

Elad Gil and Sarah Guo back Stripe Press’s Built to Grow; Graham and Tan point to Podium’s AI turnaround

Recommended Reading from Tech Founders

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Two investors recommended a new Stripe Press book on B2B sales. Founders also shared a turnaround story about becoming AI-native, an Arc Institute preprint, an investment memo on Arda and a film that is easy to walk out of too early.

Elad Gil and Sarah Guo: *Built to Grow*, by @she_travels

Built to Grow is a new sales handbook from Stripe Press. Two investors endorsed it on the same day. **Elad Gil** wrote that he was “so excited” for it [1] and linked to it on Amazon [2]. **Sarah Guo** gave a more specific reason. For more than a decade she has coached strong product builders through their first stretch of B2B sales and marketing, and she wishes the book “had existed sooner for me to gift.” [3] She also called it “an education” [4] and praised its “beautiful design” [5].

Paul Graham and Garry Tan: Eric Rea on rebuilding Podium around AI

Podium cofounder Eric Rea posted that his company has reached \$150M ARR twice. The first time took 8 years and the second took 2.5. Podium has now crossed \$150M in AI annual recurring revenue. [6] Three years ago the company had well over \$100M in revenue, but it chose to “start over.” It bet its future on AI employees that do the work for customers rather than protect the software it had built over a decade. [6]

Paul Graham said established companies will at best adapt to AI while new startups start out AI-native. He called Podium “an interesting example of a company in the middle” that remade itself as AI-native “by great effort.” [7] He also called it an example of founder mode: a hired CEO, he argued, wouldn’t have the moral authority, or probably wouldn’t care enough, to ignore existing revenue and refocus on AI. [8] **Garry Tan** shared it as “what it looks like when it *really* hits.” [9]

Patrick Collison: Arc Institute preprint on the genome’s “dark matter”

Collison shared a new Arc Institute preprint thread from @pdhsu. The work uses latent-space representations of genomes from single-cell life to find new candidate functional RNAs. [10] The preprint uses genome language models and AI agents. It targets the RNA-encoding stretches between protein-coding genes, which conventional computational tools struggle with. [11] Collison said he thinks it is “cool” for three reasons:

- It puts deep learning and model interpretability to productive use on a different kind of knowledge.
- It shows how agents might speed up discovery in huge combinatorial search spaces.
- It is an early example of computational methods working together with wet-lab biology. [10]

Brad Gerstner: “Why we invested in Arda”

Gerstner pointed followers to a post by @apoorv03 [12] that links the investment memo. He also called Arda a “killer team” working to make US manufacturing the best in the world. [13] Arda was founded by Bob McGrew, and the memo gives three reasons for investing:

- McGrew has been preparing for this mission for at least two decades.
- The mission is one that “MUST be pursued.”
- The plan is sequenced well: first software for manufacturing engineers, then robotic lines that update as fast as the design does. [14]

For readers who prefer video, the memo links a CNBC conversation with McGrew. [14]

a16z podcast: the film *Digger*

In a16z’s Frontier conversation with Marc Andreessen, Ben Horowitz and Chris Dixon, one speaker said he is “completely obsessed” with *Digger*. The transcript doesn’t name the speaker. His advice is to sit through it even though you will be tempted to walk out after the first half hour: there is “a reason why they did what they did,” and the film is “very clever.” [15] He also used it to make

a business point. The film lost about \$200M on a roughly \$180M budget, and he argued that on an AI-enabled \$2M budget it “would have been insanely profitable.” [15]

Shorter mentions

- **Guillermo Rauch** cited the book *Running with the Kenyans*. He described Kenyan marathoners who start races faster than seems possible, which sets a new pace and teaches them they could have gone faster. He tries to bring that idea into the standard he sets at work (interview). [16]
- **Brian Chesky** named the industrial designer Charles Eames, whom he studied at RISD, as one of his favorite designers. He quoted Eames’s line that a designer is “a very thoughtful host anticipating the needs of their guest” and used it to describe Airbnb’s role: “We set the conditions for magic” (interview). [17]

Sources

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