

# A Practical Guide to Finding Your Customer's Real Job to Be Done

## The Job in Practice: Diverse Real-World Applications

The Jobs to be Done (JTBD) theory provides a lens that reveals non-obvious opportunities and drives strategy by focusing on the fundamental progress a customer is trying to make. An analysis of its application across various industries demonstrates a consistent pattern: initial business assumptions are often product-centric, while breakthrough success is achieved by pivoting to a customer-centric view of the "job."

### B2B SaaS: From All-in-One to Job-Specific Solutions

The case of Intercom, a customer communications platform, serves as a powerful illustration of how JTBD can diagnose and correct a flawed value proposition. Initially, Intercom positioned itself as a comprehensive, "all-in-one solution," believing its core value was in consolidating all customer data into a single platform. However, this product-centric strategy led to a growth plateau. The company discovered that customers were not using the full suite of features as anticipated. For instance, IT departments might "hire" the platform for its help desk capabilities, while marketing teams, skeptical of a free CRM function, would not adopt it. This created a disconnect where the broad, all-encompassing messaging failed to resonate with the specific, pressing needs of different user segments.

To address this, Intercom engaged The Re-Wired Group, a consulting firm co-founded by JTBD pioneer Bob Moesta. Through a series of in-depth JTBD interviews, they sought to understand the real "jobs" that different customers were hiring the platform to accomplish. This research uncovered four distinct and critical jobs. In response, Intercom executed a fundamental strategic shift. The single "all-in-one" product was unbundled and restructured into four separate products, each meticulously designed to solve one of the identified jobs. This transformation extended to their entire go-to-market strategy, which moved from promoting features to communicating value based on the "language of the demand-side" that had been unearthed during the interviews. The results of this customer-centric pivot were dramatic, demonstrating that JTBD is not merely a research tool but a comprehensive business strategy framework.

### E-commerce: Redefining the Online Purchase Journey

In the e-commerce landscape, the customer's job is rarely as simple as "buy a product online." Successful companies understand that the real job often involves mitigating risk, reducing uncertainty, or overcoming circumstantial constraints.

A compelling example comes from CarMax, where Product Design Manager Jake Mitchell applied JTBD to enhance the online car shopping experience, which users described as "difficult, cumbersome, and ultimately frustrating." Initial hypotheses might have focused on adding more features or photos. However, JTBD research revealed that customers were "hiring" the car photos to perform two very specific jobs: "feature confirmation" and "quality assessment." For example, a customer needed to see the physical "answer phone" icon on a

steering wheel to truly believe the car had Bluetooth. Armed with this knowledge, CarMax developed a "feature gallery" that explicitly highlighted specific features within the images, directly serving the confirmation job. This targeted innovation solved a significant point of customer friction without requiring a massive technical overhaul.

Similarly, DoorDash leveraged a deeper understanding of the customer's job to dominate the competitive food delivery market. While the basic functional job was "deliver food," DoorDash's strategy went further. By analyzing customer profiles in smaller cities and rural areas, they identified a segment of underserved customers. For these individuals, the job of "getting convenient food from a variety of restaurants" was far more acute due to fewer local options and greater travel distances. While competitors focused on major urban centers, DoorDash targeted this latent demand. This strategic focus on a constrained customer segment proved highly successful, now accounting for nearly 40% of the company's deliveries and helping it secure a majority market share.

## **Professional Services: Innovating the Consulting Engagement**

The JTBD framework is also a powerful tool for service-based businesses to innovate their own offerings. Leading innovation consulting firms like Strategyn and New Markets Advisors have built their entire business models around applying JTBD for their clients. These firms understand that clients do not hire them merely to "receive a market research report." Instead, clients are hiring them to accomplish higher-level jobs such as "de-risk a major investment," "create a predictable innovation process," or "align the entire organization around a customer-centric strategy".

