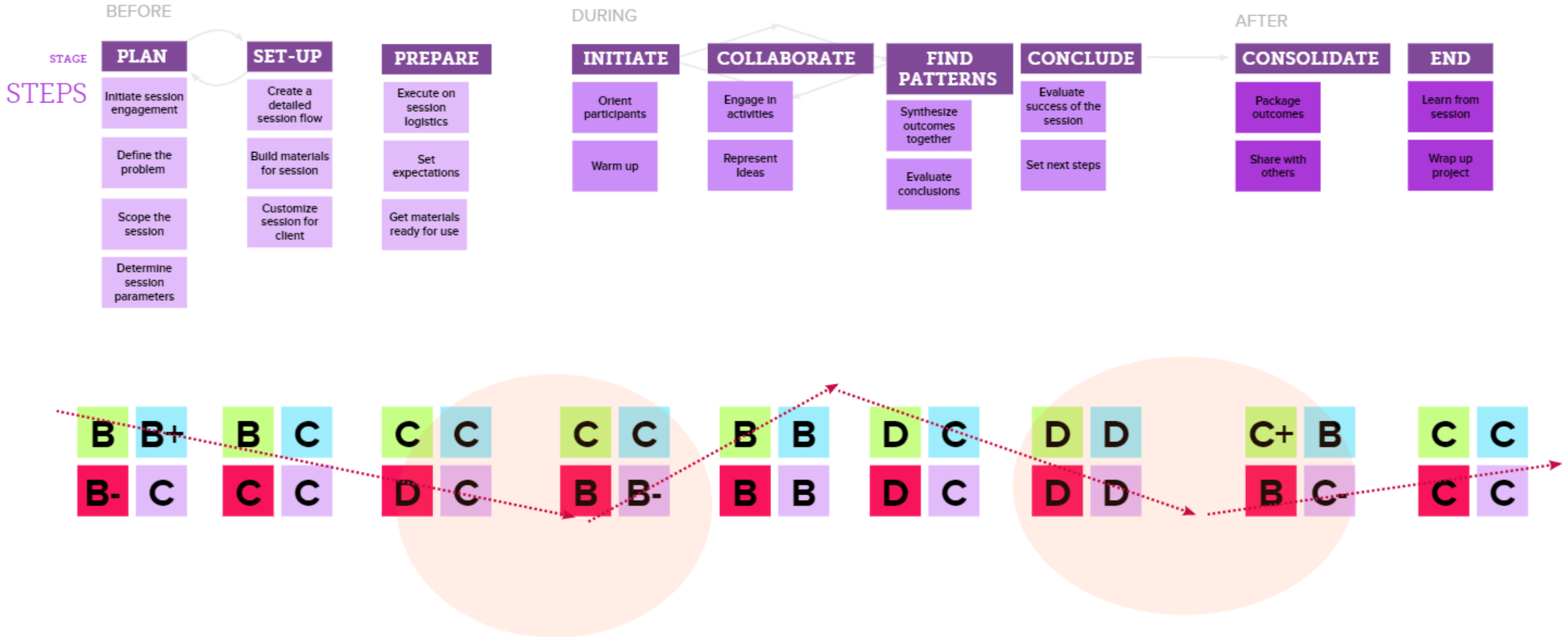
# EXAMPLE JOB MAP

*Conduct a working session with a client*



# EXAMPLE JOB MAP

*Conduct a working session with a client*



Product Goal and OKR

OKR 1	OKR 2	OKR 3	OKR 4	OKR 5
...	...	...	...	...

OKR 1

...	...	...	...	...
-----	-----	-----	-----	-----

OKR 2

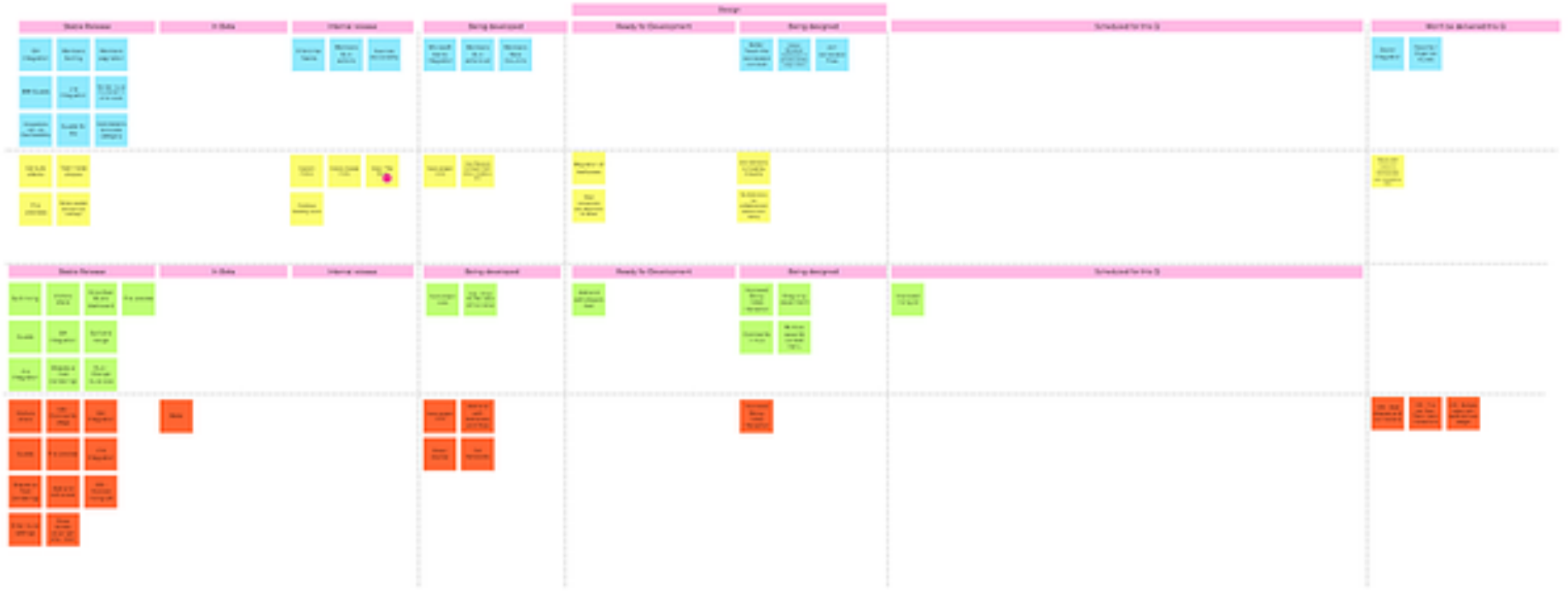
...	...	...	...	...
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OKR 3

