THE POST-CATEGORY PLAY

Category Design (Marketing) + JTBD-Disruption (Strategy) + Double Materiality (ESG)

1. The Three Frameworks Used:

CATEGORY DESIGN (MARKETING)	JTBD-DISRUPTION (STRATEGY)	DOUBLE MATERIALITY (ESG)
Create and name a new market rather than fighting for share of an old one.	Find the progress customers want that existing products refuse to deliver.	Environmental impact is both a moral question and a financial one — and regulation can turn it into revenue.

How the Three Connect (Fusion Logic)

JTBD finds the unmet job. Category Design builds a new market around it. Double Materiality shows that the environmental angle isn't just branding — it changes the economics through regulation. Fused, they build a category the incumbents cannot easily enter.

2. Application: TESLA (USA)

Background — What Happened and Why

- Electric cars had a reputation as slow, ugly, worthy compliance vehicles — bought out of duty, not desire.
- Incumbent carmakers made EVs reluctantly to satisfy regulators, and it showed in the product.
- The real unmet job wasn't 'save the planet cheaply' - it was 'I want a car I actually desire, that happens to be electric'.
- Attacking Toyota or Ford head-on in mass-market petrol cars would have been suicide.

What They Did

- Launched with a high-end, genuinely desirable sports car (the Roadster) - proving EVs could be fast and beautiful.
- Moved down-market gradually — Model S, then Model 3 — funding each step with the last.
- Built its own charging network, removing the biggest practical objection to ownership.

- Sold regulatory emissions credits to rival carmakers — turning the environmental angle into direct revenue.

Applying the Fusion — Step by Step

1

Find the job the old product couldn't do

Buyers wanted a car they truly desired that happened to be electric — not a slow, dull compliance car. Petrol carmakers found this hard to answer well.

2

Build a new category, not a rival car

Tesla created the premium electric-car category rather than fighting petrol cars head-on, starting with a genuinely desirable high-end sports car.

3

Make the green angle pay

Tesla sold regulatory emissions credits to other carmakers, turning the environmental side into a direct source of revenue, not just branding.

4

Remove the biggest objection

Tesla built its own charging network, taking away the main practical reason people hesitated to go electric.

The Result

Tesla created and owned the premium EV category instead of competing in petrol cars. Regulation became a revenue line, and desire — not duty — became the reason to buy electric.

3. Key Takeaways

- The strongest new categories sit on jobs where the incumbent's product is the problem.
- Sustainability claims work as category fuel only when they're double-material facts, not decoration.
- Pick the beachhead where credible insiders demo your best use case.
- Category kingship earns the crown, not the treasury — operations still decide the ending.