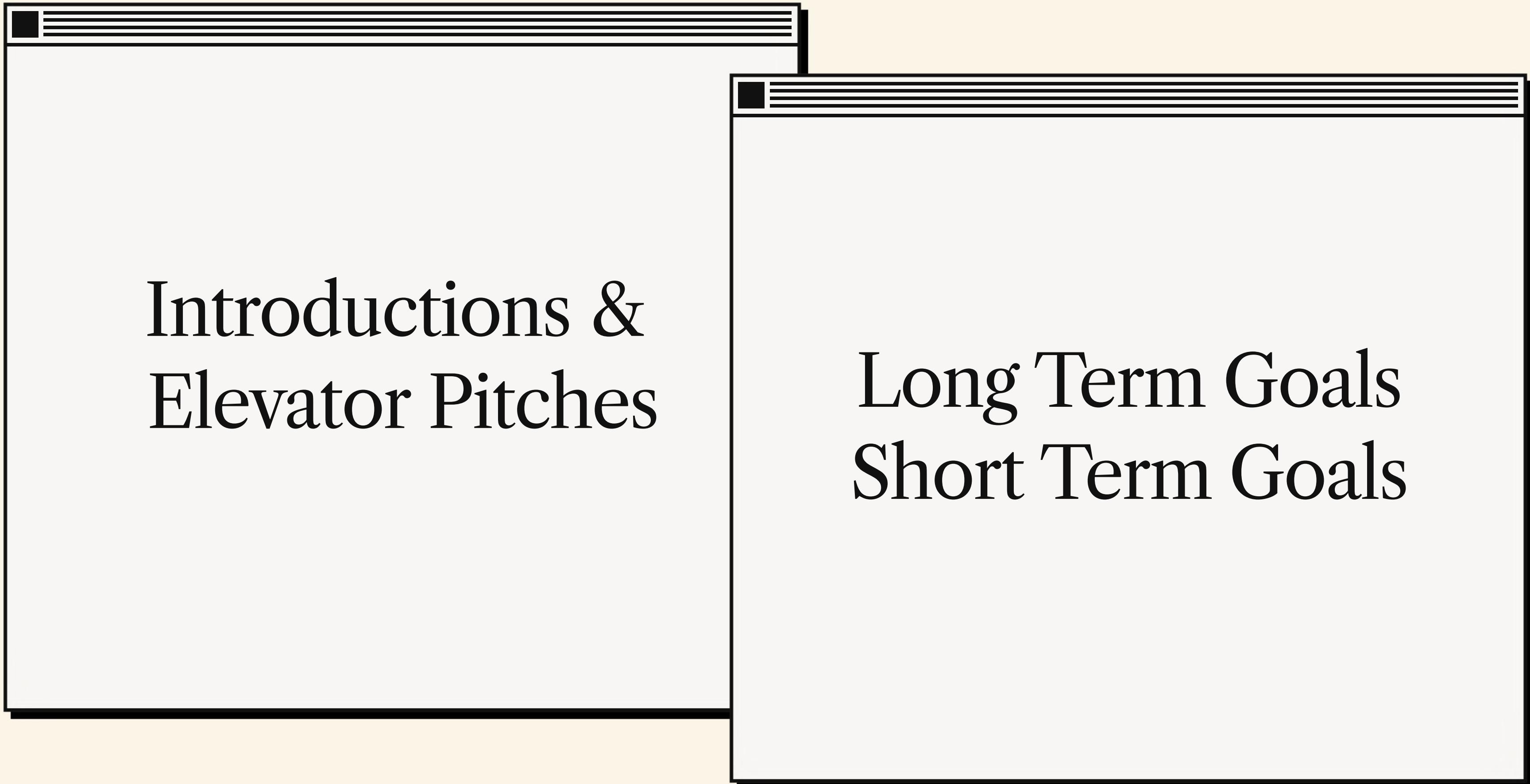




# MaruSF - Oct 2025



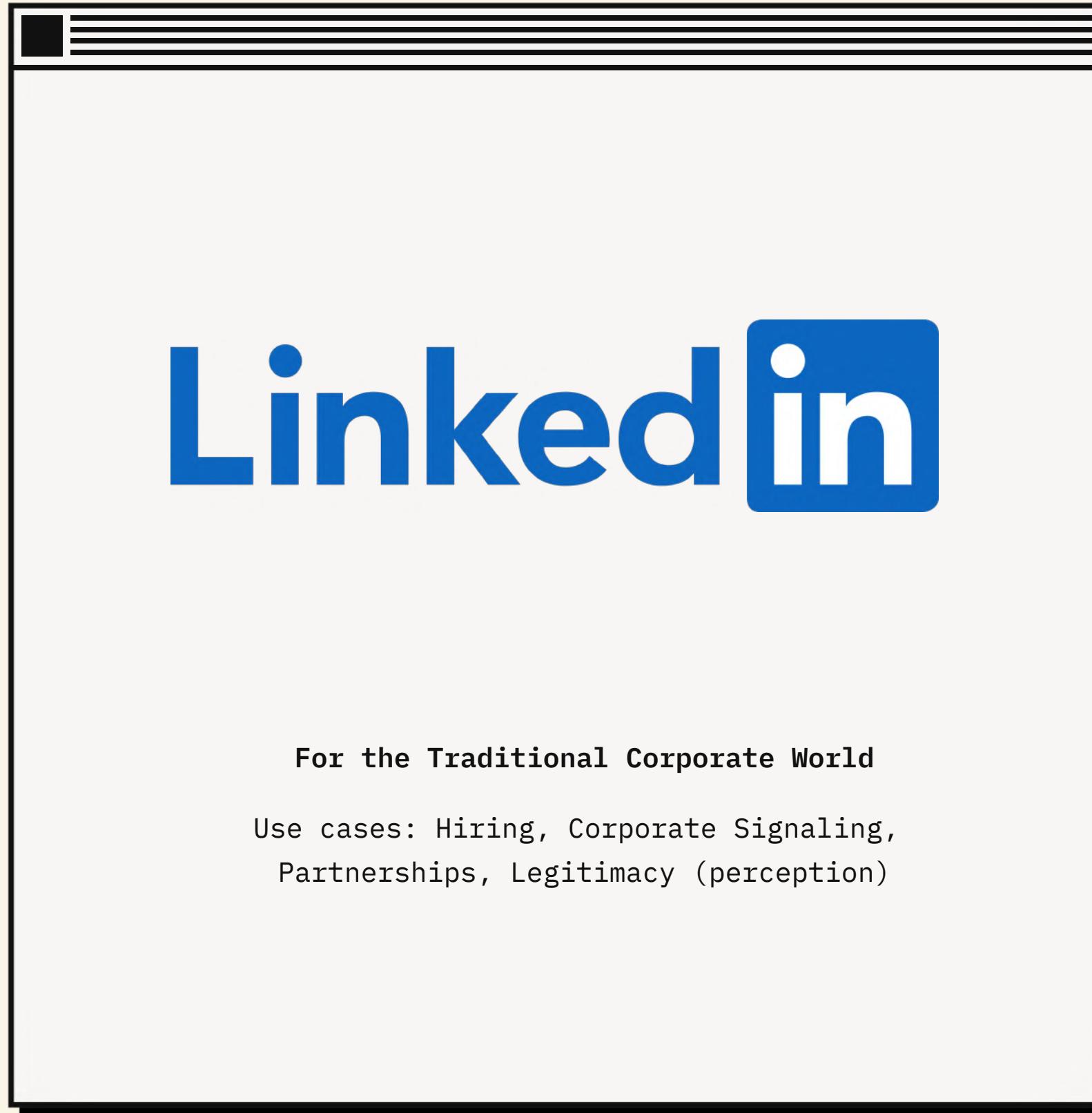
Bo Nam  
[bo@eightai.com](mailto:bo@eightai.com)  
San Francisco



