Twitter Thread by Andrew Kuhn



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3 ways to research durability:

You could gather testimony about customer behavior

You can go by the history of the industry

You can use a speculative approach by trying to work out the adoption of future technologies/trends & how that can shift the economics of the industry

We generally spend a lot of time talking to customers, studying as much of the industry's history going as far back as we can, and try to sketch out the economics of a new company entering the market