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Jobs to be done with diagrams

Deliver value to your customers, partners and internal colleagues with draw.io

Jobs to be done

Use the Jobs to Be Done method with diagrams to deliver value to your customers, partners and internal colleagues. When our team is working on a new product or feature, we want to use the most effective method possible to deliver the best outcomes for our customers.

The core idea

Why do people purchase and use certain products and services?

Or rather, what jobs do our customers need to get done (including their "why")? When we use traditional customer research, we tend to ask simple, direct questions, such as "What do you want?" or "Why do you want it?"

You'll often hear this kind of response: *"I want a new watch, because I need to know the time."*

We can create and diagram personas from these simple answers, develop them into use cases then launch into development. Unfortunately, the answers we get from asking direct questions are often misleading or even false.

In the example above, perhaps the customer really meant:
"I want a new watch that is comfortable and stylish, one that represents me and my personality. I should be able to customize it in order to fit the situation or whenever I want to make a change, for whatever reason. It will always remind me to be where I'm supposed to be, perfectly in sync with my calendar. I don't want to have to get my phone out of my bag just to tell the time or to check my calendar."

When demand for a product or service is low after getting direct question-based feedback from your target market, typically the documentation is blamed. But it's not the diagrams' or documents' fault, it's that we didn't deeply understand our target market's 'job to be done', their motivations, their why.

Our customers' lives are complex and nuanced. We must consider social and emotional factors, product attributes, and new trends and technologies when considering a person's motivations. We want to discover our customer's needs and then prioritize them, and consider not only what they need to complete their job, but also how they want to feel. In order for customers to reach their goals we need to clearly define both functional jobs and any related emotional jobs. This will help us to define our target market.

Interview customers the right way

We can directly ask customers what they want, but what they need in order to complete their job may not actually match what they say they want. Quick answers to direct questions such as "Why do you want it?" will often fail to provide real insight.

Instead, we should interview people – ones who have already purchased related products and services – about the situations in their lives that drive them to make those purchases. Open questions, with plenty of related follow-up questions, let us tease out their why:

- What triggered you to think about looking for the product or service?
- What products or services did you try? How did you find out about them?
- What were you doing when you last purchased a similar product or service, and what did you feel?
- What did you like or dislike about the product or service you purchased?
- What were you struggling with at the time? What was holding you back from making progress without the product or service?
- Were there any particular reasons you purchased that specific product or service over another similar one?

Define the customer's job to be done

Now that we have gathered a mountain of information, it will help us define the customer's job to be done.

1. Think about it from the customer's perspective: what goals are our customers trying to achieve?
2. Include the entire job, not just one component: our customers don't want to have to cobble together many components!
3. Define the market around the functional job instead of emotional goals: emotional jobs help us to better understand our customers, especially when marketing and positioning our new products or services. While our varied customer base has many different emotional goals, they all need our product or service to complete the same functional job: that's our target market.

Now, how do we clearly present the mountain of data we have collected and analyzed? With diagrams, of course!

Use diagrams to define the jobs to be done

Diagrams can concisely communicate complex information. Of course, you don't need to create all of these diagrams, but they will help you refine your understanding of the data gathered from the customer interviews.

Force diagrams
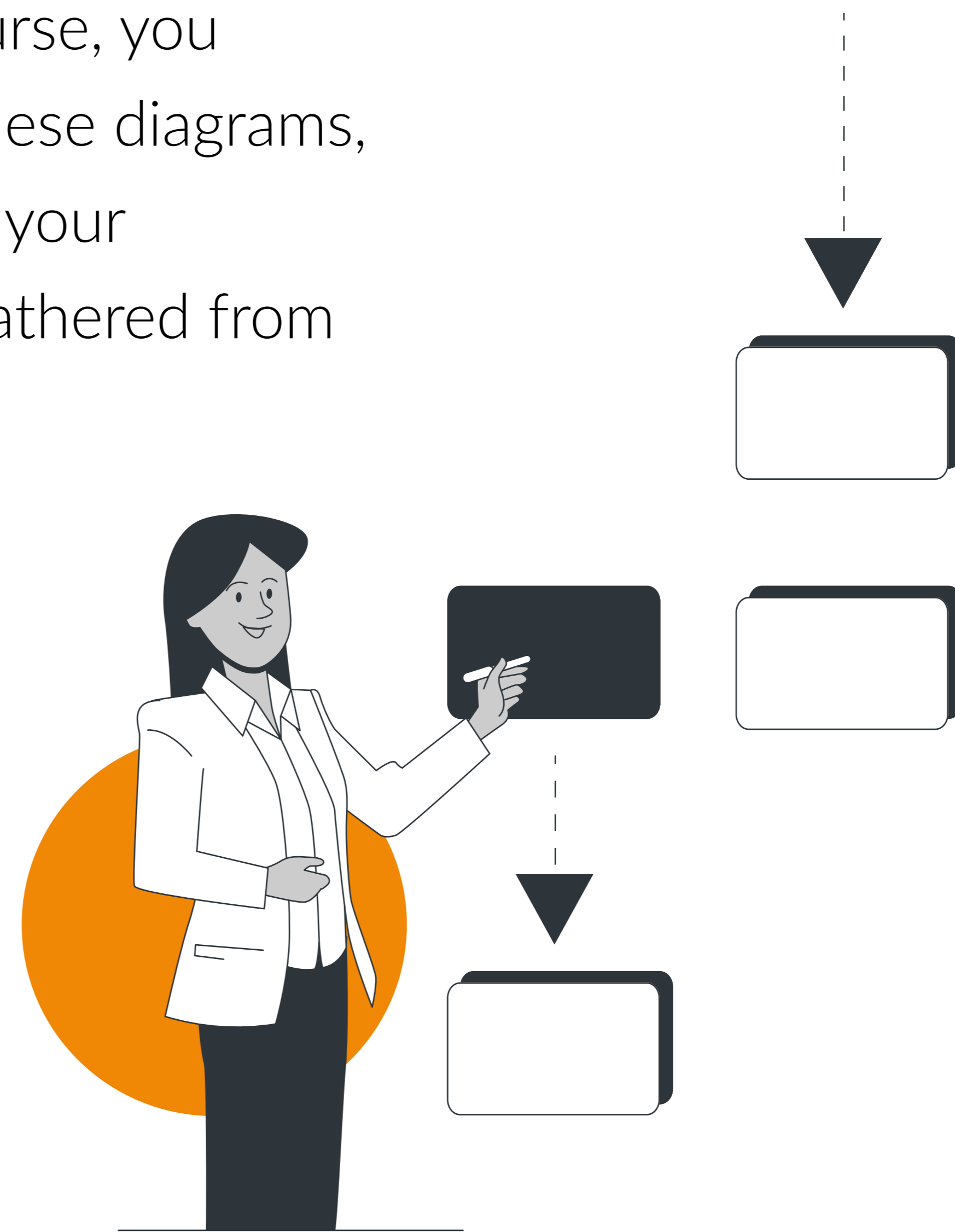
Force diagrams show what drives target markets to use a product:

- The push of the current situation: frustration, the drive to change.
- The pull of the new solution: because it's cool!
- Feelings that may block or hinder the new solution: the fear of change.
- Loyalty to or reasons to stay with the current product: stick with what you know.

FORCES THAT PROMOTE CHANGE

PUSH / make the situation better

- **Problems** that the customer needs to solve
- **Jobs** that the customer needs to do
- **Negative feelings** about the current solution or situation

PULL / attractiveness of new solution

- **Attractiveness** What customers find attractive
- **What's missing** What customers miss in their current solution

SWITCH

to new solutions

FORCES THAT PREVENT CHANGE

STAY

with current solution

REASONS / to stay with the current solutions

- **Habits**
- **Loyalty**
- **Feelings** about similar solutions

ANXIETY / about change

- **Obstacles** What holds the customer back
- **Bad experiences** in the past
- **Negative feelings** about switching products

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Value proposition canvases

A value proposition canvas helps us more easily relate our customer's jobs to be done with their forces and our products and services. It expands upon the forces diagram and is also useful when a team feels more comfortable working from customer personas.

Each group of customers has their own value proposition canvas which is developed in two parts - the first half of the diagram is completed first to drive the brainstorming and analysis from the customer's point of view.

- **Pains:** what gets in the way of a customer completing their job - the reasons the customer is looking for a new solution.
- **Gains:** all of the positive effects that the customer wants to 'gain' from completing their jobs or from using a product or service, including their larger ambitions and desires.
- **Jobs to be done:** including the customer's functional, emotional, social and supporting jobs.

Both the gains and the pains in the first part of the value proposition canvas include the forces that promote change - the push and the pull from the forces diagram.

Next, we add priorities and weight to the customer's pains and gains. Not everything will be important, or perhaps not in all contexts - we want to focus on the high value, important aspects where we can help.
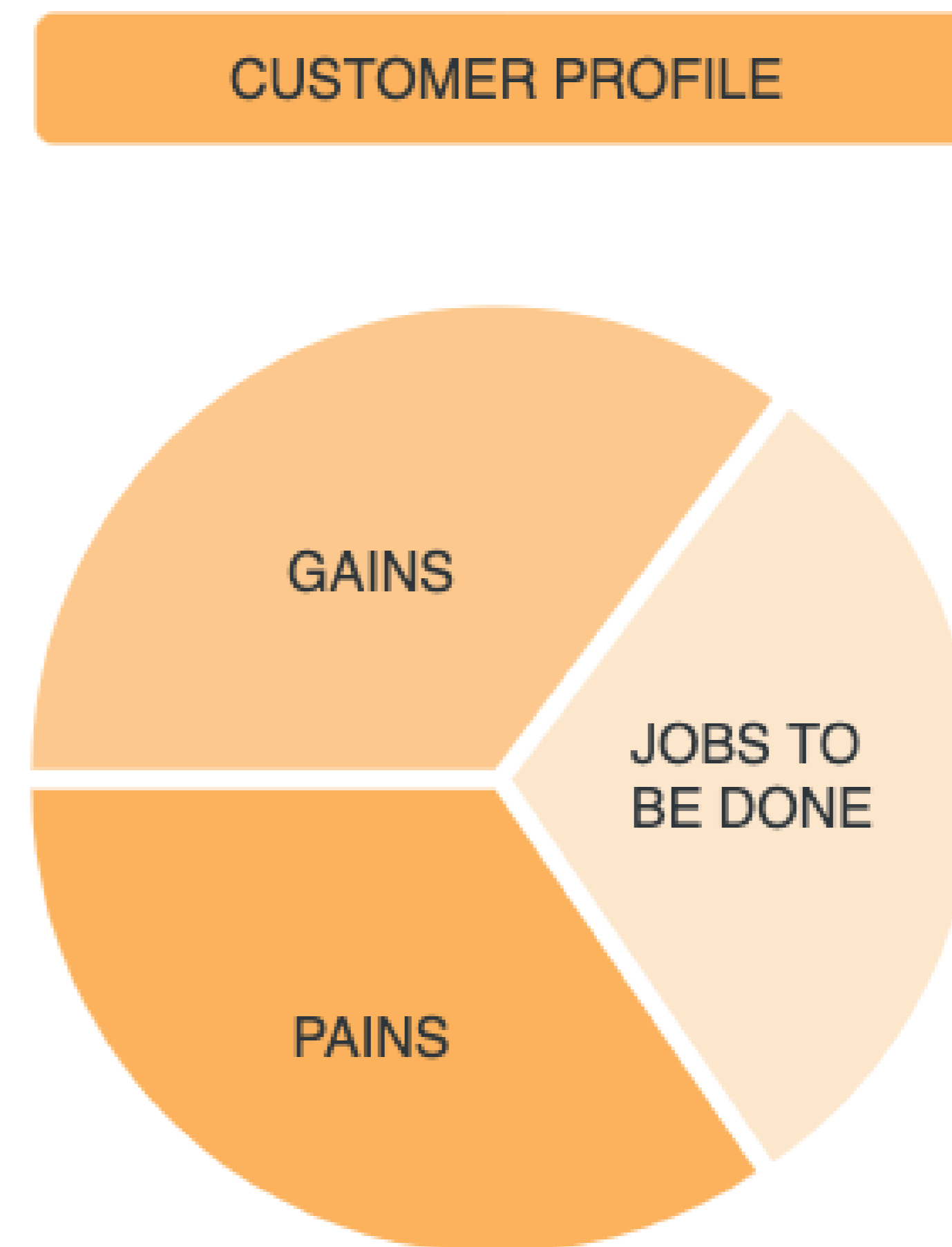
Finally we want to detail everything that could enable or amplify our customer's gains and minimize or eliminate their pains in the second half of the diagram.

