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Recommended Reading from Tech Founders

2026-11-07

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By Recommended Reading from Tech Founders • November 7, 2026

This round's founder and investor picks: Danny Meyer's new book, Boom Supersonic on The Social Radars, the latest Invest Like the Best episode on venture markets, an essay on the AI trade versus the AI economy, and METR's report on Anthropic.

Gurley: Danny Meyer's *What Could Possibly Go Right?*

Bill Gurley finished the audiobook of Danny Meyer's new book. He contrasts it with *Setting the Table*: that book was about hospitality, while this one looks closely at "the day to day decision making required to run a business." He calls it "remarkably vulnerable and humble" and "a 'must listen' for any business leader" [1]. He specifically recommends the audio version because Meyer reads it himself, which adds "so much more color" [1]. Audiobook [1]

Livingston and Graham: Blake Scholl on Boom's turn to turbines

Jessica Livingston and Carolynn released a special *Social Radars* episode with Boom Supersonic's Blake Scholl. It covers the company's "amazing recent transformation": Boom lost Rolls Royce as its engine supplier and now funds airliner development by selling gas turbines [2]. YouTube · Spotify [3]

Paul Graham shared the episode with Scholl's line that a supersonic engine "looks much more like a power turbine than any other jet engine" because it

runs continuously at full power at high temperatures [4]. Graham also quoted Scholl's companion X post: "Most hardware engineering is actually software engineering in disguise" [5]. In that post, Scholl tells engineers to "design the *algorithm* for designing the hardware" [6]. He says Boom has a turbomachinery tool that lets one engineer do in real time what previously took 100 engineers six months [6]. Post

O'Shaughnessy: Ramtin Naimi on venture markets

Patrick O'Shaughnessy promoted his episode with Ramtin Naimi as "40 feverish minutes" on venture markets. Topics include why rounds are moving so fast, how today compares to 2021, what record deployment means for LPs, the Anthropic S-1 and compute, and seed risk at Series D prices [7]. In the clip he posted, Naimi says the assumed best-case outcome has moved from $10B in 2016 to $100B around 2021 and now $1T. That shift is how investors justify billion-dollar entry prices, though Naimi bets there "might be two to three more, and not 40 more" [8]. YouTube · Spotify [9]

Hoover: "The AI trade isn't the AI economy"

Ryan Hoover shared Erik Syvertsen's essay. He wrote: "Yesterday was brutal. I also bought more of the market" [10]. Syvertsen separates the volatile AI trade from the slower-building AI economy and argues against trying to call the turn [11]. The one thing he says would change his mind is a "data center humming in the dark, fully powered, with nothing to do" [11]. Essay

Casado: Sam McCandlish on METR's Anthropic report

Martin Casado highlighted a passage from Anthropic co-founder Sam McCandlish's post about METR's latest report [12]. McCandlish says Anthropic gave METR access to sensitive internal data, including benchmark scores for unreleased models. In his reading, METR concluded that AI is speeding up Anthropic's research but can't yet make the most important training contributions on its own [13]. Anthropic redacted much of the report. McCandlish says that makes METR's work harder to check, but he defends the call as a tradeoff [13]. Post

Parker Conrad: Ari Emanuel's book on agenting

On a podcast, **Parker Conrad** said that "the best thing to do" to understand the agentic future is to read Ari Emanuel's book about Hollywood agenting. His view is that AI agents will work like human agents, with a few trusted relationships whose "asset is trust and knowledge of you." He also warned that this makes for a very competitive, trust-based market [14]. Video

Shorter picks

- **Garry Tan** quoted a Chinese-language summary of an Anthropic alignment paper. The quoted figure: 3 million tokens of advice from ordinary people facing moral dilemmas brought malicious behavior down to 0% [15]. That 0% figure comes from the summary post, not the paper itself [16].
- **Tim Ferriss** shared a clip, "How to Process Your Anger and Rage," from his full conversation with Dr. Gabor Maté [17]. YouTube [18]
- **Matt Mullenweg** shared Reason's "Russia Wants To Censor Americans. Why Are U.S. Tech Companies Helping?" without adding any comment [19]. Article

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Sources

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