

Survive the AI Knife Fight: Building Products That Win — Brian Balfour, Reforge



AI Engineer
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If you've ever been blocked by vague specs, shifting goals, or chasing "vibes," things have only gotten messier in the age of AI. Everyone is obsessing over engineers doing PM work and PMs cranking out prototypes—but that skips the hardest question: What should we build, and why will it win? Today's competitive landscape is a knife-fight. When it's trivial to ship "something," true differentiation becomes brutally difficult.

At Reforge, we built AI agents that analyze user feedback at scale, perform real-time market analysis, model feature impact, and run continuous user research -- pushing us to rethink what "product work" actually looks like.

In this talk, we'll explore:

- How to find a seam within the red ocean of incumbents, well-funded upstarts, and the horde of startups.
- How to use real-time feedback analysis, competitive monitoring, synthetic users, AI-native research to understand impact before it ships.
- How to architect workflows where human intuition and machine intelligence ship product side by side.

About Brian Balfour

Brian Balfour, Founder/CEO of Reforge, previously VP Growth @ HubSpot. Prior to Reforge, he has started multiple VC backed companies, and grown user bases to millions of daily active users.

Survive The AI Knife Fight

Building Products That Win

In the past 45 days...

Notion launches Granola, Glean, and ChatGPT Competitors

Figma launches Canva, Framer, Illustrator, and Lovable Competitors

Atlassian launches Granola, Glean Competitors + Claude Integrations

Anthropic launches Glean competitor w/ Claude Integrations

Google launches Codex, Lovable, and many other competitors

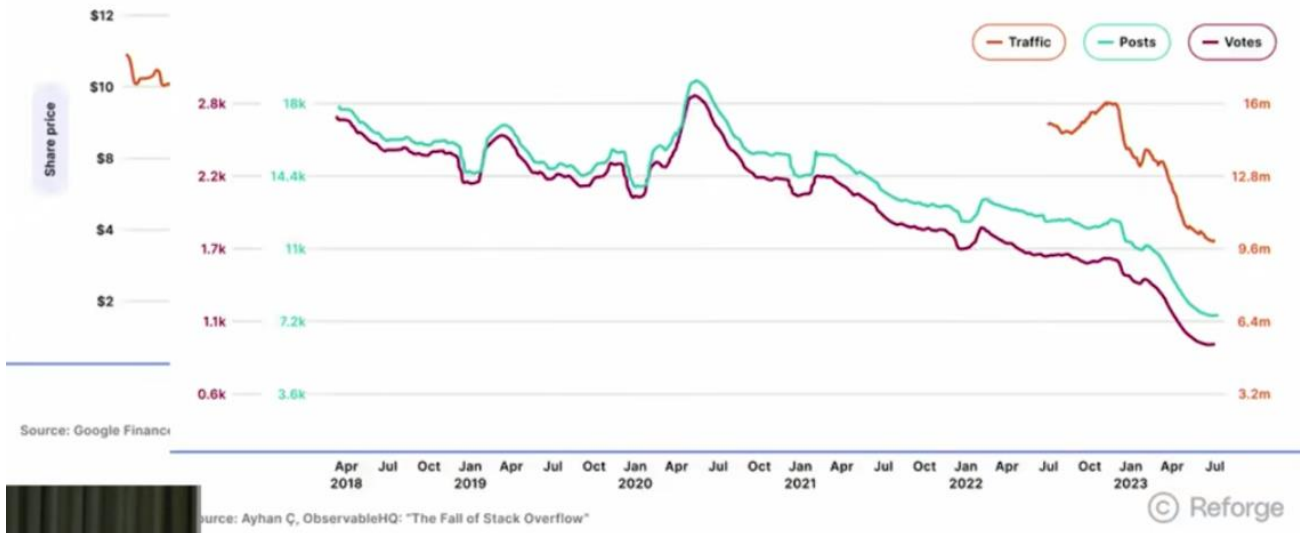
OpenAI launches Windsurf (Cursor competitor), Launches Codex, + more



90% Decline in 9 months **Chegg**



stackoverflow



The #1 Question

What do I build and why will it win?

You're constantly trying to get ahead.