A case study involving a global medical diagnostics company illustrates this principle in action. The company had long focused its innovation efforts on "lead users"—the most advanced specialists in the field. They hired Strategyn to help guide their product development. The subsequent JTBD research uncovered a critical strategic error: while the lead users, representing 21% of the market, were highly *overserved* by the current complex technology, the vast majority of the market (79%) was significantly *underserved*. The client was investing heavily in features for experts who didn't need them, while ignoring the struggles of the mainstream user base. The consulting engagement, grounded in JTBD insights, prompted a fundamental strategic redirection. The client shifted its focus away from the overserved niche and toward the large, underserved market segment, a move that was critical to preventing further decline in market share. This demonstrates that the true "job" of a professional service can be to provide a new, more accurate lens through which a client can view their own market.

## **The JTBD Interview Playbook: Frameworks and Questions for Uncovering the Struggle**

To uncover a customer's Job to be Done, one must move beyond traditional surveys and focus groups. The most effective method is a qualitative, story-based interview designed to reconstruct the "why" behind a purchase decision. This approach, championed by the "Jobs-as-Progress" school of thought, provides a practical playbook for any business leader to follow.

## **The Timeline Framework: Reconstructing the Purchase Story**

Bob Moesta's interview framework is not a rigid questionnaire but a guided storytelling session. Its objective is to create a detailed timeline of the customer's journey, starting from the moment they first considered a change to the point of purchase and their initial experiences with the new solution. This focus on the causal sequence of events helps to overcome flawed memory and post-purchase rationalization by grounding the conversation in concrete details.

The interview is structured around ten key phases:

1. **Setting the Stage:** Begin by establishing a casual, exploratory tone. The goal is to hear their story, not to conduct an interrogation.
2. **Understanding Their World Before:** Establish a baseline of what "normal" looked like before the struggle began. This context is crucial for understanding what changed.
3. **Pinpointing the First Thought:** Identify the specific trigger moment when the customer first thought, "I need to find a new solution." This is the genesis of demand.
4. **Uncovering the Struggle:** Delve into the specific pain points, frustrations, and workarounds that fueled their search for a new solution.
5. **How They Looked for Solutions:** Reconstruct their search process. What keywords did they use? What alternatives did they consider? This reveals their initial hiring criteria.
6. **Why They Chose This Product:** Isolate the "tipping point" in their decision. What specific feature, message, or moment made them choose one solution over others?
7. **First Experience & Early Wins:** Understand their initial moments with the product. Did it immediately deliver on its promise and provide a feeling of progress?
8. **How Their Usage Evolved:** Learn how the product's role in their life or workflow has changed over time.
9. **Current Pain Points & Future Improvements:** Uncover any ongoing struggles or unmet needs, which can point to future innovation opportunities.
10. **Mapping the Four Forces:** This analytical step occurs after the interview, using the collected story to map the motivations behind the decision.

## The Four Forces of Progress: Mapping Customer Motivation

The "Four Forces of Progress" is the primary analytical framework used to synthesize the interview data. It models the decision to switch to a new solution as a dynamic interplay between forces promoting change and forces resisting it. Progress only occurs when the forces for change overcome the forces of resistance.

The four forces are:

1. **Push of the Situation:** The problems and frustrations with the current situation that *push* the customer away from it. Example: "Our current manual process is causing too many errors and wasting valuable time."
2. **Pull of the New Solution:** The benefits and appeal of the new solution that *pull* the customer toward it. Example: "This new software promises to automate the entire process and integrate with our existing tools."
3. **Anxiety of the New Solution:** The fears, uncertainties, and doubts associated with adopting the new solution. Example: "What if it's too complicated to set up? Will my team actually use it? Is the company stable?"
4. **Habit of the Present:** The inertia and comfort with the current way of doing things that creates resistance to change. Example: "We've been using spreadsheets for years; it's what we know."

A successful product and its marketing must do more than just amplify the "Pull." It must also address a significant "Push," mitigate "Anxieties," and provide a compelling reason to overcome

the "Habit" of the present. This model reveals that a company's biggest competitor is often not another product, but customer inertia.

## A Curated Question Bank for JTBD Interviews

The following table provides a practical set of questions, aligned with the timeline framework, to help interviewers uncover the story of the struggle and map the forces of progress.