...	...	...	...	...
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OKR 4

...	...	...	...	...
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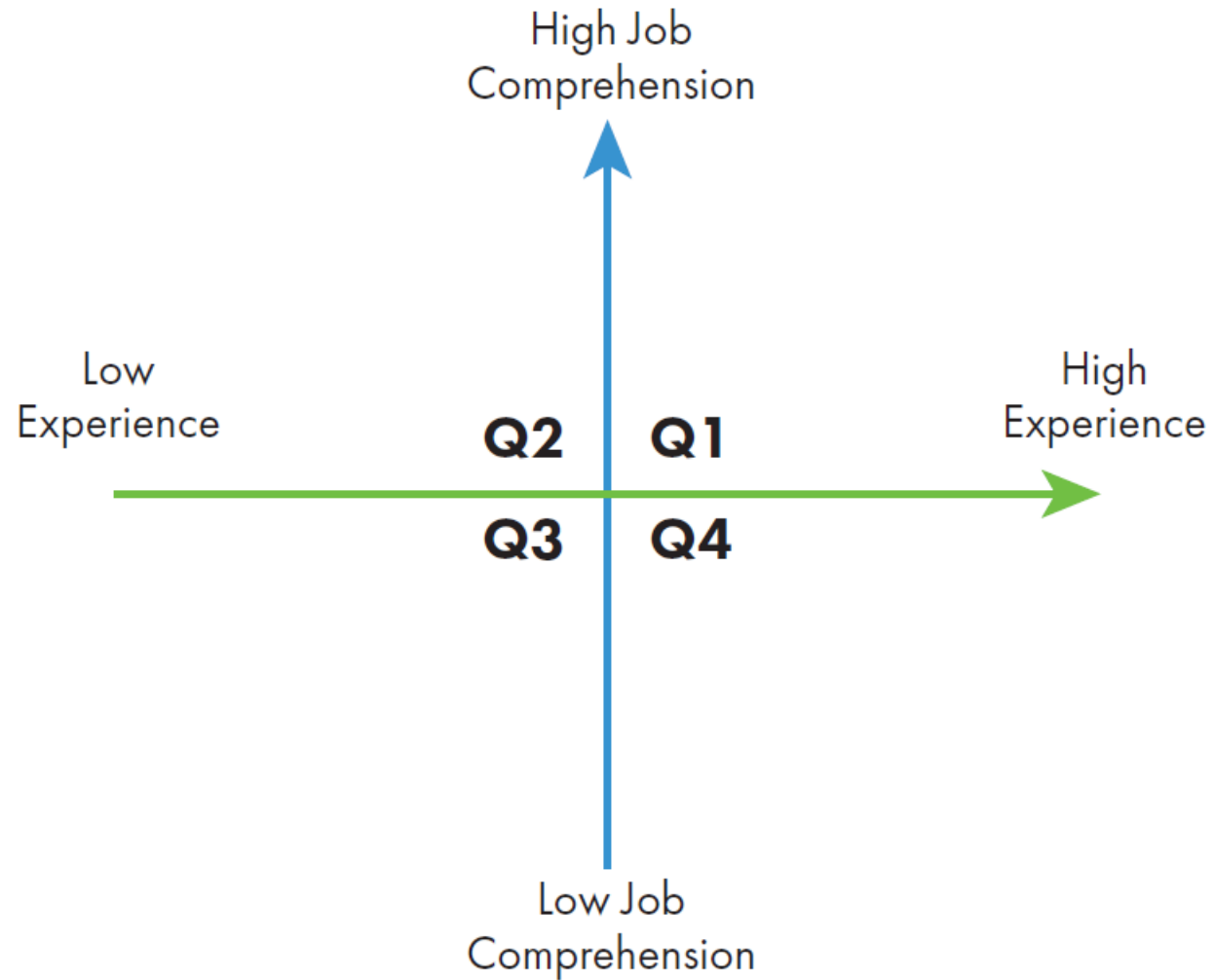
<http://blog.mural.co/jtbd>

