

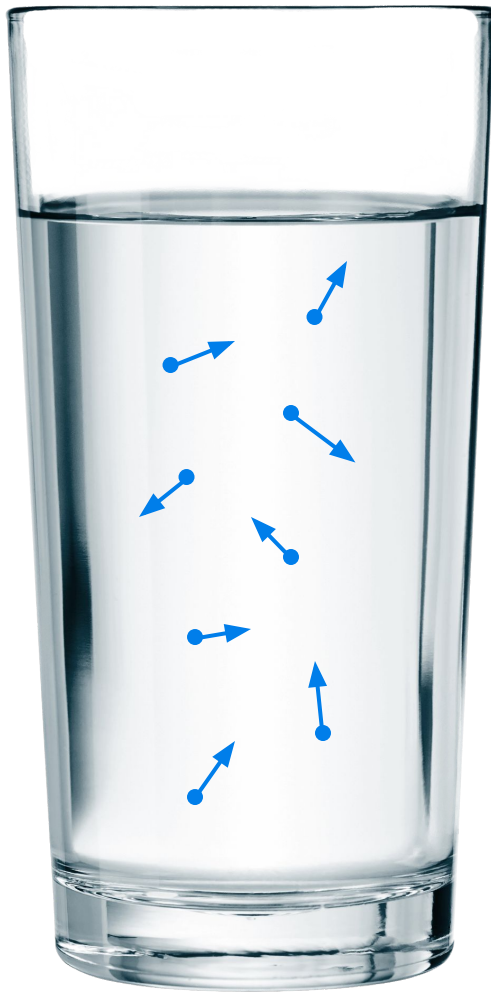
Mach 2

Creating your individualized, defensible strategy

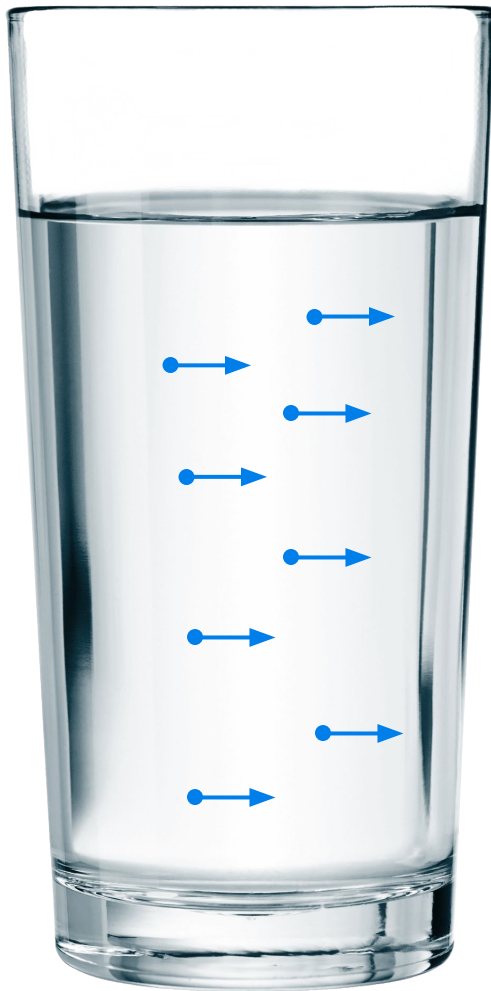
Jason Cohen, founder of WP Engine & Smart Bear
<https://asmartbear.com> T: @asmartbear

Business of Software, Fall 2023

Slides: <https://asmartbear.com/mach2>

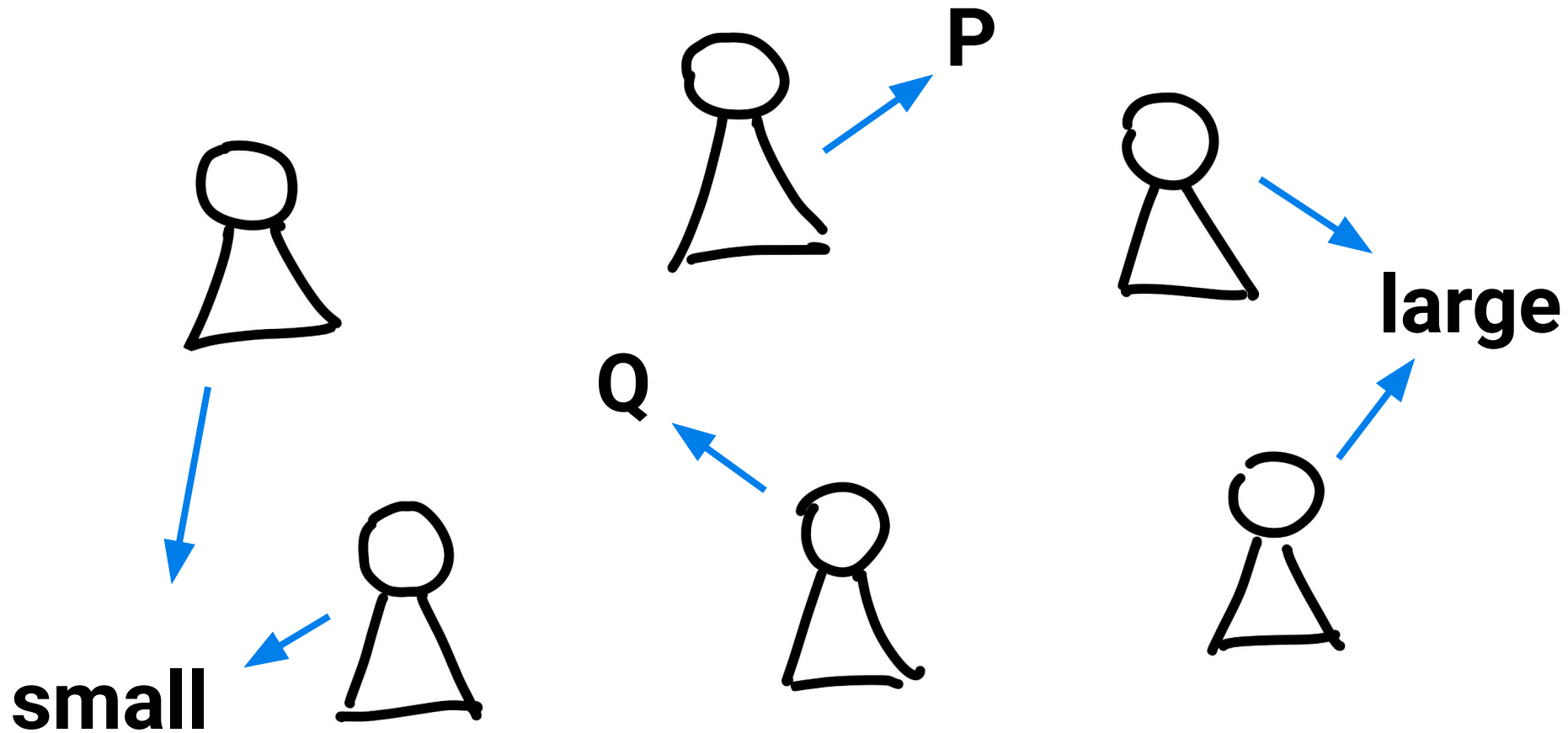


1300 mph / 2000 kph
(Mach 2)

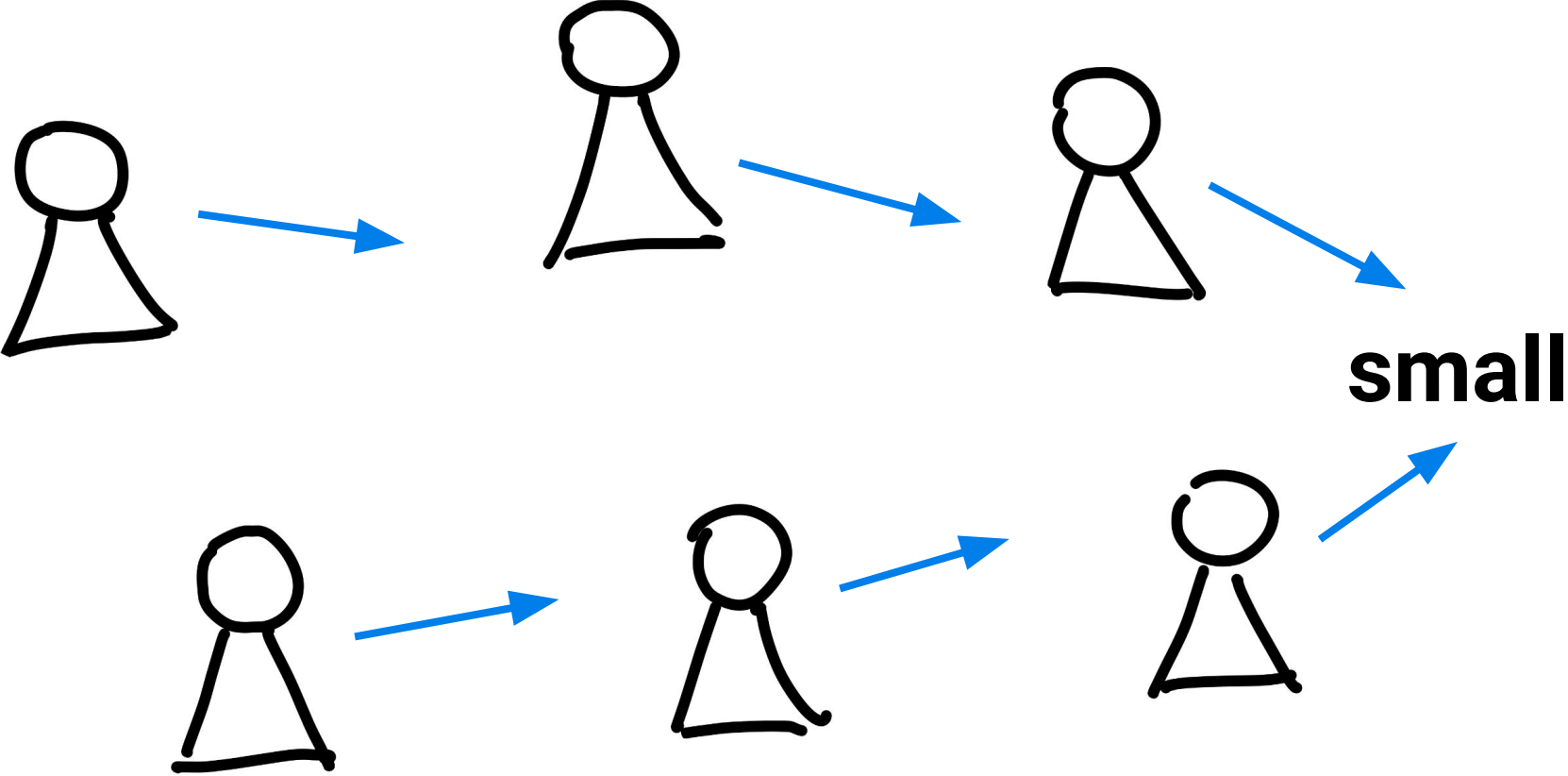


1300 mph / 2000 kph
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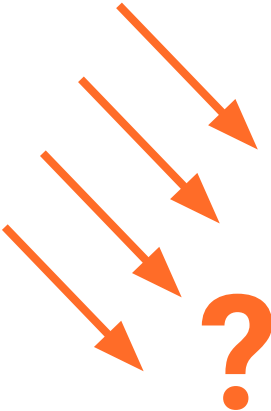
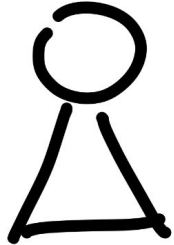
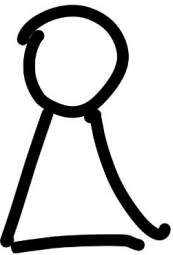
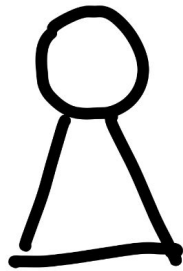
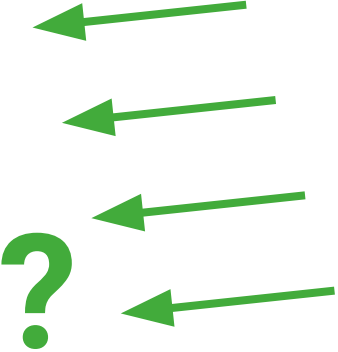
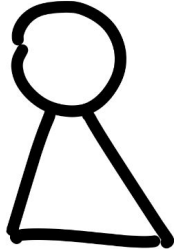
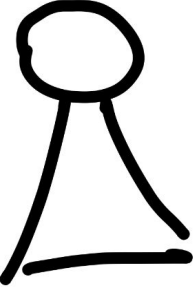
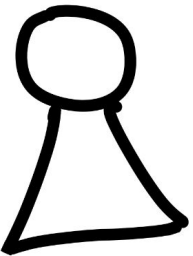




The hard problem



The really hard problem



Practical “Mach 2” Strategy: How we will win

Why is strategy difficult?

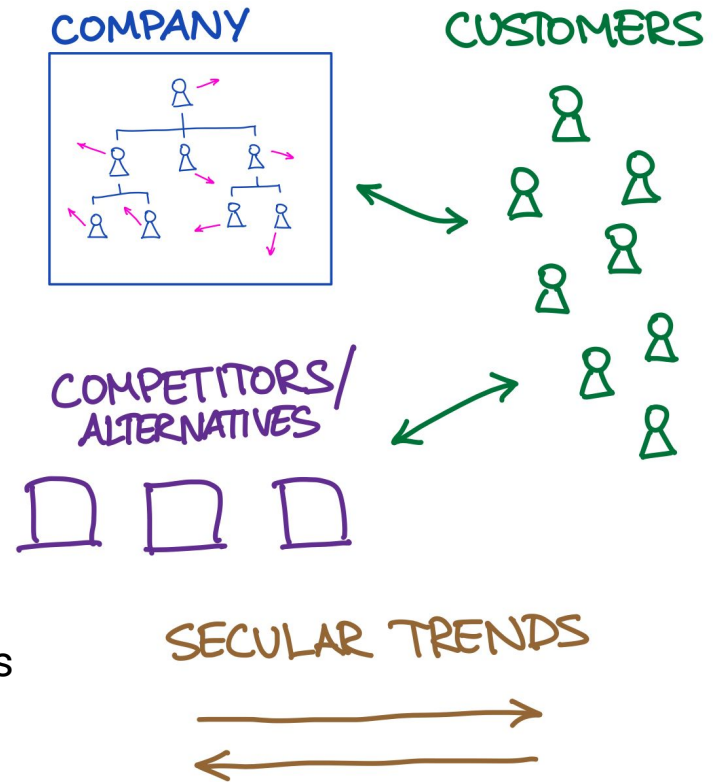
Integrating complex systems...