Interview Stage	Objective	Sample Question(s)	Source(s)
<b>Pinpointing the First Thought</b>	Identify the specific trigger event that moved the customer from passive to active searching.	"Take me back to the day you first realized you needed a solution for [problem]. What was happening that day?"	
		"Why did you start looking for a solution on that particular day? What made it so special?"	
<b>Uncovering the Struggle</b>	Detail the pain points and frustrations that made the old solution untenable.	"What was frustrating about the way you were handling this before?"	
		"What hacks or workarounds were you using to try and solve the problem?"	
<b>How They Looked for Solutions</b>	Understand the consideration set and initial hiring criteria.	"How did you start your search? What specific search terms did you use?"	
		"What other solutions did you consider? What did you like and not like about them?"	
<b>Why They Chose This Product</b>	Isolate the tipping point and the specific value proposition that resonated.	"What did you see that made you think this was the right fit?"	
		"What other factors played a role in your decision-making process?"	
<b>Mapping Anxieties &amp; Habits</b>	Uncover the forces resisting the change.	"Did you have any anxiety about purchasing or using this product? Was there anything that made you	

Interview Stage	Objective	Sample Question(s)	Source(s)
		nervous?"	
		"If you could no longer use our product, what would you use instead? (This often reveals the 'habit' or true alternative)."	

This forensic reconstruction of the buying journey reveals the precise moment demand was created. The "First Thought" is the critical inflection point where a passive problem becomes an active search. This understanding allows a business to move beyond generic marketing and instead create campaigns and messaging that target the specific *circumstances* of the customer's struggle, dramatically improving relevance and timing.

## Navigating the Nuances: Common Pitfalls and Best Practices

Successfully applying the JTBD framework requires more than just conducting interviews; it demands analytical rigor and a disciplined mindset. The most common errors stem from a single root cause: a failure to maintain a strict separation between the customer's world (the problem space) and the company's offering (the solution space).

### Critical Pitfalls in JTBD Research and Application

1. **Confusing the Two Schools of Thought:** The most significant source of confusion in the JTBD landscape is the distinction between "Jobs-as-Progress" and "Jobs-as-Activities".
  - **Jobs-as-Activities**, associated with Tony Ulwick and Strategyn, defines a job as a task to be executed more efficiently (e.g., "listen to music," "cut wood"). This view often leads to incremental improvements on existing solutions.
  - **Jobs-as-Progress**, associated with Clayton Christensen and Bob Moesta, defines a job as a customer's struggle for a better self or situation (e.g., "make my commute more interesting"). This perspective is more likely to uncover opportunities for disruptive innovation.
  - **The Pitfall in Practice:** A company supplying herbicides to farmers might conclude the job is "to kill weeds" (an activity). This leads them to develop a better herbicide. However, if they define the job as "to grow a crop" or "to maximize yield" (progress), they might innovate entirely new solutions, such as soil analytics software or drone-based monitoring services.
2. **Defining the Job at the Wrong Level of Abstraction:** A job defined too narrowly will limit innovation opportunities, while one defined too broadly will be unactionable. For a drill manufacturer, the job is "creating a quarter-inch hole." "Hanging a picture on a wall" is too broad—that is the job of the picture-hanging hardware manufacturer. "Rotating a drill bit at high speed" is too narrow—that is a product function, not the customer's goal.
3. **Confusing the Buyer's Journey with the User's Job:** This is a frequent error in B2B contexts. Interviewing a purchasing manager will yield valuable insights for improving the sales and procurement process. However, it will provide little to no information for



innovating the product itself. Only the end-user who performs the core functional job every day can provide those inputs.

4. **Asking Leading or Hypothetical Questions:** JTBD interviews must focus on actual past behavior ("Tell me about the last time you..."), not on future desires or abstract opinions ("What features would you like?"). Customers are notoriously poor at predicting their own future behavior. Furthermore, asking "why" directly can trigger post-hoc rationalizations. It is more effective to ask "what happened" and reconstruct the sequence of events to infer the underlying causality.
5. **Letting the Solution Creep into the Job Definition:** A well-formulated Job to be Done is always solution-agnostic. The statement "help me brush my teeth" is inherently tied to the solution of a toothbrush. A true job statement, such as "help me keep my teeth healthy," opens the aperture for innovation. This job could be solved with a better toothbrush, but it could also be solved by a revolutionary mouthwash, a new dental service, or a dietary supplement.