2

**JTBD techniques offer a common language for understanding customer success across teams and departmental lines.**



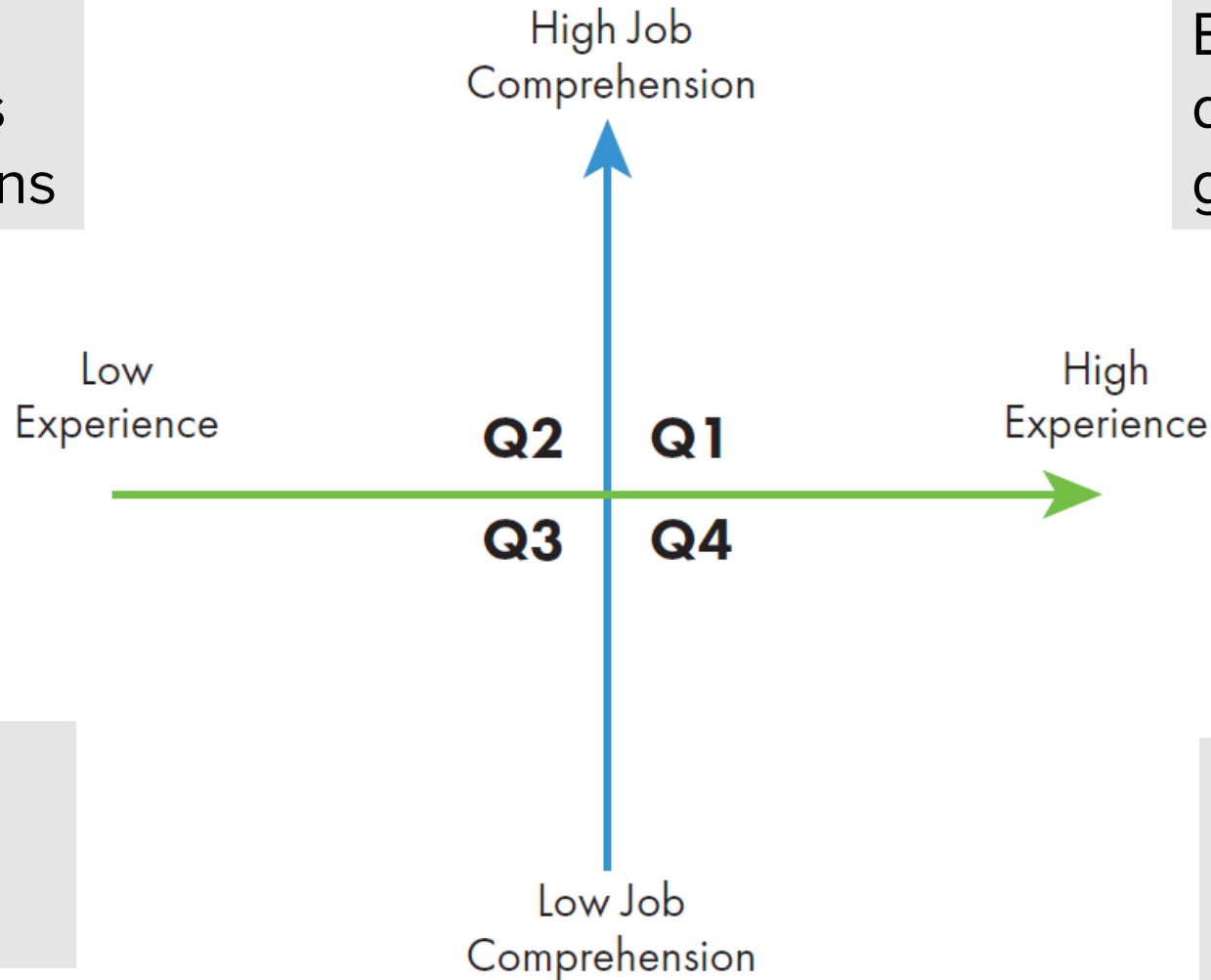
# EXAMPLE: ONBOARDING TYPES



# EXAMPLE: ONBOARDING TYPES

Explain the tool and differences to other solutions

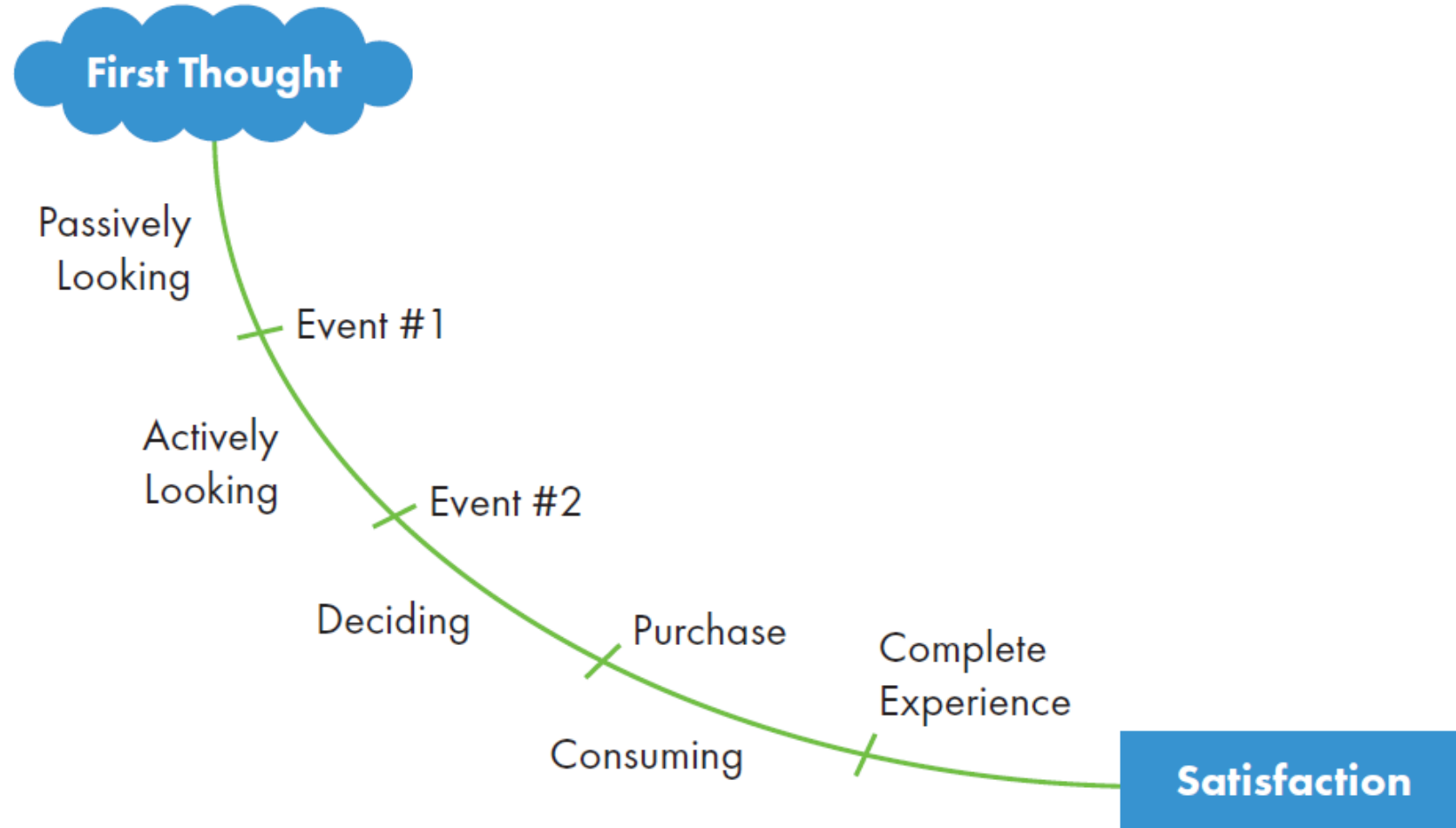
Educate on the deeper aspects of getting the job done



