

PRODUCT MANAGEMENT FRAMEWORK

The Jobs to Be Done Framework

Situation · Motivation · Expected Outcome

A Practical Guide to Understanding Why Customers “Hire” a Product

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1. What Is Jobs to Be Done?

Jobs to Be Done (JTBD) is a customer-research framework built on a simple premise: people don't buy products, they "hire" them to make progress on a specific job in their life. The theory was popularized by Clayton Christensen and later refined for product teams by Tony Ulwick, Bob Moesta, and Alan Klement. Instead of segmenting customers by demographics, JTBD segments the situation what the customer was trying to get done at the moment they reached for a product.

This reframing matters because it explains competition and switching behavior that feature lists miss. A milkshake competes with a banana and a bagel, not just with other milkshakes, because all of them can get hired for the same commute-boredom job. Understanding the job a product is hired for and the jobs it's fired for gives a team a much sharper lens on what to build next.

Why PMs use it

- Explains why customers switch to or away from a product in terms of progress, not features.
- Surfaces the real competition for a product's job often not the obvious direct competitors.
- Gives customer interviews a repeatable structure instead of open-ended, hard-to-synthesize conversations.
- Anchors a roadmap in a durable customer motivation rather than a trend that will pass.

2. The Job Story Anatomy

A job is written as a job story: a situation, a motivation, and an expected outcome. This format deliberately avoids mentioning any specific solution the same job can be satisfied by very different products.

WHEN *I'm in this situation...*
I WANT TO *have this motivation...*
SO I CAN *achieve this expected outcome.*

Each part does distinct work: the situation grounds the job in a real, specific context rather than a persona; the motivation captures what the customer is actively trying to do; the expected outcome captures how they'll judge whether they succeeded. A well-written job story should read naturally without ever naming a feature or product.

3. The Three Types of Jobs

Every job has a functional core, but customers are also hiring a product to manage how they feel and how they're perceived. Strong discovery captures all three dimensions, since a solution that nails the functional job but ignores the emotional or social one often still gets fired.

1 Functional Job

The practical task the customer is trying to accomplish.

- The concrete, task-level outcome file a claim, track a shipment, close the books
- Usually the easiest dimension to observe directly in usage data
- Necessary but rarely sufficient on its own to win loyalty

2 Emotional Job

How the customer wants to feel or avoid feeling while getting the job done.

- E.g., wanting to feel in control, confident, or unhurried during a stressful process
- Often the real reason a technically adequate product still gets abandoned
- Surfaces through interview language about frustration, relief, anxiety, or confidence

3 Social Job

How the customer wants to be perceived by others as a result of using the product.

- E.g., wanting to look competent to a manager, or responsible to a family member
- Particularly strong in B2B contexts, where the buyer is judged on the outcome
- Easy to miss because customers rarely state it directly it shows up in what they emphasize

4. The Four Forces of Progress

Popularized by Bob Moesta, the Four Forces model explains why customers switch or don't from their current solution to a new one. Two forces push someone toward change; two forces hold them back. A switch only happens when the forces for change outweigh the forces of resistance.

PUSH Push of the Situation

Growing frustration with the current way of doing things.

PULL Pull of the New Solution

The attraction of a better, clearly understood alternative.

ANXIETY Anxiety of the New Solution

Fear that the new option won't work, or comes with unknown risk.

HABIT Habit of the Present

Comfort and inertia built up around the current way of working.

Push and Pull sit on the side of change; Anxiety and Habit sit on the side of the status quo. A product with strong Pull but unresolved Anxiety will generate interest without conversions a common pattern worth watching for in trial and onboarding funnels.

5. Worked Example

The job story and forces below were synthesized from customer interviews for a claims-tracking mobile app at an insurtech company.

WHEN *my insurance claim status changes and I don't know if action is needed from me,*
I WANT TO *find out immediately and understand exactly what to do next,*
SO I CAN *avoid delaying my reimbursement or missing a deadline I didn't know existed.*

Force	What the interviews revealed
Push	Repeated frustration at having to call support just to learn a claim was stuck
Pull	Interest in a status app after seeing a similar experience for package delivery tracking
Anxiety	Worry that a self-service app would miss something an agent would have caught
Habit	Years of trusting a familiar phone-call relationship with a specific claims adjuster

Reading the result: functionally, customers want status visibility; emotionally, they want to stop feeling powerless while waiting; socially, they want to appear on top of their own finances rather than caught off guard. The Anxiety force fear of missing something an agent would catch turned out to be the real blocker, which pointed the team toward an in-app escalation path to a human rather than a pure self-service redesign.

6. How to Apply JTBD - Step by Step

1. Recruit recent switchers people who recently adopted or abandoned a solution for this job since their memory of the decision is freshest.
2. Run a timeline interview: walk the customer back from “when you started using it” to the first moment they noticed the problem.
3. Listen for the situation, not the persona capture the specific circumstance that triggered the search for a solution.
4. Draft the job story using the When / I want to / So I can structure, with no product or feature names in it.
5. Tag interview quotes against the four forces to see which ones are actually driving or blocking switching behavior.
6. Separate the functional, emotional, and social dimensions of the job don't let the functional job crowd out the other two.
7. Validate the job story against multiple interviews before treating it as representative rather than one person's anecdote.
8. Feed validated jobs into discovery they make strong Opportunity nodes on an Opportunity Solution Tree.

7. When to Use It and Its Limitations

Best suited for

- Early-stage discovery when the team needs to understand why customers switch solutions
- Diagnosing unexplained churn or low adoption that usage data alone can't explain
- Reframing a competitive landscape beyond the obvious direct competitors

Known limitations

- Interview-intensive and time-consuming compared to a quick survey or analytics pull
- Quality depends heavily on interviewer skill leading questions easily contaminate the job story
- Produces qualitative insight, not a ranked backlog pair it with RICE or ICE once opportunities are identified
- Emotional and social jobs are easy to under-elicite if the interviewer stops at the functional answer

PM Practice Tip

- Use JTBD interviews to generate well-grounded opportunities, feed them into an Opportunity Solution
- Tree to map candidate solutions, then score those solutions with RICE or ICE before committing to build.

8. Reusable Template

Copy the structure below into your own interview synthesis tracker. Fill in one row per validated job story, tagging the dominant force behind the switch.

Job Story (When / I want to / So I can)	Type	Dominant Force	Source Interviews

Suggested "Type" values: Functional, Emotional, Social. Suggested "Dominant Force" values: Push, Pull, Anxiety, Habit.