## Best Practices for Analysis and Synthesis: Crafting the Job Statement

The Job Statement is the foundational artifact of JTBD research. It is a concise, clear articulation of the customer's goal that aligns the entire organization—from product to marketing to sales—around a single, validated customer truth.

### Rules for a Strong Job Statement:

- **Structure:** A robust job statement follows a simple pattern: **Verb + Object + Contextual Clarifier**. For example, "Manage (verb) daily cash flow (object)".
- **Perspective:** It must be from the customer's perspective. A helpful mental check is to place a silent "I want to..." before the statement.
- **Solution-Agnostic:** It must describe the goal, not the method for achieving it.
- **Functional Anchor:** While emotional and social dimensions are critical for understanding the full context, the core job statement should be anchored in the functional progress the customer is trying to make.
- **Completion State:** A job can be completed. "Control daily spending" has a clear success state, whereas "manage finances" is an ongoing task without a clear end.

**A Practical Template for Job Stories:** A widely used format that captures the key elements of the job is the "job story": **When** ` , **I want to** [Motivation/Goal], **so I can** [Expected Outcome].

- **Example:** "When I am working during travel, I want a laptop with a battery that can last a full work day, so that I can be productive and do my work from outside the office".

For more complex jobs, it is a best practice to create a **Job Map**, which deconstructs the core job into a sequence of steps. A universal eight-step map includes: Define, Locate, Prepare, Confirm, Execute, Monitor, Modify, and Conclude. This allows a team to pinpoint which specific steps in the customer's process are the most underserved and ripe for innovation. Adopting these practices requires a significant cultural shift, particularly for technology-led or sales-led organizations. It demands a move away from an internal focus toward deep, empathetic customer understanding, championed by leadership and embedded across the company.

## From Insight to Impact: Quantifying the Business Outcomes of JTBD

The ultimate value of the Jobs to be Done framework lies in its ability to generate tangible,

measurable business results. By aligning the entire organization around solving the customer's real job, companies can drive growth, build more engaging products, and de-risk the innovation process. The business outcomes are not isolated; they are part of a causal chain where deep customer insight fuels better marketing and product development, which in turn drives superior acquisition and retention, leading to accelerated and sustainable growth.

## Driving Growth Through Superior Messaging and Conversion

JTBD provides the raw material for marketing messages that resonate on a deeper level because they speak directly to the customer's struggle and desired progress, rather than simply listing product features. This improved message-market fit translates directly into superior marketing performance.

- **Quantifiable Impact:** Research indicates that when marketing messaging shifts from generic benefits to specific job improvements (e.g., gains in speed or accuracy), **conversion rates can increase by 23-45%**. This same job-focused approach has been shown to **decrease sales cycle length by 30%** and **reduce customer acquisition costs (CAC) by 18%**. The Intercom case study provides a real-world proof point, showing the company **quadrupled its website traffic** after adopting "demand-side" language discovered through JTBD interviews.
- **Application in Practice:** A furniture retailer initially believed it was in the business of selling couches. After applying a JTBD lens, they realized their customers' true job was "creating a space that feels like home." In response, they began bundling design consultation services with their sales process. By addressing this deeper, more emotional job, they improved conversion rates on high-ticket items.

## Building Stickier Products: Enhancing Adoption and Retention

Within the JTBD framework, customer churn is reframed. It is not a failure of customer loyalty but a mismatch between the product and the customer's evolving job. Sustainable retention is achieved by consistently helping the customer make progress in their life.

- **Quantifiable Impact:** While specific retention percentages are not always available, JTBD directly influences the key metrics that drive retention, such as Customer Lifetime Value (CLV). By ensuring a strong product-market fit, JTBD helps reduce churn and increase loyalty.
- **Application in Practice:** LeanStack, a product management software, suffered from poor retention despite having a solid value proposition. Founder Ash Maurya used JTBD to discover the problem: the core job—creating an initial business plan—was finite. Once entrepreneurs completed this job, they had no reason to continue their subscription. This insight prompted a strategic pivot to address an ongoing job, thereby solving the retention issue. In another example, a streaming service reduced churn after discovering its users' real job was not just to "watch shows" but to "feel relaxed and connected." By redesigning its interface to be less overwhelming and more user-controlled, the service better addressed the emotional dimension of the job and boosted its perceived value.