Walk through entire process step by step

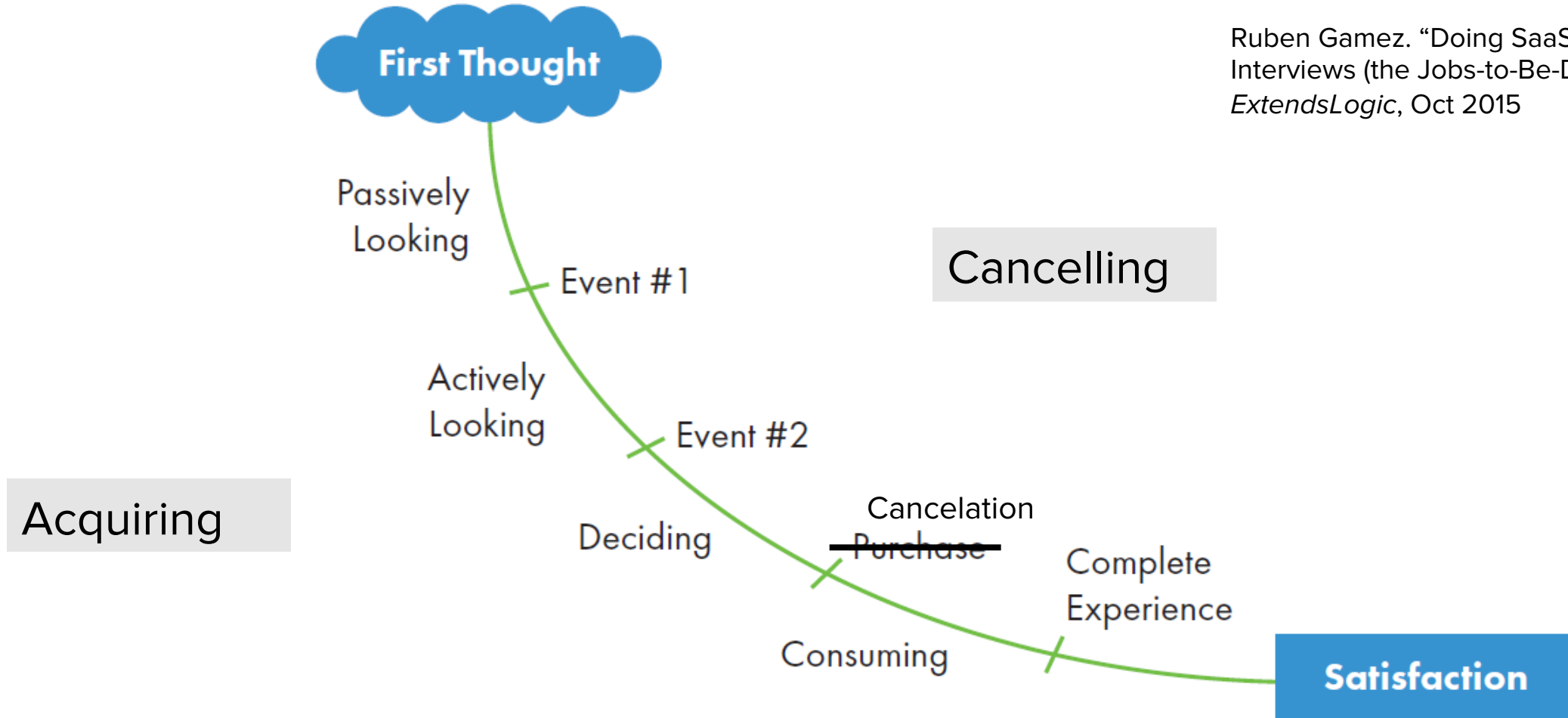
Usage is likely limited > expand use of tool

# EXAMPLE: SWITCH (on and off)

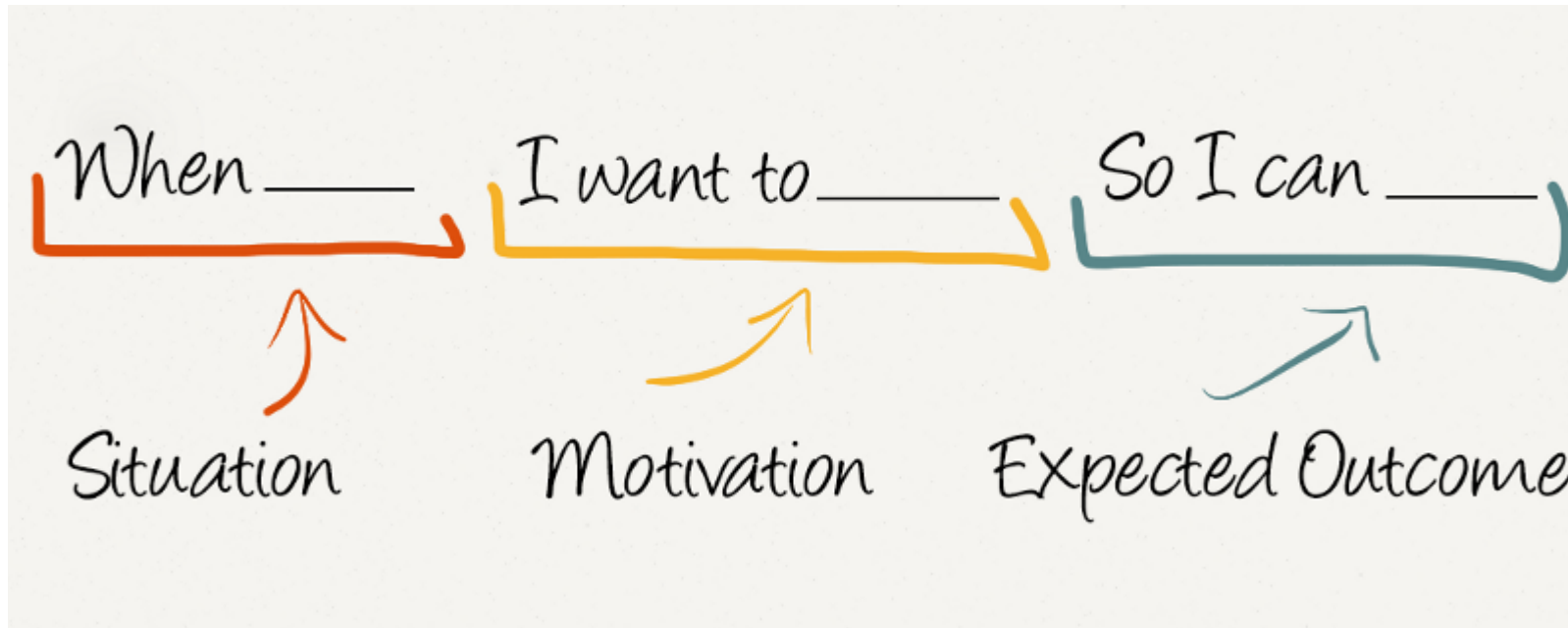


# EXAMPLE: SWITCH (on and off)

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



# EXAMPLE: JOB STORIES FOR ISSUES



# *EXAMPLE: JOB STORIES FOR ISSUES*

JOB PERFORMER

Facilitators

UNMET NEED

**When my team is **SETTING UP** workshops, we need to be sure that content is up-to-date so that we can build on past experiences in order to improve our delivery and facilitation.**

SUCCESS CRITERIA

- Reduce the time it takes to identify when content was created
- Increase the speed of locating most recent content
- Minimize the chance of using out-dated content
- Feel confident the most recent content is being used

## PASTE FROM SPREADSHEETS AND LISTS

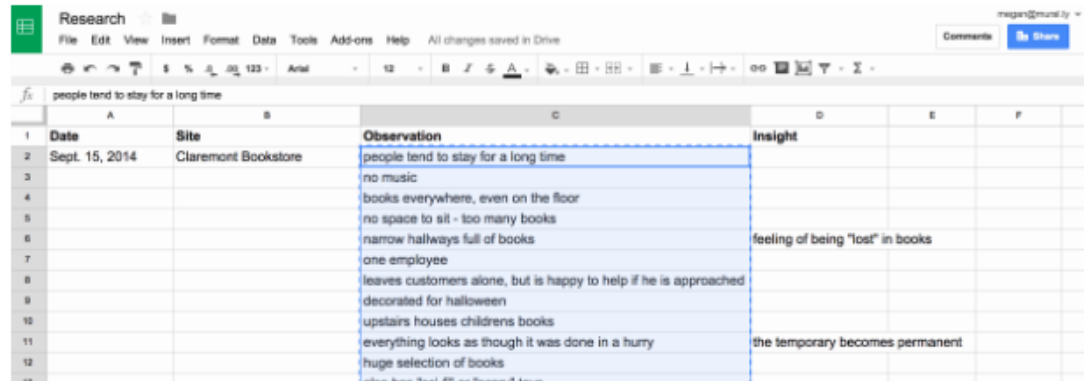
### Increase the ease of working with content across documents

You work in many programs and in many formats - we get that. To help you move text from one documents to another, use the copy and paste feature in MURAL.

