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Recommended Reading from Tech Founders

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Two investors separately recommended one consumer-agent interview, and Packy McCormick recommended three sources in his Airbound essay. Sarah Guo, Patrick Collison, a Google Search PM and Sam Altman also recommended material.

Top pick: Noah Shinn on *Invest Like the Best*

Resource: Patrick O'Shaughnessy's interview with Noah Shinn, founder of Instinct (YouTube, Spotify) [1]. O'Shaughnessy is the host, so his own promotion doesn't count as an outside signal. He says it is Shinn's first long conversation about Instinct, a personal AI assistant that is invite-only, has spent nothing on marketing and is growing "roughly 10% A DAY" [2]. The episode covers why Instinct has no app, buying compute months ahead of demand, how users learn to trust it with a credit card, and agents coordinating with other people's agents [2].

Recommended by: Scott Belsky, who says there are "so many gems on consumer agent re-imagination of the internet." He picks out two themes: the "ROI on trust," and the idea that "the long-tail of user preferences are the ultimate moat in consumer AI" [3]. Sarah Guo also shared it. Her list of highlights includes why users give Instinct their credit cards, "the role of craft in the age of AI," and "the end of apps and websites" [4].

Why it's the top pick: two investors recommended it independently, and each named specific ideas. For anyone building consumer agents, the case for listening is its focus on trust.

Packy McCormick's sources from his Airbound essay

McCormick invested in Airbound's $37M Series A [5]. His essay on the company points readers to three sources:

- ***The Box* by Marc Levinson.** He calls it an "excellent book" and "a 540-page ode to the idea that even a seemingly minor improvement in transportation technology can alter the global flow of goods, and therefore capital and people." This is the book behind his argument about drone logistics [5].
- **Rahul Sanghi's Tigerfeathers piece "Airbound: Delivering Abundance".** He calls it "awesome" and says it has "a lot more fantastic detail" on founder Naman Pushp's journey, so readers should "read it" [5].
- **David Senra's conversation with Ribbit founder Micky Malka.** He calls it "great." The idea he takes from it is Malka's: many of today's most successful young founders spent COVID "sucking information" from YouTube, and that left them naive enough to think "anything is possible" [5].

Also noted

- **Grady's AI talk (Loom).** The speaker, @gradypb, recorded it for the Boston College Investment Committee and describes it as "not a sales pitch, it's just a reflection on what we're seeing" [6]. Sarah Guo recommended it, saying he is "a clearer thinker than 99.9% of investors" even "on an average friday morning" [7].
- **@AtalantaArdenM's essay "Human Frailty".** Patrick Collison called it a "very good post… on the role of suffering in art" [8].
- ***Competing Against Luck* by Clayton Christensen.** It came up in a Lenny's Podcast talk (video) by a product leader who worked on Instagram Stories and now works on Google Search [9]. He loves its jobs-to-be-done framework: "we don't use products, we hire them to do things for us." He says the book shows how to draw those needs out of users' own stories [9].
- ***Amp It Up* by Frank Slootman.** Higgsfield CEO Alex Mashrabov recommended it on 20VC (video). He says it convinced him a no-nonsense culture can scale a company and support enterprise sales, and he has "watched all his interviews" [10]. He adds a caveat: that style can come "at the sacrifice of product advancement" [10].
- **David George's article "OpenAI Understands Something Important and Rare".** Sam Altman shared it with "Pretty excited for DevDay tomorrow. We have found a new thing" [11]. George argues that OpenAI will win because it is good at "creating new kinds of customers" and has "the most durable distribution strategy," not because it has the best models [12]. Altman runs OpenAI, so treat this as self-interested promotion rather than a neutral endorsement.

Sources

1. X post by @patrick_oshag
2. X post by @patrick_oshag
3. X post by @scottbelsky
4. X post by @saranormous
5. Airbound: As We May Move
6. X post by @gradypb
7. X post by @saranormous
8. X post by @patrickc
9. What it takes to be a top PM today | Robby Stein (Google Search)
10. The Untold Story of Higgsfield | Burning $4M a Month on AI Models | CEO, Alex Mashrabov
11. X post by @sama
12. X article by @DavidGeorge83