Company: strengths, weaknesses, values

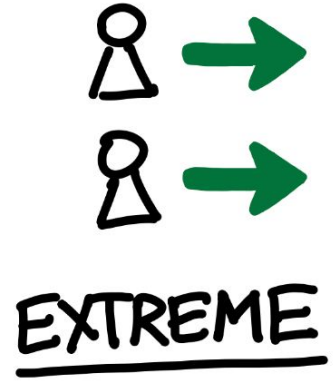
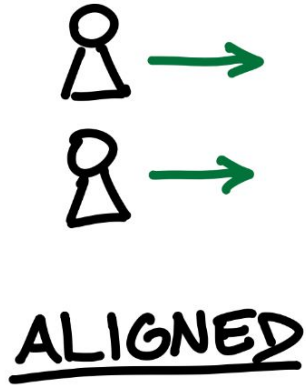
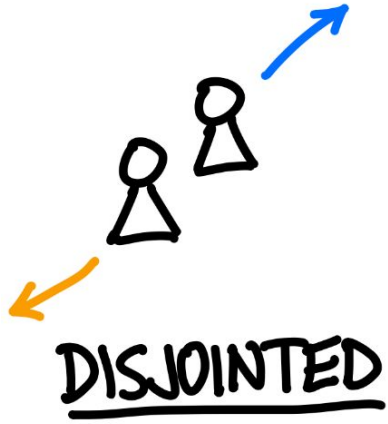
Customers: requests, complaints, faster horses vs. cars

Market: competition, industry trends, future state

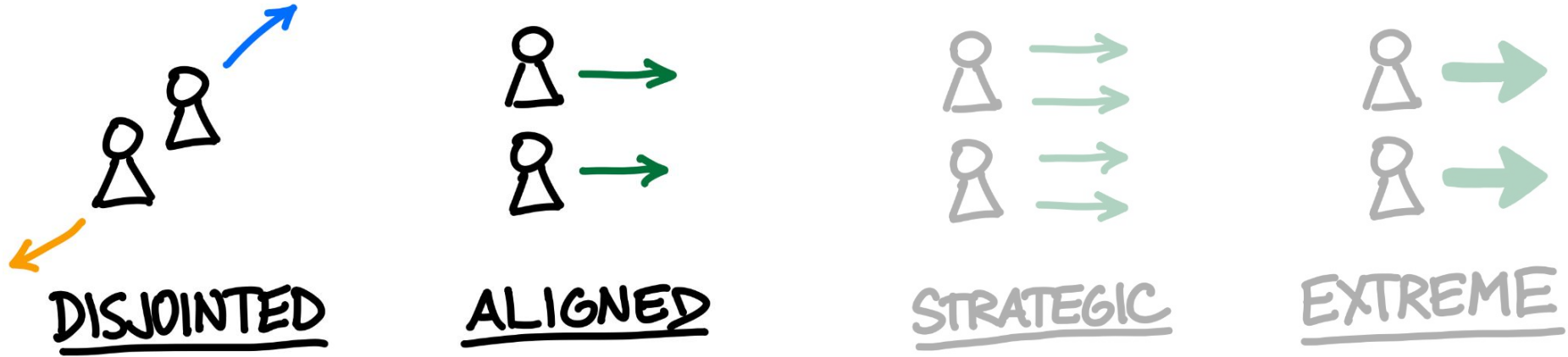
Execution: capacity, financing, skillset, risk-tolerance



Mach 2 Strategy: How we will win

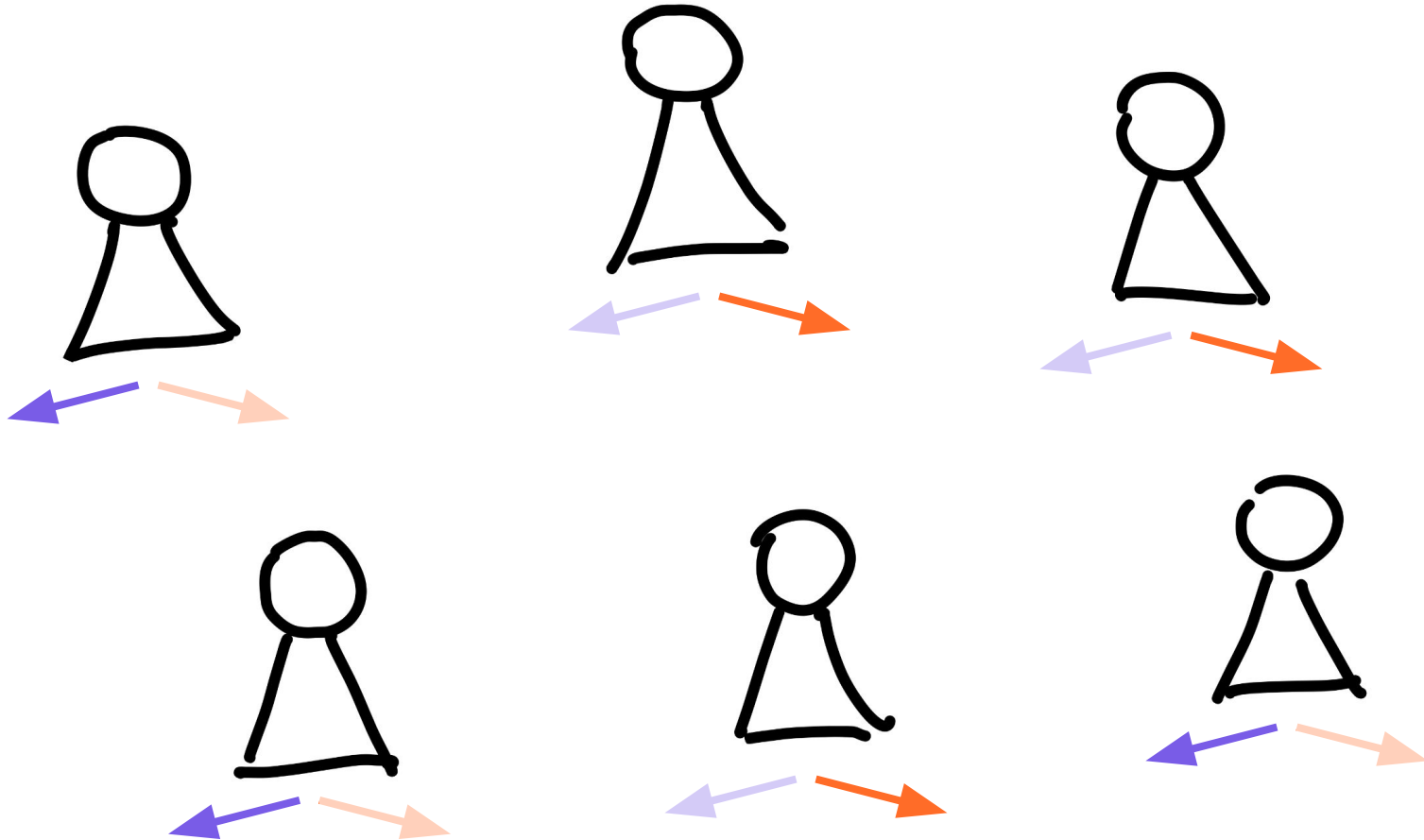


Mach 2 Strategy: How we will win



- INTROSPECTION
- REFINE "CHOICES"
- RESOLVE CONFLICTS
- DECISION CIRCLE
- ALTERNATIVES

Reverse-engineering the Status Quo





HUMAN

Prompts for introspection

We're so ____, even competitors admit it.

I'm tired of losing sales due to ____.

Customers consistently complain/complement us for ____.

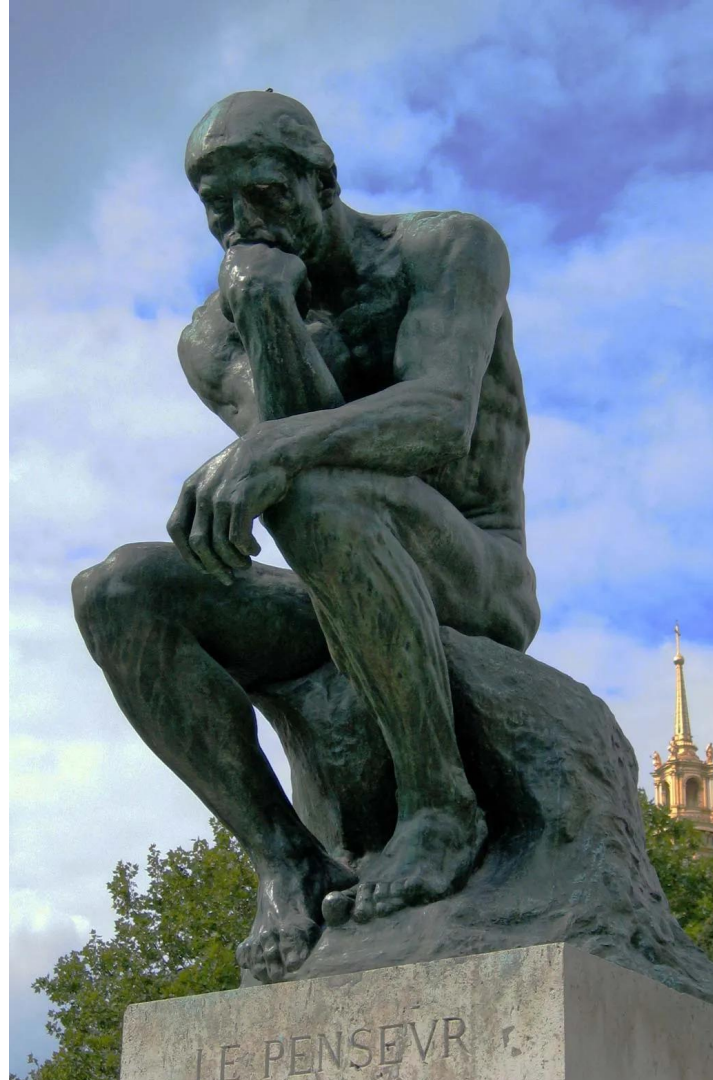
I'm really proud of how we ____.

I'm jealous that a competitor has ____.

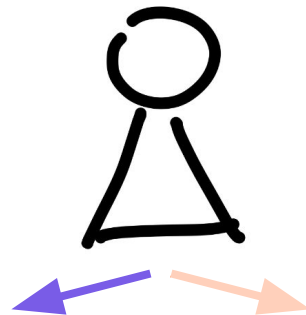
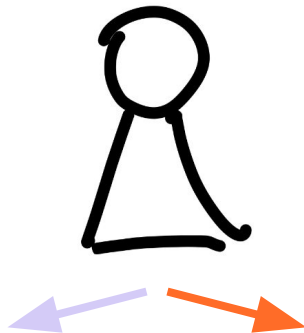
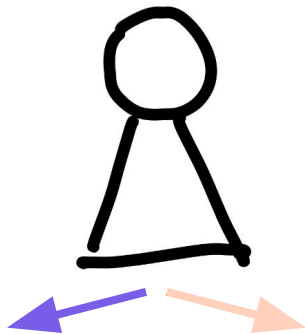
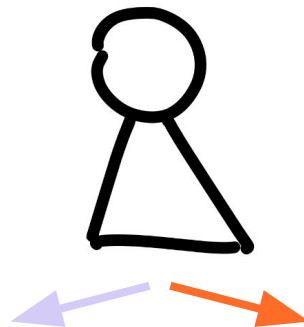
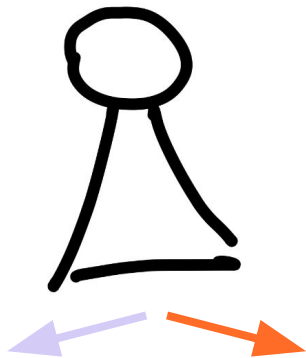
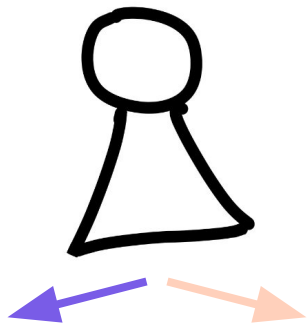
Our tech architecture makes ____ easy/hard.

We wish/say we're great at ____, but we're not.

Our company philosophy, a hill we'll die on, is ____.



Extract Choices



Extract Choices: List as attributes

Low price

Few features

Great support

*“Our affordable software
does only a few things,
but does them well,
with outstanding tech support.”*

Extract Choices: Pair with opposites

	Status Quo	Alternative
	Low price	
	Few features	
	Great support	

Extract Choices: Pair with opposites

	Status Quo	Alternative
	Low price	Over-priced
	Few features	Many features
	Great support	Garbage support

Extract Choices: Refine into intelligent choices

	Status Quo	Alternative
	Low price	Over-priced
	Few features	Many features
	Great support	Garbage support

Extract Choices: Refine into intelligent choices

	Status Quo	Alternative
Price	Affordable + maximum number of customers + can do self-service / credit-card – must be inexpensive to deliver – perceived as low-quality or untrustworthy	Premium + can afford a sales & service org + more profitable, if the high price does not generate proportionately more cost + can position as “the leader”
	Few features	Many features
	Great support	Garbage support

Stop saying “strengths” and “weaknesses”

“Competitive”

Extract Choices: Refine into intelligent choices

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Quantity of Features	Minimal <ul style="list-style-type: none">+ small team can execute well+ requires less tech support+ straightforward for users w/ simple needs	Feature-rich <ul style="list-style-type: none">+ supports many use-cases for many customers → larger addressable market+ justifies higher prices
	Great support	Garbage support

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Extract Choices: Refine into intelligent choices

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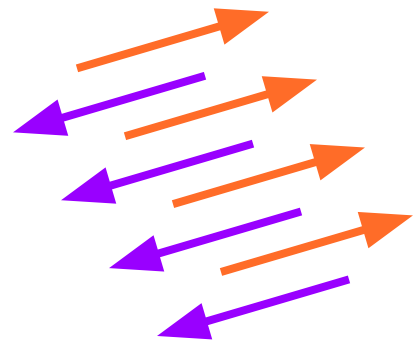
	Status Quo	Alternative
Talent	Hire only the best	Hire poorly? Hire idiots? Hire assholes?

Extract Choices: Refine into intelligent choices

	Status Quo	Alternative
Price	Affordable + m + c - n - p	Premium
Quantity of Features	Min + s + re + straightforward for users w/ simple needs	+ justifies higher prices
Service	White-glove + thrills customers, creating advocates + at-scale companies can't compete - experts with people skills are expensive	Self-service + customers prefer visibility/control w/o chat + inexpensive to deliver, even at scale

	Status Quo	Alternative
Management Style	Productivity with minimal coordination	Team players: 1+1=3

Consistent Choices: Identify conflicts






	Status Quo	Alternative
Price	Affordable <ul style="list-style-type: none">+ maximum number of customers+ can do self-service / credit-card- must be inexpensive to deliver- perceived as low-quality or untrustworthy	Premium <ul style="list-style-type: none">+ can afford a sales & service org+ more profitable, if the high price does not generate proportionately more cost+ can position as “the leader”
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Consistent Choices: Resolve conflicts



	Status Quo	Alternative
Price	<p>Affordable</p> <ul style="list-style-type: none">+ maximum number of customers+ can do self-service / credit-card- must be inexpensive to deliver- perceived as low-quality or untrustworthy	<p>Premium</p> <ul style="list-style-type: none">+ can afford a sales & service org+ more profitable, if the high price does not generate proportionately more cost+ can position as “the leader”
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A: Low-cost leader
B: Premium Service

Consistent Choices: Resolve conflicts

	Status Quo	Alternative
Price	Affordable + maximum number of customers + can do self-service / credit-card - must be inexpensive to deliver - perceived as low-quality or untrustworthy	Premium <u>+ can afford a sales & service org</u> + more profitable, if the high price does not generate proportionately more cost + can position as "the leader" 
Quantity of Features	Minimal + small team can execute well + requires less tech support + straightforward for users w/ simple needs	Feature-rich + supports many use-cases for many customers → larger addressable market + justifies higher prices
Service	White-glove  + thrills customers, creating advocates + at-scale companies can't compete <u>- experts with people skills are expensive</u>	Self-service + customers prefer visibility/control w/o chat + inexpensive to deliver, even at scale

Consistent Choices: Resolve conflicts

A: Low-cost leader
B: Premium Service
C: Elegant Simplicity

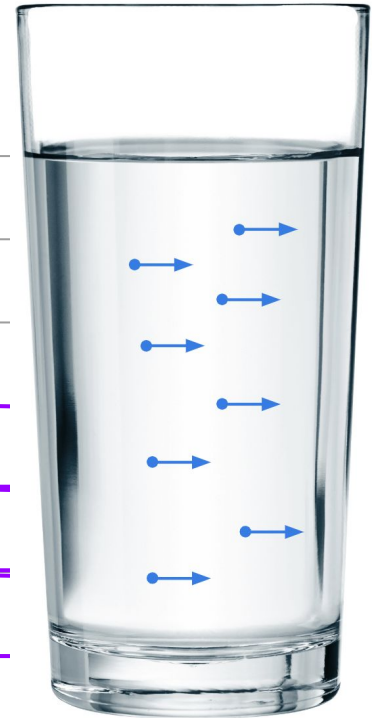
	Status Quo	
Price	<p>Affordable</p> <ul style="list-style-type: none"> + maximum number of customers + can do self-service / credit-card - must be inexpensive to deliver - perceived as low quality or untrustworthy 	<p>Low Ticket Volume</p> <ul style="list-style-type: none"> - prioritize ↓ tickets over ↑ features - treat every ticket like a bug
Quantity of Features	<p>Minimal</p> <ul style="list-style-type: none"> + small team can execute well + requires less tech support + straightforward for users w/ simple needs 	<p>High Quality</p> <ul style="list-style-type: none"> - prioritize bugs over new features - slower to release new things + fewer tickets + customer happiness
Service	<p>White-glove</p> <ul style="list-style-type: none"> + thrills customers, creating advocates + at-scale companies can't compete - experts with people skills are expensive 	<p>Great Design</p> <ul style="list-style-type: none"> + delights customers beyond utility + intuitive → no support questions - slower to release new things

Consistent, mutually-reinforcing choices

Lean into what's working

	Status Quo	Alternative
Price	Affordable	Premium
Features	Minimal	Feature-rich
Service	White-glove	Self-service
Tickets	Always helping	Low-volume
Quality	Practical	First-rate
Design	Utilitarian	Craftsmanship

Strategic changes



Decision Circle

	Status Quo	Alternative
Price	Affordable	Premium
Features	Minimal	Feature-rich
Service	White-glove	Self-service
Tickets	Always helping	Low-volume
Quality	Practical	First-rate
Design	Utilitarian	Craftsmanship