- **Pain relievers:** what would help customers avoid or get rid of their pains and problems, fix under-performing solutions, or reduce the influences that prevent a new solution from being adopted (feelings like fear, habits, or other barriers).
- **Gain creators:** what would help customers achieve their gains, make it easier to adopt a new solution, and what would make our products or services outperform what our customers currently use.
- **Products and services:** all of the products and services that help customers get their jobs done.

BONUS: Use layers and create a template

We put each side of the value proposition canvas on it's own layer. When brainstorming for the first part of the diagram, we hide the side with products and services so we can avoid short-circuiting the process. We save this as a template, and copy it into a new diagram page for each group of customers.
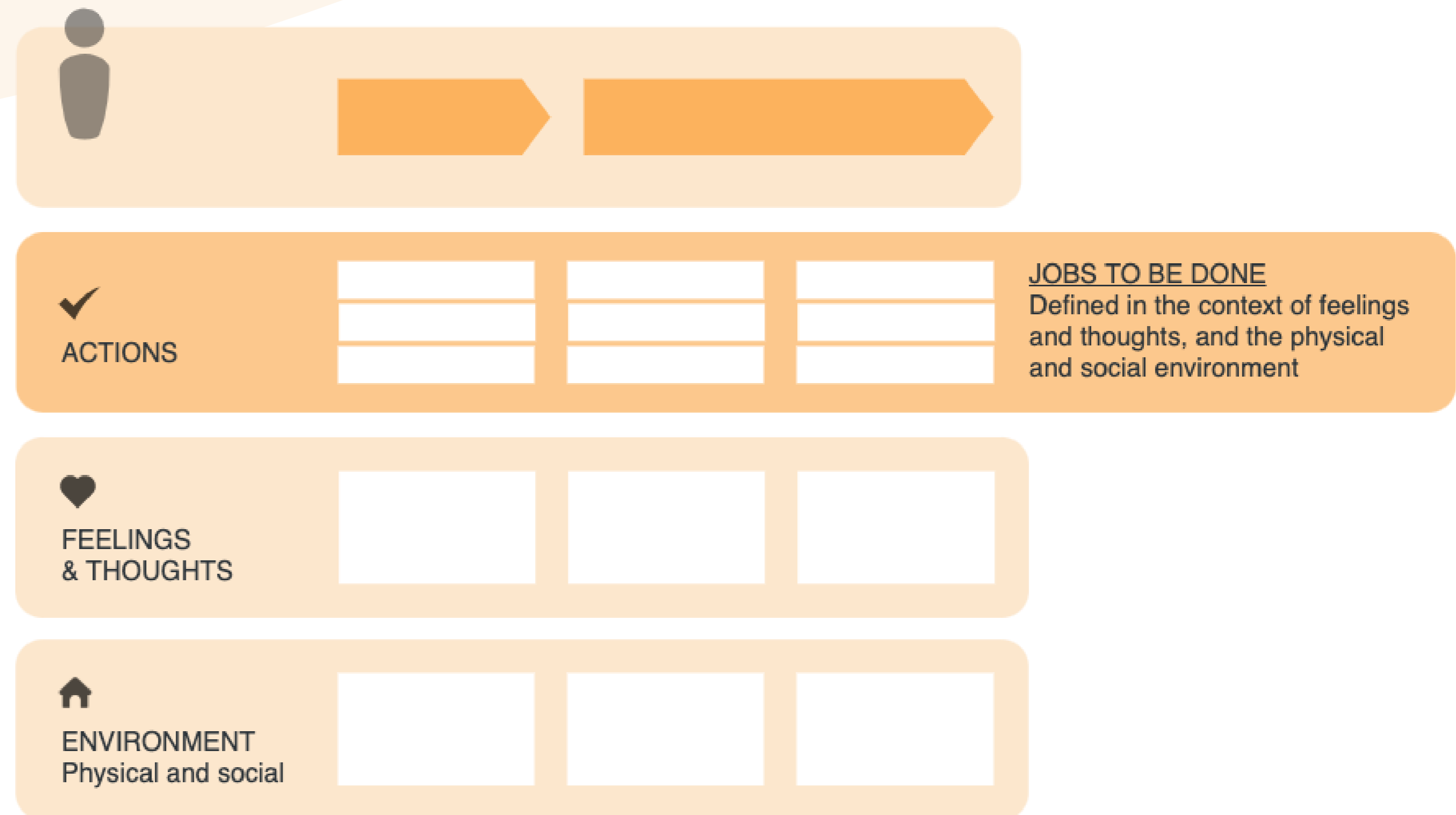
VALUE PROPOSITION

