

<4>

<4>

* Monthly burn

LITIGATION REVENUE

→ \$14

* Payroll =

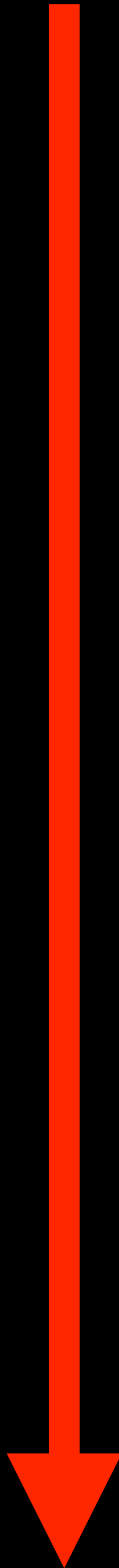
CORE TEAM

50%
57%



Despite what he said, I recommend revenue.

BUS-217



Step 1: Listen to the waves.

Step 2: Create something people want.

Step 3: Draw the landscape.

Step 4: Build an engine of growth.

Step 5: Create an economic model.

Step 6: Develop a capital strategy.

Step 7: Frame a funnel.

Step 8: Be a master storyteller.



**Who did something this week to push
their startup forward?**

Business Model

“A business model describes the rationale of how an organization creates, delivers, and captures value”

**Sometimes innovation isn't product
innovation, it's business model
innovation.**



Free Tier details

Filter by:

[Clear all filters](#)

▼ Tier Type

- Featured
- 12 Months Free
- Always Free
- Trials

▼ Product Categories

- Analytics
- Application Integration
- Business Productivity
- Compute
- Containers
- Customer Engagement
- Database
- Developer tools
- End User Computing
- Front-End Web & Mobile
- Game Tech

COMPUTE

Free Tier 12 MONTHS FREE

Amazon EC2
750 Hours

per month

Resizable compute capacity in the Cloud.

750 hours per month of t4g.small instance



STORAGE

Free Tier 12 MONTHS FREE

Amazon S3
5 GB

of standard storage

Secure, durable, and scalable object storage infrastructure.

5 GB of Standard Storage



DATABASE

Free Tier 12 MONTHS FREE

Amazon RDS
750 Hours

per month of database usage (applicable DB engines)

Managed Relational Database Service for MySQL, PostgreSQL, MariaDB, or SQL Server.



DATABASE

Free Tier ALWAYS FREE

MACHINE LEARNING NEW

Free Tier FREE TRIAL

COMPUTE

Free Tier ALWAYS FREE

Hi, I can connect you with an AWS representative or answer questions you have on AWS.





Power by the hour

Our TotalCare® circular business model helps us to reduce waste and optimise resource efficiency, whilst enabling our customers to maximise the flying potential of their engines.



More about:

- [Discover >](#)
- [Sustainability >](#)
- [Airlines >](#)
- [Future technologies >](#)
- [Advance >](#)
- [UltraFan >](#)
- [Global >](#)

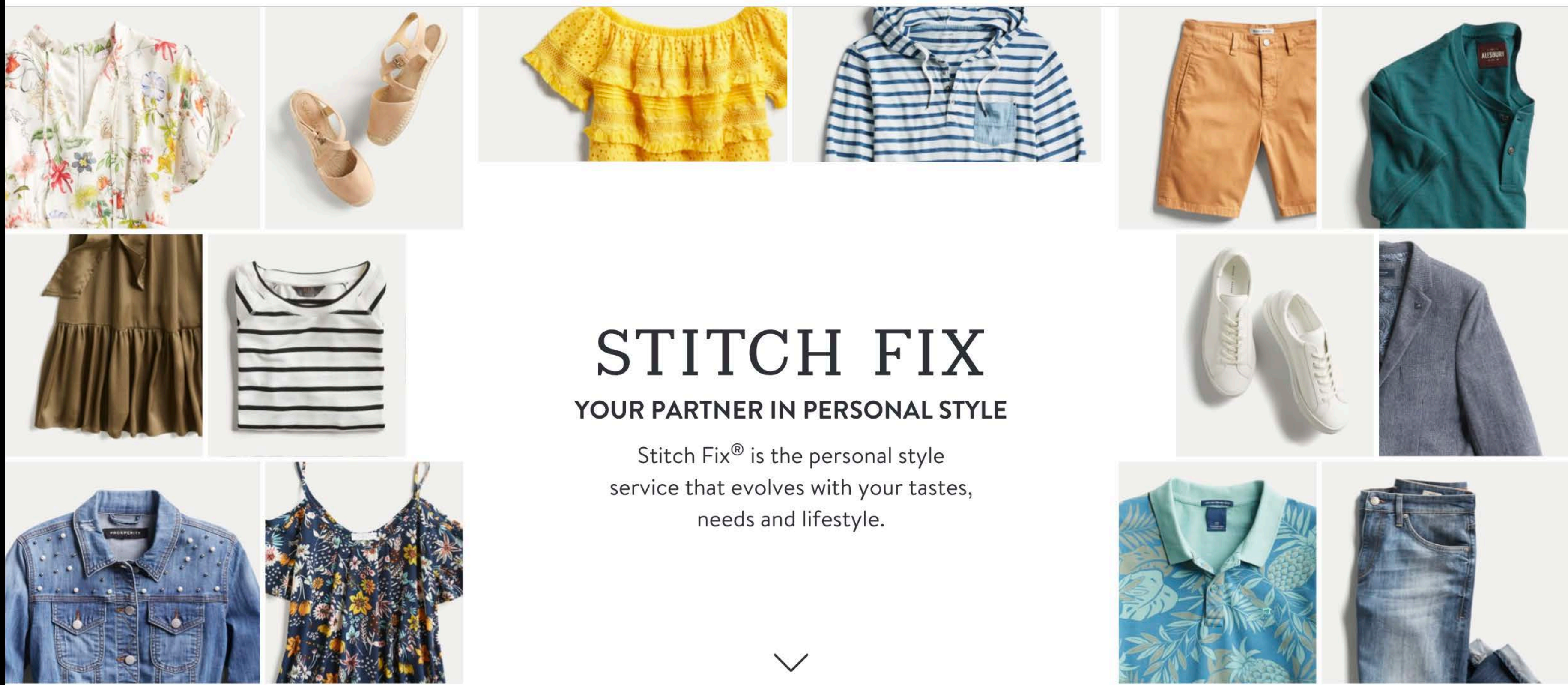
A circular business model

Our long-term service agreements retain product stewardship. This provides a means

STITCH FIX

[FAQ](#) [STYLE GUIDE](#) [GIFT CARDS](#)

[SIGN IN](#)



STITCH FIX

YOUR PARTNER IN PERSONAL STYLE

Stitch Fix® is the personal style service that evolves with your tastes, needs and lifestyle.



[WOMEN →](#)

Offering 0-24W (XS-3X),
petite and maternity.

[MEN →](#)

We currently carry 28-42W (XS-2X).



Dollar Shave Club

☰ MENU

OUR BLADES

OUR PRODUCTS

GIFT



HOW IT WORKS

REVIEWS

LOGIN

JOIN

BOX



BLADES



BUNDLES



THE HUMBLE TWIN

EVERY MONTH

\$1

+2.00 S&H

SELECT

A great basic shaver, for guys who dig simplicity and precision.



THE 4X

EVERY MONTH

\$6

SHIPS FREE

SELECT

Member favorite - a gentle shave in a single stroke.