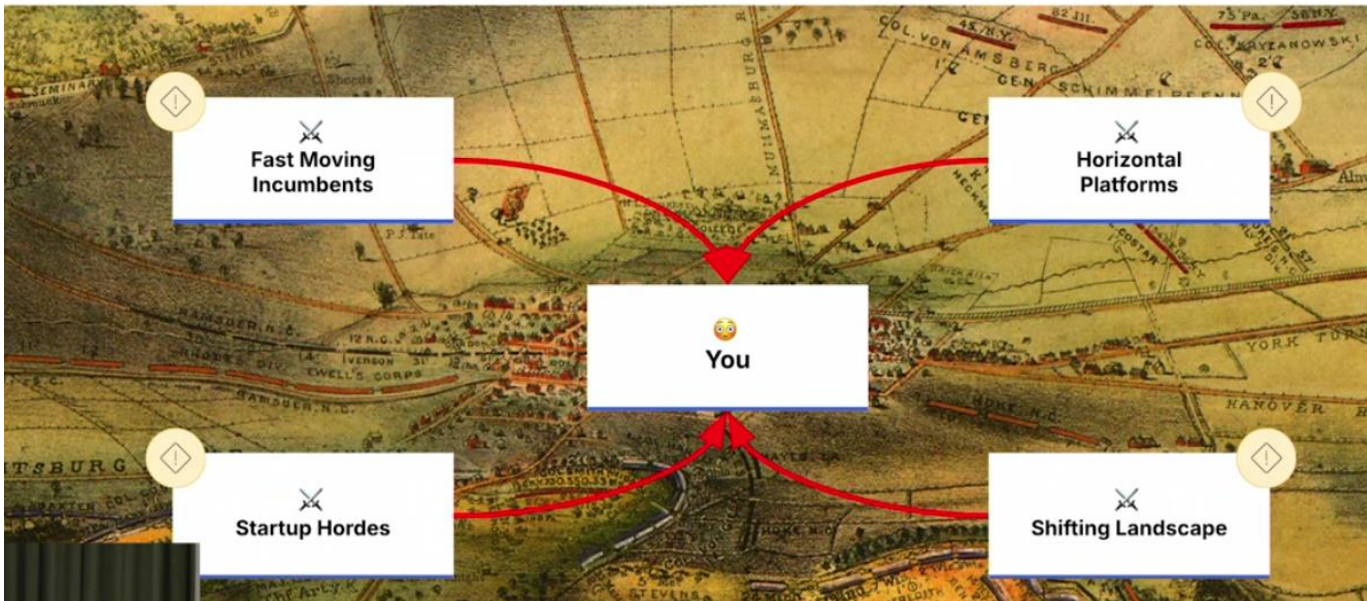
You're trying to find the angle, the question that has not yet been asked that gives you an insight that is not being actioned by other people. Remember, it doesn't just have to be an insight, has to be an insight that others are not actioning. Because if you find that insight and others are not actioning it, that's your competitive advantage.



Shaun Clowes

CPO at Confluent
Formerly CPO, Mulesoft at Salesforce

This question has gotten *harder...*



10 Years, Thousands of Product Teams, 100K+ Professionals



Meta Microsoft Adobe HubSpot Canva

The New York Times Dropbox ATlassian Google

Community of 400+ experts in tech...



Fareed Mosavat
Ex-Head of Product



Bangaly Kaba
Ex-Head of Growth



Casey Winters
Ex-CPO



Elena Verna
Head of Growth/Data



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Ex-CPO



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Dan Hockenmaier
CSO



Britt Jamison
Head of Product



Darius Contractor
CGO



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AI Foundations

Every PM role is becoming an AI role, whether you're ready or not. Our BUILD framework gives you the deep product-focused AI fundamentals to build the next 10 years of your career.



Mastering AI

Traditional product development cycles are rapidly changing. Develop new AI-driven approaches to building product. Learn to rapidly prototype, measure non-deterministic features, and build products that learn and evolve.

