

[Transcript] My First Million / #59 - YC Demo Day Startups, Airbnb Survival & Teachable Acquisition

All right.

Quick break to tell you about another podcast that we're interested in right now, HubSpot just launched a Shark Tank rewatch podcast called Another Bite.

Every week, the hosts relive the latest and greatest pitches from Shark Tank, from Squatty Potty to the Mench on a Bench to Ring Doorbell, and they break down why these pitches were winners or losers.

And each company's go-to-market strategy, branding, pricing, valuation, everything.

Basically all the things you want to know about how to survive the tank and scale your company on your own.

If you want to give it a listen, you can find another bite on whatever podcast app you listen to, like Apple or Spotify or whatever you're using right now.

All right.

Back to the show.

What's going on, listeners?

We get asked all the time different bits of advice on the stuff that Sean and I talk about, and that's great.

And it's actually something that Sean and I do all the time, which is ask people for different insights, particularly those who are a lot better than us.

And one person who we've been heavily inspired by is Jordan Harbinger.

I've known Jordan now for eight years now, and I've been listening to him for about that long.

And he's had podcasts for years and in fact has been in the top 100 for the last 13 years. And he has a new show called the Jordan Harbinger Show.

And what he does is he talks about social engineering, in particular for helping men be more charismatic, which is great.

But what I think is even more interesting is that he teaches social engineering to seals, to intelligence agencies, to special operations, and it's incredibly fascinating.

And we actually have Jordan here for a minute to tell us some of his favorite episodes, a particular one that I've listened to recently was how to ask for advice.

Jordan, what's going on?

Hey, thanks for having me on.

I've really appreciated it.

I think the reason I chose the advice topic was because I'm sure you get this too.

You get an email from somebody, maybe even somebody who's younger, saying something like, I want you to mentor me, or how do I succeed in my idea, or how do I come up with a good idea?

And these are the wrong questions.

A lot of people are asking for validation of their idea.

They're asking for permission to do something.

You really can't get a lot of value from that.

You have to be sure if you're actually asking for advice, you're actually asking for permission, you're just asking for encouragement, or if it's specific, intentional, and explicit in detailing what you need.

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The other half, of course, is being able to implement that advice and then show the other person how you've implemented their advice in a very specific way.

So I decided to write an article and do an entire show about this on episode 321 of The Jordan Harbinger Show because it's helpful for people looking for advice, and it's also helpful for people who get asked for advice in the wrong way all of the time because they can just say, hey, listen to this, and then come back to me after you're done.

And I get maybe three or four dozen messages a day of people doing this and breaking the rules that you've just mentioned.

And I've noticed that when people do it right, it can be career changing.

Has any listener come to you and said, thank you for giving this advice here's what I've done effectively and how it's worked?

Oh, it happens all the time, and it's great.

It's really rewarding for me.

Of course, when people write to me and say, my dream is to start a clothing line.

Any tips, all I can do is say, I don't know really what you want or what you're going to do.

And then, of course, any tip I give them that's not go for your dreams, just leaves them feeling angry.

So I don't like to even field those questions anymore.

That's crazy.

I do the same thing.

I give them advice.

I just say, just start.

The question isn't specific enough.

It's impossible.

It's like saying, how do you make art?

So I think this is like an incredibly useful podcast and something that people need to listen to regardless of where they are in their journey of building whatever they're building.

So give this a listen.

I mean, it's a great podcast.

I actually have paid for a handful of your products.

So this isn't just nonsense.

I have really been a customer for a while, and I appreciate you coming on.

And so where should people turn to if they want to listen to this?

Sure.

You can find me at jordanharbinger.com, but honestly, the podcast is anywhere you get your podcasts.

Well, thanks for coming.

And this really means a lot to us.

Thank you.

What up?

Nothing.

It's been a crazy few days.

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I got my car broken into last night.

Oh, no.

Front.

Is there something in it or you just it's just go break in.

I have a garage.

I didn't park in my garage and the back window was broken into and someone stole my little \$200 like battery that jump jump starts the car, but it was like \$1,000 or no, it was \$400 to fix it just sucks.

I'm also pretty sure I have Corona.

Oh, no, you're feeling it.

Yeah.

Adam, like Adam Ryan, my coworker, he confirmed has it.

He lives in Austin, though, but I'm pretty sure I have it.

Were you in contact with him or you just think you have it in general?

I just think I have it.

Oh, no.

I was going to the office up until Thursday, but I thought that was okay because I was the only one in the office.

Right.

And I didn't.

And I like, I didn't like see, yeah, Alan was only there one of the days and I didn't see or talk to anyone even like I would.

I drove in, I parked on the street and I just walked right up, but I feel like shit, but I'm not that bad, not bad enough that I can't do stuff, but I, you know, that's a bummer.

What's going on with you?

Well, on the bright side for you, you got to talk to your hero.

Yeah.

So the other day for the listeners, me and Sean are extra UFC nerds.

One of my favorite guys, is he your favorite?

You like him.

I like him, but he's not my favorite guy.

I feel like you feel connected to him.

Yeah.

So basically his name is Ben Askren.

He's interesting because he's very polarizing.

I would say he has more people who hate him than loves him, but the people who love him, love him and the people who hate him, hate him.

So on last week, I gave a lecture on cold emailing and literally the day before I just cold tweeted at him and then we became friends in the inbox and then we just did like a conference call and we've been chatting and that was awesome.

And what was your cold tweet at him?

He tweeted out a podcast that he liked and I tweeted, oh, hey, I was actually on that same podcast like two months ago and then I DM'd him the episode, I go, hey, I was just

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on that.

I see you're doing X, Y and Z.

I do this, this and this.

I just like you, but like if you ever want to like shoot the shit, let me know.

That's amazing.

And then you had a call with him.

He's a cool guy.

You guys are going to hang out and be best friends or what?

I pray.

I'm trying to convince Ben, okay, so Ben Askren is, he's kind of like this.

He's kind of like, I think the people who like him are like the Jordan Peterson crowd, like the people who never had good fathers and want to learn how to be men.

You know what I mean?

Yeah.

Like discipline, even though he's kind of a loudmouth and I'm like, dude, Ben, you have to like, you can like copy all, like you could like the same way Dave Asbury has built this huge thing.

You could do that too by selling workout stuff and I'm trying to convince him to do that.

He's a very big brand and he's a very, he has a very unique personality.

So you, I could see that working for him.

Yeah.

And I'm trying to convince him to do that.

He's based in Wisconsin.