Introductions &  
Elevator Pitches

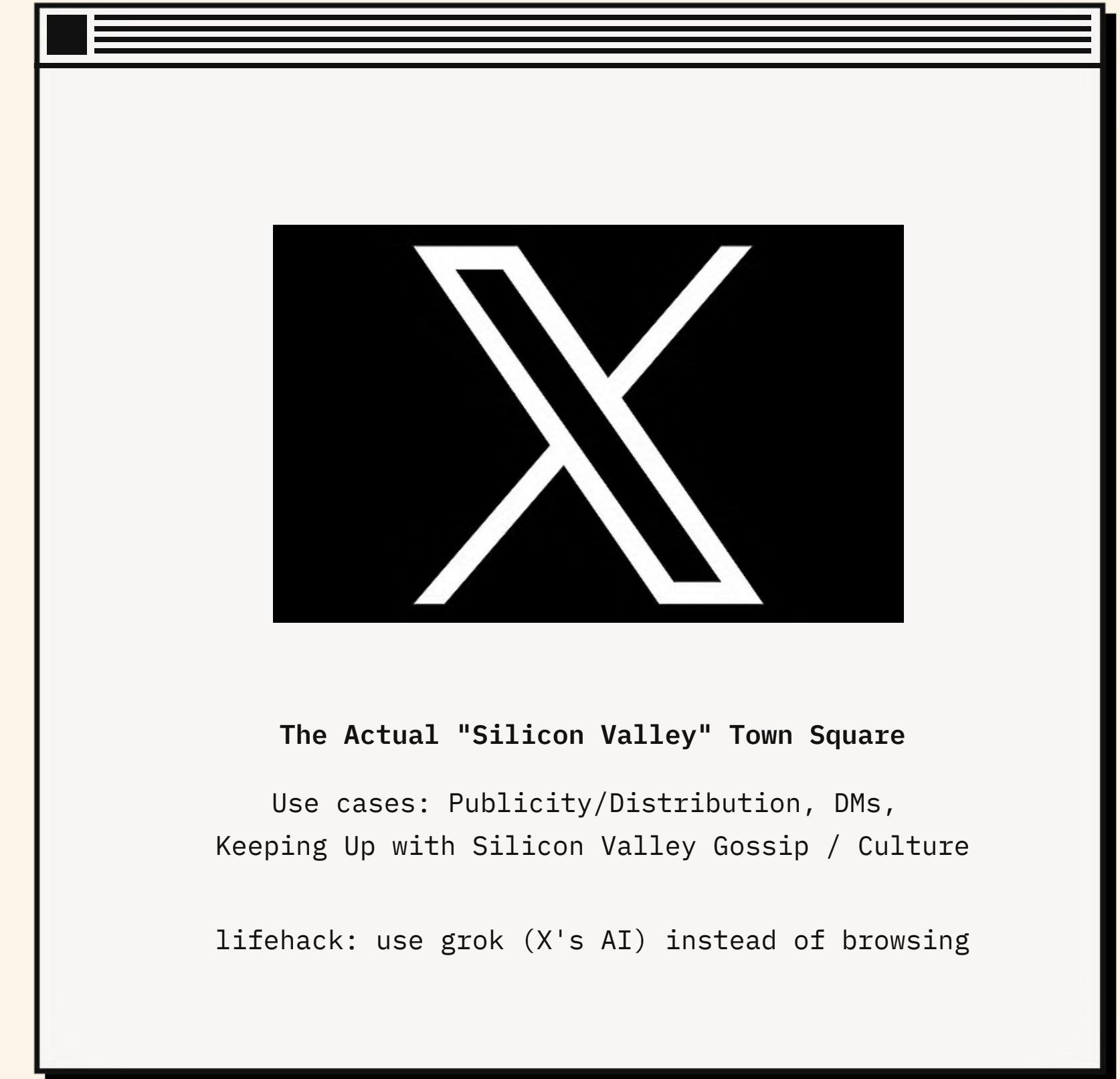
Long Term Goals  
Short Term Goals

**Be in the Right Places for the Right Reasons**



**For the Traditional Corporate World**

Use cases: Hiring, Corporate Signaling,  
Partnerships, Legitimacy (perception)



**The Actual "Silicon Valley" Town Square**

Use cases: Publicity/Distribution, DMs,  
Keeping Up with Silicon Valley Gossip / Culture

lifehack: use grok (X's AI) instead of browsing

# Good X Accounts to Follow



**Michelle Fang**   
@michelleefang

Plugging you into 50+ SF tech events  
(Databricks Data+AI Summit & WWDC edition!)

A list of what's happening this week  
(June 9 - June 16)

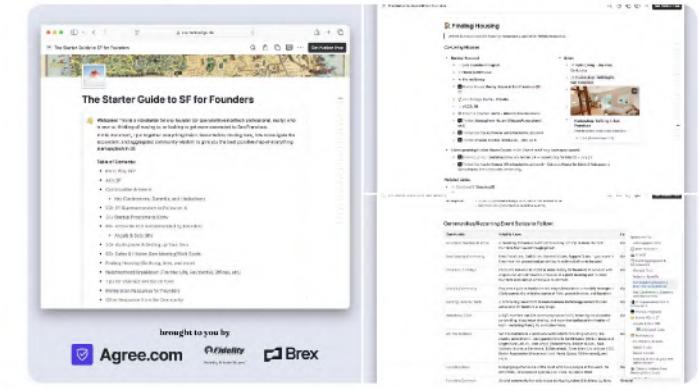


**Michelle Fang**   
@michelleefang

introducing the Starter Guide to SF — a free wiki for any founder new to or considering moving to SF.

everything i wish i knew & aggregated community wisdom accumulated over the past 3 years in san francisco (esp AI communities, events, and more)

[startertosf.guide](#)



**Business Insider**   
@BusinessInsider

The Gatsby of Silicon Alley: Meet the 27-year-old Google employee who's throwing tech's hottest parties [trib.al/qgm1V4W](http://trib.al/qgm1V4W)



**Andrew Yeung**   
@andruyeung