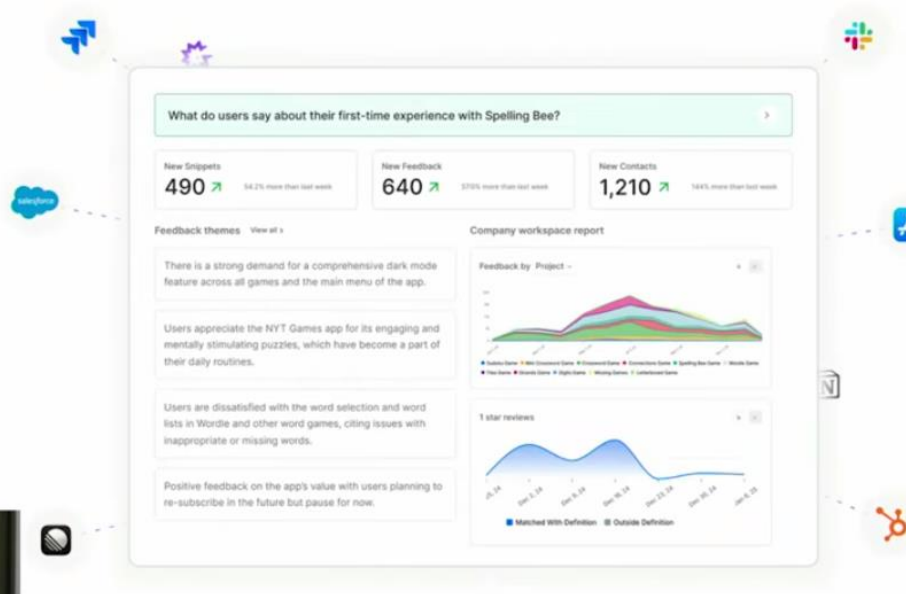


AI Strategy

Today's AI landscape isn't just evolving - *it's becoming strategically brutal*. Market dynamics that took years to shift now transform in months. Learn to fundamentally rethink how you compete and win in the most intense strategic environment product leaders have ever faced