Add content from a list or spreadsheet with just a few clicks:

1. Copy a list or cells of a spreadsheet or a list in a document
2. Find the open mural you want to the text to
3. Paste it straight into your mural.

Voilà! Each cell or line will magically appear as its own sticky note. Feel in control with how easy it is to cluster and arrange your content. Impress your colleagues by finding patterns and make conclusions quickly.



	A	B	C	D	E	F
1	Date	Site	Observation	Insight		
2	Sept. 15, 2014	Claremont Bookstore	people tend to stay for a long time			
3			no music			
4			books everywhere, even on the floor			
5			no space to sit - too many books			
6			narrow hallways full of books	feeling of being "lost" in books		
7			one employee			
8			leaves customers alone, but is happy to help if he is approached			
9			decorated for halloween			
10			upstairs houses childrens books			
11			everything looks as though it was done in a hurry	the temporary becomes permanent		
12			huge selection of books			
13			high level of customer service			

Job

Outcome

Emotional Job

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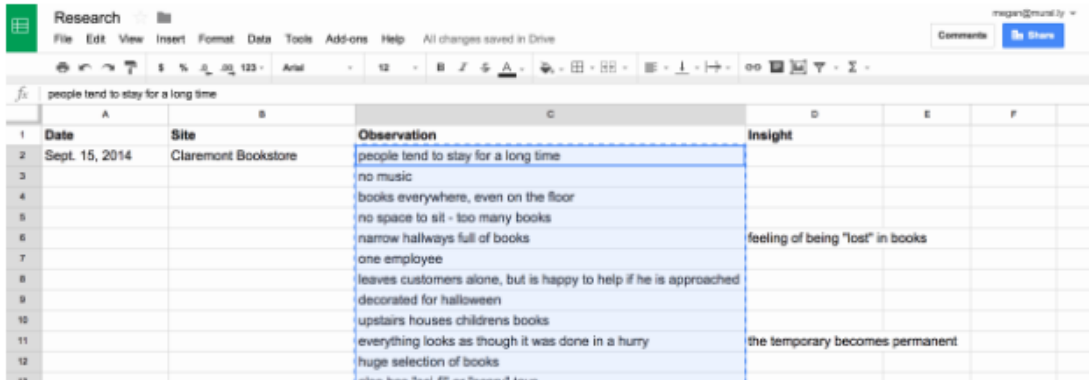
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Circumstance