Hosted a thing last week at the Flyfish Club with @oceansventures + @stevenjr76

Switched up the vibe a little...

Grateful to everyone for coming out!

Thank you to our friends at @rhobusiness / @AgreeHQ / @PerkinsCoieLLP for supporting.



**Peter Walker**   
@PeterJ\_Walker

Everyone's favorite topic - can you raise VC in the summer?

Yes. Yes you can

Ignore everyone who says that email doesn't work during June/July/August

Most VCs are working (as judged by signed venture rounds)

Even the ones on Lake Como answer email for the right founders :)

## Can you raise VC in the summer?

The stereotype of VCs on yachts in July is overplayed

Data: 42,000+ primary rounds signed by US startups on Carta | 2018–2024

Month	2017	2018	2019	2020	2021	2022	2023	2024
Jan	7.0%	6.3%	6.9%	6.3%	5.0%	9.3%	6.6%	5.3%
Feb	5.9%	6.5%	5.9%	7.0%	5.9%	8.8%	7.1%	6.9%
Mar	8.3%	7.9%	7.6%	9.8%	8.6%	10.5%	8.4%	7.8%
Apr	7.2%	7.8%	8.9%	7.9%	8.6%	10.2%	8.6%	10.0%
May	9.1%	8.8%	9.2%	6.4%	8.8%	9.1%	10.1%	9.3%
Jun	9.2%	9.5%	8.9%	6.9%	9.3%	8.9%	9.4%	8.5%
Jul	8.3%	7.3%	8.7%	8.1%	9.0%	7.7%	8.1%	9.4%
Aug	8.6%	8.4%	8.6%	7.4%	8.4%	7.8%	8.6%	8.4%
Sep	8.2%	7.6%	8.5%	8.3%	8.1%	6.8%	7.1%	7.4%
Oct	7.6%	8.7%	8.3%	9.1%	7.9%	6.5%	7.8%	8.0%
Nov	9.0%	9.6%	7.6%	9.5%	8.6%	6.5%	7.9%	8.0%
Dec	11.6%	11.5%	11.0%	13.5%	11.7%	7.9%	10.2%	11.1%