Decision Circle

PRICE:
AFFORDABLE

SERVICE:
WHITE-GLOVE

FEATURES:
MINIMAL

STATUS QUO

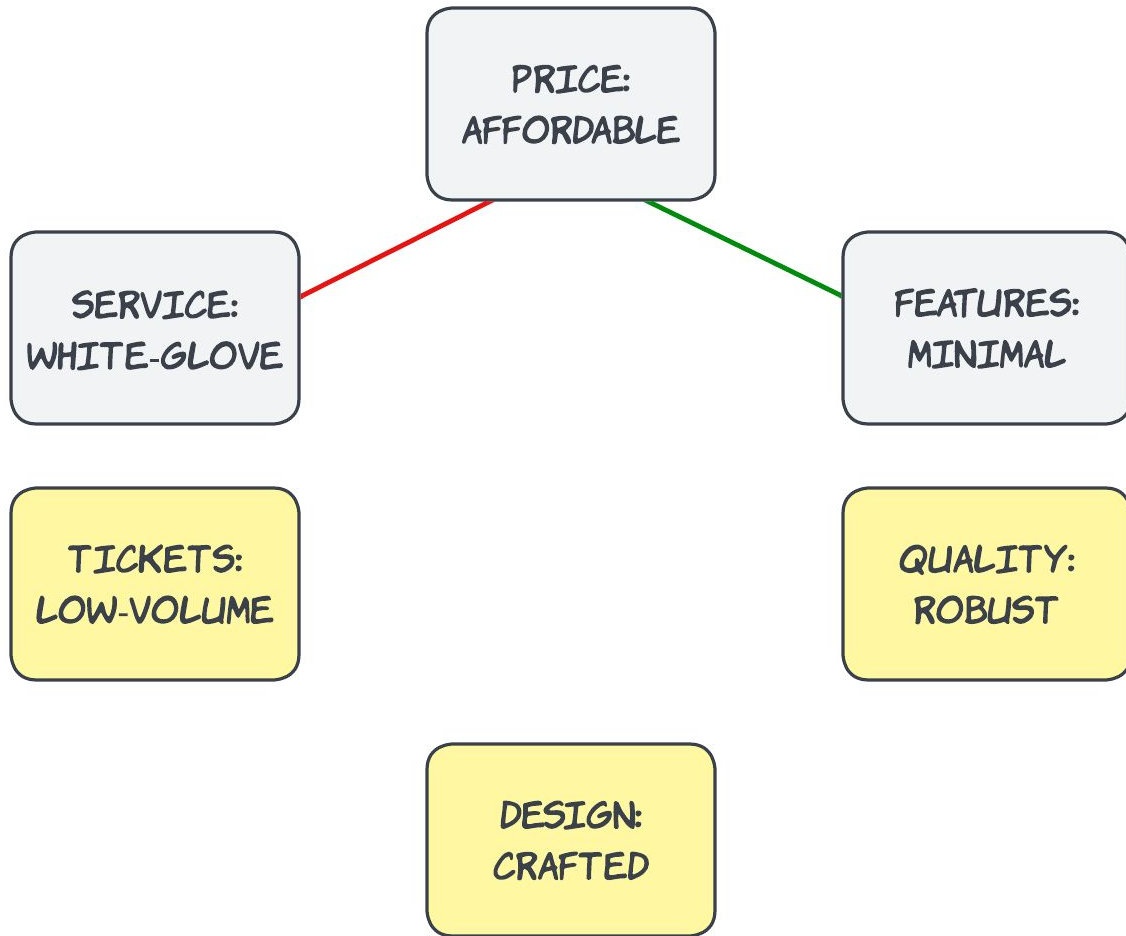
CHANGE

TICKETS:
LOW-VOLUME

QUALITY:
ROBUST

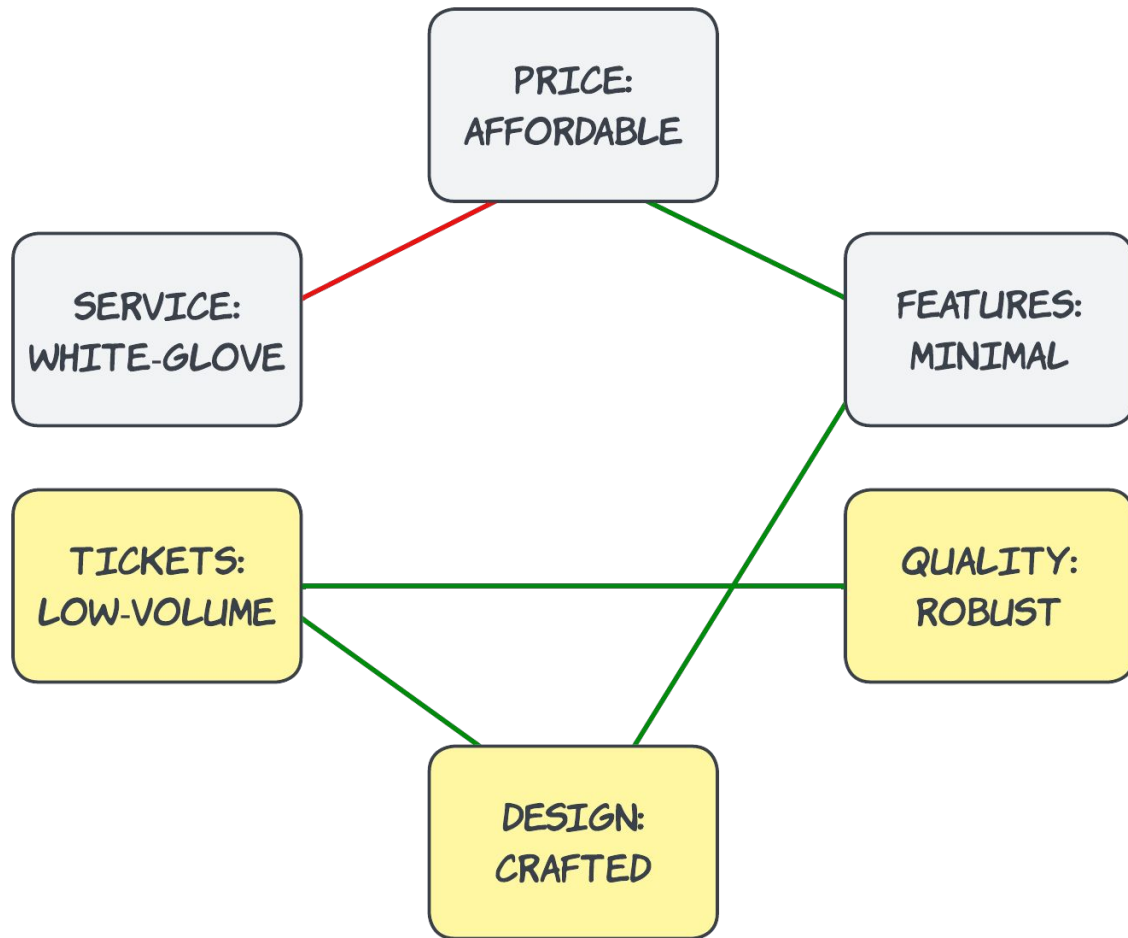
DESIGN:
CRAFTED

	Status Quo	Alternative
Price	Affordable	Premium
Features	Minimal	Feature-rich
Service	White-glove	Self-service
Tickets	Always helping	Low-volume
Quality	Practical	First-rate
Design	Utilitarian	Craftsmanship