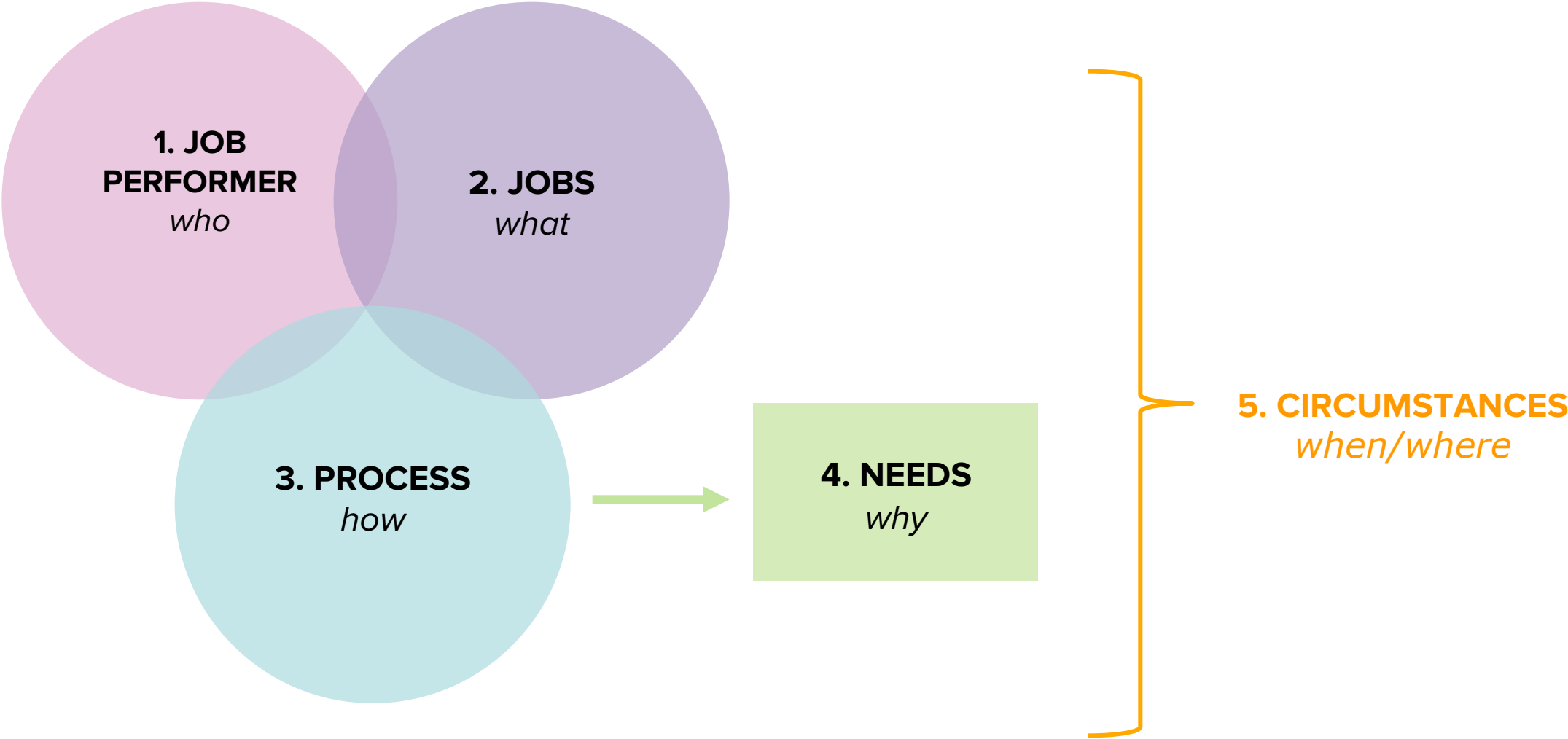
Process

Social Job





# ELEMENTS OF JTBD



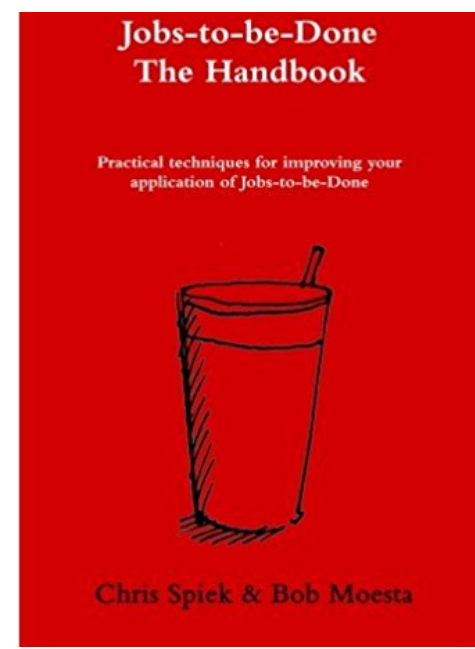
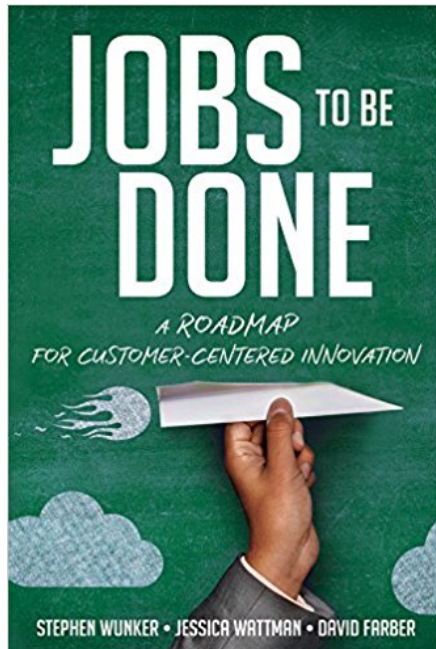
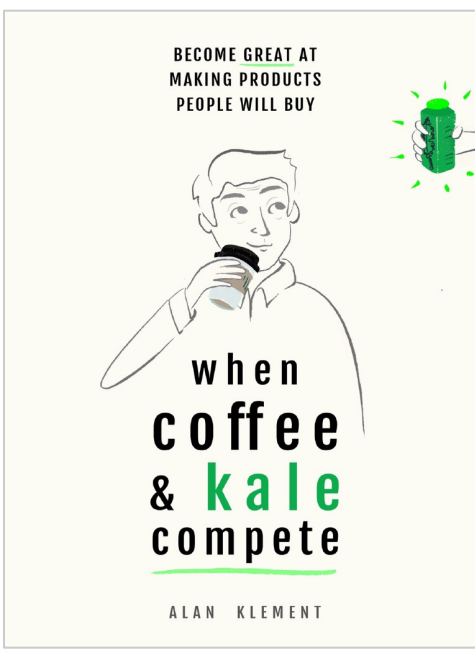
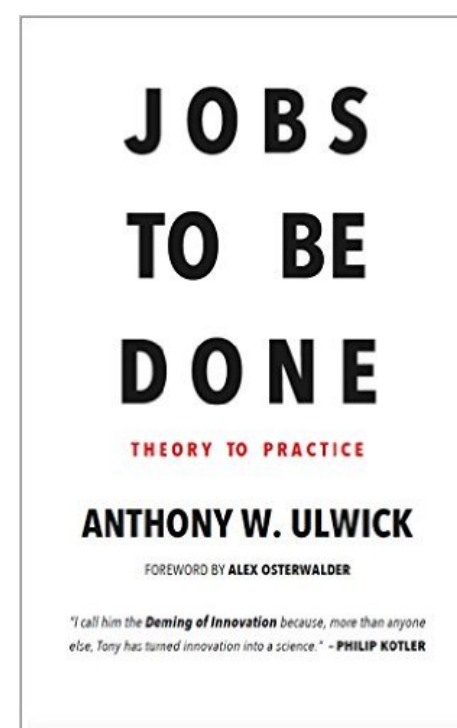
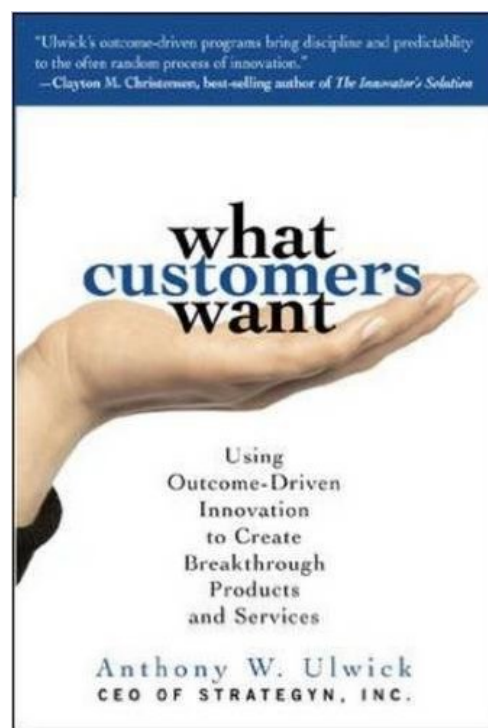
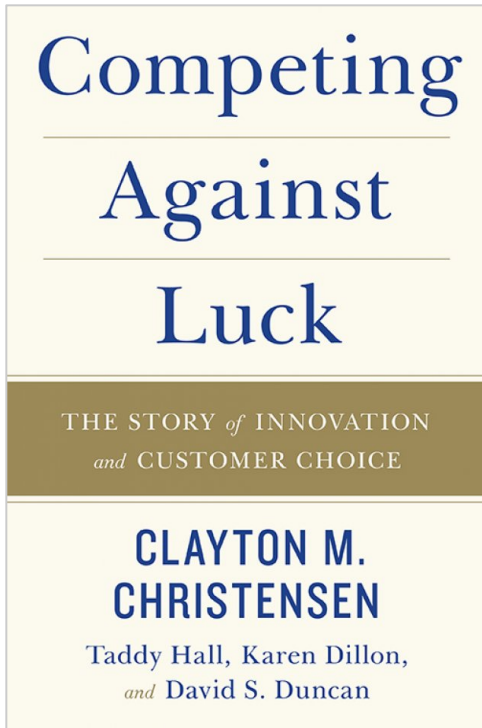
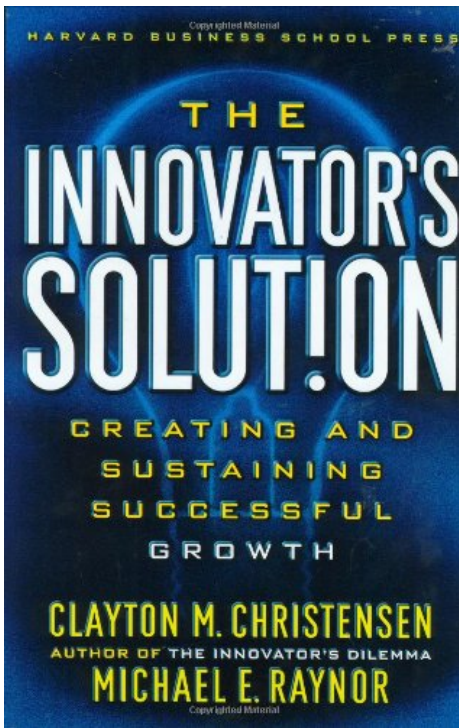
3