THE EXECUTIVE

EVERY MONTH

\$9

SHIPS FREE

SELECT

The final frontier - it's like a personal assistant for your face.

Business Model

“A business model describes the rationale of how an organization creates, delivers, and captures value”

“A business model describes the rationale of how an organization creates, delivers, and captures value”

The **Business Model Canvas is an established way to outline all the different components of a startup’s business model.**

The Business Model Canvas

Business Model Canvas

A business model describes how an organization creates, delivers, and captures value. This canvas provides a way for you to list your **hypotheses** as to how your venture's business model will work. Print this canvas out as large as you can, put it on your wall, and then use sticky notes on it. Remember, these are hypotheses which you will test, swapping-out stickies as you learn.



Problem <i>As the saying goes, a problem well-defined is a problem half solved.</i>	Solution <i>How does our product or service solve the problem we've stated?</i>	Unique Value Prop (Differentiation) <i>Within the competitive landscape, what is your positioning? Help your customers understand what is different about you, compared with the alternatives in the marketplace.</i> <i>Examples: Organic, the most convenient location, focus on speed, focus on personalized service, cheapest, customized products, largest selection.</i>	Secret Sauce (Defensibility) <i>Something you have that your competitors don't have. Something that can't be easily developed or bought.</i> <i>Examples: Patents filed, proprietary process, exclusive distributorships, uniquely qualified team.</i>	Customer Segments <i>How would you segment the universe of customers you plan to serve?</i> <i>Examples: Teens, Parents, Geeks, Fortune 500 companies, family-run companies, fashion queens. Something you have that your competitors don't have. Something that can't be easily developed or bought.</i> <i>Examples: Patents filed, proprietary process, exclusive distributorships, uniquely qualified team.</i>
Key Partners <i>What are the partnerships that we will need to form in order for our venture to be a success?</i> <i>Examples: Retail chains, delivery services, government agencies, financial services institutions, independent software vendors.</i>	Key Metrics <i>Startups can't afford to track and chase a whole bunch of different metrics. What are the top 1-3 metrics that we need to focus on?</i>	The Wow! <i>What one feature will really impress customers and make your product stand out?</i>	Channels <i>What are the channels through which you will sell to customers?</i> <i>Examples: Retail stores, direct via your website, mobile app, direct sales team, resellers' sales teams, value added resellers.</i>	
Cost Structure <i>What will our primary costs be? Will the venture be a cost-driven business like a no-frills airline or will it be value-driven like a luxury brand? List your principle costs here.</i> <i>Examples: Rent for retail locations, labor, scientific staff, IT services, software development.</i>		Revenue Streams <i>Every business needs revenue, and a great business needs multiple revenue streams.</i> <i>Examples: subscriptions, advertising, merchandising sales, commissions.</i>		

The Launch Path Canvas 2.0

Name of Startup Venture:
 One Sentence Description:

Date:

Iteration:

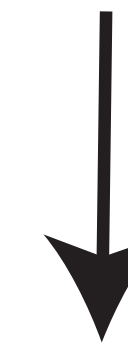
<p>Problem </p> <p>One clear sentence that articulates the problem your startup solves.</p>	<p>Solution </p> <p>How does your venture solve the problem you have articulated? Keep this short and concise!</p>	<p>Why it matters </p> <p>Why is this a problem worth solving?</p>	<p>Landscape </p> <p>This is a list of competitors and alternatives. When a customer looks at alternative ways to solve the problem your startup solves, what will they see?</p> <p style="text-align: right;">Link to a full visualization.</p>	<p>ICP </p> <p>What do you think your startup's Ideal Customer Profile will be?</p> <p style="text-align: right;">Link to a Personas doc.</p>
<p>Path to PMF </p> <p>What is your plan for getting to Product-Market Fit?</p>	<p>PMF Metrics </p> <p>As you work your way toward Product-Market Fit, what are the key metrics that matter?</p>	<p>Distribution </p> <p>What are your distribution channels? Direct to consumer, or via resellers, or?</p>	<p>Positioning </p> <p>Within this landscape of competitors and alternatives, how is your venture positioned?</p>	<p>Trigger </p> <p>What makes someone suddenly be in the market for what your startup provides?</p>
<p>Economics </p> <p>What are the Unit Economics for this venture, what do we expect the CAC<LTV to look like, and what are out capital needs?</p> <p>Unit Economics: _____</p> <p>Customer Economics (CAC:LTV goal): _____</p> <p>Enterprise Economics (runway): _____</p> <p style="text-align: right;">Link to full spreadsheet.</p>		<p>Capital Strategy </p> <p>What source and structure of capital will best align interests between founders, employees, shareholders, and investors?</p>	<p>Unfair Advantage </p> <p>What unique advantage does your startup have that may help to defend from competitors?</p>	<p>Top 3 Benefits </p> <p>What are the top 3 benefits that your product or services provides to customers?</p>

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The Launch Path Canvas 2.0

Competition

Customers



The "Why?"



PM(D)F



Economics



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The Launch Path Canvas 2.0

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Name of Startup Venture:

Iteration:

One Sentence Description:

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Problem



One clear sentence that articulates the problem your startup solves.

Solution






How does your venture solve the problem you have articulated? Keep this short and concise!

Why it matters



Why is this a problem worth solving?

<p>Path to PMF </p> <p>What is your plan for getting to Product-Market Fit?</p>	<p>PMF Metrics </p> <p>As you work your way toward Product-Market Fit, what are the key metrics that matter?</p>	<p>Distribution </p> <p>What are your distribution channels? Direct to consumer, or via resellers, or?</p>
---	--	--

Landscape



This is a list of competitors and alternatives. When a customer looks at alternative ways to solve the problem your startup solves, what will they see?

[Link to a full visualization.](#)

Positioning



Within this landscape of competitors and alternatives, how is your venture positioned?

Unfair Advantage



What unique advantage does your startup have that may help to defend from competitors?

Date:

Iteration:

ICP



What do you think your startup's Ideal Customer Profile will be?

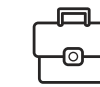
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Trigger



What makes someone suddenly be in the market for what your startup provides?

Top 3 Benefits



What are the top 3 benefits that your product or services provides to customers?

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Ten minute break.

A class challenge from Lydia!

The 10 CUSTOMER INTERVIEWS CHALLENGE



GOAL: Talk to **10** potential customers in your target market before the end of Week 8.

WHAT COUNTS:



10-30 min conversation
(Zoom, phone, or in person)



With **real** customers



Focus on **learning**, not pitching



Can be **imperfect**

WHAT DOES NOT COUNT:



Talking with your **friends/co-workers** (unless they are your target customers)



Surveys

Even **1-2** conversations is already a win. This is about building the **habit**, not being perfect.



I've created a Slack channel
👉 **#10-conversations-challenge**
Joining this channel means you accepted this challenge.

Let's learn, build, and grow together! ❤️

Email Newsletter Platforms



Could I build my own email newsletter app that can send my free weekly email to a 5,000 per month as well as support subscribe and unsubscribe functions?

Yes, you absolutely could build this yourself. At 5,000 subscribers sending once a week, you're well within the range where a self-built app is practical and inexpensive. Let's go through what's actually involved.

The core pieces you'd need are: a subscriber list (something simple like SQLite or PostgreSQL with status, and unsubscribe token per row), a sign-up and unsubscribe page, an email-sending integration, and a cron job to trigger the weekly send.