INSIGHT ANALYTICS

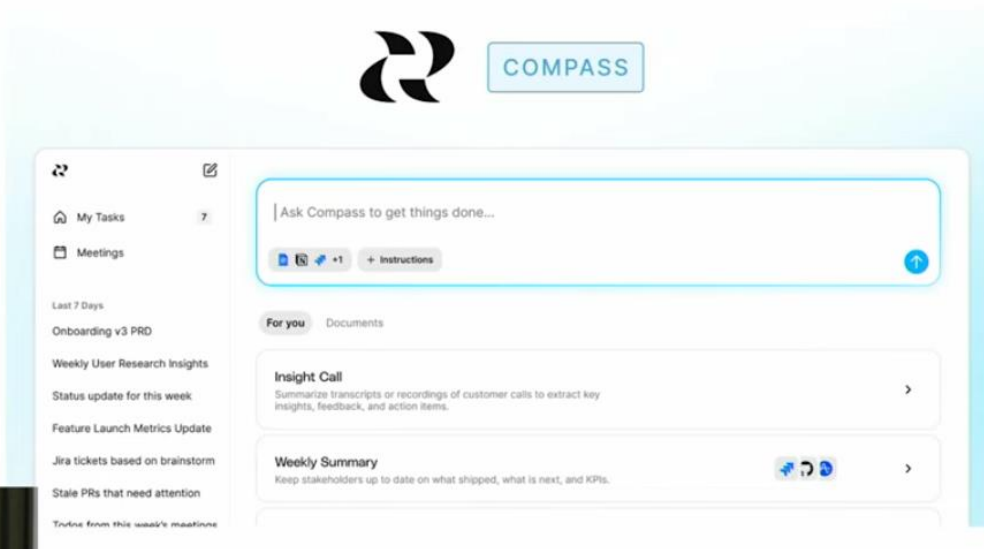
Your AI Product Researcher



COMPASS

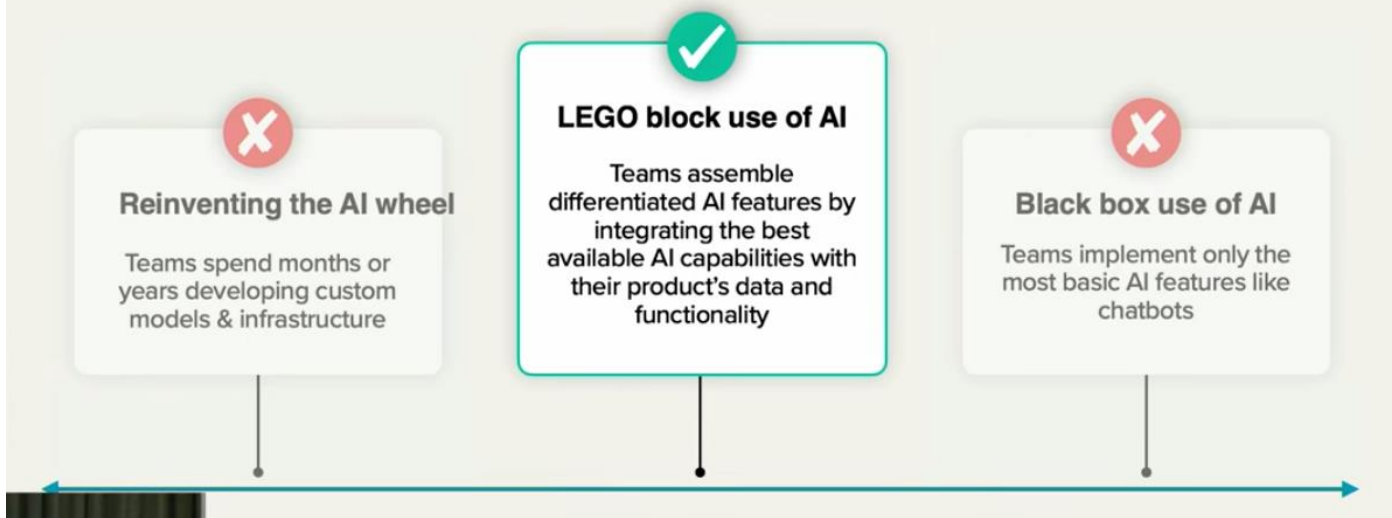
beta

Your AI Project Manager



How do you win in the most
intense environment in the history
of tech?

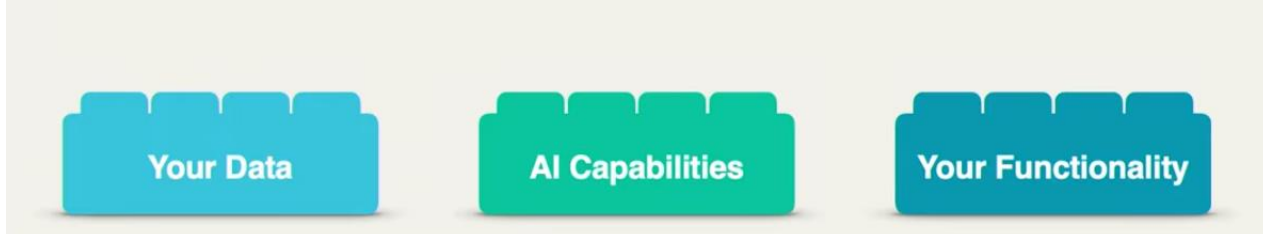
Winning = a modular approach



Your competitive advantage will come from what's uniquely yours:

1. Your data
2. Your functionality
3. Your understanding of unmet customer needs

Anatomy of a Winning AI Product



Anatomy of a Winning AI Product

Your Data

AI Capabilities

- ✓ Pre-trained AI models
- ✓ Performs tasks difficult to code traditionally
- ✓ An expanding set of building blocks

Your Functionality

Your Data

AI Capabilities

Text & Language Processing

Image & Video Processing

Audio Processing

Retrieval, Search, & Knowledge

Trust & Security

Complex Reasoning

and more...