So I don't know like if he has like a whole bunch of like internet nerds hanging out with him, that he truly understands what he's capable of and I'm trying to be his nerdy friend.

That's good.

And fighters don't have a very long shelf life.

Like he's retired now.

So, you know, they have to figure out the second, second act.

Well, he told me he has a wrestling academy and that they're not in session right now.

So he's like, I got, I got a lot of free time.

And so I asked him if you wanted to come on here and he said, yeah.

So if you want him to come on in the next couple of days or weeks, we totally can do it.

Yeah.

We should do a brainstorm with Ben on what Ben can do.

Like what would I do if I was Ben?

I think it'd be cool to brainstorm those ideas.

I'm going to write that down.

I'll email him right after this.

Cool.

And we'll, we'll research a bunch of things that other either athletes or celebrities

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have done to leverage their name, their brand, kind of like what we were talking about with Lance Armstrong.

Yeah.

I think the same conversation we had with Lance, we should do a full app with Ben on that.

I'll set that up.

Great.

You want to talk about some new stuff that's going around?

Sure.

Okay.

So first thing, teachable.

You see teachable sold?

I did see that.

Okay.

So teachable is you to me, I hate comparing things because I don't want to be disrespectful to teachable, but teachable is like you to me.

It's like you to me with one core difference.

So you to me is like, you go to you to me to find what you want to learn.

Teachable is, Hey, I can make, you know, you can make your website, cold emailing.com.

Yeah.

And you can sell your course on your brand on your site and they make it easy.

You don't have to know how to code to basically spin up an online class on your own website.

Yeah.

And you and I are friends.

I think you are too, right?

I don't know the guy, but I'm really familiar with the thing and people know my education nerd.

So I'm like, kind of was very fascinated about their business and they did a pretty phenomenal job.

They were at like 20 million or so in revenue.

And I think they sold for closer to 200, 250 million.

I talked to Angkor.

That's the guy who founded it.

And he said that it was very lucrative and it was a good, it worked out quite well.

So I'm super, I'm proud of that.

I know their last round was at 250 million.

So I don't know if it sold at the same price, which was recently.

So I don't know if it sold at that price or above that even that'd be kind of amazing.

I don't know.

All I know is that it's how it was a good deal for him.

And that he is, he's an immigrant from India, came here at age 18.

So love the, love the story.

And I believe they have several teachers who use Teachable and make over like a million

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dollars a year or something like that.

I think they have some, some real success stories.

That's what he told me.

It might not be a million.

I don't know exactly.

No, for no, there, there, there are seven figure annual earners.

Yeah.

They're mostly like affiliate marketer types, I think, but, but whatever.

Let's not let's not worry.

It's like when you say teachers, people think like an English teacher and it's actually like, you know, well, he, he told me, he told me the big, one of the top earners was a guy who has an Excel class.

Yeah.

I've seen that.

And you can actually Google.

I've done this many times.

You can Google, you know, most profiting or sort of most highest revenue Teachable classes and you can find the list that I think they even have it on their website, the most popular classes.

There's like a social media marketing, there's an Excel, how to do Excel classes, a coding one.

There's a bunch of those.

Did you do a podcast?

I don't listen to any of our podcasts, by the way, because you don't ever listen to your own stuff.

Did you listen to my voicemail?

Yeah.

That's hilarious.

Let alone you talking for a long time.

Did you launch your, your individual episode?

So I have two episodes.

I did one on Thursday.

I didn't launch it.

I thought it sucked.

And then the editor, I think has coronavirus as well.

So he's been like in and out of the hospital and he has like an underlying lung condition.

So he's like trying to make sure he didn't know that.

You know, get, get in a bad spot.

So he didn't publish it.

And I was like, you know, I got cold feet.

I got to either ship it right away or I'll overthink it.

I think you should do it.

And so, so he listened to it.

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He's like, what are you talking about?

This is good.

And so we're going to ship that.

I have two banked.

And then I also, at the end of the last one, I had this idea during the podcast to do a like morning routine thing.

So like you're in your house right now, right?

You're in your kitchen and we're all at home and everyone's getting a little crazy and trying to figure out like, oh, I'm going to work out by like opening and closing the fridge 50 times.

Like people are trying to find a way to feel good and not go insane.

And I've had this morning routine I've done for years now.

That's a nine minute morning routine.

And so on the podcast, I was like, I should just make a podcast.

It's just that.

It's just the nine minute morning routine.

You can listen to it.

It's just free.

Just put it out there.

So I recorded that last night.

So I had two episodes in the bank plus the morning routine like thing recorded.

And so hopefully all those will come out this week.

Are you working out?

Yeah.

I'm working out.

Yeah.

So we have, we've had a home gym or like a room that we turned into a gym and now I'm using the shit out of it.

I have a home gym in my garage, like a nice one.

Like I've got like, it's like a 400 pounds for a squat, like a squat rack, heavy bag.

I have all types of shit.

And I talked to a guy the other day who was a listener or something like that.

He messaged me on Twitter and he said that their home fitness equipment is selling like crazy.

We can't keep up.

Hotcakes.

Um, I ordered a thousand pounds worth of weights on Amazon last year with free shipping.

Yeah.

The delivery on weights is insane.

I felt so guilty because the guy bringing it up to my house, like up the 15 steps is like, you know, breaking his back for this thing.

I'm never going to use.

And so I bought those Bowflex dumbbells, which is like, it's one dumbbell.

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That's what I have power blocks.

You rotate it and it like can be any weight you want.

Those are actually pretty handy.

Yeah.

I love those.

Those are my favorite.

Um, do you want to talk about Airbnb?

So next week we could do the trend stuff.

We wanted to talk about trend stuff, but I, and I, it was a good one, but I think we have a lot here.

Do you want to talk about Airbnb now?

We have a lot.

So we're going to do two things.

We're going to talk a little bit about Airbnb and then we're going to start this thing that we, we, we teased last week, which is why Combinator had their demo day and it's like a gold mine of new ideas and it's sort of, you know, YC is Harvard.

And so we're going to take a look at this batch of companies and we're going to break them down.

There are six of them today.

And if it's fun, we might do the rest.

I mean, the list is like a hundred plus, so I don't know how long we can do this, but let's do like five today and let's see what happens.

So we'll do both those things in this episode.

So Airbnb, some interesting things are going on.

So Airbnb, you know very well, um, is a awesome company, one of the sort of most successful startups of the last decade or so, and was about to go public this year and was preparing for it.