Any of the code snippets in this body will be used in the app. The app will use something like SQLite or PostgreSQL. Render.com is used for the database queries and sending emails.

unsubscribe link. The unsubscribe link is just `https://yourdomain.com/unsubscribe?token=<random_token>` that flips their status to `unsubscribed`. CAN-SPAM (US) and GDPR (EU) both require a working one-click unsubscribe, and Gmail/Yahoo now require a List-Unsubscribe header for senders at your volume — your email provider will

```

143
144
145 def deliver_newsletter(newsletter_id: int, *, dry_run: bool = False,
146                       limit: Optional[int] = None) -> dict:
147     """Send `newsletter_id` to active subscribers not already marked sent.
148
149     Idempotent / resumable. If `limit` is set, we only attempt the first
150     `limit` of the not-yet-sent subscribers in this run.
151     """
152     with db.get_conn() as conn:
153         nl = conn.execute(
154             "SELECT * FROM newsletters WHERE id=?", (newsletter_id,)
155         ).fetchone()
156     if not nl:
157         raise ValueError(f"Newsletter {newsletter_id} not found")
158
159     db.set_newsletter_status(newsletter_id, "sending")
160
161     subs = db.active_subscribers()
162     skip = db.already_sent_subscriber_ids(newsletter_id)
163     pending = [s for s in subs if s["id"] not in skip]
164     total_pending = len(pending)
165     if limit is not None:
166         pending = pending[:limit]
167     log.info(
168         "Newsletter #{} {}: {} active, {} not yet sent, sending to {} "
169         "this run",
170         newsletter_id, nl["subject"], len(subs), total_pending, len(pending),
171         f" (limit={limit})" if limit else "",
172     )
173
174     if dry_run:
175         log.info("DRY RUN - would send to first 3: %s",
176                [s["email"] for s in pending[:3]])
177         db.set_newsletter_status(newsletter_id, "draft")
178         return {"would_send": len(pending), "dry_run": True,
179                "total_pending": total_pending}
180

```

db are NOT 1
(don't init
nd:
AME/newslett
grade —

of the whole walkthrough.
es some bash tricks so your
chat history:

```

fly secrets set \
  RESEND_API_KEY="$(grep '^RESEND_API_KEY=' .env | cut
-d= -f2-)\" \
  FROM_EMAIL="newsletter@missive.bretwaters.com" \
  FROM_NAME="Bret Waters" \
  REPLY_TO="bretwaters@gmail.com" \
  PUBLIC_URL="https://metabret-missive.fly.dev" \
  ADMIN_TOKEN="$(python3.12 -c 'import secrets;
print(secrets.token_urlsafe(32))')\" \
  SECRET_KEY="$(python3.12 -c 'import secrets;
print(secrets.token_hex(32))')\" \
  --app metabret-missive

```



Claude recommended tools I could use to check the deliverability of emails from the new system.

The famous spam filter [SpamAssassin](#). Score: 0.2.

A score below -5 is considered spam.

-0.1	DKIM_SIGNED	Message has a DKIM or DK signature, not necessarily valid This rule is automatically applied if your email contains a DKIM signature but other positive rules will also be added if your DKIM signature is valid. See immediately below.
0.1	DKIM_VALID	Message has at least one valid DKIM or DK signature Great! Your signature is valid
0.1	DKIM_VALID_AU	Message has a valid DKIM or DK signature from author's domain Great! Your signature is valid and it's coming from your domain name
0.1	DKIM_VALID_EF	Message has a valid DKIM or DK signature from envelope-from domain
-0.001	FREEMAIL_FROM	Sender email is freemail You're sending from a free email account
-0.001	HTML_MESSAGE	HTML included in message No worry, that's expected if you send HTML emails
-0.001	RCVD_IN_MSPIKE_H3	Good reputation (+3) 74.125.82.54 listed in wl.mailspike.net

I write a weekly newsletter for entrepreneurs, innovators, and investors. You can unsubscribe, anytime.

Email address
you@example.com

Name (optional)
Your name

Subscribe

I now have a fully-functioning system and yesterday I canceled my \$135/month subscription to MailChimp.