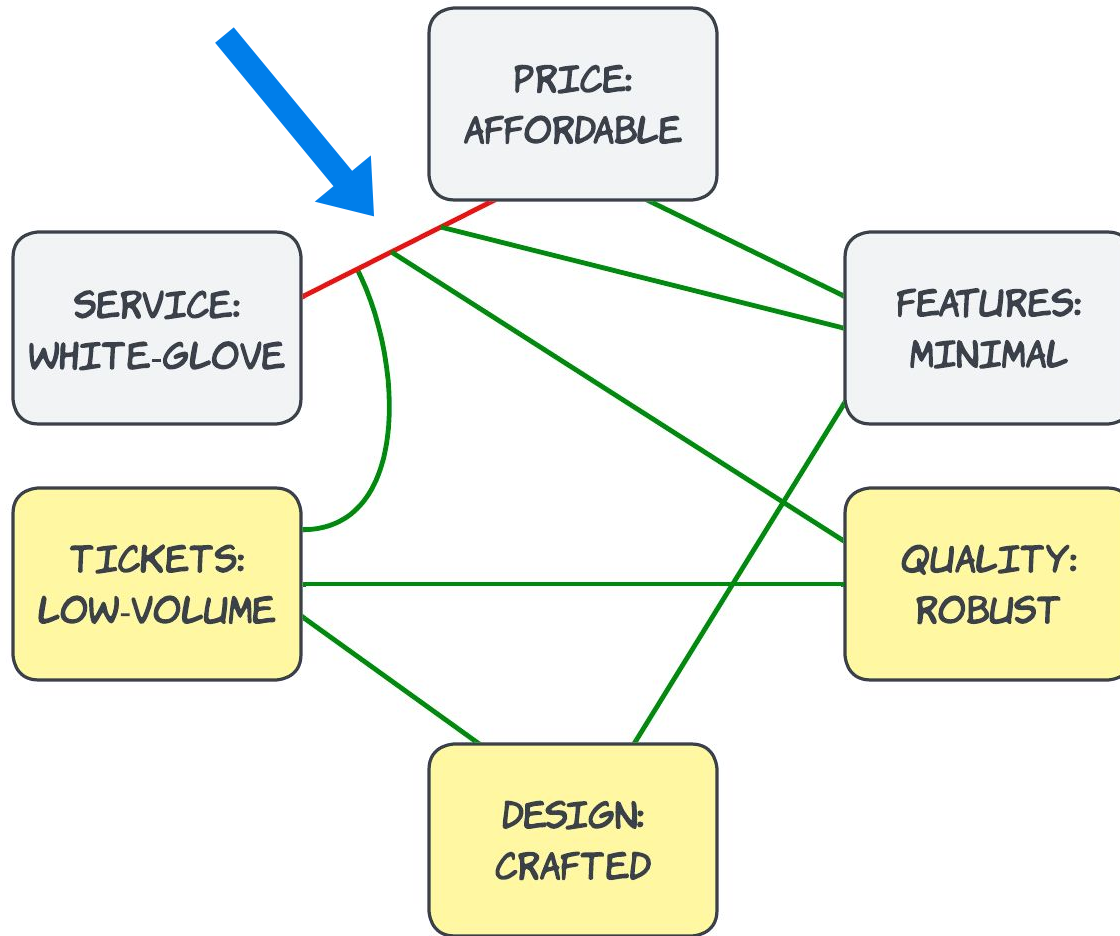
STATUS QUO

CHANGE



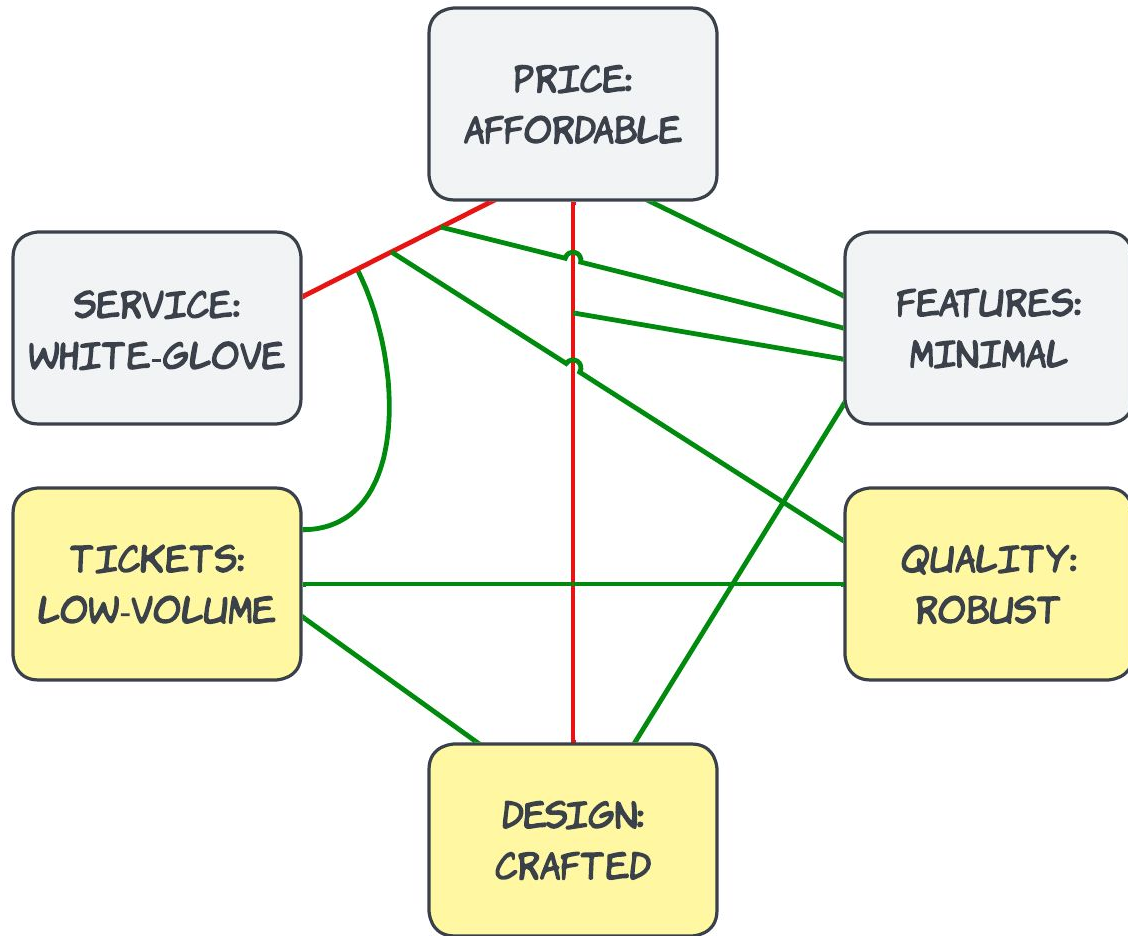
STATUS QUO

CHANGE



STATUS QUO

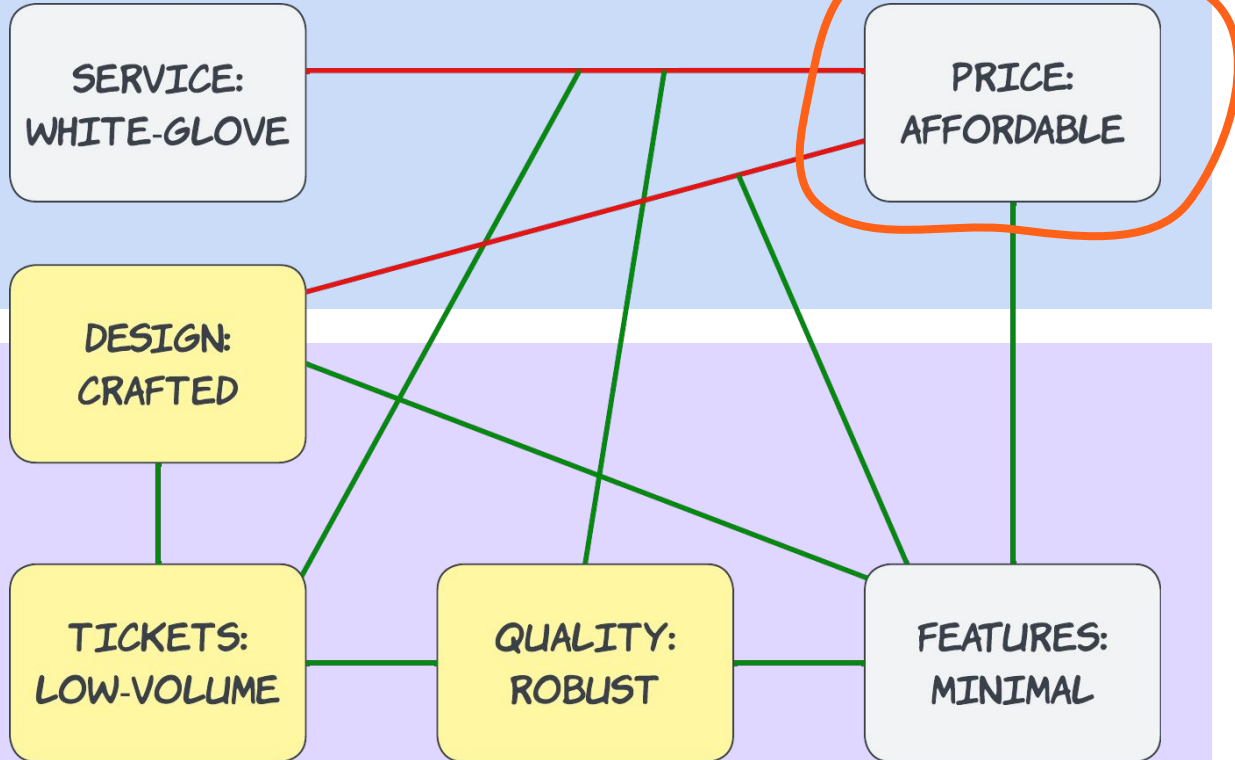
CHANGE



STATUS QUO

CHANGE

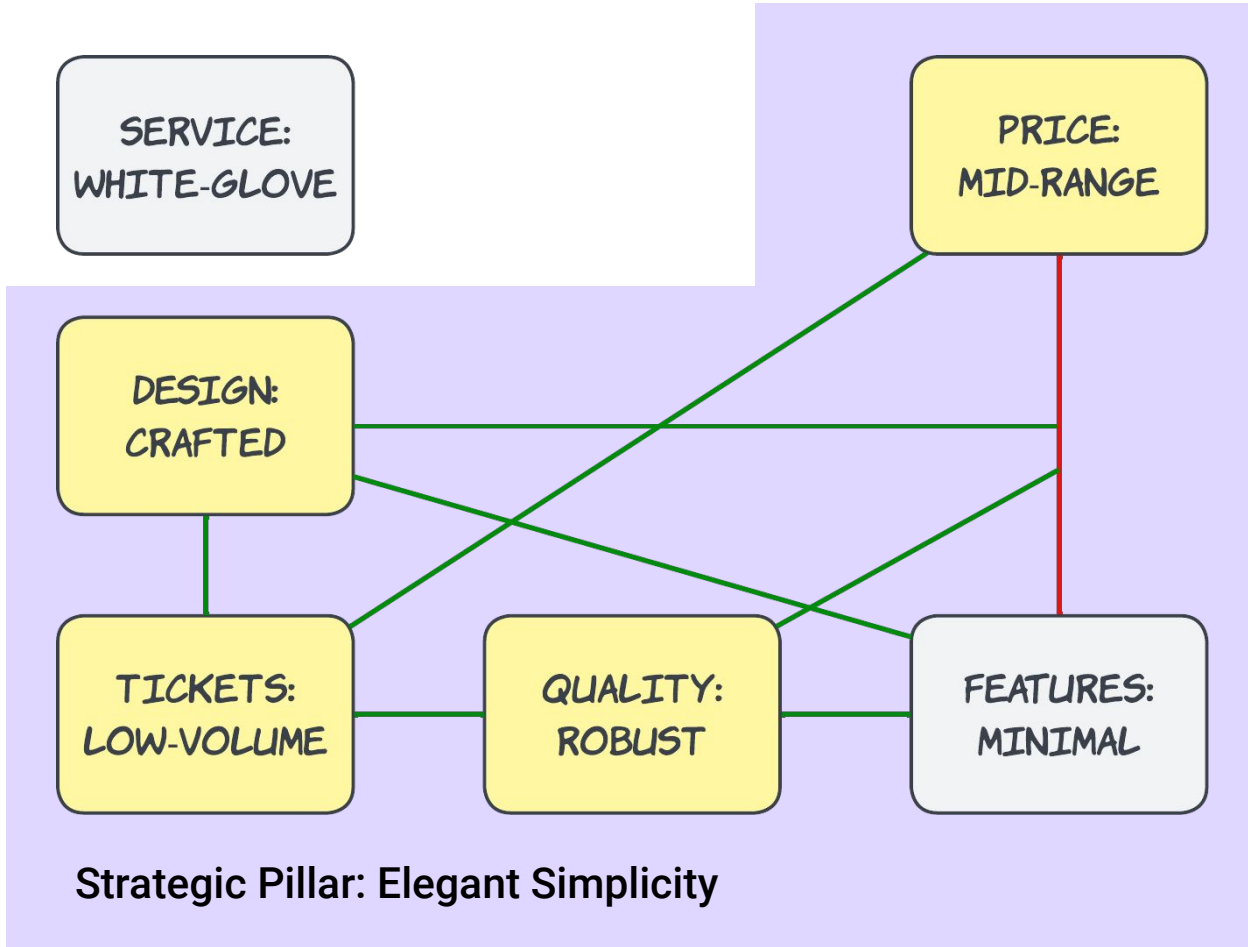
Conflict: "Human Effort" vs "Affordable"



STATUS QUO

CHANGE

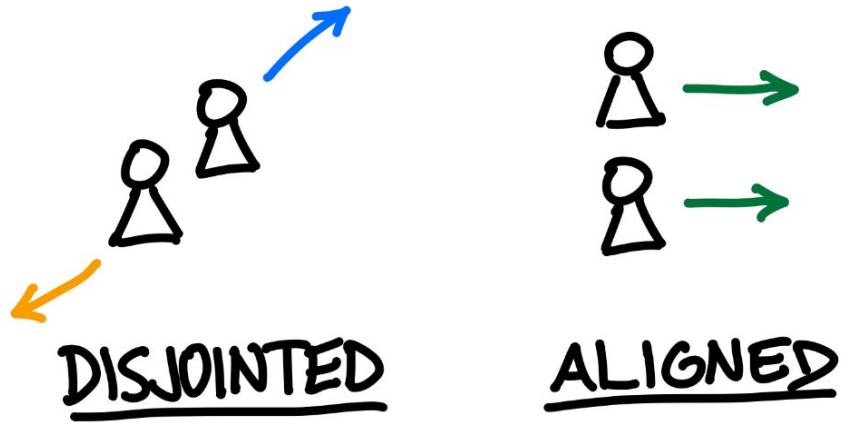
Strategic Pillar: Elegant Simplicity



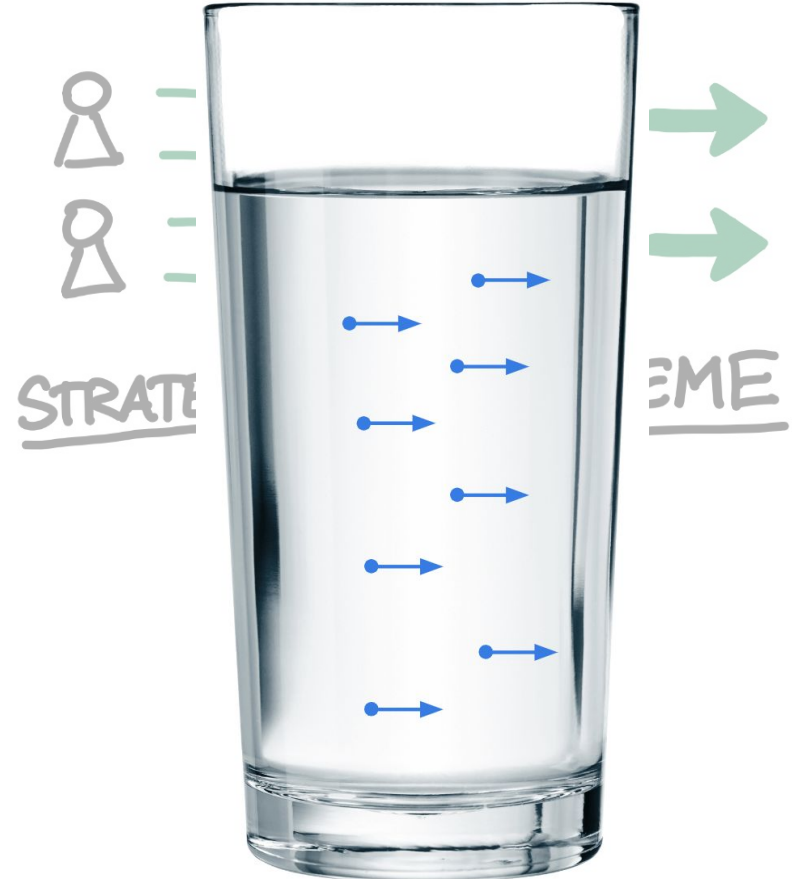
STATUS QUO

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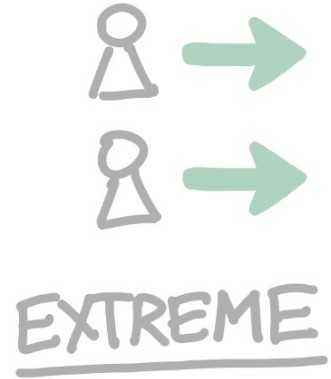
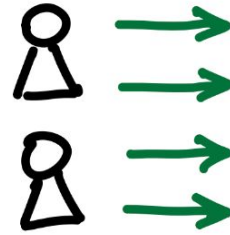
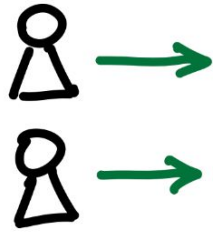
Mach 2 Strategy: How we will win



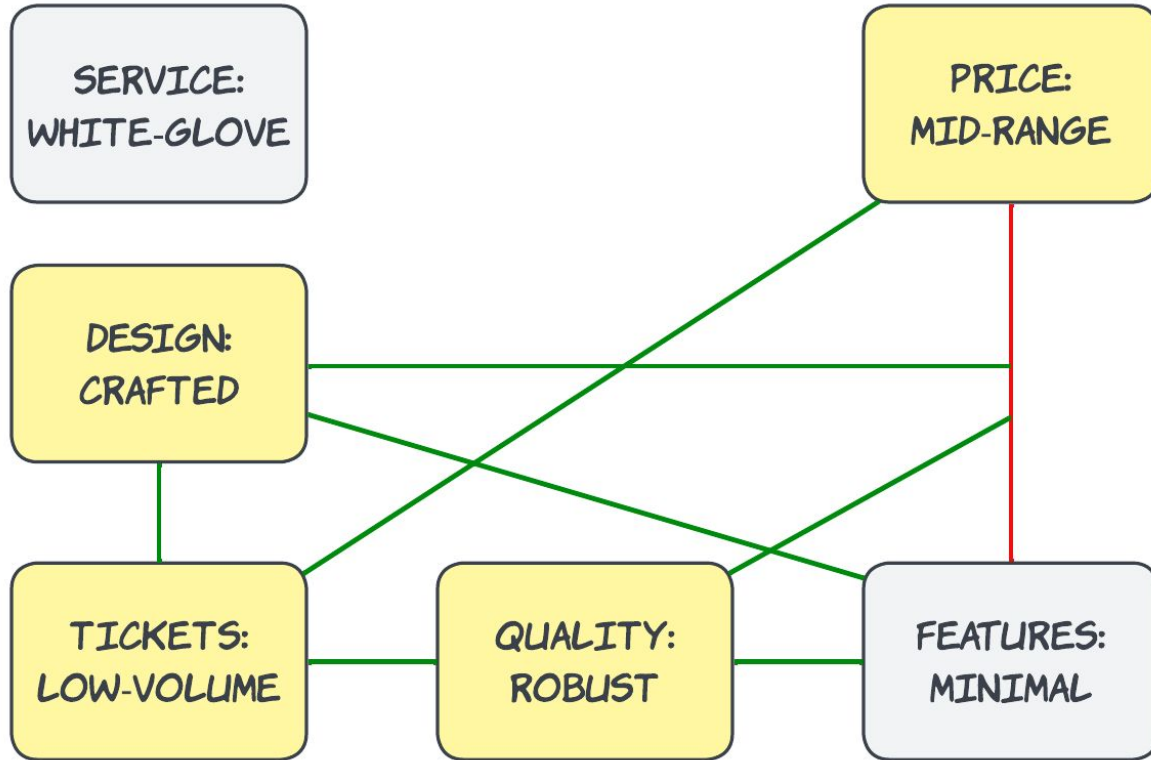
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Mach 2 Strategy: How we will win

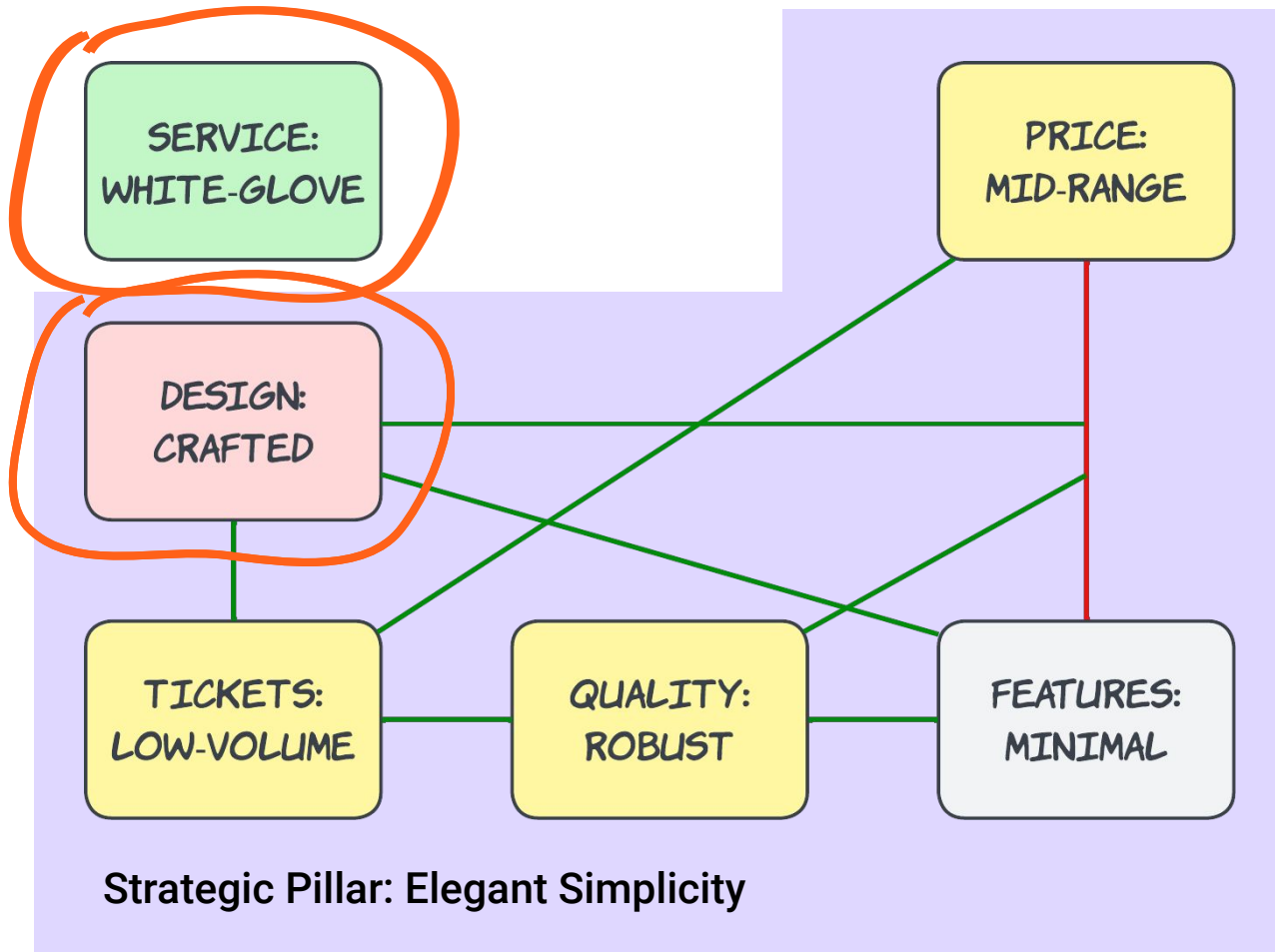


- CLUSTER ON LEVERAGE
- AVOID PIVOTS
- DIFFERENTIATION
- SECULAR TRENDS
- ALTERNATIVES



STATUS QUO

CHANGE



STATUS QUO

CHANGE

LEVERAGE

PIVOT

Competitive Differentiation

Competitive Prompts

What are their decisions/consequences?

Who is their “perfect customer?”