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**carta** Subscribe for more startup data: [carta.com/data](http://carta.com/data)



# Lu.ma - SF Events



## Generative AI SF

Subscribe to get weekly updates



By Sahar Mor

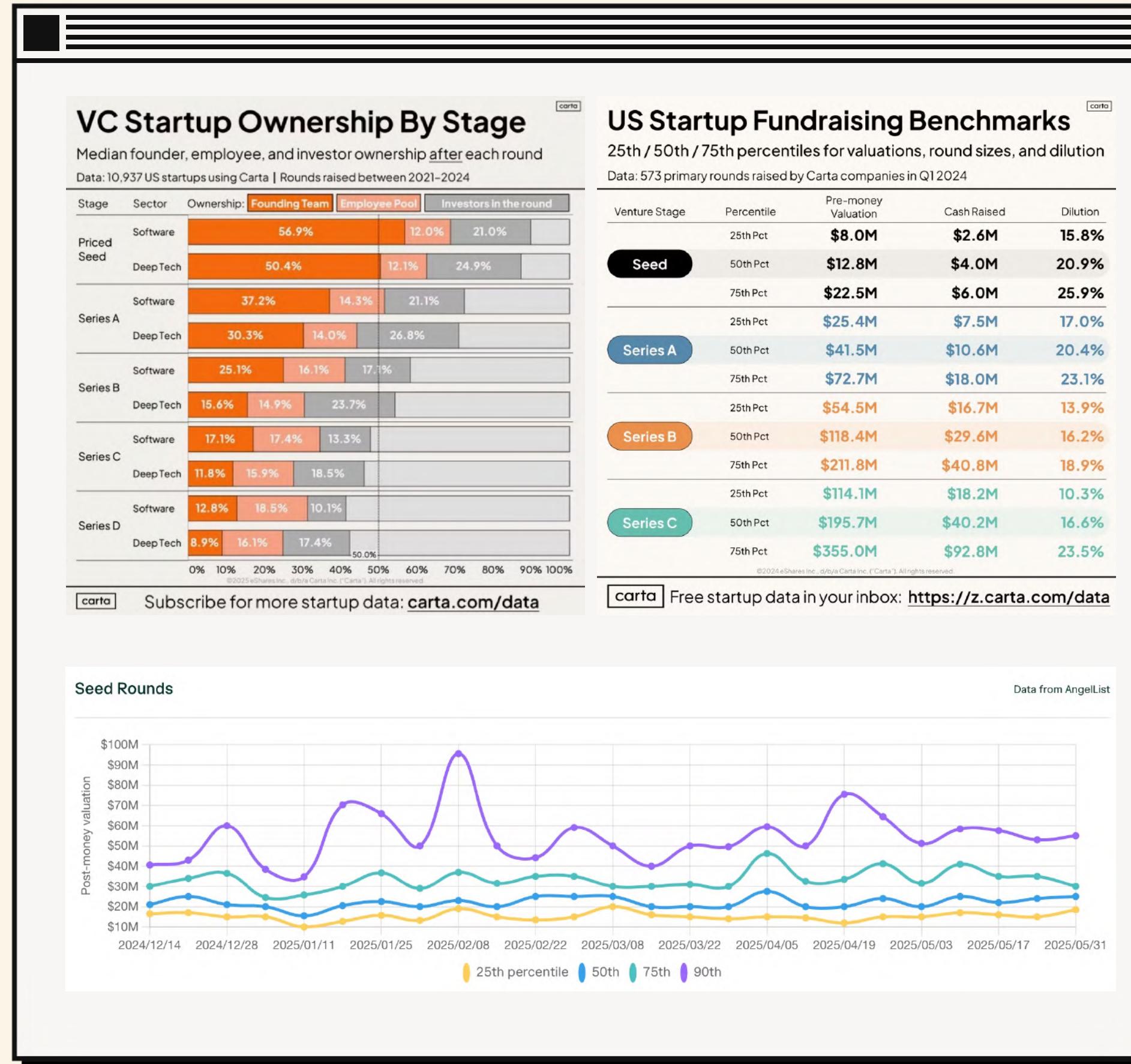
Subscribe

### Generative AI San Francisco and Bay Area

⌚ San Francisco — 7:03 PM PDT

[GenerativeAISF.com](#) - the biggest community of in-person AI events for AI devs, researchers, and founders (45k+) [Subscribe](#)  
for a weekly events email [Submit events here](#) or message on X/LinkedIn





# Great Data Sources

- Mary Meeker's AI Report
- CB Insights
- Crunchbase / TechCrunch
- Carta (Peter Walker)
- Pitchbook
- AngelList