#winning #moretacos

Dashboard · Bret Waters adm

missive.bretwaters.com/admin/

Bret Waters · admin Dashboard Compose Public site Log out

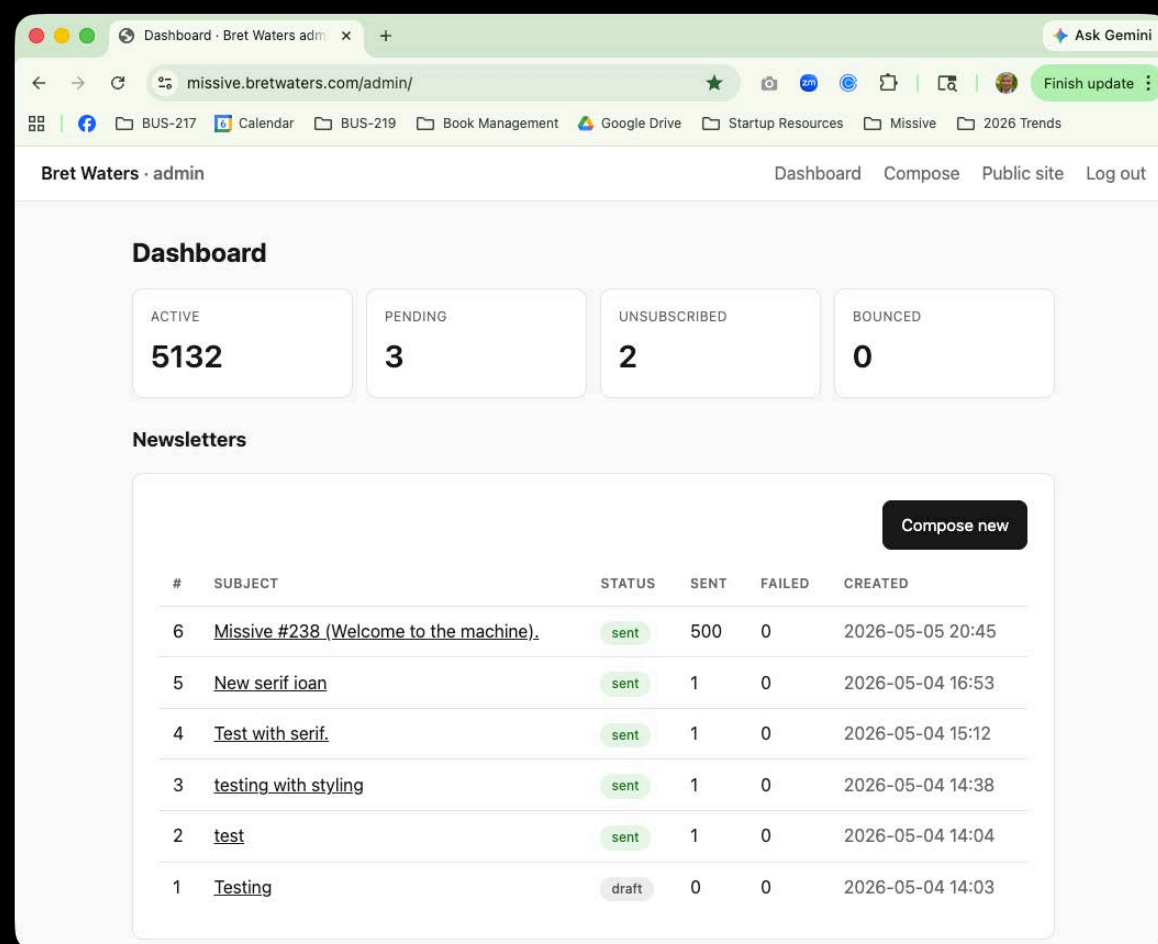
Dashboard

ACTIVE	PENDING	UNSUBSCRIBED	BOUNCED
5132	3	2	0

Newsletters

Compose new

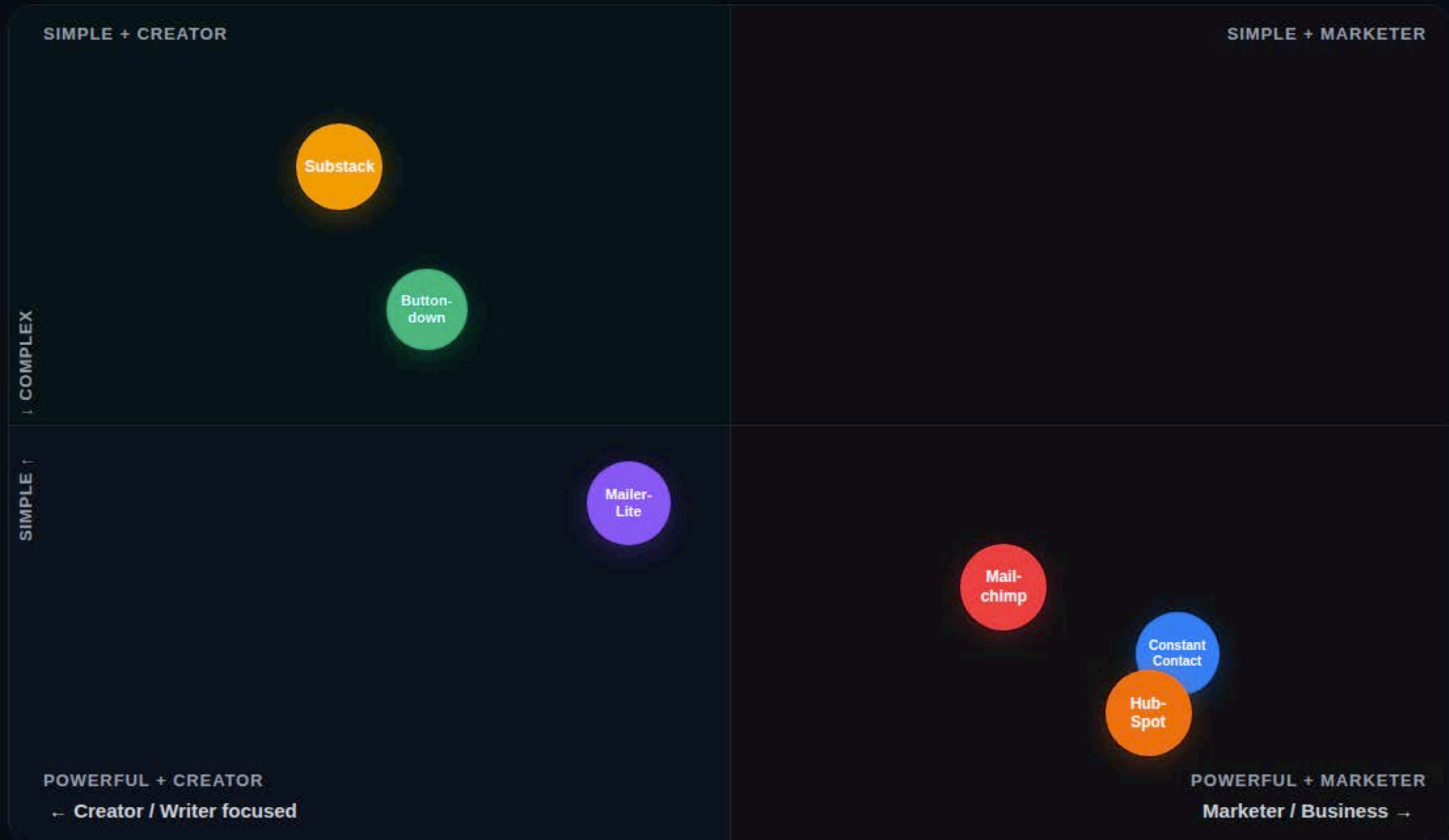
#	SUBJECT	STATUS	SENT	FAILED	CREATED
6	Missive #238 (Welcome to the machine).	sent	500	0	2026-05-05 20:45
5	New serif ioan	sent	1	0	2026-05-04 16:53
4	Test with serif.	sent	1	0	2026-05-04 15:12
3	testing with styling	sent	1	0	2026-05-04 14:38
2	test	sent	1	0	2026-05-04 14:04
1	Testing	draft	0	0	2026-05-04 14:03



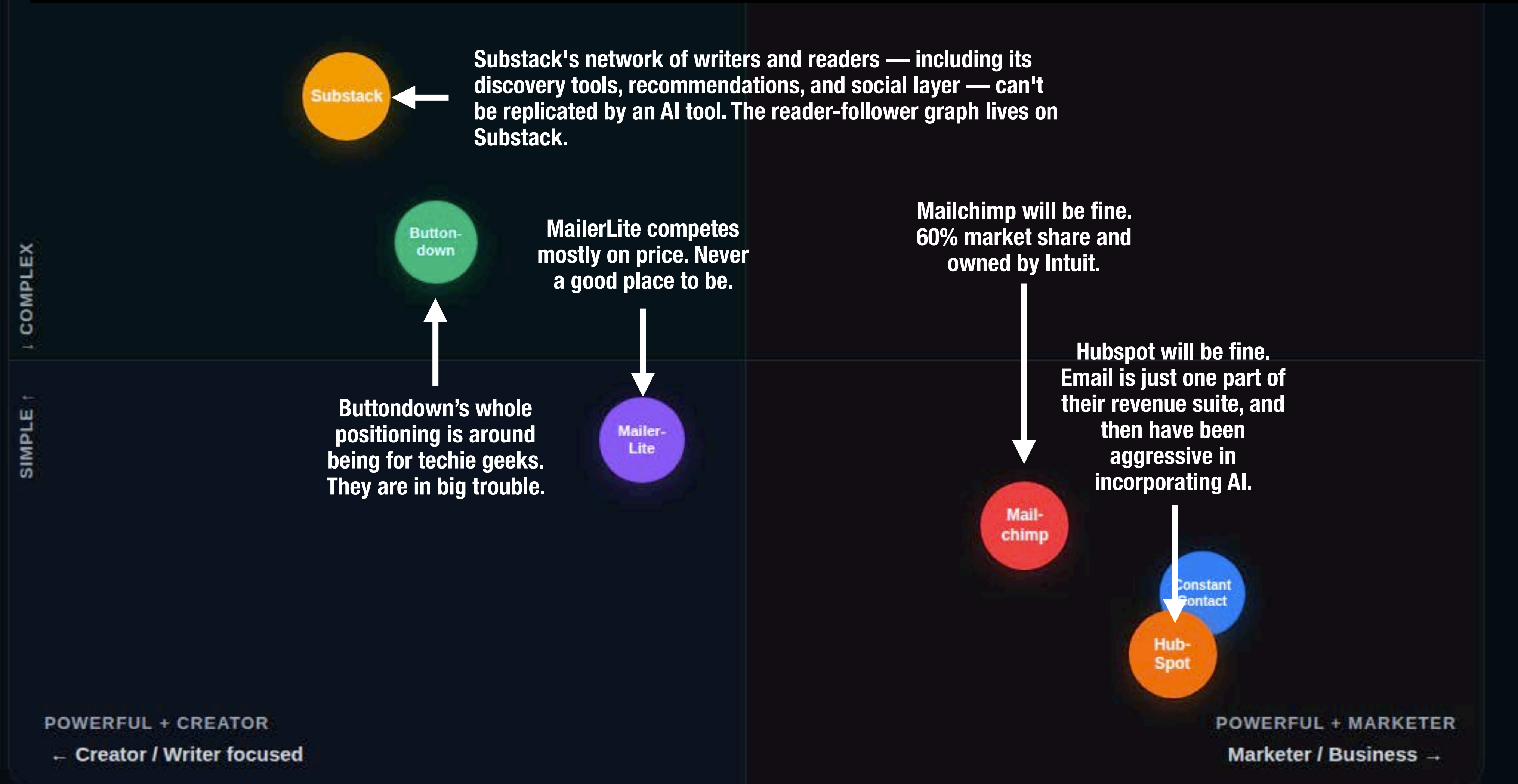
Is this the SaaSocolypse? Will all the SaaS platforms go out of business because now with AI people will just build their own everything?