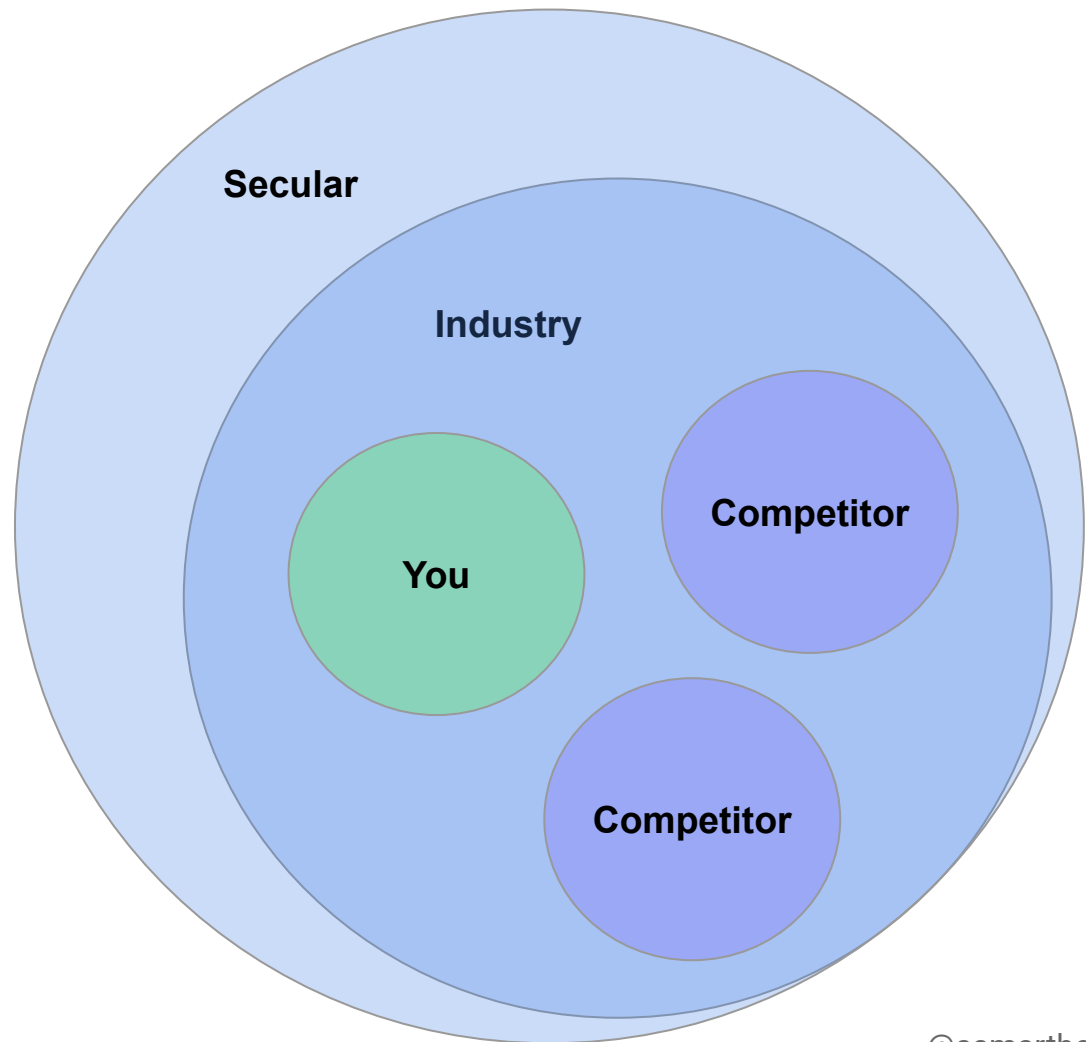
How fast / what direction is product dev?

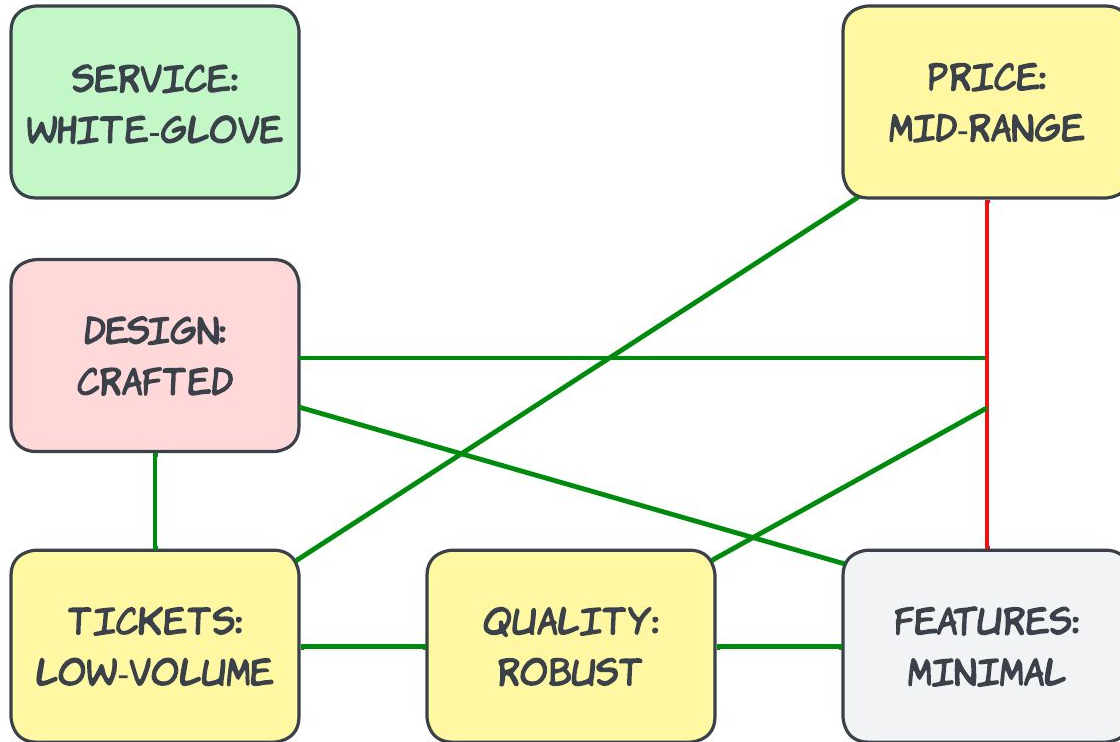
What are their inviolable principles?

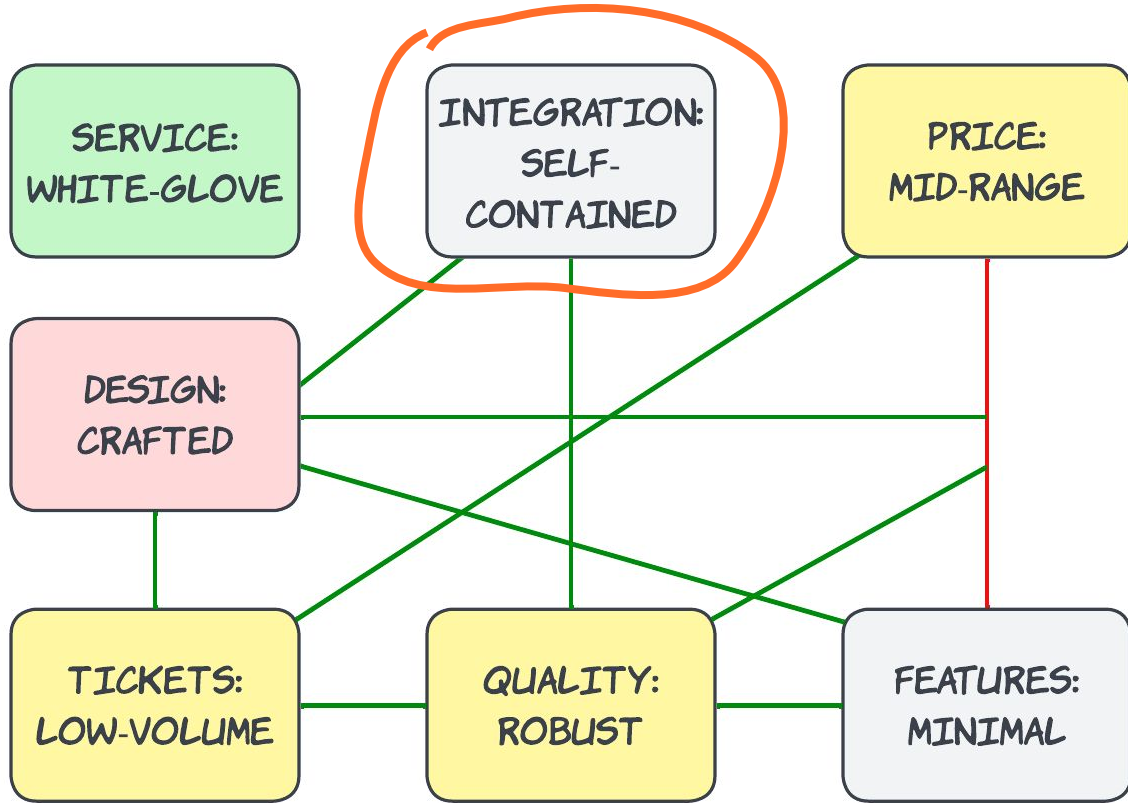
What is their primary success metric?

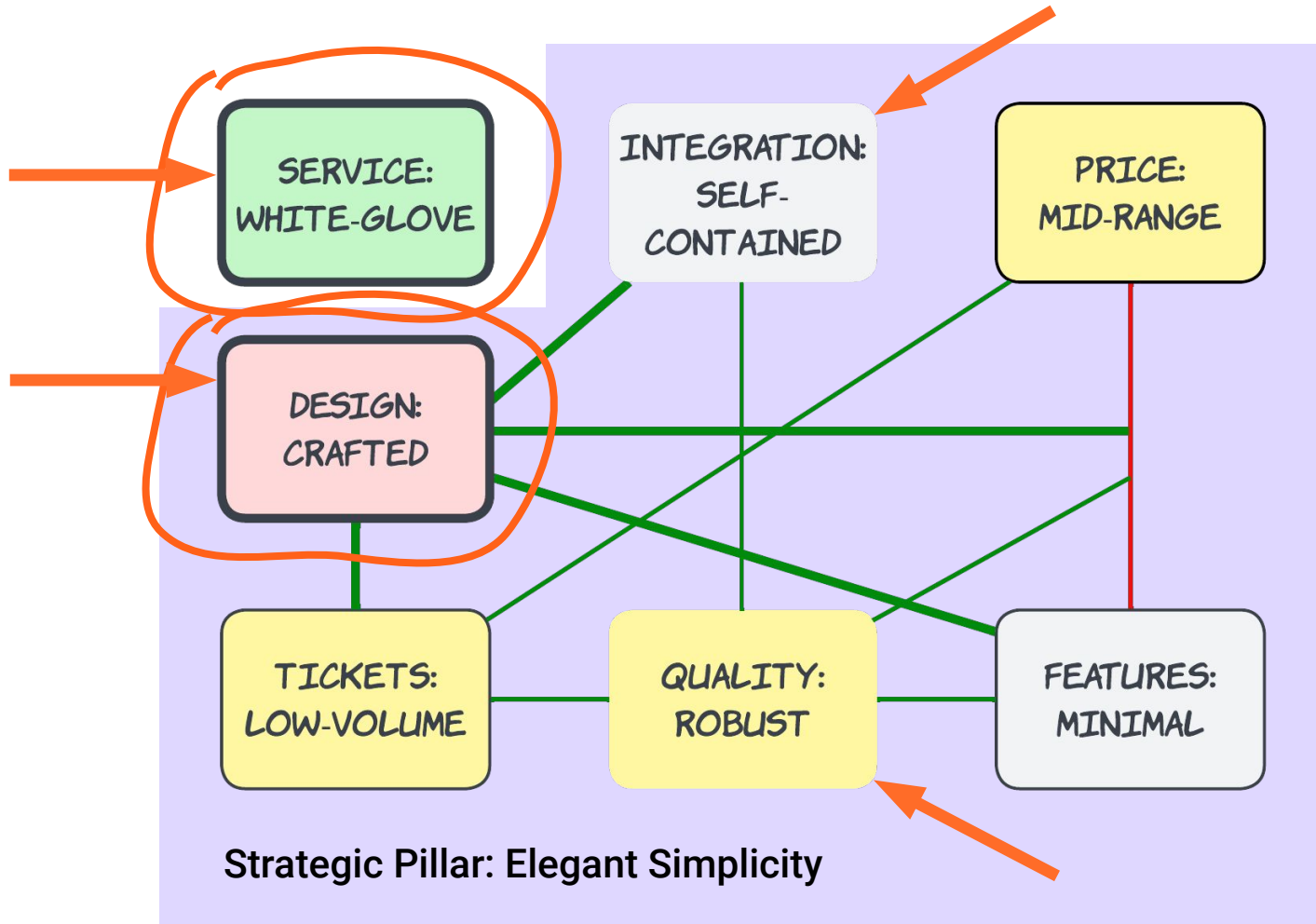
What makes money / what is a loss-leader?

Which moats are they building?









External Constraints

Secular Trends

Shift to virtual workforce

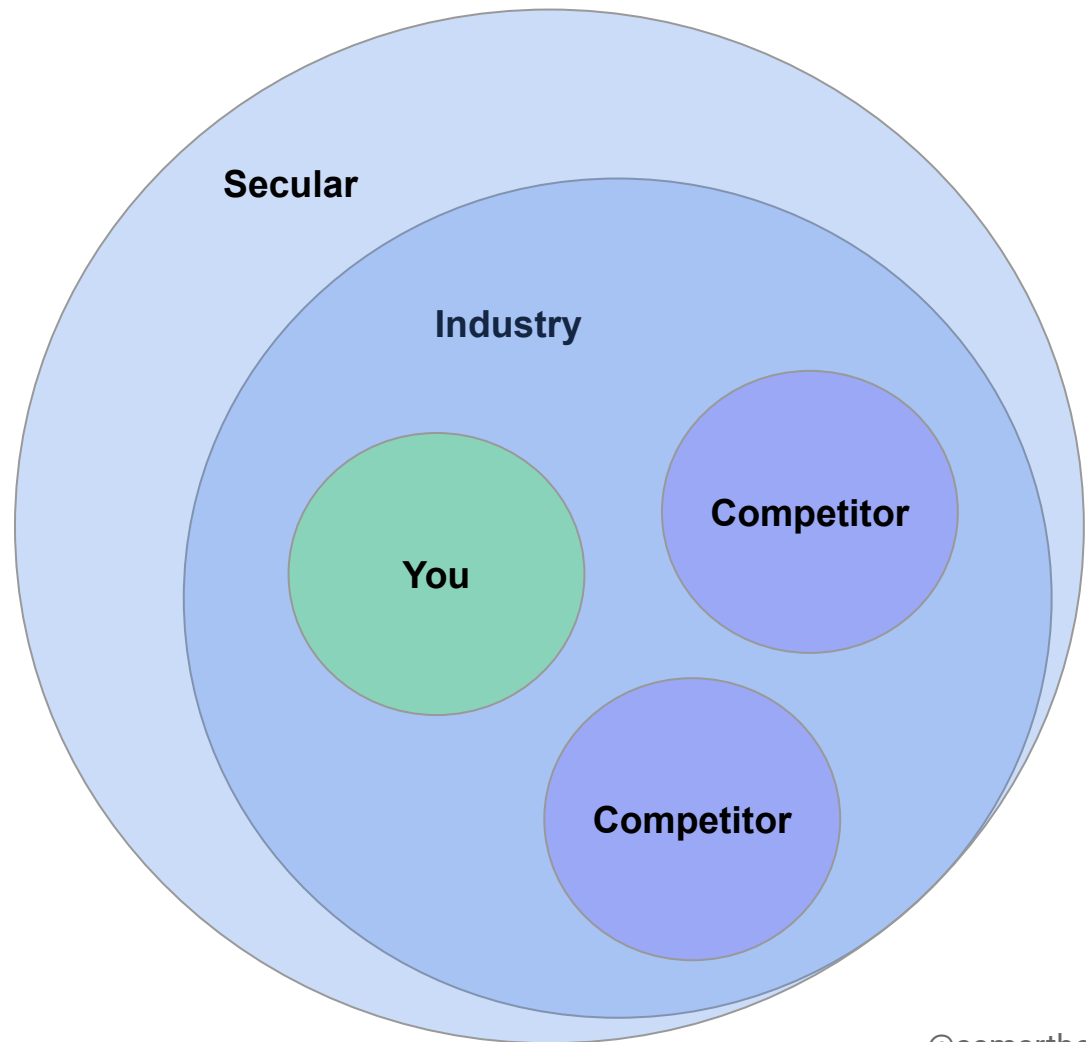
Consumerization of Enterprise

AI everywhere

Industry Trends

Which segments are growing / shrinking?

What are the 3-5 forces this industry is grappling with?



