



Using the JTBD framework to grow a business: Lessons from a JTBD research project

BY JOHN GAUCH 18 DEC 2020



Offering online business education for health and fitness professionals, the Personal Trainer Development Center (PTDC)'s products and services transform people's lives by helping them to craft more satisfying careers built around meaningful personal values.

Founder and CEO Jonathan Goodman had been a personal trainer for eight years when, in 2011, he started the PTDC. He had experienced first-hand the emotional grind and physical toll of training back-to-back clients at the gym, 10 to 12 hours a

day, week after week. Creative and driven, Goodman set out to design a better way for professionals to both work in the industry and enjoy their lives more.

Goodman knew our customers – personal trainers, nutrition coaches, gym owners – because he had been one himself, and the PTDC team adopted and were committed to the same customer and market focus that Goodman modeled. By 2020, the company had served more than 100,000 customers in over 87 countries via our

hub, theptdc.com. However, customer growth had begun to fall short of our goals, and there was no immediately obvious explanation. What could account for the stalled growth? Perhaps it was the case that our customer base had been changing over time? Were our direct competitors chipping away at our leading position? Had we missed product development opportunities and potential sustaining innovations that could have propelled us further up market or expanded our customer base?

Taking to heart Peter Drucker's admonition that "the customer rarely buys what the company thinks it is selling them," we acknowledged the possibility that we had more to learn from our customers. We also had top-of-mind Professor Clayton Christensen's model for creating a purpose brand, which relies on deeply understanding people's lives and the circumstances that they're in when they ultimately decide to hire a new product or service and pull it into their lives.

It was decided that we would reboot

our growth strategy by uncovering and acting on customer insights, and the first step we took was to zero in on our customers' Jobs To Be Done (JTBD). Goodman and I were both familiar with the framework, co-architected by Christensen and [Bob Moesta](#). They defined a JTBD as "the progress that a person is trying to make in a particular struggling circumstance." A Job To Be Done includes emotional, social, and functional factors that, taken together, cause a customer to prioritize and work to address a problem / struggling

moment they're experiencing by hiring a specific product or service. Christensen and Moesta ask: What dominoes had to fall for a person to pull a particular product or service into their life?

Goodman and I agreed that the rich and textured customer insights resulting from JTBD research would shine a light on our customers' experiences and help us to answer questions about why people hired PTDC's products and services. As such, we crafted a plan. Knowing well that at least one

partner is an absolute requirement for a project like ours, I asked one of our Product Managers, Alex Cartmill, to work with me. The passionate dialogue and debate ensuing from JTBD research are essential to the findings' quality and usefulness, and I felt confident that Alex would be an equal partner in our upcoming JTBD endeavor.

As a result of the pandemic, we improvised remote collaboration tools rather than meeting face-to-face. In order to unlock growth opportunities for our feature product, the [Online Trainer Academy](#), we developed a seven-phase JTBD research project. These phases were: 1) Project design; 2) Recruitment; 3) Identifying a pool of interview candidates that was broadly representative of our customer base; 4) Interviews with seven customers who had recently fired our product and six who had recently hired our product; 5) Debriefing, which involved consideration of each interviewee's timeline, along with their Pushes, Pulls, Anxieties, and Habits of The Present; 6) Analysis, involving the clustering of interviews into affinity groups; and 7) Actions, which included the identification of next steps based on the insights gained.

Our interviews with customers were the centerpiece of this effort. Each was an unscripted, approximately hour-long conversation. As we learned, though you may at first feel that the pay-off from this qualitative research is unclear, especially after conducting only one or two interviews, stick with it. Unexpected nuggets of insight are right around the corner, and they will be just the beginning. For example, one counter-intuitive "aha" moment that we had was the realization that people did not need to finish our program or earn the completion

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certificate in order to feel satisfied with our product. Furthermore, keep in mind that not every interview will go perfectly, and that's okay, and even expected.

Once the interviews were completed, our small team took the time to debrief and, from there, we analyzed our data. There are two different methods for developing affinity groups: contrasting and clustering. The former is a speedier approach that relies on your inherent pattern recognition ability to group the debriefed interviews. Clustering entails coding the Pushes and Pulls and conducting a mathematical cluster analysis, combined with qualitative considerations. We opted to employ first contrasting and then clustering, but doing both is completely optional. We used it as an objective way to check our initial results rather than as a mandatory step in the analysis.