Newsletter Startup — Competitive Landscape

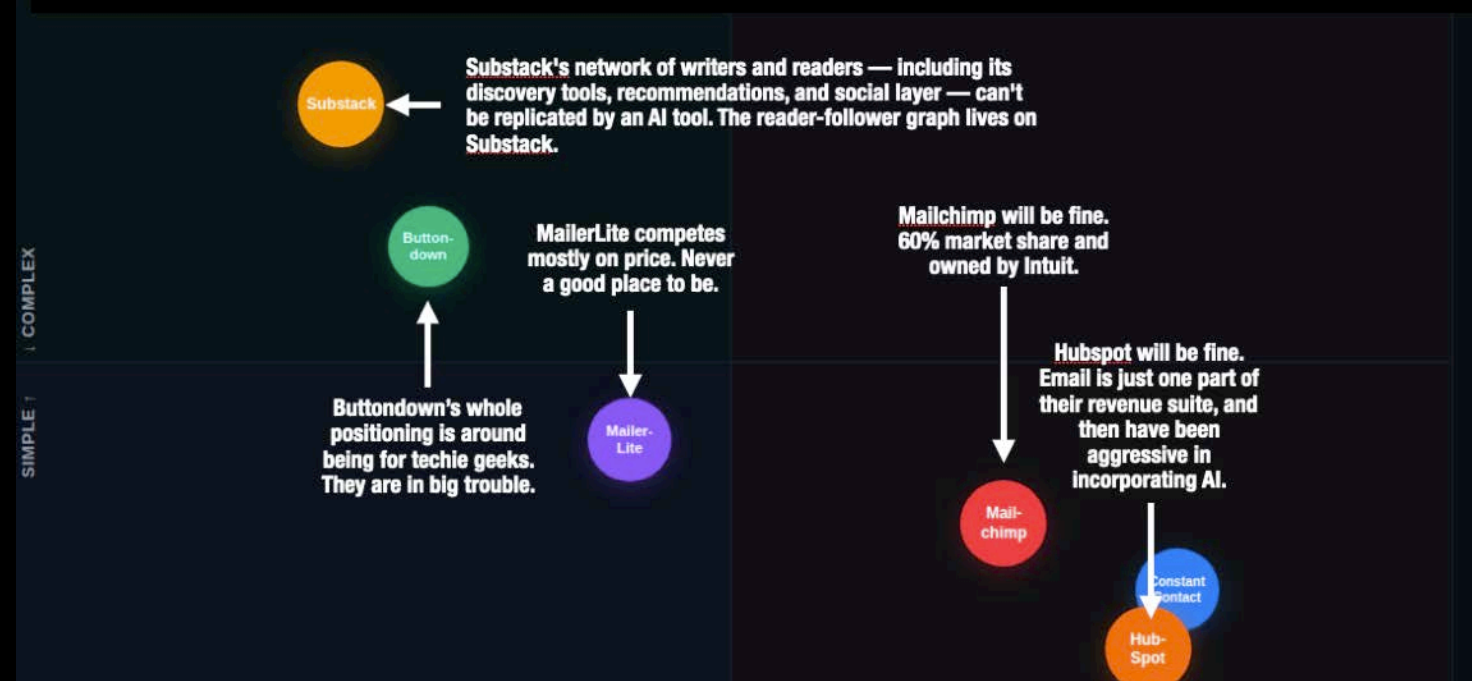
POSITIONING MAP · CREATOR VS. MARKETER · SIMPLE VS. COMPLEX



Who will survive the AI-driven SaaSocolypse?



Who will survive the AI-driven SaaSocolypse?



The platforms that survive will be the ones offering something beyond software functionality — distribution, integration depth, brand trust, or network effects. Pure-play feature delivery is increasingly vulnerable.

If you're building a startup right now, that's a lens worth using: What does my product offer that AI can't easily commoditize?

bus217.org

Accelerate your startup idea.

This course is about getting from a startup idea to a launched and successful venture, in eight steps.

• Bret Waters • Wednesdays, 7:00 – 9:00 PM • 8 weeks • Spring 2026

WEEK BY WEEK

01 Listen to the Waves

Where do great startup ideas come from? What are the factors that tend to drive startup success — or failure?

02 Build Something People Want

We've all seen startups spend time and money building something no one wants. What process can we follow to avoid this?

03 Draw the Landscape

Every venture operates within a landscape of competitors and alternatives. How do we position ours for success?

04 Create an Engine of Growth

QUICK LINKS

[Launch Path Canvas](#)

[Join Slack Workspace](#)

[Private LinkedIn Group](#)

[Recommended Reading](#)

THIS WEEK'S ASSIGNMENTS

In the #competitive-landscape channel, post some sort of visualization of how your startup fits into the landscape of competitors and alternatives.

In the #social channel, post a



BUS-217 · WEEK 3

Draw the landscape.

BUS-217 / Syllabus / Week 1

THIS WEEK'S READING

"If you're competitor-focused, you have to wait until there is a competitor doing something. Being customer-focused allows you to be more pioneering."

— JEFF BEZOS

I had dinner with my friend Richard Draeger one evening before a jazz show in Menlo Park. His Draeger's Markets—big, beautiful food emporiums brimming with all things delicious—operate several locations around the Bay Area. The business dates back to Richard's grandfather, who quickly obtained the very first liquor license in San Francisco County when US prohibition laws were repealed in 1933. That's my kind of entrepreneur.

Richard and I were enjoying our Chinese meal when I asked how business was going for him. For many years, Draeger's Markets were the upscale grocery stores in the area, but then Whole Foods

LECTURE SLIDES

 **Week 3 Slides** 
PDF · Download

GOING DEEPER

 **AI for Week 3** 
Competitive research & market sizing

VIDEO

Watch this week's lecture ↓

ADDITIONAL READING

Case Study: Zoom

Bret 7:17 AM

My wife and I were in Montenegro (Bay of Kotor) right before this class began, and we loved it. Montenegro is one of the former Yugoslavia countries (it's directly south of Croatia, and across the water from Italy). It's very small (the entire country is only 600,000 people) and has only been independent since 2008. Beautiful place - highly recommended.

