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Podium's AI relaunch, Ravi Mehta's case that AI quality keeps moving after launch, the shift away from per-seat pricing, and practitioner advice on discovery, agent permissions and competitive signals.

An incumbent that restarted around AI

Podium CEO Eric Rea says the company crossed \$150M in AI ARR. The first time Podium reached \$150M ARR, it took 8 years. This time it took 2.5 [1]. Three years ago Podium had well over \$100M in revenue and tens of thousands of customers, and it still chose to “start over,” betting that AI would make much of traditional software obsolete [1]. The product grew into whole operating systems for its industries, “from the AI agents all the way down to the systems of record.” Rea says the harder part was changing how the company builds, sells, serves customers and runs [1]. He reports 20,000 agents in use, more than \$13B in revenue generated for customers, and that Podium is profitable [1].

Paul Graham calls Podium a rare middle case between incumbents that “at best adapt” and startups that are AI-native from day one [2]. He frames it as founder mode: a hired CEO wouldn't have the moral authority to “ignore existing revenue streams” [3]. For product leaders, the point is that the rebuild was organizational as much as it was about features.

Quality is a moving target for AI features

Ravi Mehta argues that a successful demo proves little for AI features. Teams need to understand “the range of experiences customers receive” [4]. Quality can get worse without any code release, because models change, information goes stale and user behavior shifts [4]. Customers rarely report this. They double-check answers, go back to spreadsheets, and “quietly quit” the feature [4]. The signals to watch are workarounds and declining reliance [4]. He says senior PMs should set an acceptable performance range rather than a pass/fail line, and when quality falls below it, “reduce scope or change the launch plan — not quietly lower the standard” [4].

Discovery was always slow. Now it’s visible

In an r/ProductManagement thread about AI speeding up delivery, one PM put it this way: discovery “stopped being hidden.” Six weeks of validation used to sit inside a 12-week build. Against a 3-week build, the same six weeks becomes the bottleneck [5]. If you don’t direct spare engineering capacity, it “gets filled by whoever asks loudest.” This PM keeps a short list of work that unblocks other teams, ready to pick up [5]. Others said to use the extra speed for hypothesis testing rather than a feature factory [6]. In r/ProductMarketing, a PMM warned that AI makes it easier for non-leaders to copy segment leaders’ roadmaps. They suggested more customer interviews and deliberate launch packaging in response [7].

Pricing when the user is an agent

Two Stockholm founders building a CRM dropped per-seat pricing after a customer pushed back. He rarely opens the app, and his AI assistant writes about 92% of his updates over MCP [8]. They now charge a small workspace fee plus a fee per company with an open deal. Their worries are harder forecasting, possibly lower revenue, and buyers who “understand seats instantly” [8]. Commenters said seats are dead “wherever the product’s value doesn’t scale with humans typing into it.” They stressed choosing a usage metric customers can predict before the invoice arrives [9]. One noted that open-deal counts track deal volume, not the value the AI creates [10]. Another suggested sizing the base fee so “the worst month” is survivable [11].

Agent permissions

Hiten Shah shared a cautionary case about Muse. Matt Robb chose “Allow Always” for replies, expecting he would still approve offers. Instead Muse accepted one and shared his pickup address, and a buyer showed up while he was away [12]. The setting’s label didn’t match what he thought it did, and that matters most when the agent’s action is consequential and can’t be undone.

Also notable

- **AI fluency in performance reviews:** Aakash Gupta summarizes Zapier’s rubric, with grades of Capable, Adoptive and Transformative. He warns that what counted as Transformative in 2025 may only be Capable in 2026 [13]. He also says “every line you send out, you are accountable for” [13].
 - **Landing-page friction:** Magic Patterns removed the prompt box from its landing page and its conversion rate “totally tanked” [14]. Tests at Creative Market found that a visible, expanded input converted much better than flows that required a click first [14].
 - **Unconfirmed competitor moves:** A market-intelligence lead found that hunches in the weekly digest get read as fact [15]. One fix is to tag each item as signal, likely or confirmed, keep everything but confirmed out of battlecards, and tell sales what evidence would confirm it [16].
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Sources

1. X post by @ericwilliamrea
2. X post by @paulg
3. X post by @paulg
4. Product Quality.
5. r/ProductManagement comment by u/*pratyush_88*
6. r/ProductManagement comment by u/rollingSleepyPanda
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