**JTBD is a broad field with many techniques that, when applied properly, get to the heart of what success means to customers.**

**Danke schön!**

@JimKalbach

[jim@mural.co](mailto:jim@mural.co)



# 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

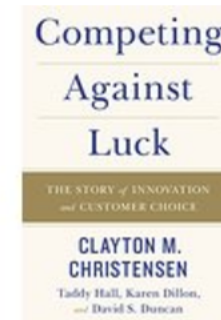
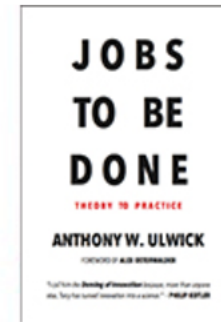
[Applying Jobs Theory to Micro-Moments](#) **NEW**

by **Anthony Ulwick**  
*CustomerThink*, March 2017

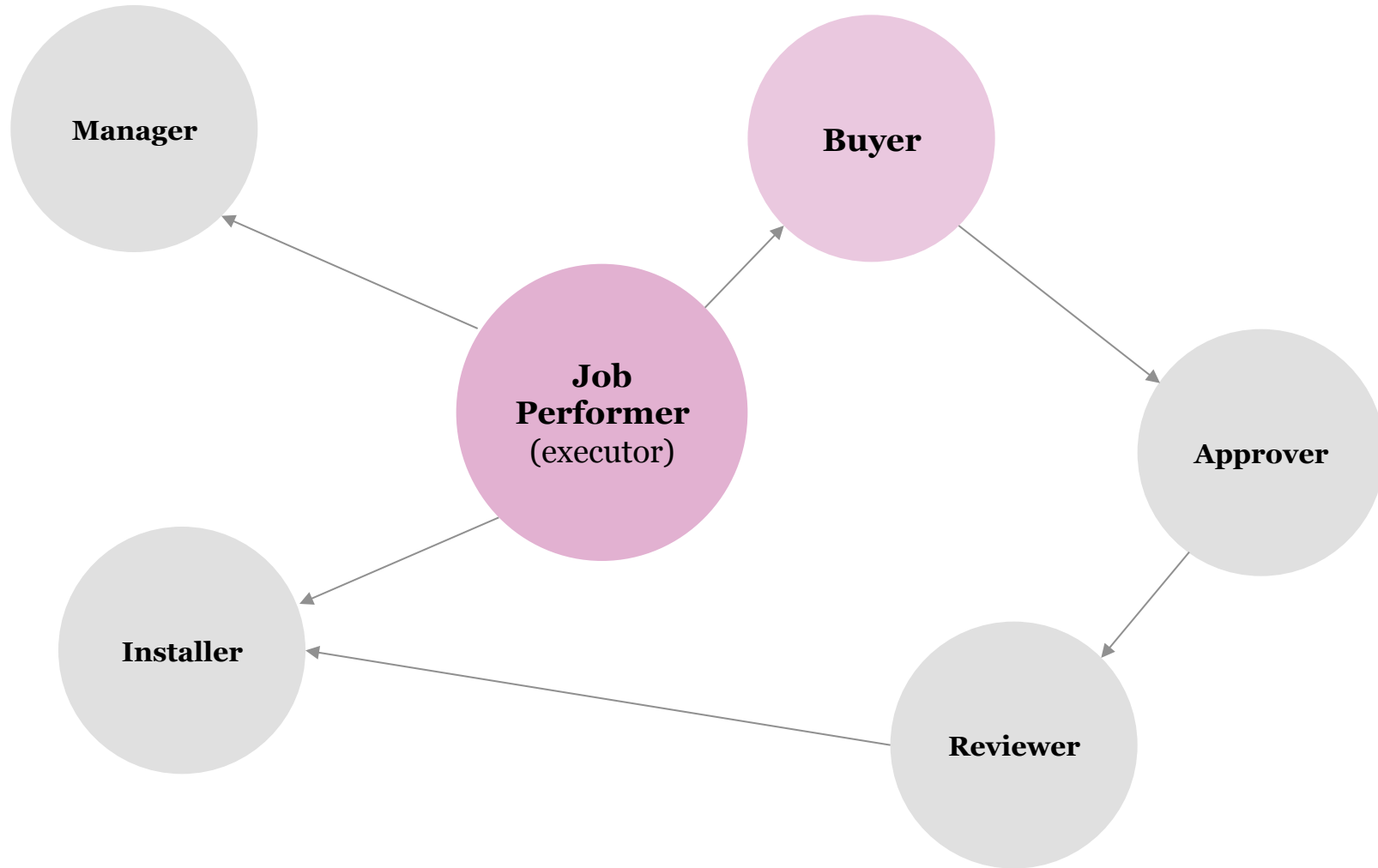
[Define Markets Around the Job-to-be-Done](#) **NEW**