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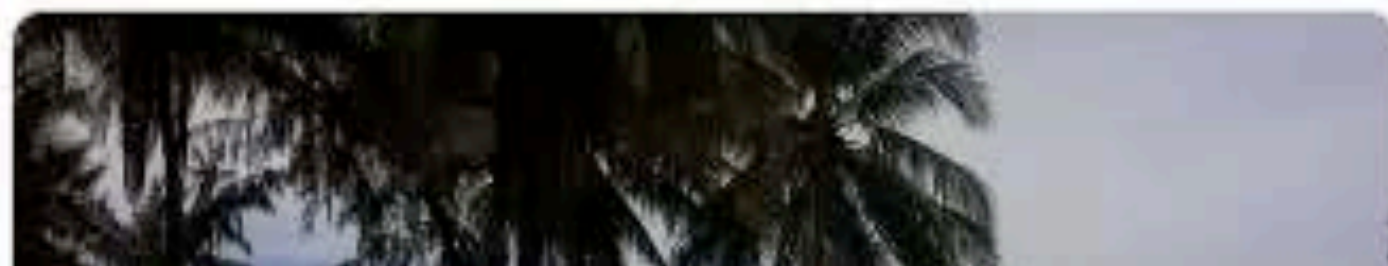
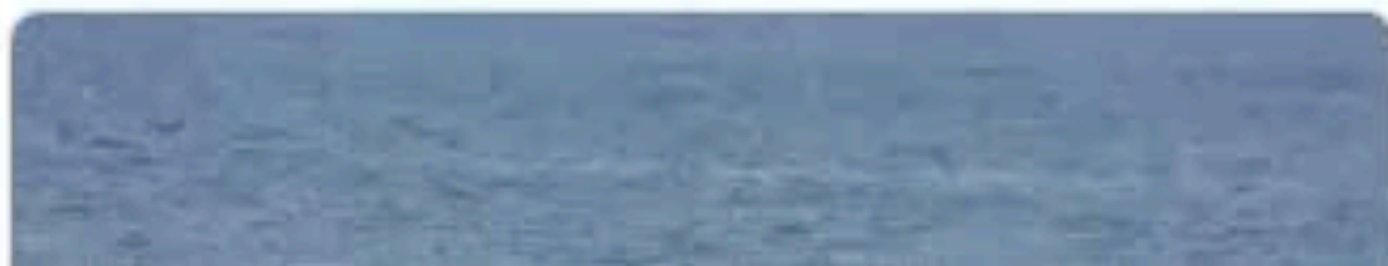


❤️ 12 👍 2 😊

Richard Goetz 11:01 AM

I've returned to El Salvador seven times over the past two decades, initially drawn by the surf but gradually exploring much more of the country. Along the way, I've visited several volcanoes and the remarkable Joya de Cerén (often called the "Pompeii of the Americas") – you can read more here: [Joya de Cerén Wikipedia](#). It offers a rare, intact glimpse into everyday pre-Columbian village life, preserved under volcanic ash from around 600 AD. What continues to stand out is how different the on-the-ground experience is from the perception. It feels significantly safer than its reputation suggests, and despite its depth of culture and natural beauty, it remains refreshingly uncrowded compared to more established tourist destinations.

2 files ▼ | 📄 Download all



Optional **Startup Coffee** zoom calls:
The next two Saturdays at 9am.

This Saturday, join to discuss anything
you'd like.

Next Saturday will be about nonprofits
and social ventures.

Competitive Landscape.

All startups operate within a landscape of competitors **and alternatives.**

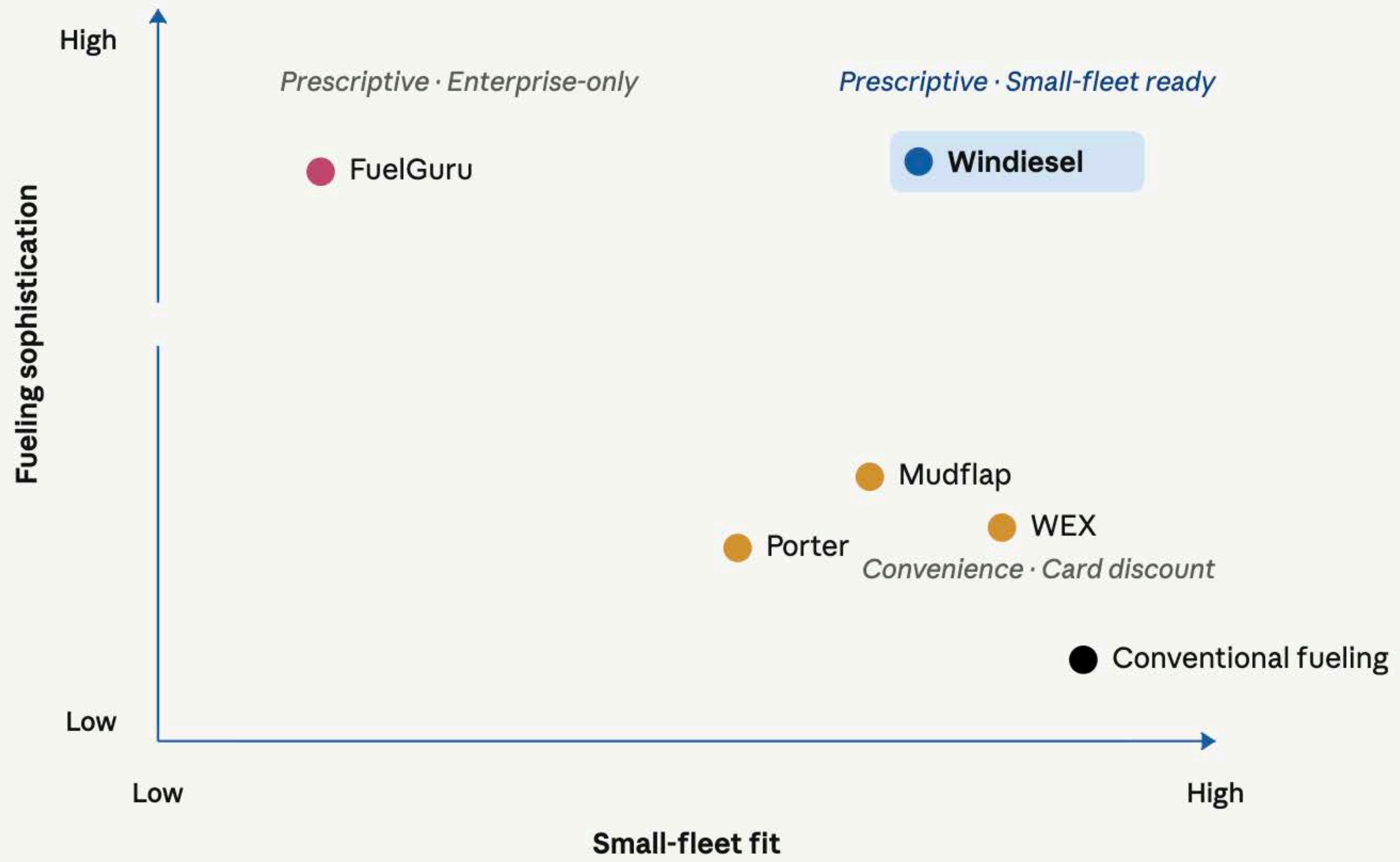
Don't pretend that your startup is better than any competitor or alternative - that's just not credible.

Instead, prove that you understand the landscape that you will be operating in, and how you are positioned within that landscape.

Windiesel Competitive Positioning

Small trucking fleets (5-50 trucks) still fuel the old way – the driver picks the stop and fills the tank, no plan. Fuel-card apps like Mudflap and WEX offer a little, but each one only shows discounts on its own card. The only product doing real fuel optimization today is FuelGuru – but it's built for big carriers and sold through expensive software integrations. Small fleets can't use it. And requesting a demo from them is a nightmare that takes months to integrate. Windiesel fills the gap: smart fuel optimization built for small-medium fleets. We've been running it manually in our own fleet for 8 months and saving \$3-5K a week on 50 trucks.