X - this is the best but must filter

- use Grok as a shortcut

## How the "Smart Money" Views the Current State of the Markets

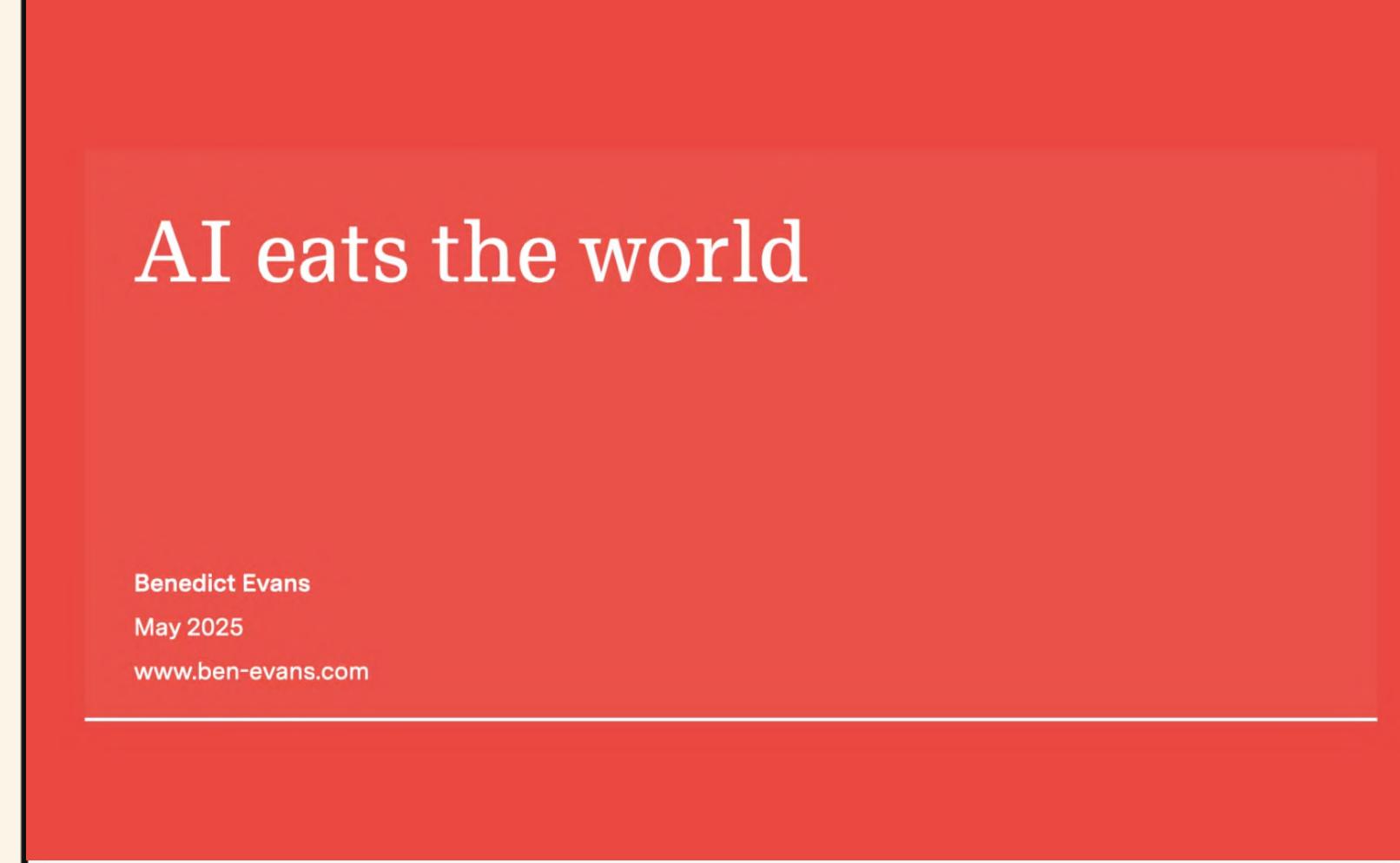


Company Update

# Coatue's 2025 EMW Keynote Deck

06.17.2025

[Coatue - NY Hedge Fund & SF Venture Fund](#)  
Public & Private Tech - State of the Markets



# AI eats the world

Benedict Evans  
May 2025  
[www.ben-evans.com](http://www.ben-evans.com)

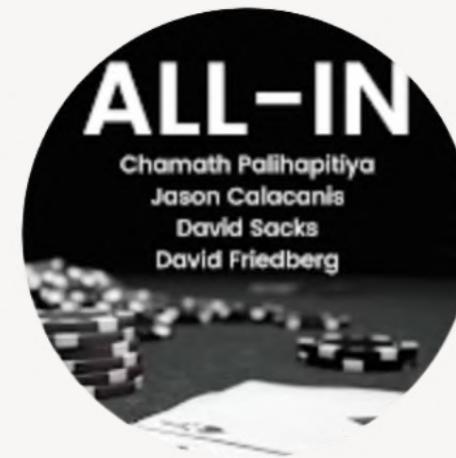
[Ben Evans - former a16z Partner](#)  
"AI Eats the World" 2025