GAIN CREATORS

PRODUCT & SERVICES

PAIN RELIEVERS
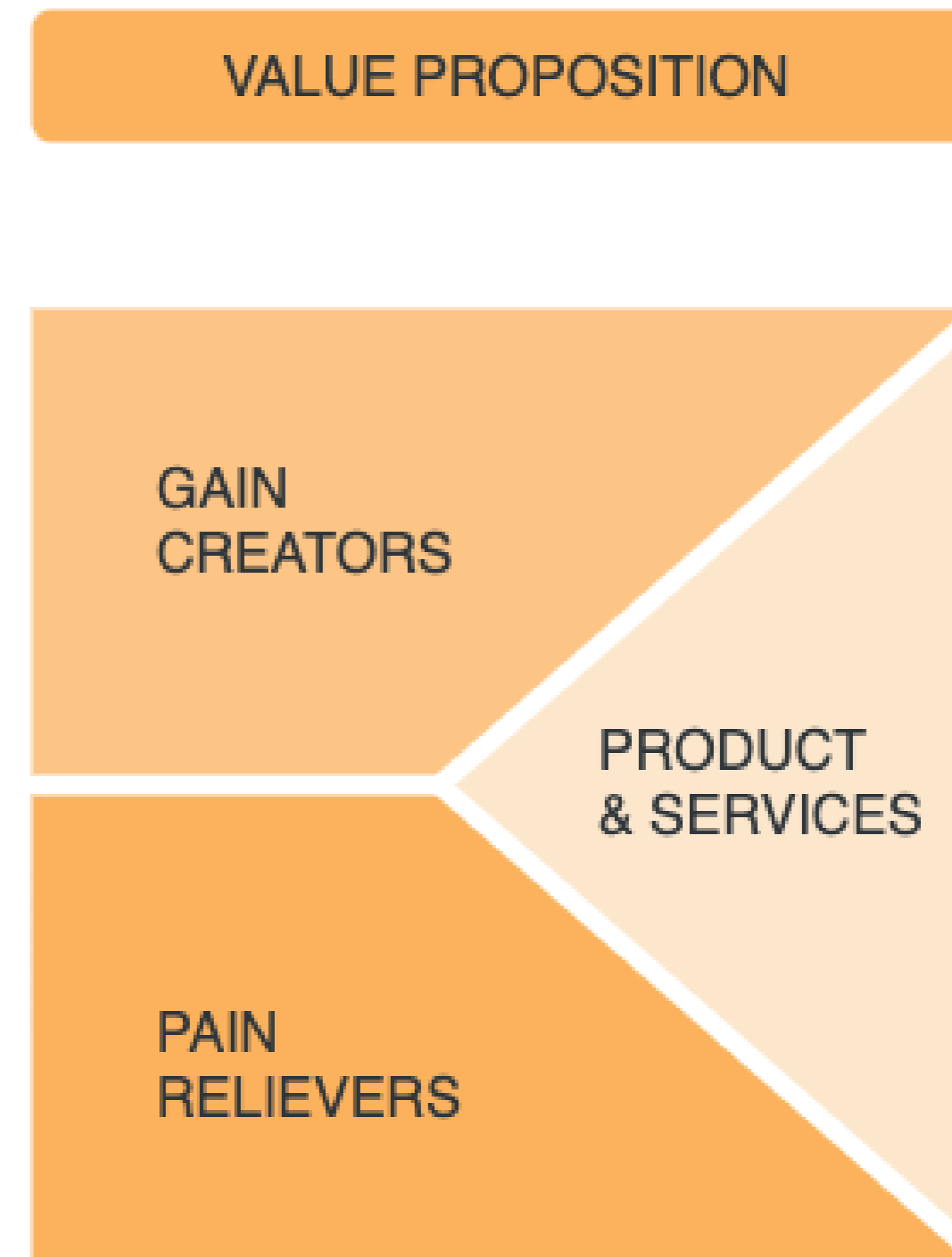
Customer journey maps

Customer journey maps detail the series of functional tasks that need to be completed with their desired outcomes. These serve to highlight the needs of our customers, especially where there are needs that are currently not being met.

1. What tasks must be performed before customers can work on their job?

2. What tasks must be performed to get their job done?

3. What tasks must be performed after their job is finished?

Each of these three series of steps needs to be put into its proper context: What emotional response is the customer seeking? What is it they would like to be thinking at each stage (intrinsic motivation)? What are the important and noteworthy aspects of their physical and social environment?

ACTIONS

JOBS TO BE DONE
Defined in the context of feelings and thoughts, and the physical and social environment