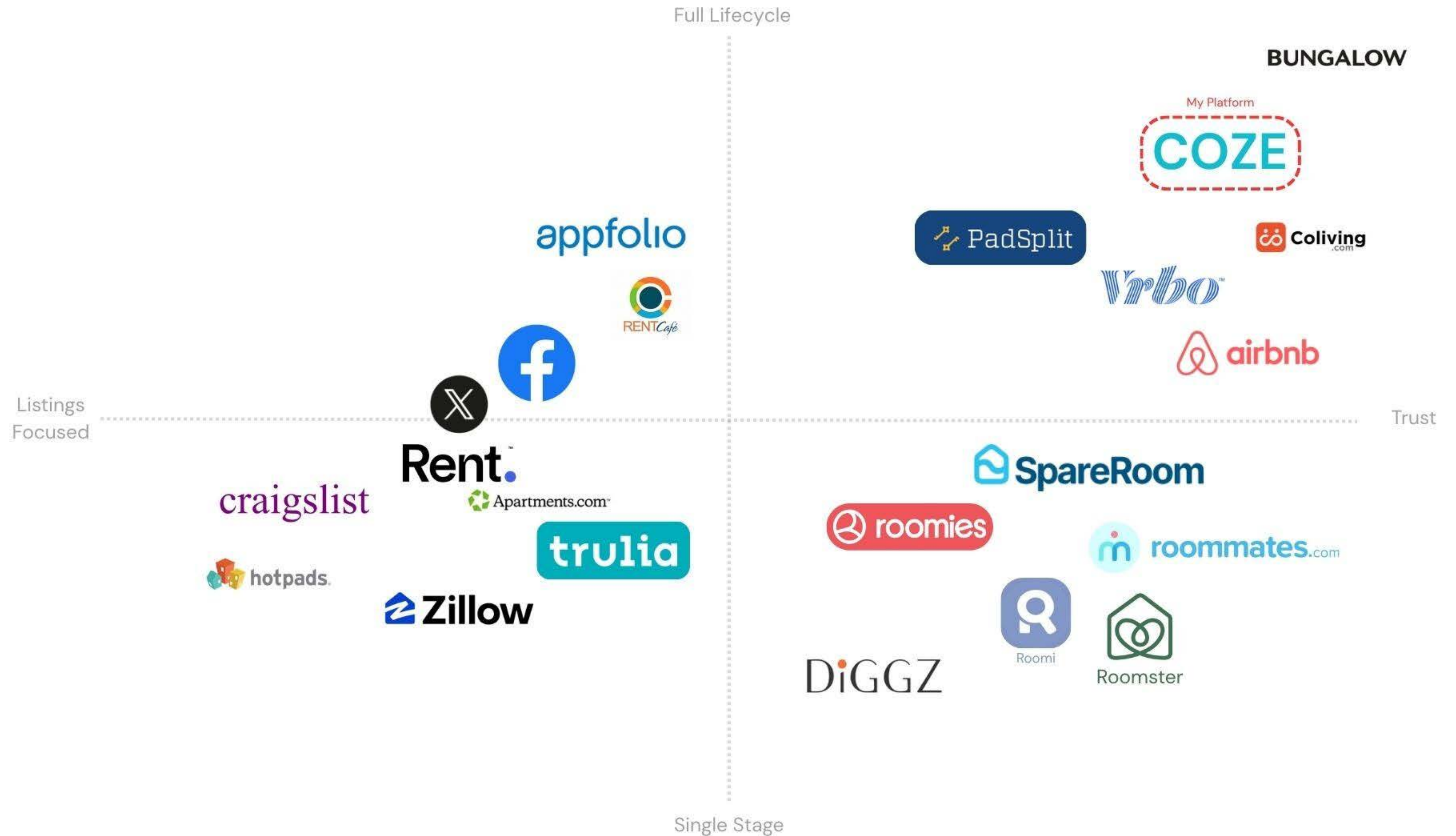
Windiesel Competitive Positioning



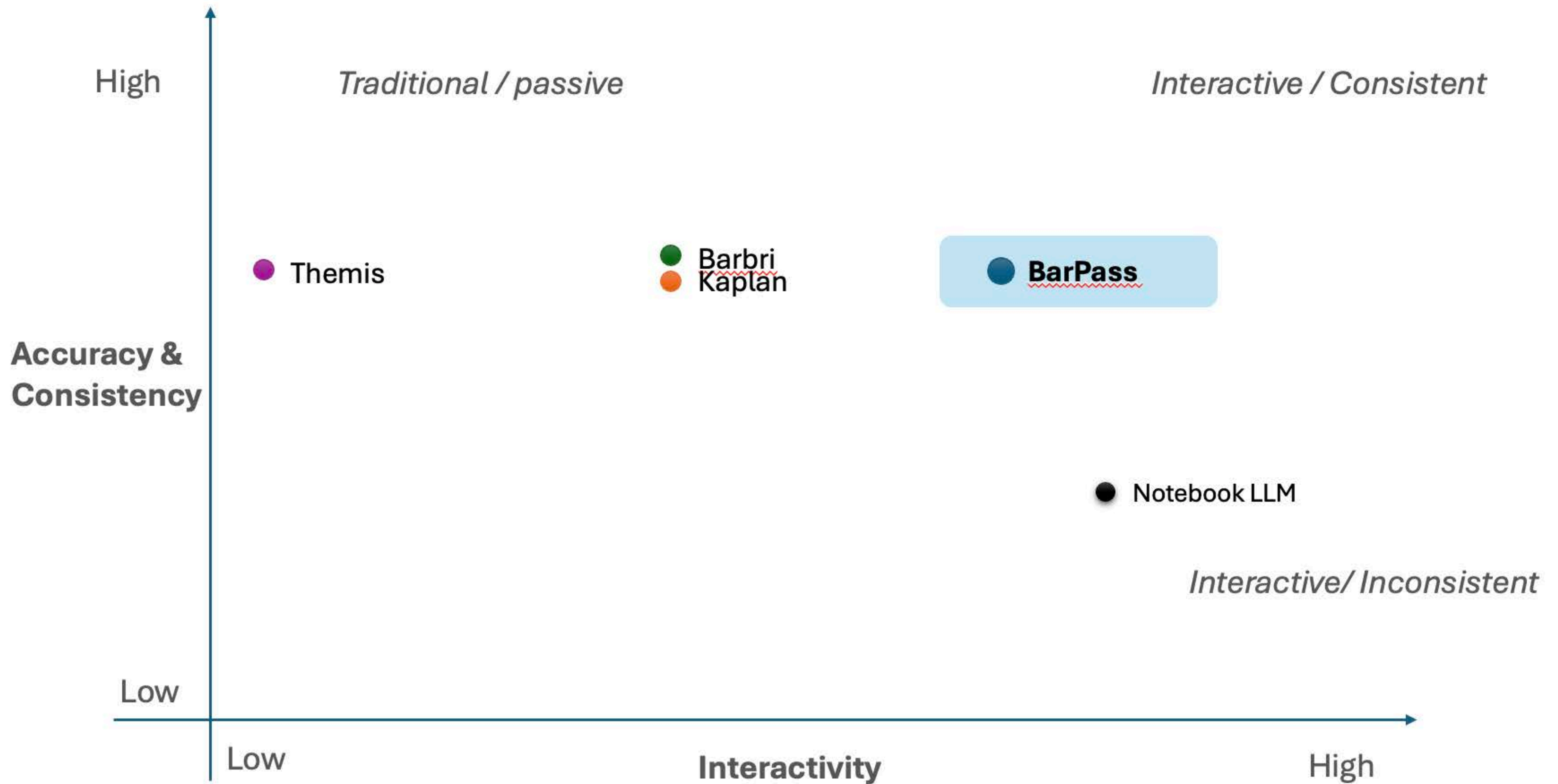


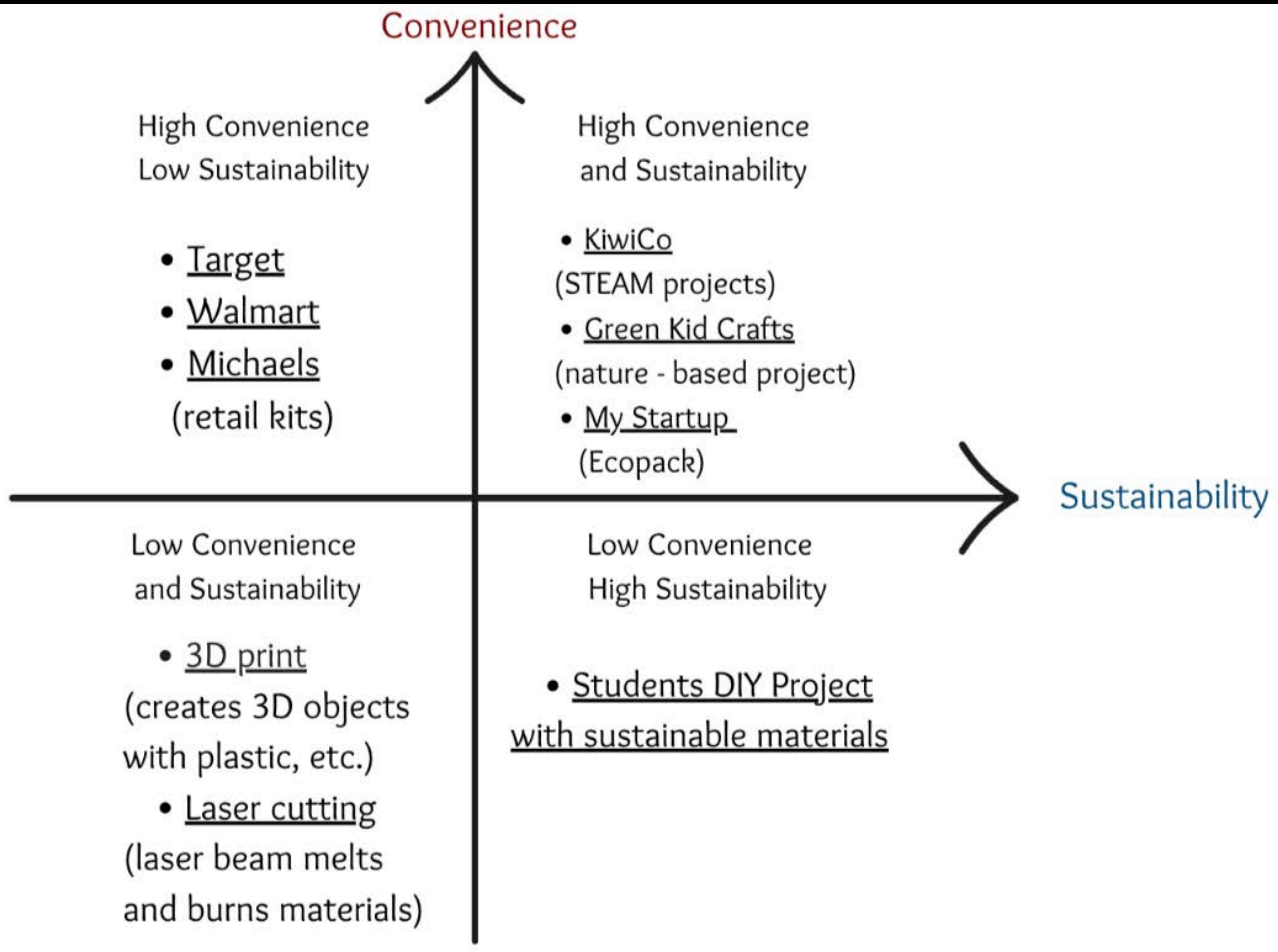
Joshua Villarín 2:39 PM

I loved this exercise! My landscape focuses on the rental housing market, where it shares alternatives and competitors that have similar features. My startup, CozE, has the goal to build a housing platform that captures renters in every stage of living: compatibility matching roommates, housing options, and managing rental experience for both landlord and tenants. The landscape showcases that there are distinct segments when comparing, trust/transitional relations vs. Single Stage/Full Lifecycle Management for renters which I've circled.



BarPass Competitive Positioning





Marla







\$25,000







WITH HER PARENTS MARK AND
LAURA OLMSTEAD.
GOOD MORNING.

57° 
9:16 NBC



NEW QUESTIONS ABOUT CHILD PRODIGY

Charlie Rose Reports On 4-Year-Old Artist Marla Olmstead

2005 FEB 22 CORRESPONDENT REBECCA LEUNG COMMENTS FACEBOOK TWITTER STUMBLE MORE

In most ways, 4-year-old Marla Olmstead is just like any other child her age. She goes to pre-school, plays with dolls, and loves to draw and paint.

But Marla paints unlike any other kid in the world. She's signed her name to dozens of works deemed breathtaking by fans of abstract art. She's garnered international attention, and her paintings are selling as fast as she can finish them -- for as much as \$24,000.

And that's where the mystery comes in: How is it possible that a girl so young and so small can create works of art that many say are so sophisticated and so complex? Correspondent Charlie Rose reports.