# YouTube Channels & Podcasts



TBPN

Daily Livestream  
Tech News & Interviews



All In Podcast

Tech Wealthy Podcast  
News, Politics, Gossip



My First Million

Startup Ideas  
Entrepreneurship



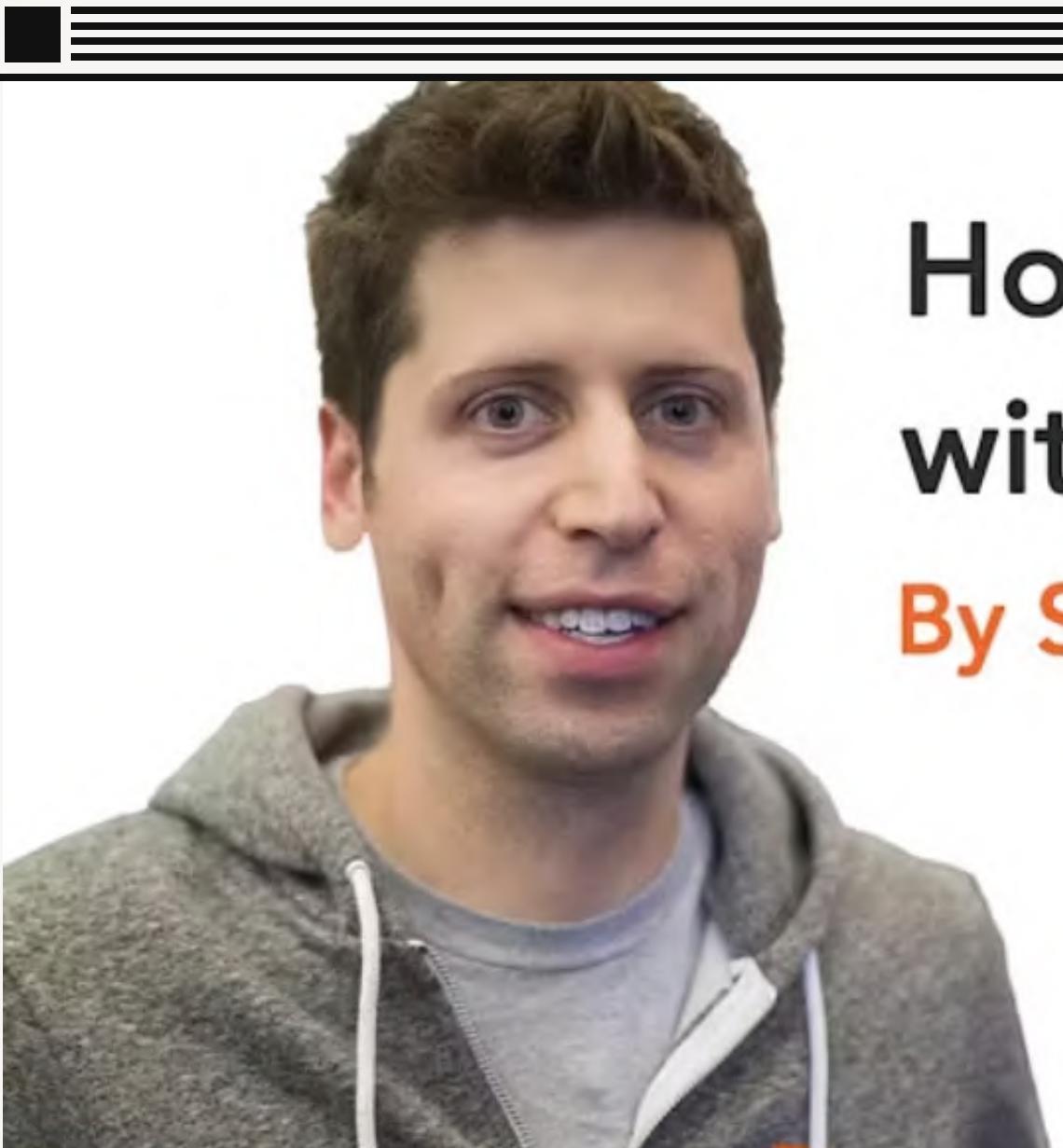
BG2

2 notable VCs chat  
Tech, Finance



Acquired

Big Tech Exits  
Tech News & Interviews



**How to Succeed  
with a Startup**

**By Sam Altman**

**Y STARTUP SCHOOL**

16

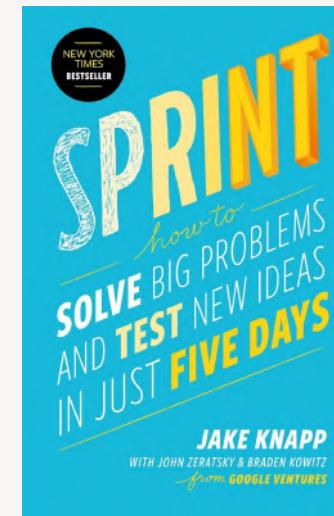
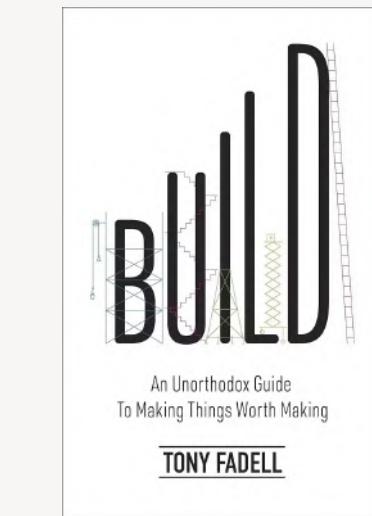
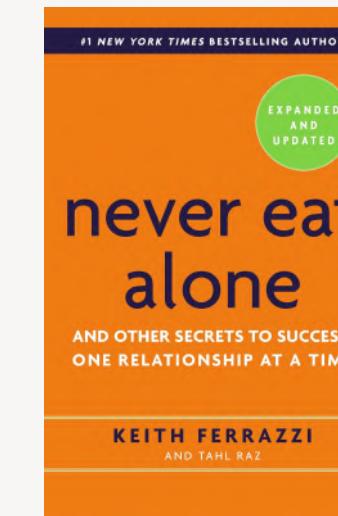
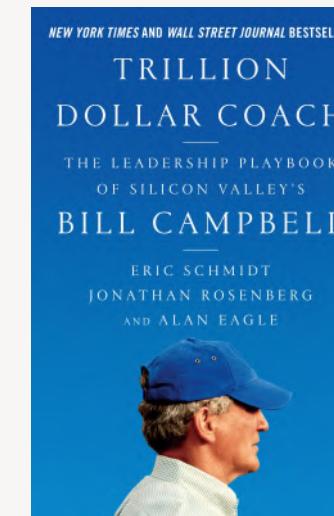
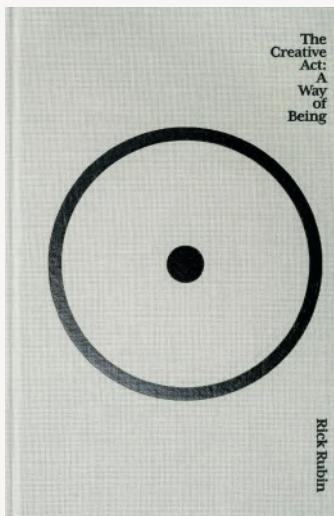
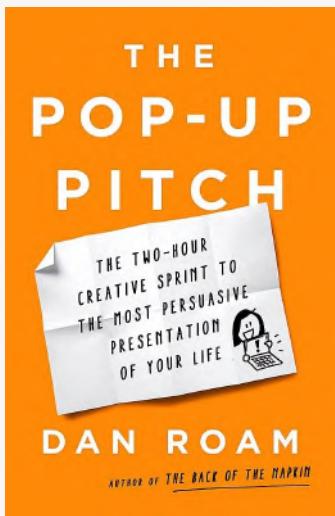