FEELINGS
& THOUGHTS

ENVIRONMENT
Physical and social

BONUS: Use multipage diagrams

ments within the customer journey map can link to another page in a draw.io diagram. This is ideal when we need to define all of the processes in detail. Each page can contain a flow chart or UML activity diagram for each of the tasks that need to be completed in order to get the job done, and viewers can quickly navigate by clicking on the related linked elements in the overview diagram.
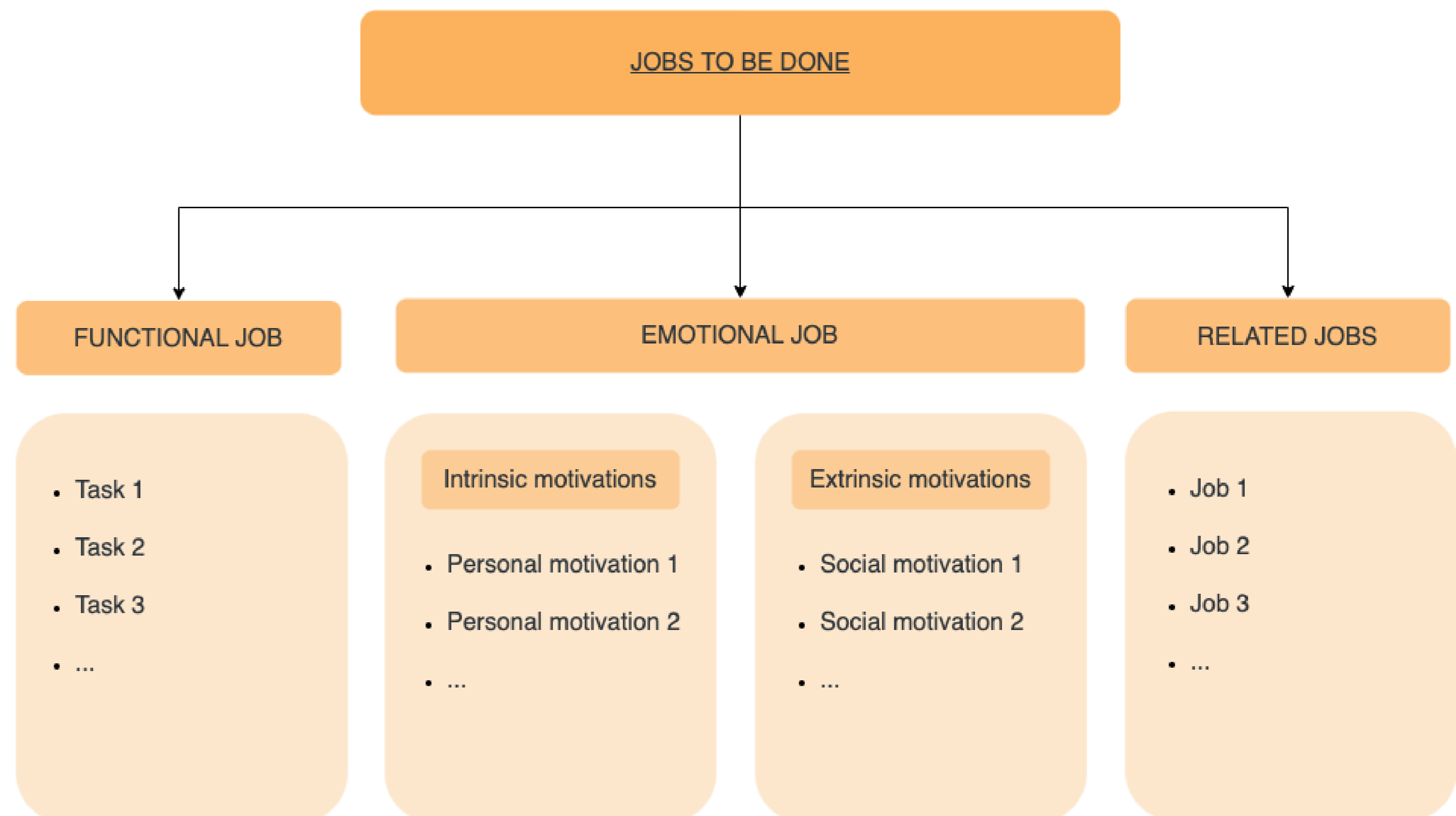
Job maps

The same information can be represented by the simpler job map diagrams, which can also include links to related jobs. These are more utilitarian and use a basic hierarchical tree structure.

Part of our job that we need to do is to motivate and inspire our colleagues in all departments. When we design our customer journey maps, an attractive diagram displays our excitement and enthusiasm - these diagrams are more appealing to everyone!

JOBS TO BE DONE

FUNCTIONAL JOB

- Task 1
- Task 2
- Task 3
- ...

EMOTIONAL JOB

Intrinsic motivations

- Personal motivation 1
- Personal motivation 2
- ...

Extrinsic motivations

- Social motivation 1
- Social motivation 2
- ...

RELATED JOBS

- Job 1
- Job 2
- Job 3
- ...

Mental models

Mental models combine simple job maps or multiple customer journey maps into one very long diagram of our customers' jobs, both functional and emotional. This lets us more clearly group similar and related jobs to see where some of their aspects might overlap.

Extended mental models map our services and products to the jobs to be done. We can use these mental models to pinpoint gaps in our products or services, identify related services we could potentially offer, or see where we deliver too many options and can simplify things for our customers.

Our colleagues love it when we print the entire mental model 'skyline' and stick all of the many pages up on a wall. It's much easier to see the big picture, prioritize development opportunities and discuss our internal requirements in diagram format. It's especially useful to add comments and to vote on aspects with sticky notes!