And now with coronavirus, you know, travel has stopped, hospitality, you know, hotels, casinos, they're all taking a total beating and Airbnb, of course, is going to get caught up in the, the crossfire as well.

And so a couple of interesting things here.

So Airbnb financially, you know, their revenue must have dropped by 50, 60, 70, 80% essentially overnight and with an indefinite time span.

We don't know how long this is going to last.

The second thing is Airbnb, um, not only does it have huge, you know, staff on payroll and now revenue drops, but, um, all the hosts were essentially small, small, small entrepreneurs.

So some people did, you know, a traditional thing, they just rented out an extra bedroom in their house, but a lot of people, once they got a taste of that money, they started buying places, renting out places and sub leasing and basically putting it on Airbnb.

And so all those people now, there's this thing that was a money maker for a couple of years has gone to zero.

And so I think there's something that's very interesting that's going to happen where what happens to all these hosts who got places just to Airbnb them and now the Airbnb income

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has sort of totally dried up.

Are they going to default on their mortgages?

Are they going to default on their rent payments if they're, if they're sub leasing or, um, are they going to turn into just normal rentals?

Like I don't know what's going to happen, but what do you think about all this?

So you already know what's going on in Zillow, you're the one who told me, right?

Well, I did see some charts.

Yeah.

So I saw some charts that basically showed on Zillow, um, normal housing.

So just normal rentals, not a short term Airbnb stay, but, uh, just here's an apartment for lease for six months is exploding.

So like it looks like the coronavirus is like, here's last month, one little blue dot this month, 15 blue dots on the map, right?

It's like, uh, the number of listings is exploding for rentals, which is also bad for Airbnb because in places like San Francisco where there's a housing shortage and for years, Airbnb has been saying, Oh, we don't contribute to the housing shortage.

We are, we're a different thing altogether.

Well, now it's actually kind of a, whether it's, whether it's truly the, the proof or not.

I don't know, but it certainly does look like if you're somebody who was anti Airbnb, you have a lot of evidence and a lot of ammunition now to say, Hey, look, when we turned Airbnb off, look at how much more housing supply came on the market.

I think how that lowers rents for everybody.

You know what Airbnb is doing now though is longterm rentals.

Um, they've been getting into that for a while where you could rent something for many months, maybe many years and that part is growing still or it's growing a lot right now.

And so, so I'm curious whether people in cities who are anti Airbnb are going to take this and run with it.

Yes.

The answer is yes.

Very sensitive to legislation.

Right.

They, they changed some rules here in San Francisco where it's like, you can only do 90 days out of the year and you have to live in the place.

You have to prove that blah, blah, blah.

And that, you know, it eliminated like 30 or 40% of the listings overnight when that legislation happened a year or two ago.

So now I wonder if it's going to get worse.

Sonder, you know Sonder, I'm Googling them right now.

You know them?

No.

Oh, that's the like, um, it's the hotel or explain Sonder.

It's basically if you are traveling for work and you want to go stay somewhere, you'll

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stay at a Sonder often.

Um, let's see, I'll go to Sonder.com.

It's also, if you want to stay somewhere for like three months, like let's say you're going somewhere for three months and you want to, and you have to make a lot of money in order to do this.

It's high in shit.

Like in San Francisco, it's like five or six grand a month need a place to stay or work.

We know it's time.

Uh, here, the best, yeah, the best parts of home and hotel.

So it's like a, it's like a, an apartment that you can rent for two months.

Right.

So the corporate housing, but done well.

Yes.

But they just laid off 20% of their company.

It looks like.

Oh wow.

Yeah.

Today.

Yeah.

Freaking news.

Um, so I think this is going to be very interesting how these different companies get affected.

You know, I'm rooting for Airbnb.

I think it's a great product.

I think it's a great company.

I hope that they have, you know, a war chest of cash that lets them endure this time.

But, um, you know, we'll, we'll see.

It's a, we'll keep an eye on.

If you could invest a little bit of what you can, you can go and buy secondary shares.

If you can invest money at Airbnb's previous valuation.

I think they raised money on a \$30 billion valuation.

Would you invest in that right now?

Well, I'd need to know more, right?

I need to know about the, how the company's financials look.

Let's say that revenue drops.

Let's say revenue dropped 70% for this order.

I'm not so concerned about the 70% drop because that's, that I think is, is more temporary.

So I just need to know, do they have enough cash in the bank to endure this?

Or I think they have \$3 billion.

Okay.

So there's 3 billion dollars, you know, they're probably burning several million a month.

But like, okay, 3 billion should, should still last you through this time.

And then the other question is where the fundamentals good to begin with.

So a lot of times these companies don't have great unit economics or fundamentals to begin

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with.

And so when the downturn comes and people start looking for things that are more stable, more sure bets, these, uh, high growth, but poor unit economic companies, they struggle. They were profitable in 2018.

Oh dude, I love this is like an analyst call.

And, uh, I think they're also profitable in 2019.

Um, this is all public information.

Right.

So, yeah, so if they're, if they're profitable right now, even with this explosive growth, then yeah, it's probably a pretty good bet, um, to, to pick up a little secondary there. All right, boys and girls, ladies and gentlemen, we're going to talk a little bit about our sponsor for this week's episode, HeadSpin.

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Okay, um, I guess we'll see what happens.

Do you want to talk about some Y Combinator stuff?

Yeah.

So, um, so we're going to go through a couple of the companies in the batch, um, you know, these are, uh, we won't say anything that's too, um, what I'll call too private information.

So we'll do what's mostly public information about these companies.

So we'll start with the first one.

Wait, Sean, before we get into that, dude, can you, can I tell you something that was striking about this list?

How many lists were there?

150?

Yeah.

So, uh, shockingly, uh, Africa, African and Indian based.

Yes.

This has been a trend in the last year or two for Y Combinator.

They did two things.

They went and did a road show.

So Michael Siebel, who was the CEO of YC for a while, um, actually he might still be.

So he went on a road show through Africa, through India and, uh, met a bunch of entrepreneurs.

They had a bunch of events and they sort of opened up the doors to those applicants and

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really got people excited about coming to YC and their bet was that, Hey, look, a lot of the growth opportunity in the best companies are, um, you know, we can go fishing this pond where not everybody else is fishing and, um, you know, certainly 500 startups did this many, many years ago where they just, they invest in companies all around the world. This has not been the, the, the sort of way that most Silicon Valley investors have been operating.

They're not actively going and hunting for great companies in India or Brazil or in Africa.