by **Anthony Ulwick**

## BOOKS



# 1. *JOB PERFORMER*



## 2. MAIN JOB

**Aspiration**



**Big Job**



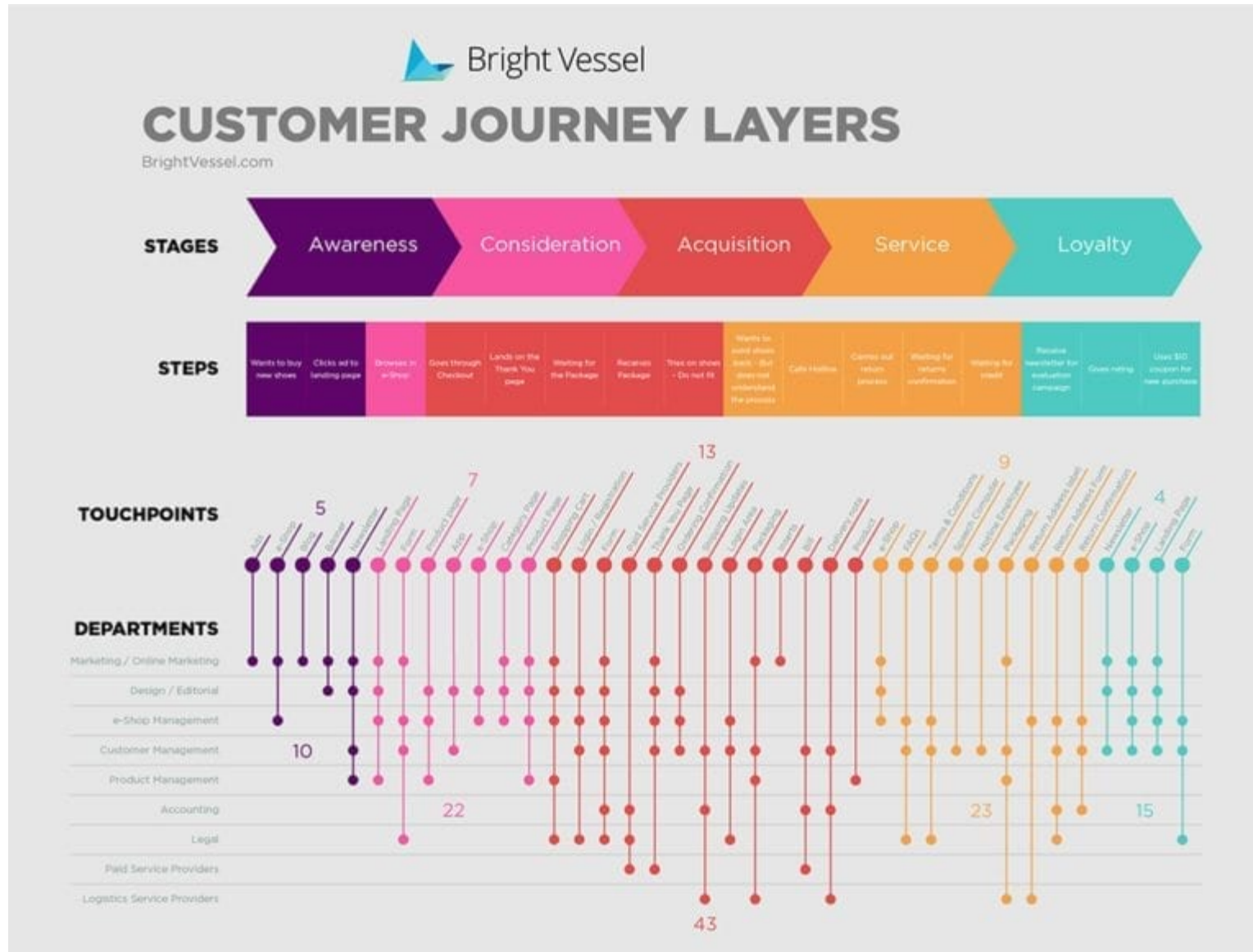
**Little Job**



**Micro Job**



# JOB MAP != CJM



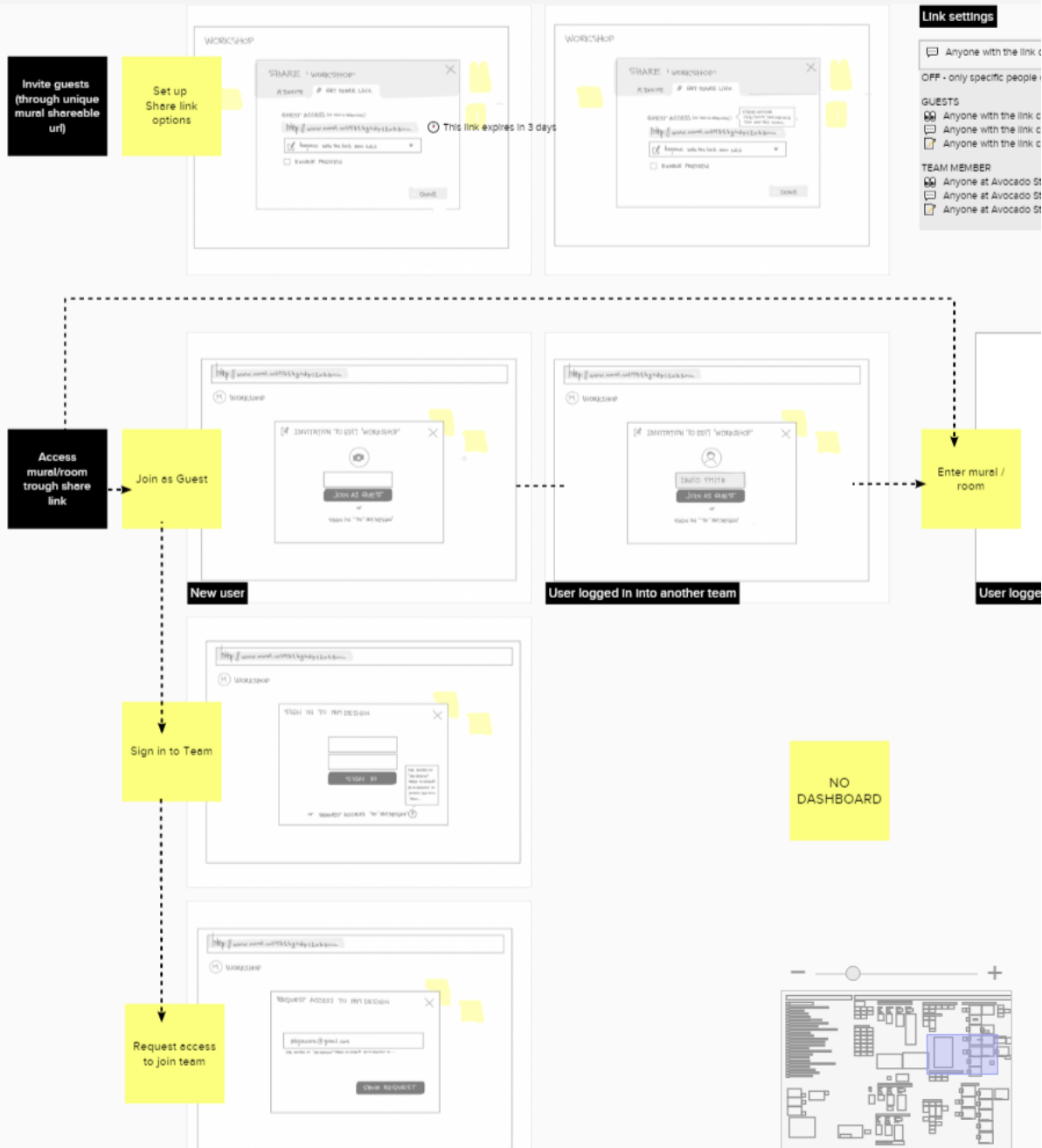


## JOBS TO BE DONE

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





# CS100SUMMIT

*Presented by*

client**success**