NEEDS

MOTIVATION
OR GOAL
emotional job

TASKS
functional job

JOBS TO BE
DONE

SERVICES
OR PRODUCTS
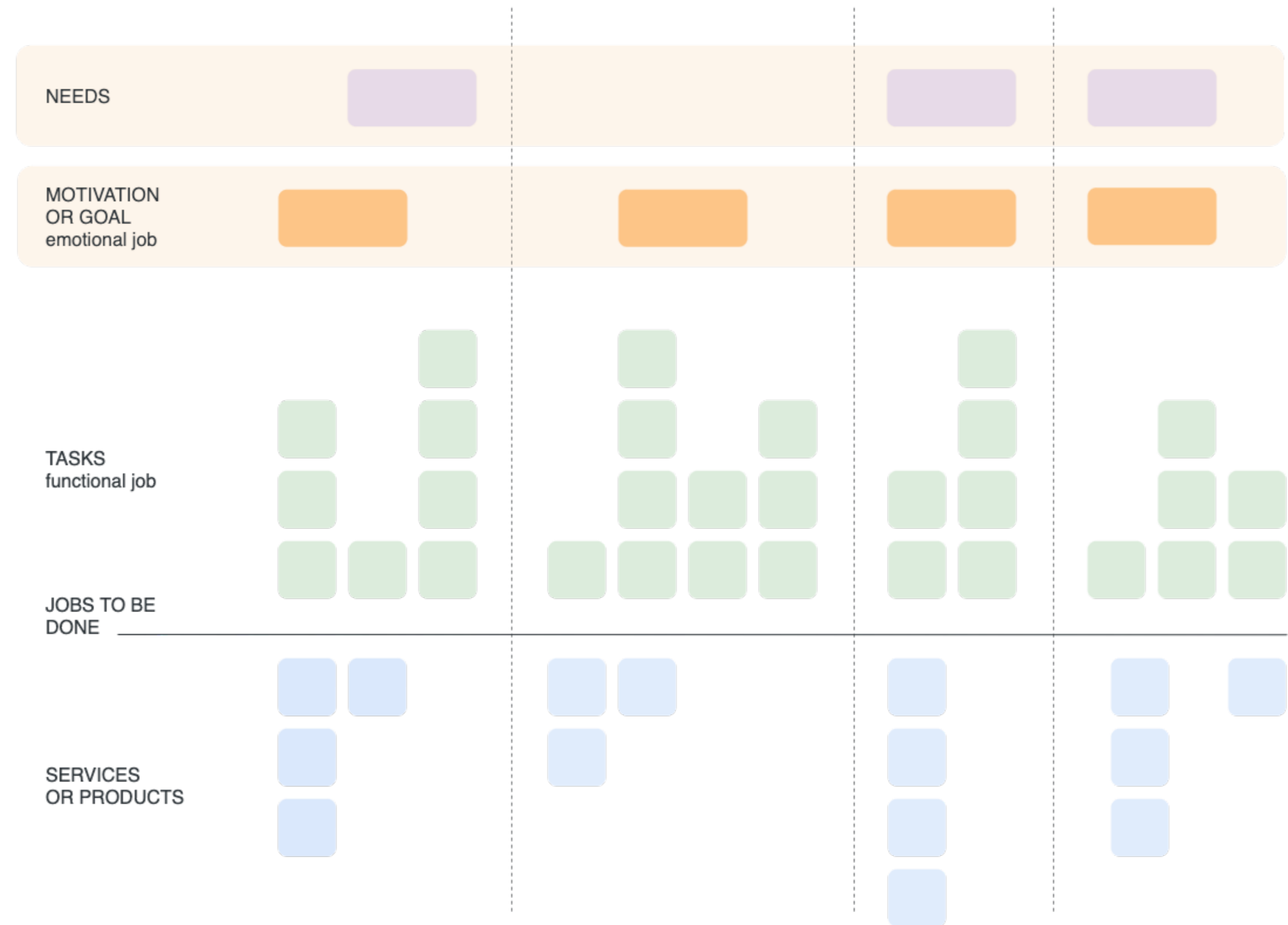
Use diagrams for prototyping and testing early and often

The more traditional approach is to spend most development resources dealing with additional or changed requirements and specifications in the development phase. It's also quite typical to find that after a product launch, a redesign and redevelopment of a product or service is needed because users aren't happy with the 'best guess' at what they needed. No one can simply jump from idea to product development and reasonably expect that it would be close to what customers really need.

The Jobs to Be Done method requires that we spend many more resources early on in our project timeline: particularly in the areas of research and analysis, followed by prototype designs and testing these with our customers. All of this should be done before we actually start the development phase.

Most of the research results, analysis, prototypes, as well as the results of testing these prototypes are visualized. Diagrams help our colleagues across many loosely-related teams quickly understand our target market and their jobs to be done, and how our products and services will help them get those jobs done.

Wireframes and mockups

We quickly mock up prototypes and ask our customers to give their thoughts and feelings.

They don't interact with these early design prototypes, unless we have added interactivity with custom links, but they can tell us how they would expect it to work or if anything doesn't make sense. Once most of our customers seem happy or excited with the design, we move on to developing a functional prototype. Then the actual development-testing phase begins.