But yeah, it's, it's pretty amazing about how like there's, I see a lot of Latin America, a ton of India and a ton of Africa.

And what's funny is a lot of them are just, you know, Flexport for Brazil.

It's like this other successful YC company, or it's like, one says, one's tagline is Smile Direct Club for Latin America.

Right.

Yeah.

That's literally it.

Um, yeah, Flexport for India, uh, or sorry, Flexport.

Flexport for Africa.

Yeah.

It's pretty crazy.

And I think that's a great move.

Yeah.

For sure.

Because a lot of these companies that, that work when they're not purely software based, they're going to scale slowly.

They're not going to expand everywhere overnight.

So same thing happened to Airbnb, Airbnb got cloned in Europe and in all, all different parts of the world.

Sometimes they, they were able to catch up and beat them.

Most of the time they weren't, and they had to buy a piece of them or acquire them or they just lost.

And they said, okay, I guess we're not going to be the number one player in the UK or going to be two or three.

And it works.

Yeah.

Well, you want to, you want to smart.

You want to start it off?

Yeah.

So let's do Cron.

So Cron is an app, uh, the website, just Cron dot app, C-R-O-N dot app.

And what these guys are trying to do is essentially superhuman for your calendar.

So that assumes you know what superhuman is, which is this really slick and very hyped, uh, email client.

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I used it for a while.

I stopped.

I don't know about you.

Have you used superhuman?

Um, I'm still using it.

Vertex still out if I love it, but they're tagline for people who don't know superhuman is the calendar for professionals.

Right.

So their thesis is, look, the market for calendar users for just, if you just take Google Calendar is 500 million people.

And what they're trying to do is take the top, you know, set of prosumers, right?

So professionals, people who really care about efficiency, people who are heavy power users of the calendar app, and they're trying to say, can we get the top X percent?

They said top 20% but really it's going to end up being the top 2% of people to pay \$19 a month to have, you know, their Google Calendar on steroids.

What's 1% of, what's 1% of 500 million?

Is that 50 million?

Wait, no, that's 5 million.

Uh, yeah, that's 5 million.

Okay.

So 5 million people paying \$19 a month, not bad.

Um, so, so they're trying to go after that.

They basically made a very slick looking calendar.

So it's got all, you know, aesthetically, it looks, looks better.

They have hot keys and little short commands and, oh, you want to set up a meeting and it's hard to sort of say, oh, I'm free Tuesday from 1 to 2 and Thursday from 3 to 4.

It's like, you just share your availability and, uh, make it, make it really easy.

So they have a bunch of these features and they have a thousand users on the wait list who are, um, so ready to pay and they're, they've onboarded the first 50 paying customers so far.

So they're, they're doing that thing that YC companies do.

You'll see this a lot is, um, big idea and then good traction but over a very short amount of time.

I don't really judge if this is successful or not yet.

And it says like 50% month over month growth, but it's been like six weeks.

But it's been six weeks and, and 100% of those companies were other, 100% of the customers were other companies in the YC batch, right?

So it's like, you know, it's hard to really get a sense of these things, but, um, I thought that's a pretty interesting idea.

What do you, what do you think about this?

Okay.

So if I was this guy, I would bet my life that this could be a company that makes a shit ton of profit.

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So there's, the nearest competitor that I could think of is Calendly.

Calendly is a plugin for Gmail.

It's a 30 million a year company that's bootstrapped out of Atlanta, started by a guy who moved here from I think Nigeria.

Cool story.

Um, Andrew Wilkinson, a guy I respect and like thinks that Calendly is, or I think he thinks it's total bullshit and that Google could totally clone it.

I disagree with, um, I disagree with that assessment.

I think that crone can for sure be a very, very profitable software company.

Um, I'm not convinced that it, that they should raise venture capital, um, because I, yeah, I wouldn't raise venture capital with them.

I was them.

If they needed money and just to start, I would say raise a million dollars and just make this make like stoop, make it stupidly profitable.

Right.

Yeah.

That's what I would do.

The route they're going because they're in YC.

Yeah, I hear that.

I think that's a valid path.

I don't think they're going to need a ton of capital.

There's not a big, um, they don't need a huge engineering force.

They don't have to buy a bunch of assets.

You know, this is a software play that really a motivated team of six to 10 people could knock out the park.

If I was listening to this podcast, I would say, and I was technical, I would be like,

Oh, that is a great idea.

Their website, if you go there right now, kind of shows how the product works.

And I would just completely rip it off and scale, but be far more scrappy because I don't think these companies out here are scrappy.

And I think that someone could build it and be able to pay themselves \$5 million a year in net income.

Yeah.

You know, the, so, so I think this is a good idea.

I also like this general genre of company.

So, uh, our friend Sully tipped me off to this a while ago.

He goes, I just think superhuman for X is a good investment thesis right now.

And so he loves superhuman.

He loves the business.

It's doing really well.

And, um, you know, we were looking at this company called linear, which is a, um, it's like a bug tracking software.

So every big software company tracks their bugs, usually using JIRA or some like old

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school ticketing system.

Nobody loves using JIRA.

It's just like, uh, you know, you, it's a must.

Uh, you have to be organized around your bugs and, uh, linear just made like a slick looking JIRA.

And, um, and so we, you know, we talked to them, thought about investing in them and I didn't end up, it was like, it was a bit of a competitive round.

And then I could have got in at the end, but I sort of, uh, cooled on it because when I tried to bring it into our company, there was a lot of, um, security concerns.

Um, not that they were doing something wrong, but you just have to do a lot of work to be enterprise security compliant and pass those checks and they hadn't done that work yet.

Now, in reality, they're going to do that work.

It's going to be fine.

And they're going to get there.

Um, it's just, it got out of sight, out of mind for me because I stopped using them.

I forgot about the email.

And you're making investments right now.

Uh, no, now I'm on startup investments.

I have, uh, cooled off, uh, for, for the time being, there's a freeze.

So okay.

So verdict on crone.

How do you say it cron cron verdict for me is great company to own.

I think it will work.

I don't know if it's good to raise money on.

Yeah.

Agreed.

Thanks to good idea.

Good product.

I think there's other products like this.

If you just take a superhuman for X and you take any work tool that's massively used and you just make an extremely slick UI UX, um, for, for that.

This can work with to do lists.

This can work with email.

This can work with calendar.

Well, you know how I would do that is I would log into Gmail.

I'm going to log into Gmail right now.

I would log into Gmail.