External Constraints

Enabling Constraints

Shift to virtual workforce

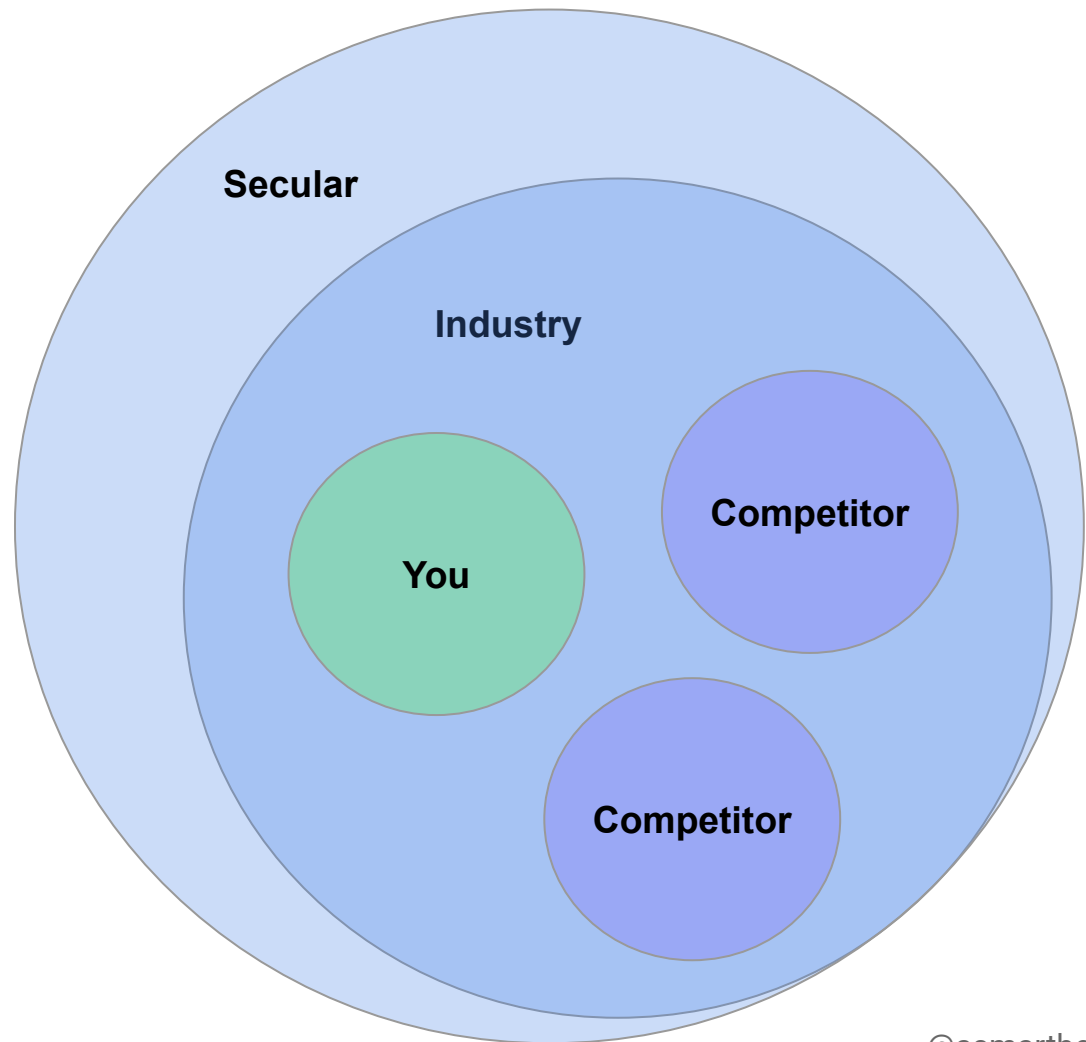
- boom in online collaboration software
 - lower morale and shallower culture
-