- **Wireframes:** We use wireframes to design the layout of websites, document templates and theme corporate intranet interfaces.
- **Mockups:** With draw.io's mockup templates and their related shapes, we can quickly design mobile app interfaces.
- **Floor plans and landscapes:** While we don't usually design physical spaces or products, we do still design our conference, office and booth spaces with an eye on what jobs our attendees, employees and visitors want to complete!
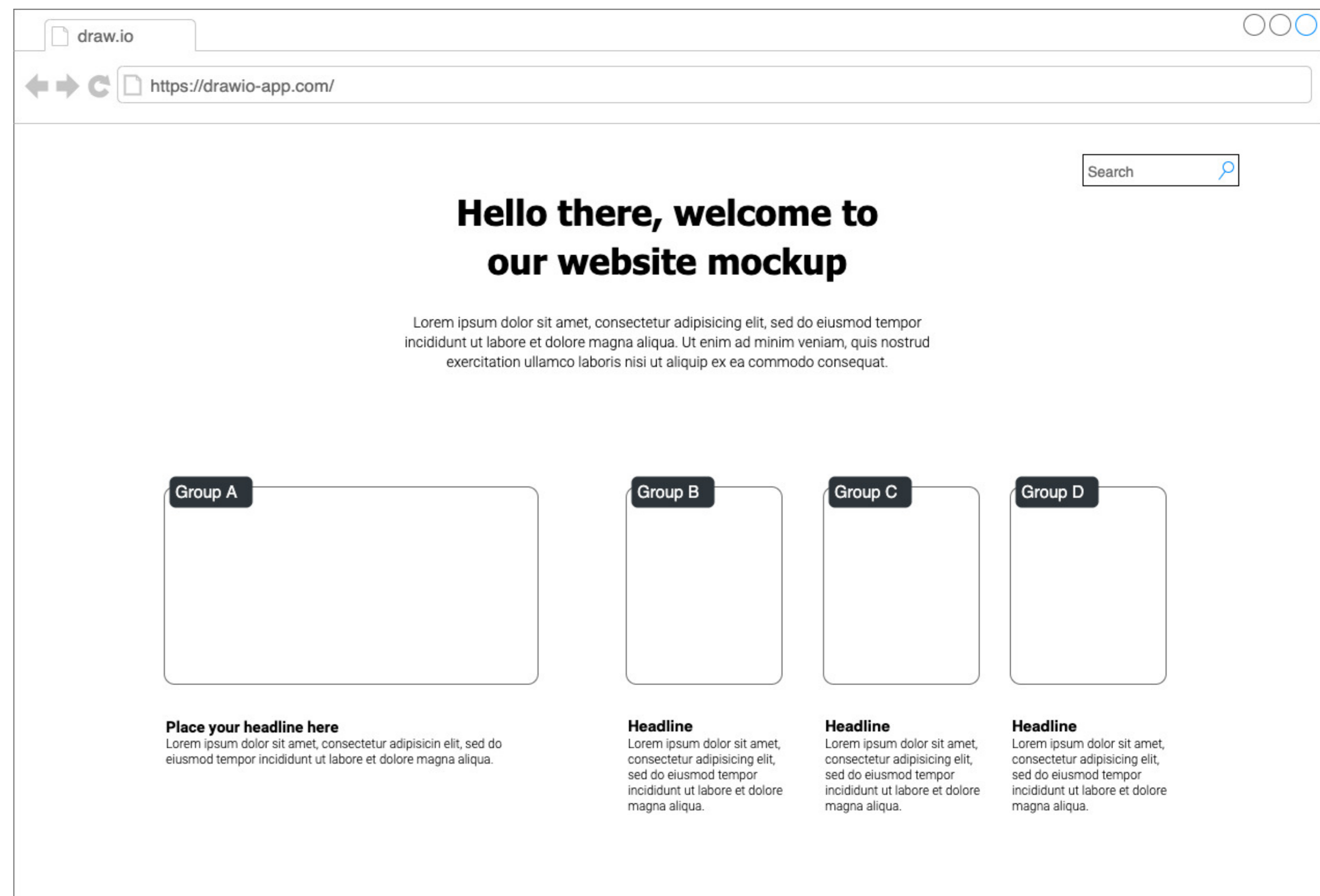
Detail functional jobs

Process diagrams

We start diagramming our processes right from the start, and it's easy when we have detailed customer interviews that answer the question:

"How would you expect to use this? Step us through how you would prefer to get to your goal."

Flow charts, BPML, business and UML activity diagrams: We love using these for illustrating steps. We can use a specific diagram type depending on which team is developing the product or service. These diagrams are also useful in later project development when we need to write how-to and training documents.
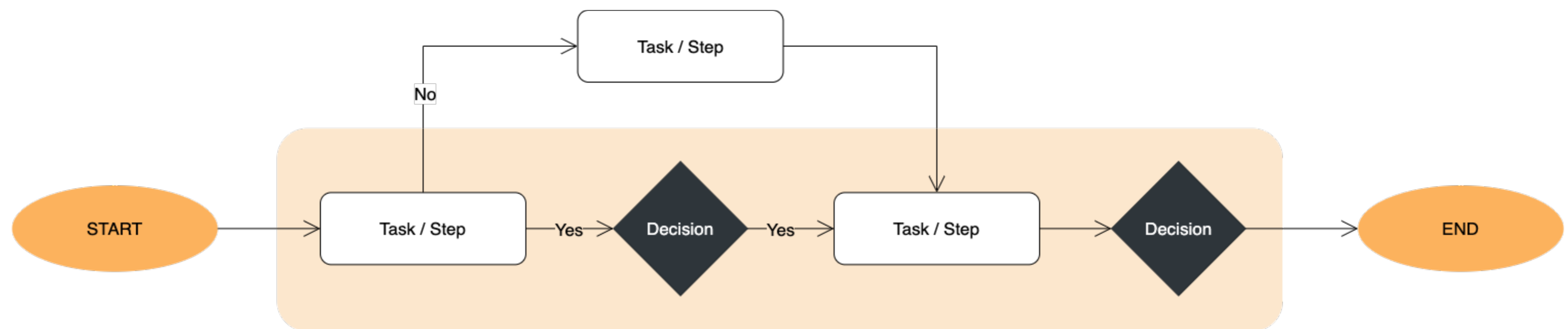
Venn diagrams

It's always great to have a simple diagram that you can point to when justifying design choices.

The ability to accurately show that the vast majority of our customers preferred process A over B or C gives our development a laser focus. It quickly puts everyone on the right track with the whole team on board, even if they themselves might choose a different design!