I would click that little, uh, the drop down arrow, the drop down or no, the Google apps thing on the top, right?

Right.

I would look at search, Gmail, calendar, docs, drive, sheets, slides, sites, groups, contacts, hang out, and I would just, oh, wow, there's way more YouTube, maps, news, translate, photos, admin, my business.

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I would, and you just put that on a bullseye or a dartboard, just close your eyes and just there it is.

That's what you do.

Air table, did this for Excel notion, did this for docs, um, superhuman did it for email.

There's a new one that's doing it for presentation.

Yeah.

So let's, let's talk about that.

I don't know much about it.

It's called pitch.io.

Right.

Or pitch.co.

It's pitch.co.

If I remember correctly.

Is it awesome or something?

I don't know.

Like, why are people talking about it so much?

No, it's pitch.com.

Dude, they got the com.

That's like a, that's how you know it's legit.

That's like a hundred thousand dollar domain name.

What, uh, what, why are people talking about that so much?

So I saw this the first time, um, so this is again, you know, just like air table did for Excel, these guys are trying to do for PowerPoint.

So PowerPoint also has hundreds of millions of users.

It's a critical business function.

And, uh, Microsoft does not make the UI UX better over time.

Uh, they do not do smart things in the cloud.

And so you have, on the low end, you have Google docs and Google sheets, Google slides.

And on the high end, you have right now Microsoft, uh, you know, PowerPoint.

And, um, these guys are trying to, to, uh, do a better job of making, making a sexy PowerPoint.

And I'm down with sexy PowerPoint.

I like, I always love their website.

It looks great.

Pitch.com.

And, um, it looks like it's ready to come out now.

I've seen this thing.

I've been in like for over a year, I believe, maybe two years that I've seen this, this, uh, website like this based off the people who are recommending it, uh, on their, on their homepage.

I feel like I know the people behind this.

Yeah.

It's like your friends with all the testimonials.

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Yeah.

Uh, great.

I'm very, yep.

I like that.

I don't know anything about it other than what I'm seeing on this website and yeah, awesome.

And so this is one where I think, um, great market to go after, uh, your execution obviously has to be good, but like, you know, but, but that's okay.

It's better than going after a bad market because then even great execution doesn't do jack shit for you.

Uh, I have another one that's like this on the Excel side.

That's called causal.

Um, so I've been talking to these guys.

I'm not quite enough.

I don't think I'm like an official advisor, but I just give my, give these guys a lot of opinions.

So causal is, um, it basically tries to give everyone the ability to do like data modeling like an Excel wizard or like, oh, that's awesome.

That sounds hard, but that's awesome.

And so they have some cool things you should just, if you just Googled causals, uh, rent versus buy calculator, you can see what the end output looks like.

They make this like calculator of rent versus buy.

How do you spell that?

Um, C A U S A L, um, that's causal, it's causal app.com is their thing.

And then if you just Google causal app, rent versus buy, um, you can see it.

It's a cool tool.

I don't think they've quite got it to work.

I'm telling them they're trying to make it to, they're, they're basically too smart.

So they're trying to do like data modeling and data science is like, Oh, look how easy it is to make a linear regression or Monte Carlo.

It's like, yeah, but you don't do that frequently.

You should just make it where it's really pleasurable and easy to do simple formulas and spit out awesome charts.

Like just do that because what air table did was air table took the part of Excel.

That's just rows of information and they made that sexy, but what they didn't do is calculation.

People use Excel for calculation and charting and an air table doesn't do that.

So if you did the calculation and charting and you made it beautiful and sexy, you could win.

And, uh, these guys aren't doing that.

I'm looking at causal now.

It's awesome.

And pitch.com, I changed my opinion.

They're going to fail.

Okay.

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Why?

I went to their about page and they have nine employees and they're all founders.

Oh yeah.

That's a, that's a bit of a red flag, um, literally, dude, they're about page.

They have nine people.

It says co-founder for all of every employee, yeah, that ain't going to work.

These are also like amazing headshots that they took for themselves.

Yeah.

So I changed my opinion.

There's one guy that's a co-founder and a QA engineer.

It says co-founder next to all of them.

Yeah.

No, pretty, pretty legit investors.

Okay.

So, so Andrew is an investor in them.

Um, yeah.

Okay.

I'm excited to see what they got.

I want to see it.

It's been two years.

It's a nice company.

Um, the next one is art in res, art in res.

So the idea here is you can buy fine art in installments and you know, I personally didn't know too much about the fine art market.

I think my hunch is that you know a little bit more.

I think you like to look into these things.

So tell me what you think about this idea and what you know about the fine art market.

Yeah.

So masterclass is one of our partners.

We work with masterclass.

I went and met with the founder, his name's Scott in New York a couple of weeks ago, a couple of months ago, and I learned a lot.

So, um, fine art is one of the largest asset classes in the world.

Um, but masterclass is not about art, right?

Or what do you mean?

Sorry.

Uh, masterworks.

So masterworks is a website where you can purchase pieces of a Bosch or a Pablo Picasso in the same way that you buy stock in publicly in the publicly traded markets.

So but art, fine art is a massive, massive asset class, but it's incredibly ill liquid

as in you, you either have to have 30 million to buy a Bosch or you don't get any upside.

And so what masterworks is doing is allowing people to purchase it with a minimum, I think of a thousand dollars.

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And what I learned meeting with those guys was how, how great that, that, that, uh, that as an asset class, how great it could be.

So for example, David Geffen, um, from Geffen Records, a big entrepreneur, uh, during the financial crisis, he was famous for saying that his, uh, fine art went up 30% while his normal, uh, equities went down significantly.

Um, um, let me see what else I have a bunch of stats here.

So I think, I think, I think that's really interesting.

If I wanted to look at how this company could do, I would look at Etsy.

So Etsy has traded at, at a 50 to 80 price to earnings ratio, which is really, really good.

Um, I would, uh, eBay right now is, is in the gutter, but I'm really, I think that market places can be quite large.

And I think that I personally was shocked at how large, um, fine, like fancy art is.

And I thought it was like, I thought that there was only like a couple of paintings sold a year that made a difference and in reality it's not, it's not that way.

Right.

The value proposition is that you can buy a fine art in installment.

So you were saying masterworks let you buy a piece of a piece of art.

They sort of fractionalize it.

These guys say it's yours, but you can, you know, a monthly payment plan.

This has been a big trend in e-commerce.

Anybody who's been paying attention to a firm or after pay, these are multi-billion dollar companies that are just saying even low priced items, right?