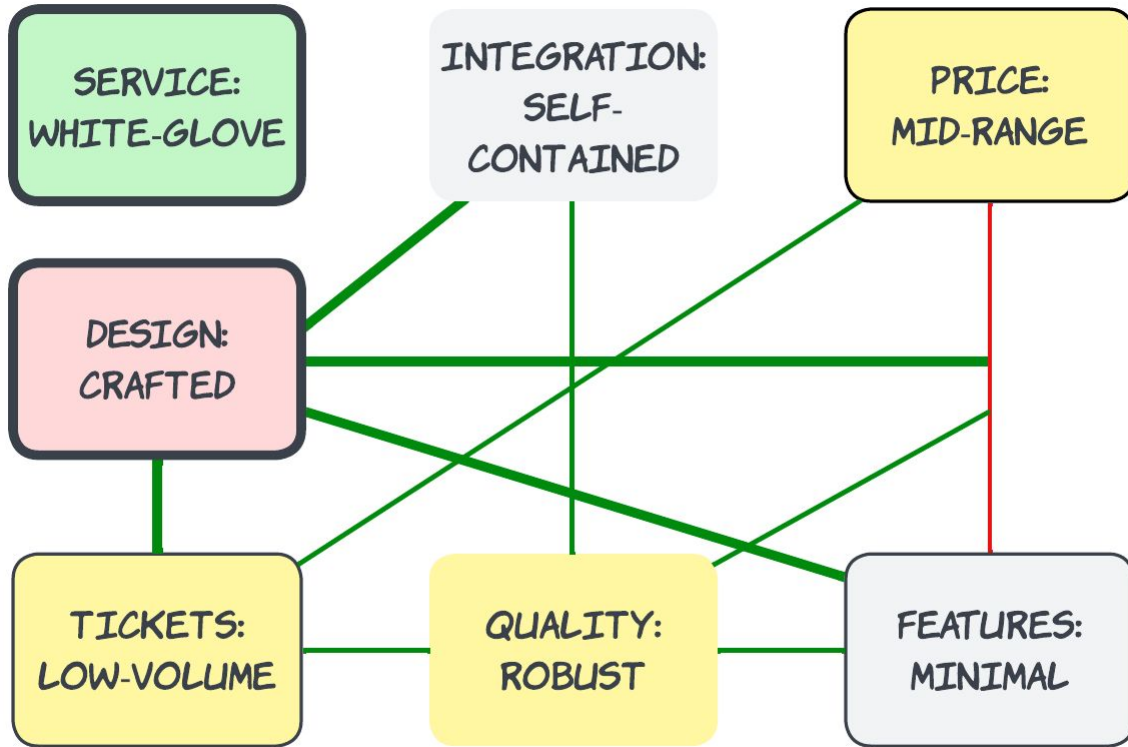
Consumerization of Enterprise

- end-users now driving sales
 - design matters
-

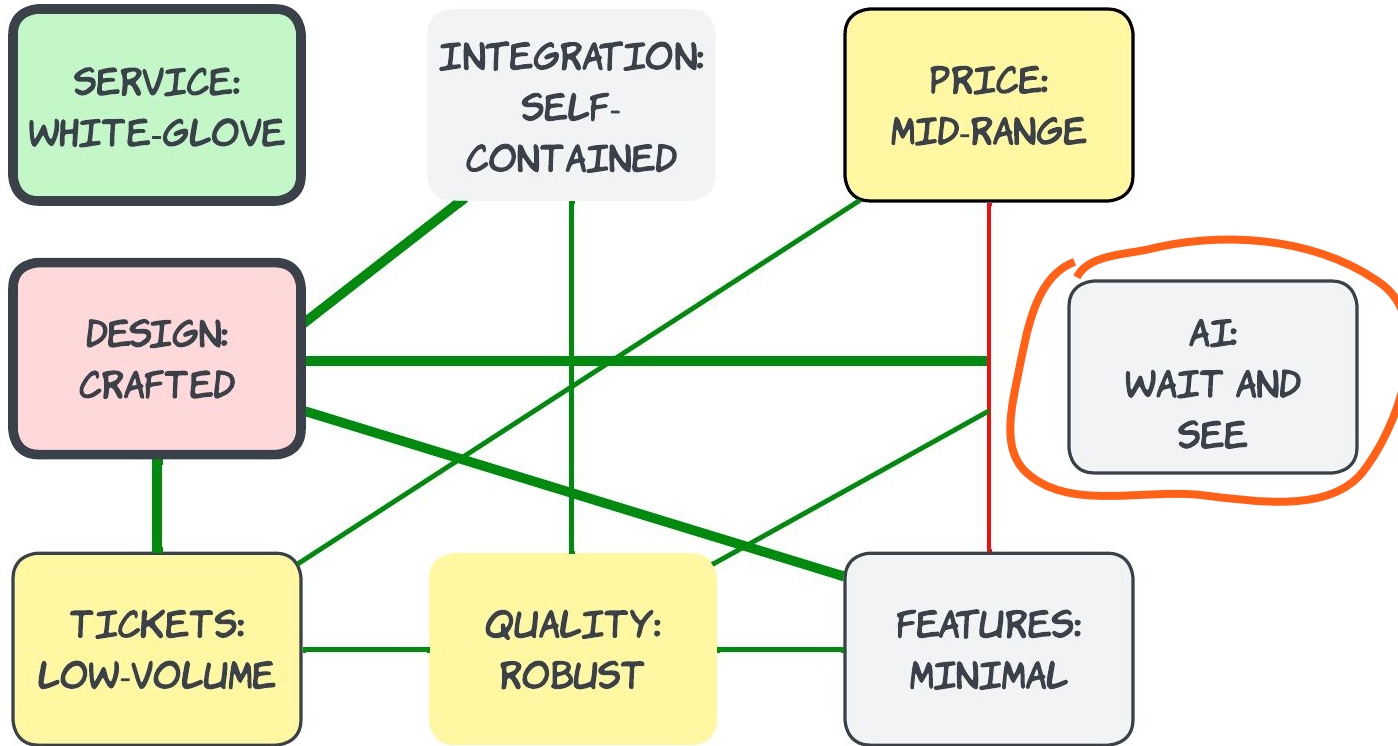
AI is everyone's next feature

- upends consumer assumptions
- initial versions suck

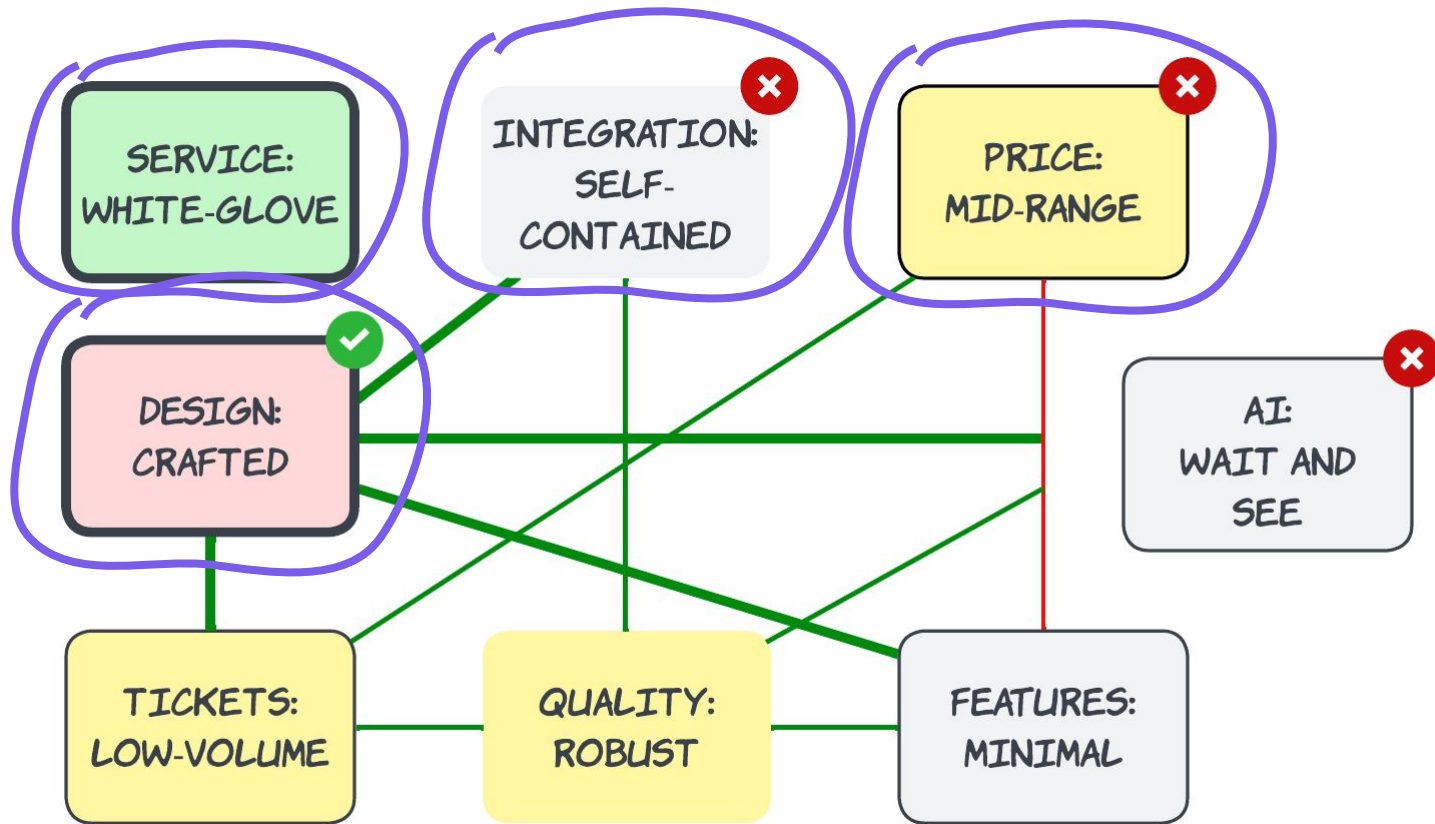




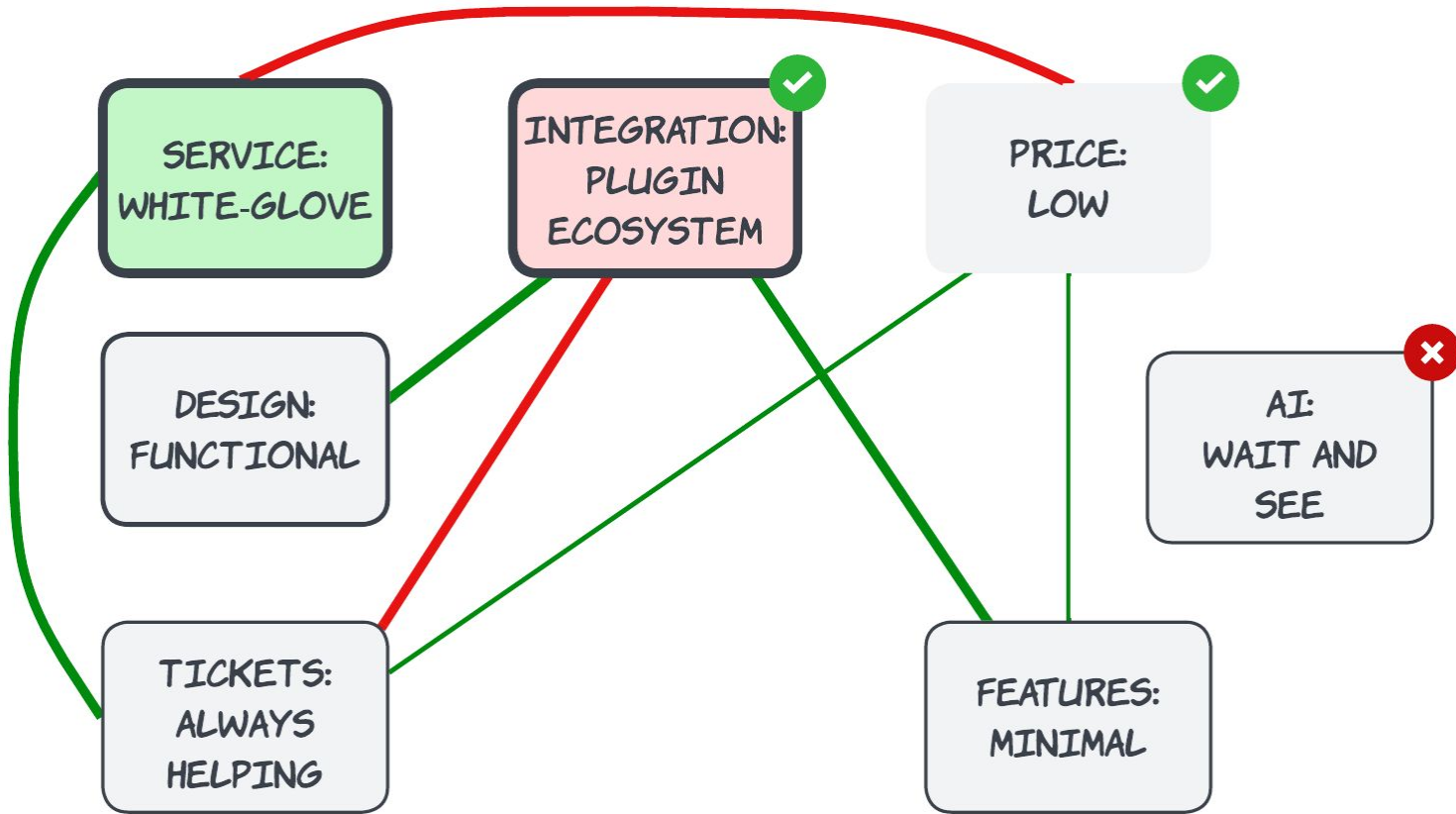
- STATUS QUO
- CHANGE
- LEVERAGE
- PIVOT
- SPECIAL
- COMMODITY

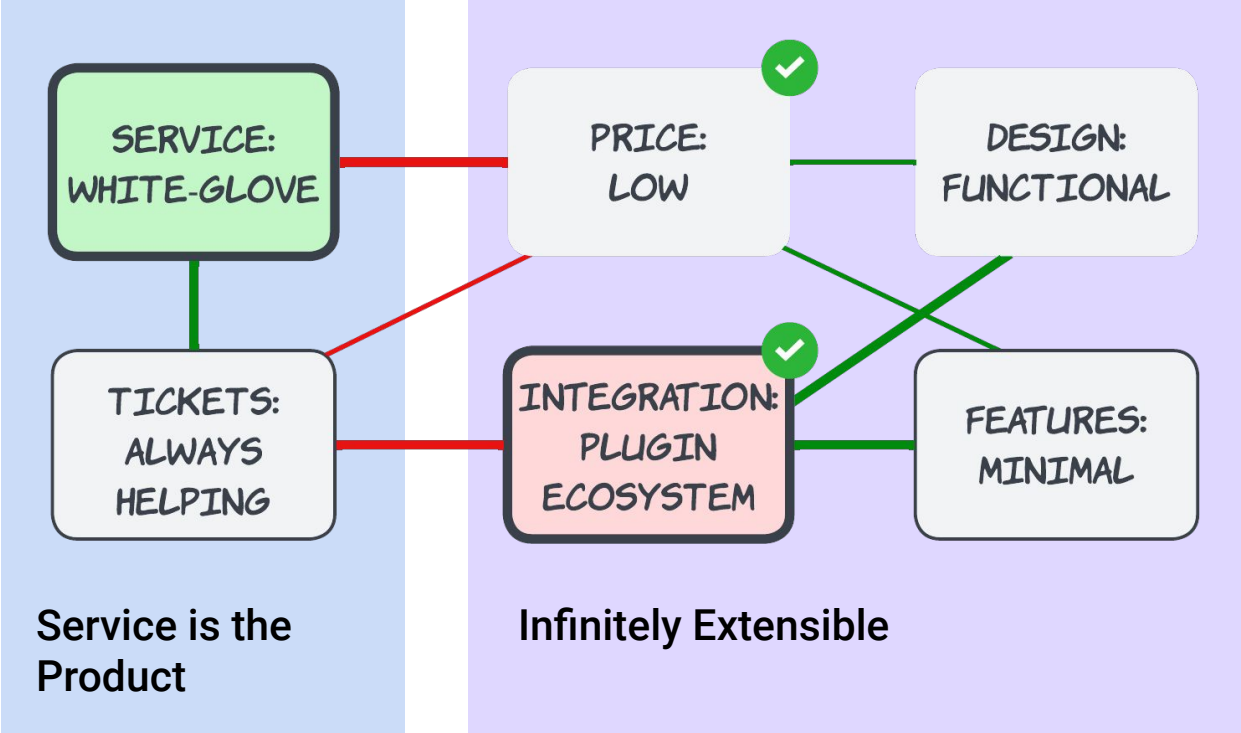


- STATUS QUO
- CHANGE
- LEVERAGE
- PIVOT
- SPECIAL
- COMMODITY



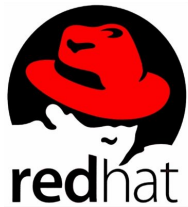
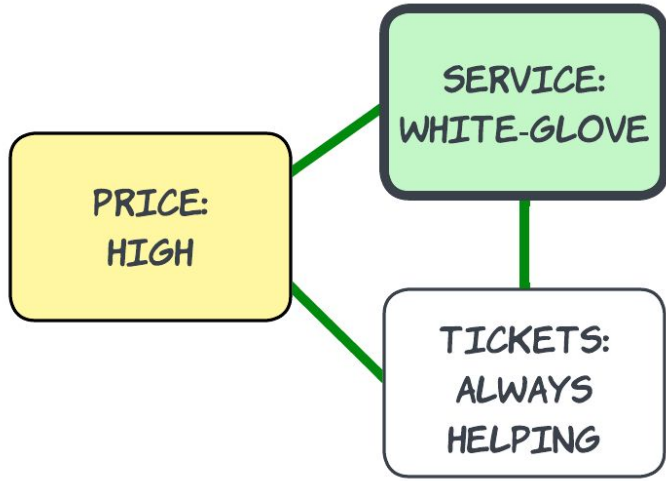
- STATUS QUO
- CHANGE
- LEVERAGE
- PIVOT
- SPECIAL
- COMMODITY
- TAILWIND
- HEADWIND



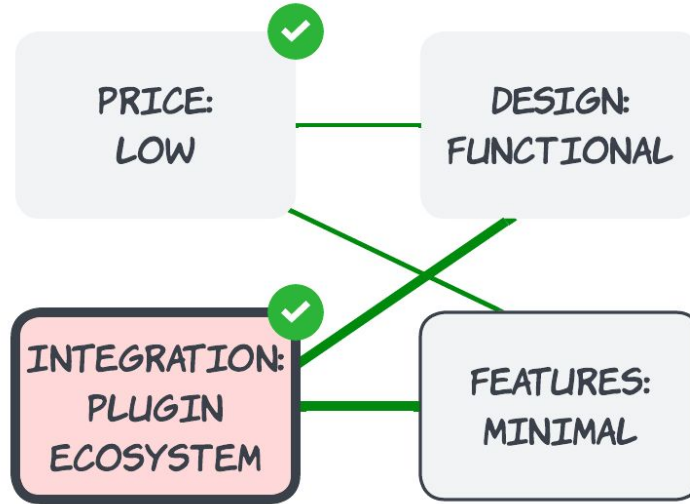


- STATUS QUO
- CHANGE
- LEVERAGE
- PIVOT
- SPECIAL
- COMMODITY
- TAILWIND ✓
- HEADWIND ✗

Enterprise Product



Core Technology Mass-Market Product



STATUS QUO

CHANGE

LEVERAGE

PIVOT

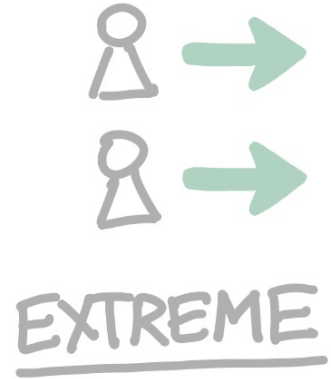
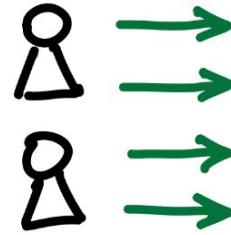
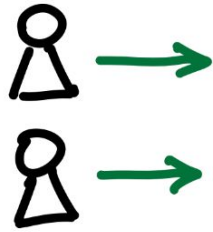
SPECIAL

COMMODITY

TAILWIND

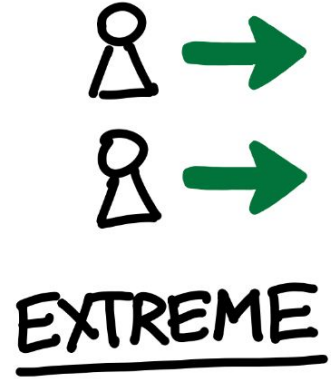
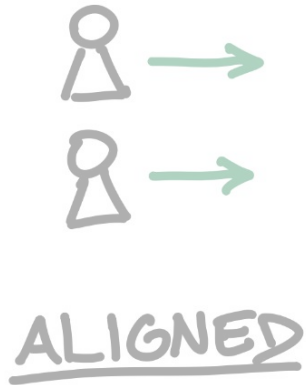
HEADWIND

Mach 2 Strategy: How we will win



- CLUSTER ON LEVERAGE
- AVOID PIVOTS
- DIFFERENTIATION
- SECULAR TRENDS
- ALTERNATIVES

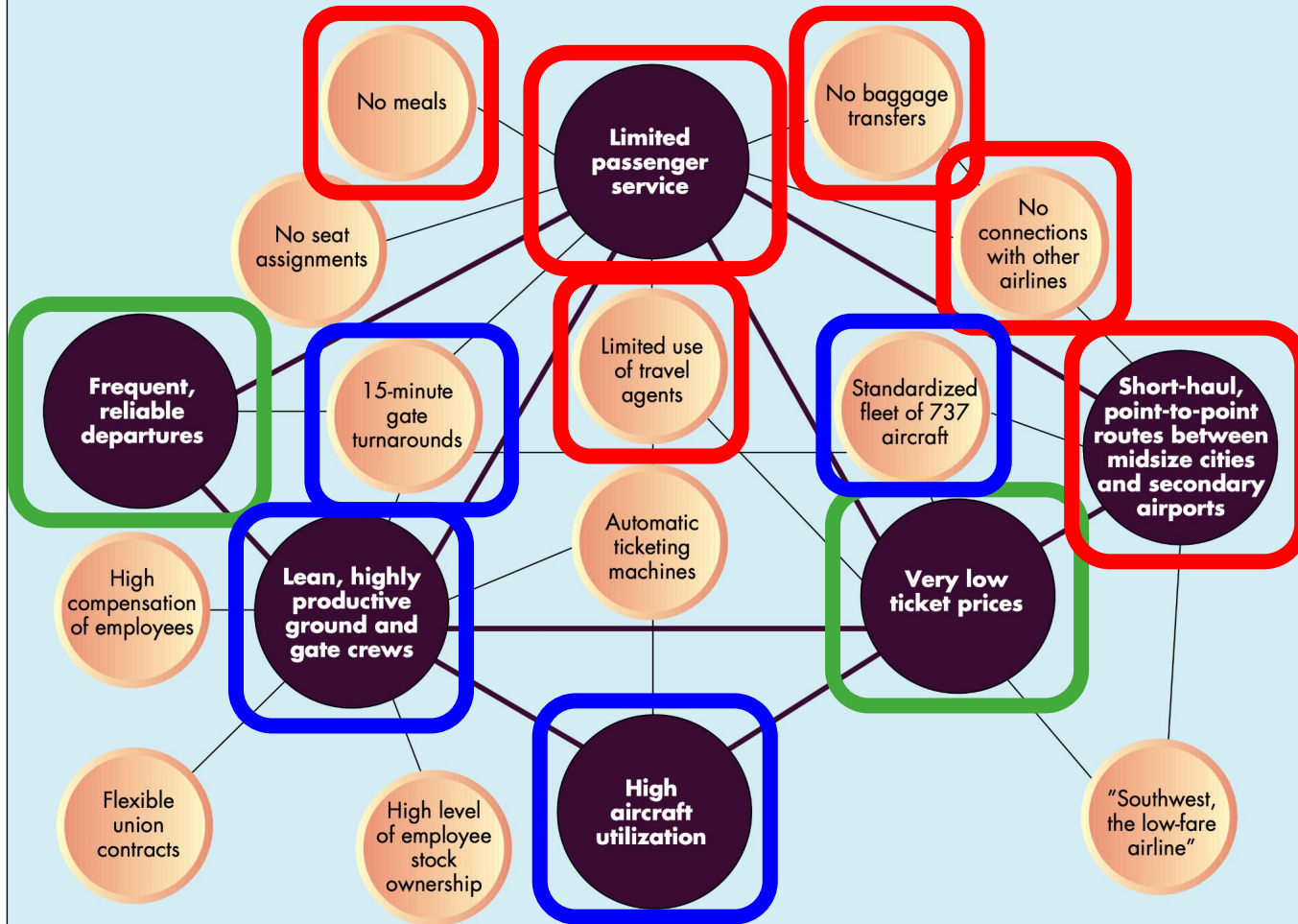
Mach 2 Strategy: How we will win



- MORE OF EVERYTHING
- EMBRACE NEGATIVES
- MOAT FROM EXTREMES

Southwest Airlines' Activity System

Michael Porter, HBR, 1996



**Bad
for customers!?**

**Best in the world
for customers**

**Coherent
Operations**

[contact](#) [post a listing](#)

[FAQ](#) [subscriptions](#)

search craigslist

community ▾

search

[discussion forums](#)

[nonprofit venture forum](#)

[san francisco - 12/5](#)

[flag for review new](#)

[our nonprofit work](#)

[spotlight: Hands On San Francisco](#)

[our policies](#)

[feedback for craigslist](#)

[about craigslist](#)

updated 4 december

community

- [activity partners](#)
- [artists / musicians](#)
- [carpool / rideshare](#)
- [childcare / kids](#)
- [general community](#)
- [pets / animals](#)
- [political forum new](#)
- [volunteers](#)

events

- [classes / workshops](#)
- [events / entertainment](#)
- [tech events](#)

personals

- [women seeking women](#)
- [women seeking men](#)
- [men seeking women](#)
- [casual encounters](#)
- [men seeking men](#)
- [misc romance](#)
- [missed connections](#)
- [personals forum new](#)

housing

- [apts / housing - no fee](#)
- [apts - broker / fee](#)
- [apts / housing wanted](#)
- [rooms / shared](#)
- [rooms / share wanted](#)
- [sublets / temporary](#)
- [sublets wanted](#)
- [office / commercial](#)
- [parking / storage](#)
- [housing directory new](#)

sale / wanted

- [barter / swap / free](#)
- [bikes / cycles](#)
- [cars / trucks](#)
- [computer / tech stuff](#)
- [general for sale](#)
- [furniture new](#)
- [general wanted](#)
- [tickets](#)

services

- [resumes](#)
- [freelance / 1099](#)
- [small biz ads](#)

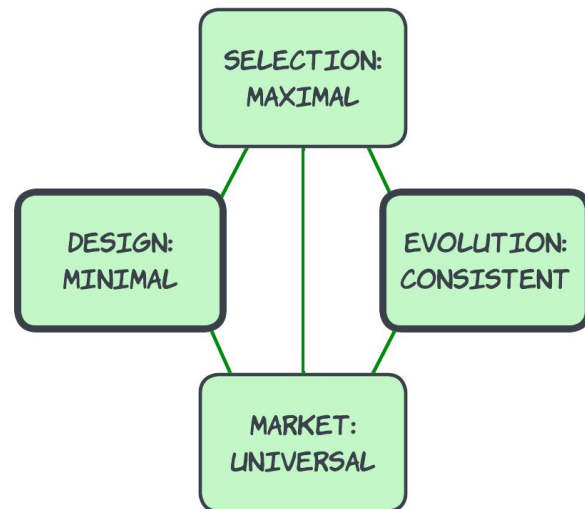
jobs

- [accounting / finance](#)
- [admin / office / cust service](#)
- [architect / engineer / cad](#)
- [art / media / print / design](#)
- [business / e-biz / mgmt](#)
- [education / teaching new](#)
- [human resources](#)
- [internet / web engineer'g](#)
- [legal / paralegal](#)
- [market'g / advertis'g / pr](#)
- [medical / health / biotech](#)
- [network / telecomm](#)
- [nonprofit sector](#)
- [retail / hospitality / food](#)
- [sales / biz dev](#)
- [skilled trade / craft new](#)
- [software / QA / DBA](#)
- [system administration](#)
- [technical support](#)
- [tv / film / video / radio](#)
- [web / info design](#)
- [writing / editing](#)
- [et cetera](#)
- [part time new](#)

- [san francisco](#)
- [south bay](#)
- [east bay](#)
- [north bay](#)
- [peninsula](#)

- [boston](#)
- [chicago](#)
- [DC](#)
- [los angeles](#)
- [new york city](#)
- [portland_ore](#)
- [sacramento new](#)
- [san diego](#)
- [seattle](#)

- [sydney](#)
- [melbourne](#)



[feedback](#) [music](#) [tv](#)
[film](#) [open](#) [vegan](#)
[fixit](#) [parent](#) [words](#)
[food](#) [pets](#) [writing](#)

[crew](#) [talent](#)
[domestic](#) [writing](#)

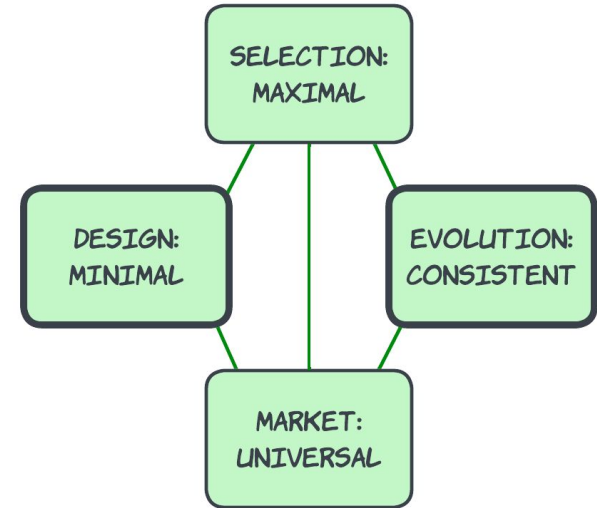
[resumes](#)

*“Creating a superior user experience
is more important than making money.”*

— CEO Jim Buckmaster

*“The obstacle to sustainability and growth
at Craigslist is the company’s
strong principles valuing
customer-offering over monetization,
trusting consistency over innovation.”*

—Harvard Business School case



create a posting

my account

search craigslist

event calendar

M T W T F S S
10 11 12 13 14 15 16

community

- activities
- artists
- childcare
- classes
- events
- general
- lost+found
- missed
- connections
- musicians
- pets
- politics

housing

- apts / housing
- housing swap
- housing wanted
- office / commercial
- parking / storage
- real estate for sale

jobs

- accounting+finance
- admin / office
- arch / engineering
- art / media / design
- biotech / science
- business / mgmt

nearby cl

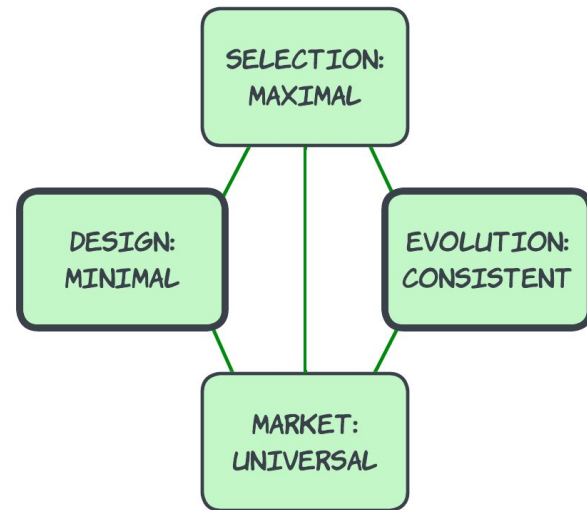
- abilene
- beaumont
- brownsville
- central la
- college station
- corpus christi
- dallas
- deep east tx

CRAIGSLIST'S REVENUE IS \$694.0 MILLION.