- **Venn diagrams and charts:** We can aggregate data to show where customers had problems, what they felt or thought when using the prototype to complete their job.
- **Business and process diagrams:** We can compare and contrast the steps in the process that the customer wants to take with our proposed steps by diagramming them side-by-side or in layers.
- **Infographics:** Occasionally, we'll create simple infographics to visualize more complex results and feedback. The variety of infographic templates in draw.io and the huge shape library make creating attractive infographics easy.
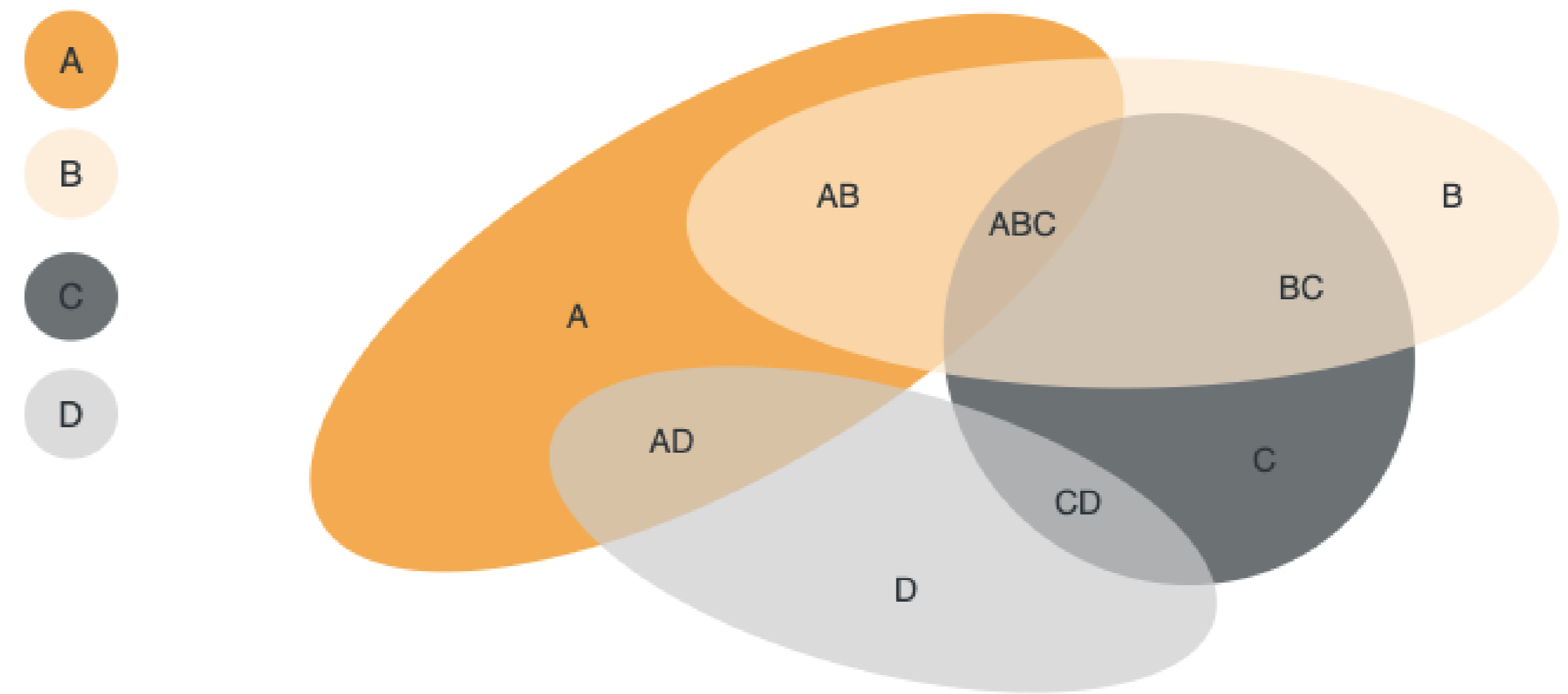
BONUS: Use these diagrams in onboarding

All of these diagrams help to onboard new colleagues and team members. It's easier to understand complex projects, processes, customer needs and why decisions were made, when they are documented in clear, concise diagrams!

Use diagrams to optimize development

Now that we have a crystal clear idea of what our customers' jobs are and why they want to complete them, and we have designs and processes that the customers have tested and love, we can now move into functional development and testing.

Luckily, because we spent so much time analyzing, designing and testing, we won't need to spend many resources on redevelopment or redesign.

At this stage, there are many other diagrams that we use to make life easier for our developers.

- **UML diagrams:** Class diagrams, entity relationship diagrams and sequence diagrams make coding easier for our developers. It's clear what new or updated data types are required and which existing areas of code need to be modified, and then to design robust test procedures for those changes. Diagrams make coding faster and they minimize bugs.

- **Infrastructure:** We'd never dream of changing our IT system without diagramming it first to see how other systems are impacted. Our IT support team needs to ensure that their colleagues are able to work in a stable and high-performance digital environment.

- **Other diagrams:** The extensive draw.io template library supports a huge variety of diagrams that can help different professionals help their customers get jobs done.

BONUS: Develop and store these diagrams in your central knowledge base

We're all human. It's inevitable that bugs or problems with our infrastructure or processes will appear. When this happens we need to refer back to these diagrams. We can quickly trace the problem to its source and see if it was from a modification introduced during a project. It's much faster with good diagrams in our knowledge base. Confluence with draw.io lets all team members work on the same diagram. No more diagram files hiding away in email where you never know which is the most recent version! Plus we feel secure: all diagram changes are tracked in the Confluence page history!

After we deliver our product or service?

Now that we've helped our customers get their job done, what do we do? A deep understanding our customers' job and a delivered product or service that perfectly meets their needs and desires is just the first step.

We also need to create tailor-made processes to provide the best possible customer experience during both the purchase and throughout the use of the product. Then these processes need to be integrated holistically into our company.

- **Get the job done better:** We need to continually monitor our customers' experience with using our product. We need to measure their success, their happiness, and make continual improvements.
- **Get the entire job done:** If we only provided a component (for example the coffee, milk or sugar), we want to ramp up to become the single best solution (like Nespresso).
- **Get more jobs done:** We should optimize the product and our processes so our customers can get their job done faster, or start helping them complete related jobs.

Of course, diagramming is the perfect way to see how to optimize processes or to explore related jobs.

Let us help you get your jobs done well!

Your job is to help your customers get their jobs done, in the most efficient and most enjoyable way possible.

Diagramming and draw.io will be with you all the way, helping you achieve that goal:

- Customer research and analysis
- Prototype design and testing
- Development and testing
- Sales and support
- Infrastructure and internal processes

Wherever you need a diagram to clearly and concisely visualize information, draw.io is there to help you!

Our support team is here to help

Whenever you have a problem, a suggestion, or even if you want to let us know how much you love a particular feature, we are here for you.

You can find self-guided training courses, tutorials and announcements of new features and events on our website at https://drawio-app.com/

Feel free to contact us at any time - we'd love to hear from you!

Support: support@draw.io

Obligation-free test!

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