Here's a \$40 item, but you can buy it in four easy installments and a firm is doing quite well.

They're going to go public or it's looking like they will.

Right.

After pay is actually already public and a firm is I think going to go public.

And so there, and there's, there's more Cecil, there's others that are doing this too.

So that's a very good business to be in, I believe.

And so, so that's what these guys are doing.

They say they've sold \$36,000 worth of art in three weeks.

This is unlike a firm and unlike after paid, they're not a payment option on other marketplace, other websites.

They are their own marketplace.

And so what they're trying to do is they give artists the ability to sell their work.

They say most artists don't even sell their work.

So they say, list it here.

We offer people the ability to buy in installments so more people can buy.

So we have more buyers in our pool and they, they get the artists to put their link to their store just like an Etsy store in their bio.

So they put their art in res link at the bio and that's driving a lot of users because these are, you know, Instagram artists or artists with an Instagram who have, you know,

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over a thousand followers and they're getting into the buy of all these different artists and that's going to drive traffic.

That's a lot how SoundCloud grew early on was going for these independent artists and then saying, cool, we'll give you an easy way to host your artwork, in that case, music. But you know, share your SoundCloud profile and that's how they got tons of traffic and built up their marketplace.

And so I think that's what these guys are trying to do.

I think this is smart.

The art market is one of those markets that's bigger than you think because you don't even, you don't even learn about it until you're already rich and once you're already rich, you don't do start a company in it.

And so I think it's one of those big invisible markets to most entrepreneurs who are scrappy and don't own, you know, like a pencil, let alone a piece of art.

So I would have agreed with you and before you start talking, I agreed that it was great. But then the way you described it, if, okay, so I would be against it, if Etsy is competent, they can destroy these guys.

I think it's going to be hard though, because Etsy's niche is handmade crafts.

And I think that's just fundamentally different than fine art.

I think when you, it's like putting a bottle of wine next to a Budweiser, right, in the aisle.

It's a little bit, I don't think the people who want their art to be sold or fine art to be sold or want to buy want to be next to somebody who's making bracelets. That would be my, that'd be my bear case against that.

Okay.

I buy that.

I buy that.

But oh, okay, I get it.

So I see a painting on here, it's \$3,000.

I can pay over time for, for 24 months for \$137.

Okay.

So my question is this, is this pay-over-time feature even that unique enough to build most of your company on top of?

Why not just like have a normal art store and just install a firm?

Yeah.

That's a good question.

I don't know why they're not just using one of the existing installment plans.

You know, why are they, why are they owning that piece of it?

It's like an art marketplace, but then also this financing program when they could just use one of the existing financing programs.

So I'm looking at it now.

Yeah.

I'm changing my mind.

It's stupid.

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Okay.

We'll see.

Jerry's out on, on art and res.

I'm not an expert in this area, but I'm going to bet there's something there.

My bet would be, I think marketplaces are really, really freaking hard to start.

Correct.

And so I, for that reason, I think that it's going to be incredibly difficult.

And they definitely haven't shown that they've done that yet, but you know, so I would say odds are always against any marketplace being successful, but I do like the fundamentals of what they're trying to do.

I don't think this is a stupid, I don't think this is a stupid bet to take if you're an entrepreneur, but I do think still likelihood is that it doesn't work like most startups.

I think that it, okay, but there's a difference here of working and just building wealth and then working by raising money.

No, I mean the business working, not the raising money.

Lots of companies can raise money.

Yeah.

But what I mean is, should, I think this, it for sure can make a living for the owners.

The question is, is if they raise money, then will it work or will it not?

My prediction is if they raise money, it's going to fail.

I feel like that's your prediction with most things.

I think you just don't like what people raise money for the most part.

No.

The next one that we're going to talk about, carrot, I think that could work.

Okay.

All right.

Let's talk about it.

Okay.

I think carrot, it's, they provide loans and a line of credit for influencers.

That's interesting.

And the reason it's interesting is I use, I have a million dollar line of credit with a company that provides line of credit for media companies.

This clearly works in some cases.

Influencers can it work?

Maybe.

The company that I use, it was started by a DreamWorks exec.

It has over a hundred employees and they have billions of dollars and, and, and, and I don't know what, how do you describe billions of dollars in credit?

Yeah.

They have billions of a billion, over a billion dollars to deploy.

I think it's great because I'm totally hooked on their company and I don't plan on leaving.

And I think I pay them like a thousand dollars a month for this.

What do you use it for?

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Your company expenses or personal one?

Company.

Yeah.

So we don't really use it.

So when a rainy day comes and we need money, I have that set up.

Right.

And so, and so the other example here is ClearBank where they're basically providing credit to e-commerce companies and they're saying, great, don't, don't go raise money for this.

If you can show that you're credit worthy by looking at your Shopify data, then we'll, we will front you the money you need for inventory or for Facebook ads or whatever else.

You shouldn't go raise venture capital to pay for Facebook ads.

And so the interesting thing here is the big ideas, the real big ideas that come out of Y Combinator don't always sound like big ideas to start.

Airbnb is a great example of that.

You know, when it was, when it was on YC's list like this, it would have been called airbed and breakfast.

It would have been like, you know, rent out an air mattress in my apartment.

And it would have seemed like a small idea.

And this is one of those two where it's like, do influencers really need credit?

Do they really need loans?

What do influencers need, you know, this for?

And it just turns out, I think that there's a lot of influencers and this might be a hidden big market.

It might be something that influencers really actually do need this capital.

They are not, the traditional banks and lending institutions don't know how to assess an influencer for credit worthiness in the same way that they didn't do it for e-commerce.

And the question I have is how does the influencer use that capital to invest and grow their business?

Like for e-commerce, I get it.

For your business, I get it.

If you're going to invest the money, you're going to grow your business.

What does an influencer really do to grow their business?

Is it ads?

Is it to pay for stunts?

That's good content.

Like what are they doing with this money?

That's a good question.

And I don't think anything, but let me go a different angle here.

When you bought your house, was your wife listed as an earner?

Yes.

Was she listed as self-employed?

Yes.

Well, what do you mean listed?

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Like for example, when you got your mortgage, sorry, when you got your mortgage, did she say that she was a sole proprietor?

Did you say that you are a 25% owner of a business?

Did I say that?

No.

Okay.

When she was getting approved for the mortgage, was it hard for her?

No.

Well, it was a lot of paperwork, but it wasn't hard.