What Is Craigslist's Revenue?

Craigslist's annual revenue is \$694.0M. Zippia's data science team found the following key financial metrics about Craigslist after extensive research and analysis.

- Craigslist peak revenue was \$694.0M in 2022.
- Craigslist has 50 employees, and the revenue per employee ratio is \$13,880,000.



philanthropies

- celebs
- comp
- cosmos
- diet
- divorce
- dying
- eco
- feedbk
- film
- fixit
- food
- housing
- jobs
- jokes
- legal
- manners
- marriage
- money
- music
- open
- parent
- pets
- rofo
- science
- spirit
- sports
- super
- tax
- travel
- tv
- vegan
- words
- writing

- cell phones
- clothes+acc
- collectibles
- computer parts
- computers
- electronics

- toys+games
- trailers
- video gaming
- wanted
- wheels+tires

- web / info design
- writing / editing

gigs

- computer
- creative
- crew
- domestic
- event
- labor
- talent
- writing

resumes



Credit:
A Crowded
Space

@asmartbear

community

activities	local news
artists	lost+found
childcare	musicians
classes	pets
events	politics
general	rideshare
groups	volunteers

personals

strictly platonic
women seek women
women seeking men
men seeking women
men seeking men
misc romance
casual encounters
missed connections
rants and raves

discussion forums

apple	help	photo
arts	history	p.o.c.
atheist	housing	politics
autos	jobs	psych
beauty	jokes	queer
bikes	kink	recover
celebs	legal	religion
comp	linux	romance
crafts	m4m	science
diet	manners	spirit
divorce	marriage	sports
dying	media	tax
eco	money	travel
educ	motorcy	tv
feedback	music	vegan
film	nonprofit	w4w
fitness	open	wed
fixit	outdoor	wine
food	over 50	women
frugal	parent	words
gaming	pets	writing
garden	philos	yoga
haku		

housing

apts / housing
housing swap
housing wanted
office / commercial
parking / storage
real estate for sale
rooms / shared
rooms wanted
sublets / temporary
vacation rentals

for sale

antiques	free
appliances	furniture
arts+crafts	garage sale
atv/utv/sno	general
auto parts	heavy equip
baby+kid	household
barter	jewelry
beauty+hith	materials
bikes	motorcycles
boats	music instr
books	photo+video
business	rvs+camp
cars+trucks	sporting
cds/dvd/vhs	tickets
cell phones	tools
clothes+acc	toys+games
collectibles	trailers
computers	video gaming
electronics	wanted
farm+garden	

services

automotive	legal
beauty	lessons
cell/mobile	marine
computer	pet
creative	real estate
cycle	skilled trade
event	sm biz ads
farm+garden	therapeutic
financial	travel/vac
household	write/ed/tran
labor/move	

jobs

accounting+finance
admin / office
arch / engineering
art / media / design
biotech / science
business / mgmt
customer service
education
food / bev / hosp
general labor
government
human resources
internet engineers
legal / paralegal
manufacturing
marketing / pr / ad
medical / health
nonprofit sector
real estate
retail / wholesale
sales / biz dev
salon / spa / fitness
security
skilled trade / craft
software / qa / dba
systems / network
technical support
transport
tv / film / video
web / info design
writing / editing
[ETC]
[part-time]

gigs

computer	event
creative	labor
crew	talent
domestic	writing

resumes



Credit:
A Crowded
Space

create a posting

my account

search craigslist

event calendar

M	T	W	T	F	S	S
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

craigslist app

help, faq, abuse, legal

avoid scams & fraud

personal safety tips

terms of use

privacy policy

system status

about craigslist

craigslist is hiring

craigslist open source

best-of-craigslist

"craigslist joe"

craig newmark
philanthropies

community

activities
artists
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classes
events
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groups
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connections
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rants & raves
rideshare
volunteers

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beauty
cell/mobile
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cycle
event
farm+garden
financial
health/well
household

labor/move
legal
lessons
marine
pet
real estate
skilled trade
sm biz ads
travel/vac
write/ed/tran

discussion forums

apple	frugal	philos
arts	gaming	photo
atheist	garden	politics
autos	haiku	psych
beauty	help	recover
bikes	history	religion
celebs	housing	rofo
comp	jobs	science
cosmos	jokes	spirit
diet	legal	sports
divorce	manners	super
dying	marriage	tax
eco	money	travel
feedbk	music	tv
film	open	vegan
fixit	parent	words
food	pets	writing

housing

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barter	jewelry
beauty+hth	materials
bike parts	motorcycle parts
bikes	motorcycles
boat parts	music instr
boats	photo+video
books	rvs+camp
business	sporting
cars+trucks	tickets
cds/dvd/vhs	tools
cell phones	toys+games
clothes+acc	trailers
collectibles	video gaming
computer parts	wanted
computers	wheels+tires
electronics	

jobs

accounting+finance
admin / office
arch / engineering
art / media / design
biotech / science
business / mgmt
customer service
education
etc / misc
food / bev / hosp
general labor
government
human resources
legal / paralegal
manufacturing
marketing / pr / ad
medical / health
nonprofit sector
real estate
retail / wholesale
sales / biz dev
salon / spa / fitness
security
skilled trade / craft
software / qa / dba
systems / network
technical support
transport
tv / film / video
web / info design
writing / editing

gigs

computer	event
creative	labor
crew	talent
domestic	writing

resumes

nearby cl

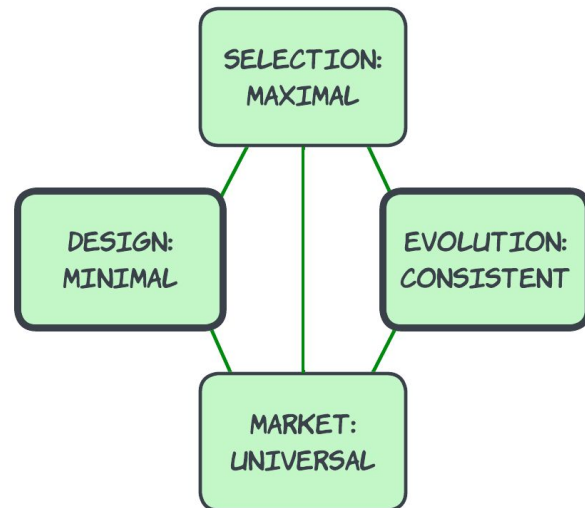
abilene
beaumont
brownsville
central la
college station
corpus christi
dallas
deep east tx
del rio
east tx
galveston
houston
killeen-temple
lafayette
lake charles
laredo
lawton
lubbock
mcallen
odessa
san angelo
san antonio
san marcos
shreveport
southwest tx
texarkana
texoma
victoria
waco
wichita falls

us cities

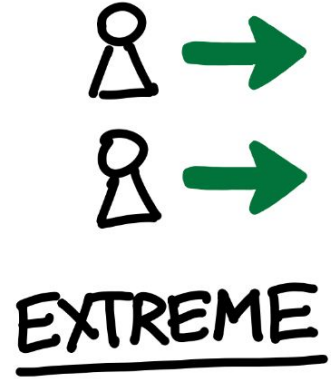
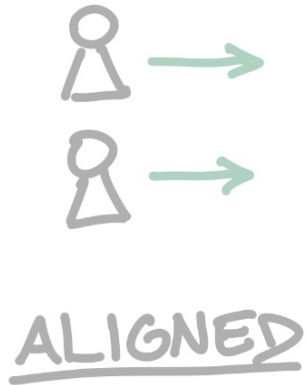
us states

canada

cl worldwide



Mach 2 Strategy: How we will win



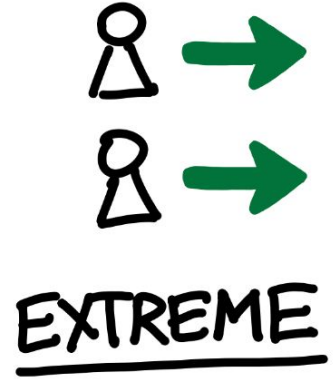
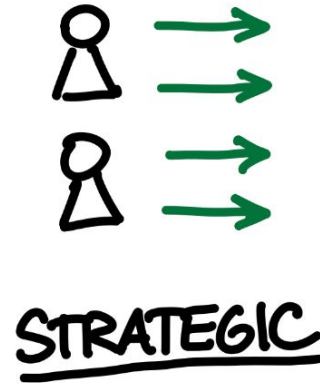
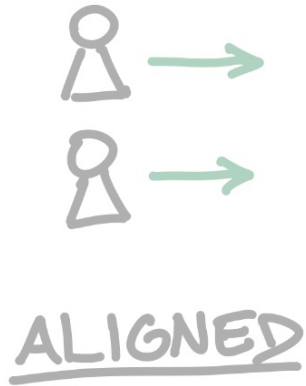
- MORE OF EVERYTHING
- EMBRACE NEGATIVES
- MOAT FROM EXTREMES

“Mutually-reinforcing, extreme decisions” is a new type of moat

Moat: Permanent competitive advantage

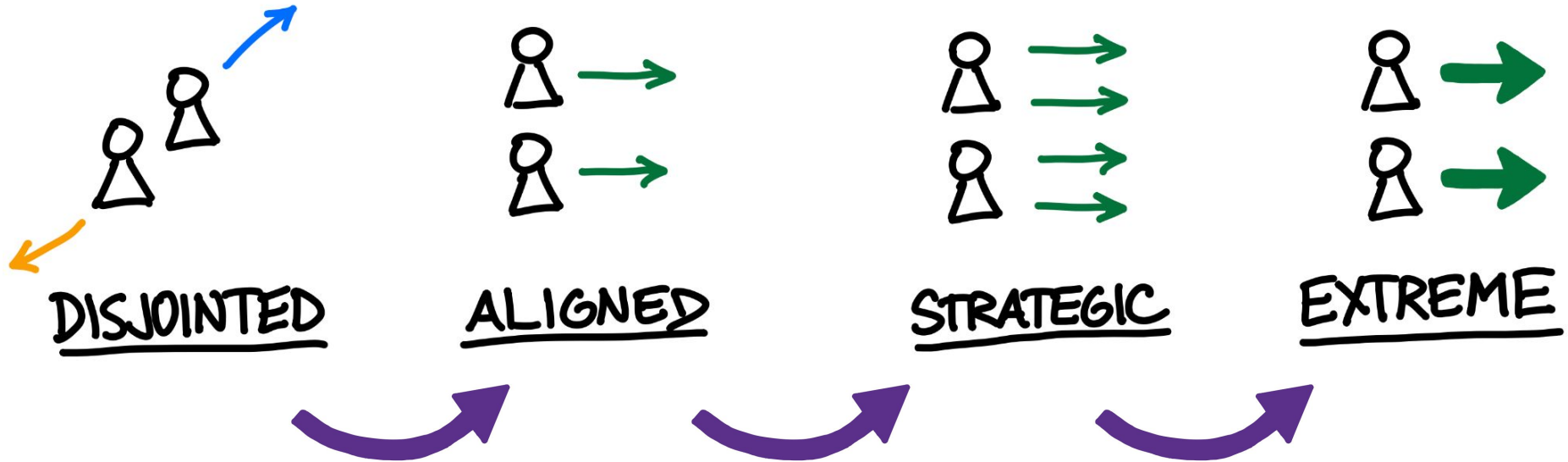
- Network Effect (eBay; Facebook)
- Unique, Secret IP (Coke formula; Google search algorithm)
- System of Record (Salesforce; Workday)
- **Mach 2 Strategy** (Southwest Airlines; Craigslist)

Mach 2 Strategy: How we will win



- MORE OF EVERYTHING
- EMBRACE NEGATIVES
- MOAT FROM EXTREMES

Mach 2 Strategy: How we will win



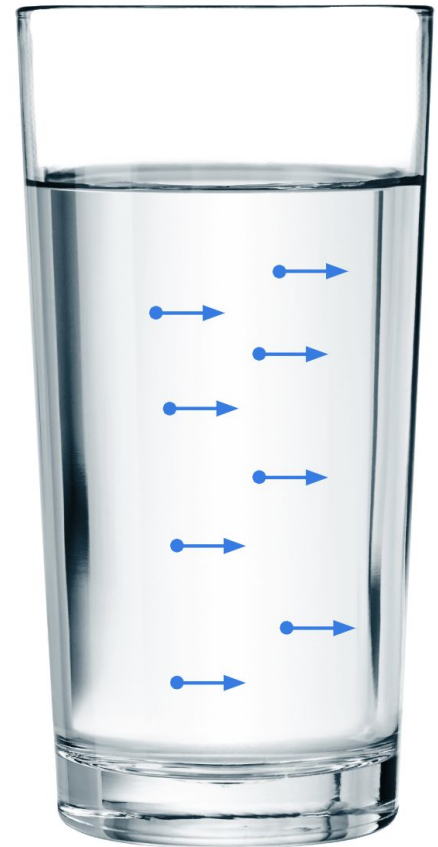
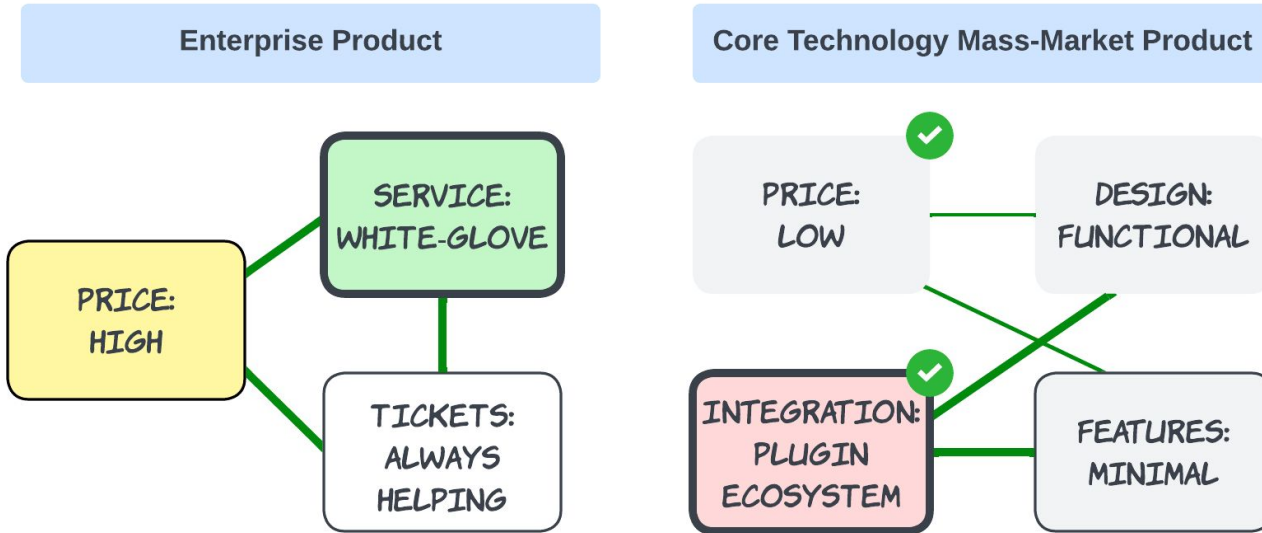
- INTROSPECTION
- REFINE "CHOICES"
- RESOLVE CONFLICTS
- DECISION CIRCLE
- ALTERNATIVES

- CLUSTER ON LEVERAGE
- AVOID PIVOTS
- DIFFERENTIATION
- SECULAR TRENDS
- ALTERNATIVES

- MORE OF EVERYTHING
- EMBRACE NEGATIVES
- MOAT FROM EXTREMES

Mach 2 Strategy: How we will win

Mutually-reinforcing extreme decisions



Slides: <https://asmartbear.com/mach2>