## De-Risking Innovation: Fueling Successful Product and Feature Development

JTBD makes the innovation process more predictable and profitable by focusing finite development resources on validated, underserved customer needs, rather than on internal assumptions or the requests of a vocal minority of "lead users".

- **Quantifiable Impact:** The results of this focused approach can be transformative.
  - A healthcare technology company, Biscom, used JTBD to identify unmet needs, which informed a product strategy that **tripled the company's growth rate** over a two-year period.
  - The Target Registry team applied JTBD insights to reverse a top-line revenue decline and achieve over **25% annual revenue growth** within 18 months.
  - The consulting firm Strategyn claims an **86% success rate** for innovation projects that use its JTBD-based Outcome-Driven Innovation (ODI) process.
  - In a challenging year for its industry, the foodservice equipment marketplace AutoQuotes saw new products developed through JTBD contribute to **30% of its new bookings**.
- **Application in Practice:** When developing early social features for the Oculus VR platform, the product team used JTBD research to prioritize its roadmap. The research revealed that the most critical job for new users was "coordinating play in VR with a friend." Consequently, the team prioritized features that solved this job over features related to "expressiveness," because reducing the initial barrier to a shared experience was the most urgent and valuable problem to solve.

This evidence demonstrates a clear value cascade. Deep customer understanding derived from JTBD research leads to more resonant marketing and a better product. Improved marketing enhances customer acquisition, while a superior product boosts customer retention. The combined, compounding effect of these improvements is what drives accelerated and sustainable business growth. This reframes how success should be measured, moving beyond vanity metrics like feature adoption to outcome-based metrics that prove the customer's job is getting done: time saved, pain points eliminated, and progress achieved.

## Conclusions

The Jobs to be Done framework offers a potent and practical methodology for small-to-medium businesses to achieve a sustainable competitive advantage. It provides a structured process for moving beyond product-centric assumptions to a deep, causal understanding of customer motivation. The core principle is a fundamental shift in perspective: customers do not buy products; they "hire" them to make progress in their lives.

The analysis reveals several key conclusions for business and marketing leaders:

1. **JTBD is a Holistic Business Strategy, Not Just a Research Tactic:** The most successful applications of JTBD, such as with Intercom and Biscom, demonstrate that its insights should not be siloed within the product team. The understanding of the customer's "job" must become the central organizing principle for the entire go-to-market strategy, influencing marketing messaging, sales processes, product roadmaps, and pricing models. This alignment is what unlocks transformative growth.
2. **The "Struggle" is the Source of Opportunity:** Demand is not created by a company; it is created by a customer's struggling moment. The JTBD interview process is specifically designed to be a forensic reconstruction of this struggle. By understanding the "Pushes," "Pulls," "Anxieties," and "Habits" that govern a purchase decision, businesses can craft solutions and messages that resonate with the customer's real-world context, rather than



their demographic profile.

3. **Discipline is the Key to Effective Application:** The most common pitfalls in JTBD research—confusing activities with progress, defining the job too narrowly, or letting the solution influence the research—all stem from a lack of discipline in separating the problem space from the solution space. A rigorous focus on the customer's world, independent of the company's product, is essential for uncovering genuine, non-obvious opportunities.
4. **The Business Impact is Measurable and Compounding:** The application of JTBD is not an academic exercise; it leads to quantifiable improvements across the customer lifecycle. From increased conversion rates and lower acquisition costs to higher customer retention and more predictable innovation, the framework provides a direct line of sight from customer insight to bottom-line impact.

For SMB owners and marketing leaders, the path forward is clear. By adopting the JTBD interview frameworks and analytical tools, they can move beyond guesswork and build their strategies on a solid foundation of what truly motivates their customers. The ultimate goal is to stop selling what the company makes and start selling the progress that customers are seeking.

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