60 MINUTES NEW LOOK. NEW SEASON. GET THE APP The 60 Minutes App for iPhone/iPad

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~~\$25,000~~



Humans love great stories.









Every great entrepreneur has the ability to tell a crisp, clear, and compelling story about what she's working on, and why it matters.

BUS-217



Step 1: Listen to the waves.

Step 2: Create something people want.

Step 3: Draw the landscape.

Step 4: Build an engine of growth.

Step 5: Create an economic model.

Step 6: Develop a capital strategy.

Step 7: Frame a funnel.

Step 8: Be a master storyteller.

“The point of a economic model is to tell a story with numbers – a story about opportunity, resource requirements, market forces, growth, milestone achievements, and profits.”

– Guy Kawasaki

Every great entrepreneur has a nesting doll set of pitches.



← **Close the deal!**

← **1- Hour Meeting**

← **3-Minute Pitch**

← **45-Second Pitch**

← **1-Sentence**

The Launch Path Canvas 2.0

Name of Startup Venture: TacoBox Name: Bret Waters
One Sentence Description: A subscription-based service delivering healthy meal kits (tacos!) for your friends and family.

 **Problem**

 **Solution**

 **Why it Matters**

Why is this a problem worth

 **Landscape**

This is a list of competitors and

 **ICP**

What do you think your startup's



Eric Bahn 

@ericbahn

My historical progression on what it takes to lead a great company:

In my 20s, I thought it was all about product.

In my 30s, I thought it was all about sales.

In my 40s, I'm realizing it's all about great storytelling.

Eric Bahn, Venture Capitalist

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