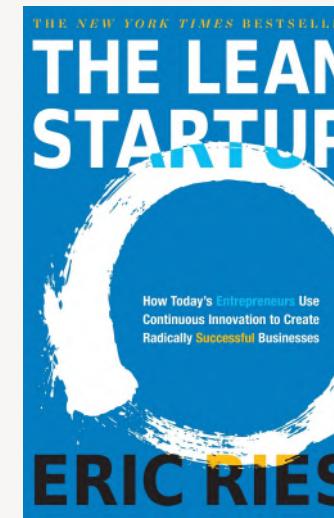
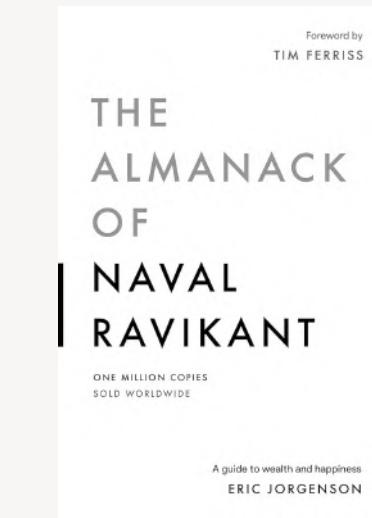
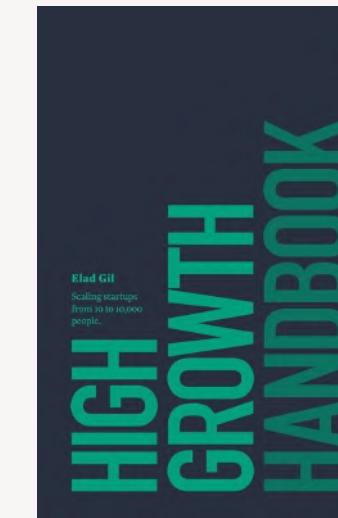
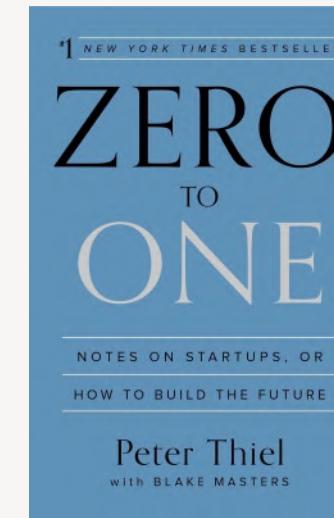
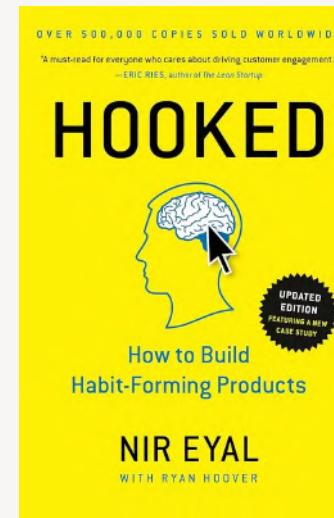
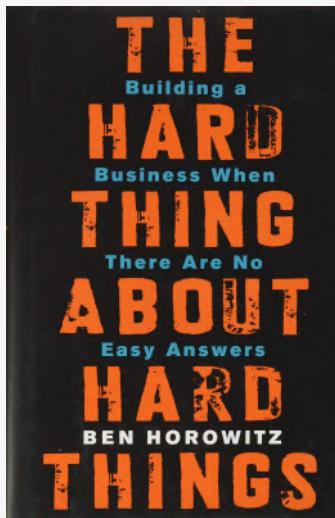
The slide features a portrait of Sam Altman on the left, smiling. To his right is the title 'How to Succeed with a Startup' in large black font, followed by 'By Sam Altman' in orange font. At the bottom right is a red bar with the letters 'Y' and 'STARTUP SCHOOL'. A small number '16' is in the bottom right corner of the red bar. The background is white with black decorative bars at the top and bottom.