Like she had the income to show it, but it just required, like mine was simple, W2 submit.

They're like, yeah, got it.

We understand your economics.

For her, she had like, you know, this roller coaster history and a whole bunch of different entities and like all those different stuff that like was very, very hard for them.

In fact, I just refinanced because the interest rates have dropped like crazy and we didn't even use her this time because the lady at the bank was like, if we can, let's just do this off your income.

Like, I don't want to do all that paperwork again for your wife.

That's what I think the opportunity is.

When I try to buy a home, because I'm an entrepreneur, I told them I own, I think the threshold is 20%.

They go, they said, do you own more than 25% of a business?

I said, yes.

And they go, okay, we need to see the last X amount of the years in P&L.

And I showed it to them and it was profitable or whatever.

And they still gave me a hard time.

I think that if I was this company, carrot, I would, I think that there's a big opportunity who can provide home loans for small business owners.

I think that's the real opportunity here.

Yeah.

And maybe they do.

So here's some of the stats about them, right?

They've loaned out a million dollars in the last six months.

The average payback period is 45 days, extremely fast payback.

The APR is very high because of that.

So even on a low APR, because of the fast payback, it annualizes at 40%.

And now they're rolling out a credit card.

After they do a credit card, I'm sure that they would want to get into other financial services.

And if they can be sort of the financial services for influencers or the bank for influencers, that's very interesting because this will always be a niche market that is overlooked and misunderstood by the traditional banking system.

And so that's the bull case, the bearer case is, I don't know, I don't know what the influencers

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need this money for.

I don't know if they can actually pay it back and I don't know how credit worthy they actually really are.

So the strategy here is you get into a market, you get a ton of, you buy a ton of share. People like you and trust you and you're profiting and then you start launching more and more stuff to them, which I personally love.

Which is the Brex model in this case, right?

Well, yeah, and it's what I do, I mean, it's what I did for a living, we built up a free email list, they'll be sell more stuff and then more and then more and then more.

I mean, yeah, a lot of people do it.

And but you got to get them locked in early and you got to get enough people.

So I think that that's cool.

And that actually brings us to a good point of the next one, how do you pronounce this?

And I'll tell you why.

There's an angle here.

What's this one called?

How do you pronounce that?

We're just going to call it lila.

I don't know what it is.

It's liala.

I don't know how to pronounce it.

They need to change their name because that's hard to pronounce.

So it's stupidly simple.

It's a product that helps women freeze their eggs, pretty straightforward.

But what I think could be cool with these folks as well as carrot is once you get this customer on the hook, there's loads of products that you could sell them.

And the same way him started with Viagra and now is doing hair loss.

And then now they're thinking about doing testosterone, doing X and then doing Y, whatever.

I think you could do the same thing for both carrot really well and this egg freezing one.

Hello, Lilia.

Yeah.

That's stupid.

I think that's how you say it.

So bad name, great idea, great business.

You know, this is one of those you just close your eyes and invest is how I would treat it.

Yeah.

So here's some stats that I went and found.

This is not from their deck.

I just went and found this.

Okay.

And this number was shocking.

Do you know that only, according to CNBC, only like 11,000 people freeze their eggs

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a year?

Is that right?

That's amazing.

It's not a lot.

Yeah.

Not a lot.

But it's growing at 25% a year.

And I actually buy that.

I think it's going to grow significantly.

Gen Z, I think are going to put it off more and more.

I also think that, so large companies like Facebook and Google actually subsidize it and pay for it.

So to get your eggs frozen, it costs between \$5,000 and \$20,000 a year.

If you're in San Francisco, it could be \$18,000.

If you're in a smaller city, it could be \$6,000.

So it's really expensive.

It's very invasive.

It takes four to six weeks where you got to give shots in your arm and it's like huge needles.

It's just intense shit, but you know, it's about having children.

So it's a pretty big deal and you're willing to put up with all that.

It's a pretty big deal.

My question is, so first of all, there's not that huge of a market right now, 10, 12,000 people.

Would this new company be able to convince a young woman to use them as opposed to her doctor?

Right.

And the other existing services that surely exist around this, right?

Like I don't know the competitive landscape, but I do like where all the trends are going.

So I think that the data shows that people are having kids later.

They're getting married later and that this is becoming less fringe and less taboo over time.

And so that's what's going in the favor of this is that more people, the market for egg freezing is growing and it's becoming more serviceable.

Now do they, what I don't see here is some unique go to market strategy.

Oh, here's how they're, here's how they're going to acquire customers differently than how anybody else would.

I also don't see them really talking about their expertise and how they, you know, why that, why they're going to be able to build trust in a way that's better or different than anybody else.

So that's what I think is missing from this limited information we have here.

We talk about product and distribution and how a lot of people, particularly first time people think, well, if the product's good, it's going to sell itself.

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In reality, that's not the truth because there's way more great, there's a ton of great products that die because they have no distribution and there's a ton of shit products that crush because their distribution is amazing.

And so in this case, in the same way that HIMS is just reselling other people's shit, like HIMS isn't interesting, it's just generic Viagra, their product's nothing good.

It's just that they like smacked cute branding on it and they made it so men can call their call and get it and young men don't have to be embarrassed about going to the doctor.

You need to see something like that from this company, I think, in order for it to work because what the service they're offering doesn't seem particularly different, right?

Right.

Yeah, exactly.

They haven't made it less invasive, less painful, less cost.

They haven't innovated on the product side.

That means they need to have innovated on the marketing side or the go-to-market side.

So that's what I don't like about this, but I love the space that they're in and I think there's going to be a winner.

I don't know if it's this company or another, but that's what's great about this one.

Yeah, and let me see.

Do they have...

I don't know what...

Okay, here it is.

I got some information on them.

Let me charge.

Okay, so it looks like what they're doing is they're not actually doing the work.

They're just a middleman for the clinic.

So in reality, they're almost like lead gen.

Yep.

They have a \$500 concierge service that they offer first, so how do we educate you, handle you through the process, and basically qualify the lead?

Yeah, so what they're doing is they are not actually providing the service.

They're just a marketing company for the service providers.

If that's the case, I like this.

I think it's cool.

Yeah.

I have a friend who does a company called Yoderm, and what they do is the same thing around dermatology, so it's telemedicine, but in reality, what they're doing is they said most people who need to see a dermatologist are going because of acne.

Most people who have acne get the same prescription.

That prescription is something that they can just get quickly from a doctor.

The biggest bottleneck is getting an appointment.