In the end, we found three Jobs for which people hire our products and services.

The Job statements were:

1. When I'm deeply unhappy with my job and I can't find meaning in my work, help me to start building a new career so that I can feel more purpose in my life.
2. When I've reached a work milestone but I'm struggling to take the next step, help me to expand my capabilities so that I can realize my ambition to do "X".

3. When I'm feeling anxious about my work, help me to develop a fix so that I can carry on doing this work that I love.

Next, we identified steps to take based on the insights that we had gained from our Jobs research. There were numerous measures that we could implement to refine PTDC's growth strategy, and we are in fact now taking many of those steps. For instance, we are narrowing our focus. Although our research highlighted three different Jobs, this does not mean that our addressable market is split neatly into thirds or that we want to serve each JTBD equally. Taking stock of the industry environment, we have developed a hypothesis for where we can concentrate our energy for the most significant growth impact, at least in the short term. We selected only one of the Jobs to focus on – Job #3. We are also now reconsidering our competitive set, as we see there are indirect, less-obvious competitors that we should concentrate on, including non-consumption (i.e. prospective customers who are suffering and currently not hiring any products or services). Another group of interest to us is one composed of prospective customers who currently piece together their own clunky solutions. Because there appears to be a large number of people in these two categories, we may be able to tap into ample growth opportunities by reshaping our messaging and by tweaking our product.

With the realization that there are at least three different Jobs for which people hire our products, we are also now rethinking our product development strategy. Specifically, we have decided to de-emphasize serving Job #1, in part because the group with this Job had a hard time making progress by using our product. That is, rather than doing a mediocre job serving everyone, we can tailor product decisions to best serve the Jobs of the people who we most want to attract. There is now much more certainty and far less mystery around what product investments to make next, and that newly-defined focus is hugely useful to us as we make strategy decisions.

We also developed a plan to make it through the COVID-19 pandemic. We believe that the pandemic brought Job #3, on which we now focus, to the forefront of more people's lives, thereby augmenting that particular struggling circumstance. Even though the pandemic is unprecedented in our times, the overarching Job is not. We now understand with more clarity what those suffering through the pandemic may be feeling, and this enables us to better help this large group of people to make progress in their lives.

Finally, to round out and support the above-cited activities, we are using a systematic approach to update our customer experience map. With an eye to both our product and our marketing initiatives, we will evolve what we say, do, and measure. By making

the trek from struggling moment to progress easier for people, we anticipate that more people will travel the route, thereby growing our customer numbers and company revenue.

Some final reflections worth sharing are as follows:

- The JTBD project helped us to spread a common language for talking about our customers across our teams, making it easier for us to communicate and to follow up on what we learned.
- The support of organization leadership is critical throughout and after completion of a project like this. If leaders demonstrate, through both their words and actions, that they place value on the research and findings, then team members will be more inclined to do the same. For example, we host an industry podcast, "The Online Trainer Show," and CEO Goodman referenced a few of our JTBD takeaways in an episode soon after we had presented our study findings internally to him and the organization. This added valuable color to the podcast, and it signaled to the PTDC team that we could all be using what we had learned.
- Demographic data does not causally explain why people hire your products or services. Rather, it's all about the struggling moments in which your customers find themselves. That is, certain demographic data might be correlated

with people who purchase specific products, but demographics do not explain why customers behave the way they do. Context is everything.

- The learning doesn't end when the Jobs research project concludes. Our results were a jumping-off point to deepening our knowledge, helping us to seek answers to questions that we could not have even articulated before the research began. There is always more to learn about your customers' struggling moments and the progress they're hoping to make in their lives, as circumstances are always changing.

Jobs research distinguishes between demand-side and supply-side thinking. While supply-side thinking is represented by questions such as, "How do I sell more of my widget?" and "Now that I have my product, how do I get (more) people to want it?," demand-side thinking means a commitment to understanding customers' lives and their Jobs to Be Done. I believe this commitment to better understanding our customers' struggling moments will sustain the PTDC's growth now and in the future.

Without a doubt, learning about and putting into practice JTBD research is an incredibly useful way to uncover powerful, and often hidden, customer insights – knowledge that can contribute to the strong foundation of a successful enterprise.



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