Sam Altman

Former  
Y Combinator President

# "A book is a \$20 investment for the author's lifetime of learning"

- Naval Ravikant





# Silicon Valley Tenets

- You can just do things
- Hire slow, fire fast
- Ship fast, iterate faster – Move Fast & Break Things
- Founder's job is sales
  - sell your customers
  - sell your vision
  - sell your team
  - sell your investors
  - sell your partners
- First time founders care about product, second time founders care about distribution
- Build in public
- Do things that don't scale



# You Can Just Do Things - Ask for Discounts

Stripe Atlas - "Perks Partners"

Ramp - "Partner Rewards"

Brex - "Partner Perks"

Run Out?  
Always Ask for more.

# Roles to NEVER outsource as a CEO/Founder

## **VC Investor Outreach**

NEVER use bankers

## **VC Pitch Meetings**

CEO only for intro mtgs

## **Early Enterprise Sales**

biggest negative signal  
if founder isn't the  
1st salesperson

## **Hiring**

for small teams, 1 bad  
hire can ruin company  
culture



# Start with Average, Then Adjust

## **Know the Data**

By knowing and starting with the most vanilla and straight fairway investment deal terms for your stage, you can speed up the process. If you want to get an investment quickly, do the work of the investor for them - start with the deal that the target fund does all day every day and then adjust from there.

## **Be Prepared to Explain or Justify Any Deviation From the Average**

If and when you deviate from the average, be prepared to justify every point that is an outlier. If your valuation is higher or if your round size is bigger, it must be clear in your pitch as to why. These are the easy no's that VCs look for and good pitfalls for you to avoid.

“



Naval

@naval · [Follow](#)

X

Startups don't die when they run out of cash, they die when the founders run out of energy.

2:59 PM · Feb 6, 2013



480



Reply



[Copy link](#)

[Read 46 replies](#)

## Productivity Tools



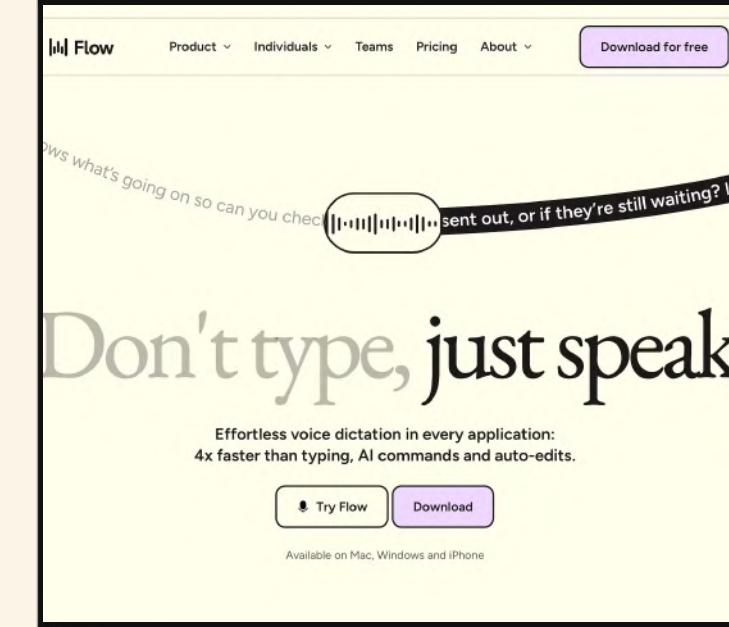
**Clean Shot X**  
Quick screen shot & annotation tool for Mac  
  
There are many other tools for this but this has been a longtime favorite



**Loom**  
Screen recording tool (app and/or chrome extension)  
Great for rapid screen capture for bugs, async comms, and more



**Aqua Notes**  
Waterproof notepad & pencil for ideas that come to you while in the shower



**Wisprflow**  
Dedicate one button on laptop to audio-to-text for rapid text entry  
  
Great for Cursor, emails, etc.



# Good Luck!

Stay in touch:

Bo Nam

[bo@bonam.com](mailto:bo@bonam.com)

646-884-3691