It takes 27 days on average to get an appointment with a dermatologist.

So what they did was they built a marketing company that basically says, hey, do you need to see a dermatologist?

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This is a faster, easier way to do it.

Just do it from like FaceTime your doctor.

And then they have a bunch of doctors who just write these same prescriptions all the time for the same acne medicine because that's what people need 80% of the time.

And 20% of the time they say, you need to go see a doctor.

It's not acne.

It's not just the generic thing.

And then they're white labeling the actual acne medicine, and they're the ones delivering it.

How big is that?

They're doing well.

I love that.

Okay, so we talked about Cron, Art and Rez, Carrot, and Lilia.

That's a stupid name.

You have \$100,000 to put in one.

Which one are you going to do?

All right, let's take a look.

It's not going to be Cron for me.

I'm also going to say it's not going to be Lilia because even though I like the market for all those reasons we mentioned, I don't know why this is the winning company.

I don't see them doing anything special.

And what we have to tell people is once you meet the person behind it, that could totally change your decision.

For sure.

Right.

This is not based on the people at all.

Because you could meet someone and you're like, they're so formidable that you don't care what you sell them in.

Right.

I think if I was going to do this, this is crazy to me that I'm even saying this, but

I think I would be putting it in Art and Rez.

I think I would put it in because I think if they can get the marketplace spun up, it's going to be valuable.

And I think that this is an overlooked marketplace, so overlooked market.

So I like that it's a marketplace as a model, not lead gen, not anything else.

And then on the other side, I think if they can get, I have a feeling that the sort of fine art marketplace has not been affected by technology in the same way as all the other industries have.

And so I'm curious to see what they can do.

So I would bet the 100K on Art and Rez and I would write it off as a loss because I would assume it's going to be a loss.

All right.

I would do a Kron.

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Okay.

Why Kron?

I just think it's super easy.

For them to be in default survival, it's so easy.

I think that they can get to like \$100,000 in monthly revenue really fast.

I think their churn might be high, but I think that it's just because of the market size and because it's an impulse buy, and if this just saves you a little bit of time,

I just think that they can get to \$10 or \$30 million in recurring revenue inside three or four years with very little capital.

And so they're default alive pretty easily.

And depending on how creative the entrepreneurs are, they could expand beyond that.

So I'm going to go with Kron.

Okay.

I like that.

I don't know who would buy them though.

Well, like for example, Microsoft bought Sunrise calendar, I believe it was a calendar that people really liked.

It was a professional calendar and they got bought for, I don't know how much, I know like inbox got bought for \$100 million for making a slicker inbox, you know, by Google and then sort of thrown away, Sunrise got bought.

So I think that there's potential for an acquisition there by one of the, you know, big companies that cares about, you know, enterprise and productivity and whatnot.

So there's a chance there.

I just want to be evil and just clone half of these things on this list.

Yeah, that's not evil.

It's just capitalism, but I do like some of these ideas, I think are really stellar.

I don't know.

Can I tell you the one that I would invest in?

It's not even one we discussed and then we got to go, I'll do it in 30 seconds.

Company called Beffle, they're doing fast deliveries on college campuses.

Oh, I think it's a horrible idea, but go ahead.

Not horrible.

Not horrible.

I'll tell you why.

What they do is they buy the popular stuff that kids want like Ben and Jerry's and chips and whatnot, beer.

They put it in an apartment and then they deliver it to you on scooter when you order it.

So average car to \$16, they make \$5 per delivery and they're delivering in a very lightweight way on the same, in a very tight geographic boundary, so they don't have a bunch of logistical issues.

There's a company called Puff or GoPuff, have you heard of those guys?

No, what's that?

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It's this, but it's basically it's this and they're doing over \$100 million a year right now and they're just two kids out of, I don't know, Penn State or something like that. I don't know where they are, but somewhere in middle America. And so I've seen this model work, I think that this is a good business idea. Yeah, Puff or I think the website's gopuff.com. You're saying they do \$100 million in sales? Yeah, more than that, I believe. And so there in, you can see all the different campuses. So then how profitable are they? I mean, I don't know all that, right? I don't have all their financials. I mean, as \$100 million, like their net, like their, after they pay the drive, I mean, or is it like where the driver gets most the money and most the money is the store? They're at \$163 million a year is the thing and I don't think they even raised that much money. Like let me look at their fundraising for gopuff. I don't think they raised too much. Oh no, they have now raised a lot. How much? \$866 million. Oh, you described it as two kids. Well, it was SoftBank invested in them recently and is a huge round. So SoftBank backed up the truck in them. But anyways, I think this market works and I actually think it's great that SoftBank backed up the truck and put the touch of death on this company. If I'm duffel, I believe in what I'm doing. There's a lot of college campuses out there to make this work. Can I give you two that I would do right now? Yeah, before. This is just purely off of reading about their market and like a description of the company. The first one is buildplane.com, project automation for commercial construction. I think that with the recession, this can make this company a ton of money. Their previous companies were acquired, so they're solid. But I love software that is in boring industries like commercial construction that can help people just save a little bit of money. It's called buildplane. That will take off and be big. I like that. It's not sexy. And then the second one is True North Fleet. Did you see that one? I didn't see this, no. We give independent truckers the resources of large fleets.

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And so basically what they do is a lot of truckers are just small business owners.

They're just Uber drivers, but they just do truckers.

My dad is in that industry, so that's how I know a lot about it.

And they're pretty raw.

Up until recently, they didn't use Twitter or anything like that.

They would just have their CB radios and their cell phone and my dad would have called them and be like, hey, I got a load for you to go pick up in Bakersfield, and then I need you to drop it off at the Walmart in this place.

That's just how it would work.

And this company is building bits of software for small trucking businesses, and I think people vastly underestimate how trucking is the backbone of America and how big logistics is in our country.

So I'm very bullish on that one.

I like it.

Okay, cool.

So with this, let us know we're going to do either more of these YC company deep dives since this batch list just came out.

There's like 100 companies we could go through if we wanted to.

And if you don't, let us know.

It'd be like, that was boring.

Don't do it again.

And yeah, we can go through a few more next week.

Sean, did you had topics already that you wanted to go over?

We can do these next week, huh?

Yeah, we'll do them next week.

Or we'll do them on Thursday.

Thursday.

Okay.

Well, thanks for listening.

This one was a little ghetto because we're all at home.

Hopefully the quality was sufficient enough.

Yeah.

I for one enjoy the ghetto pod.

I fucking hate it, dude.

I hate it.