Your Functionality

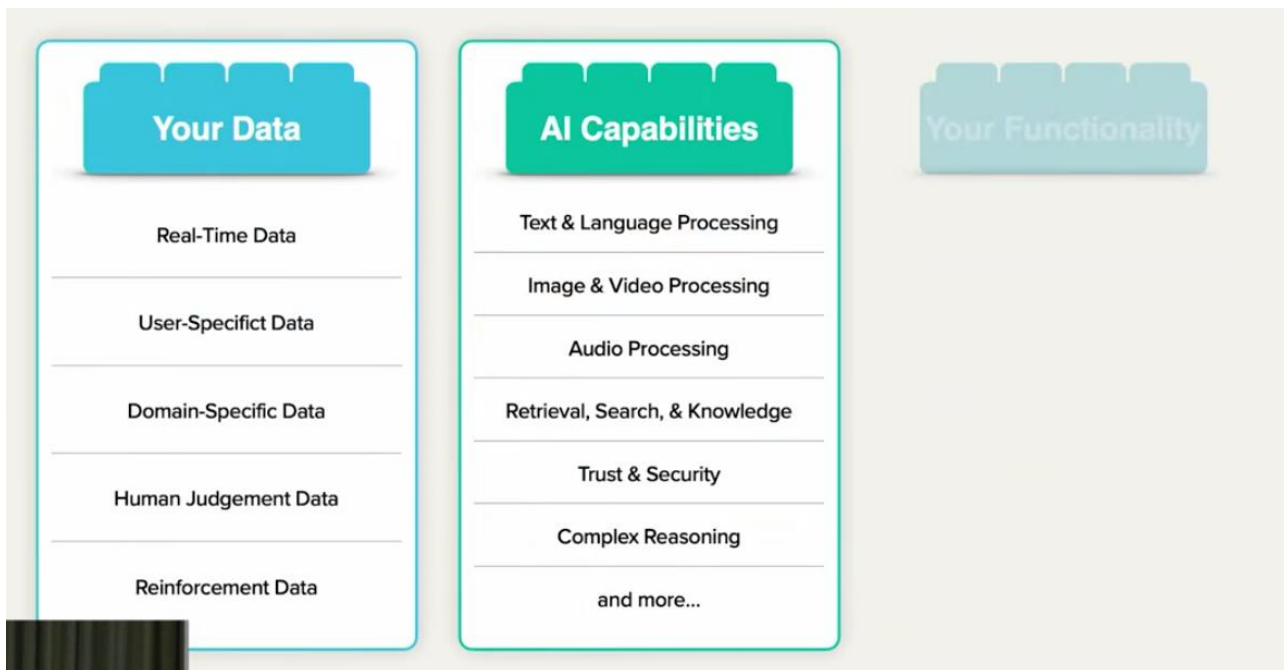
Anatomy of a Winning AI Product

Your Data

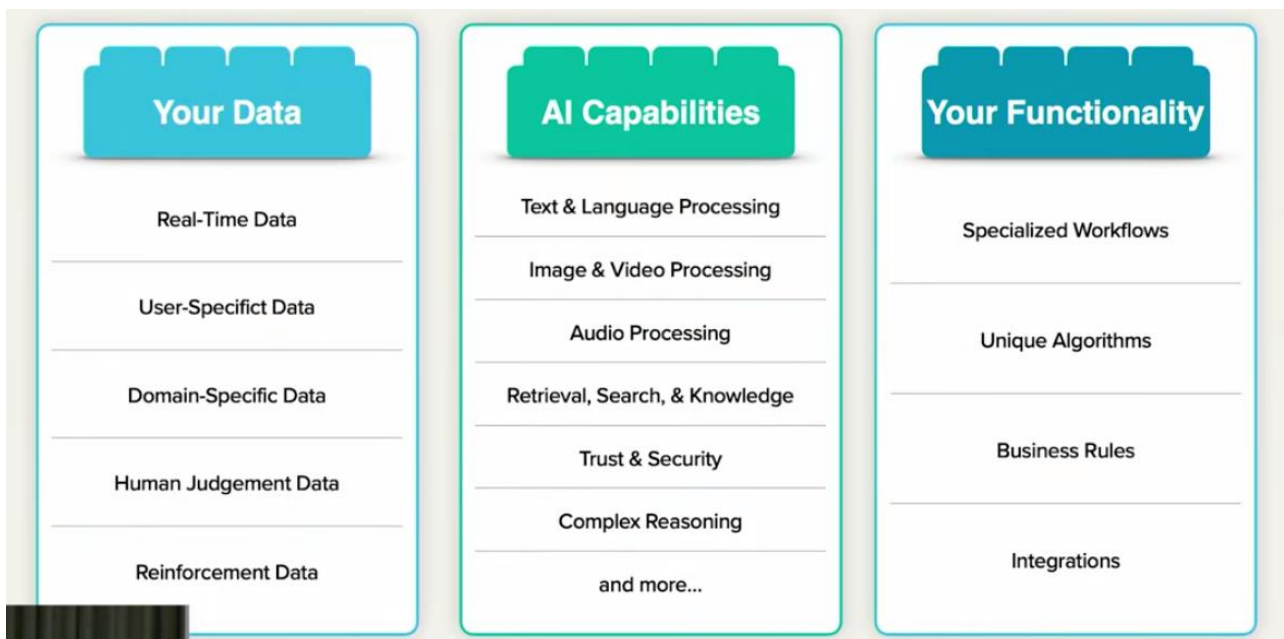
- ✓ Provides context to AI models
- ✓ Customizes off-the-shelf AI capabilities for your product

AI Capabilities

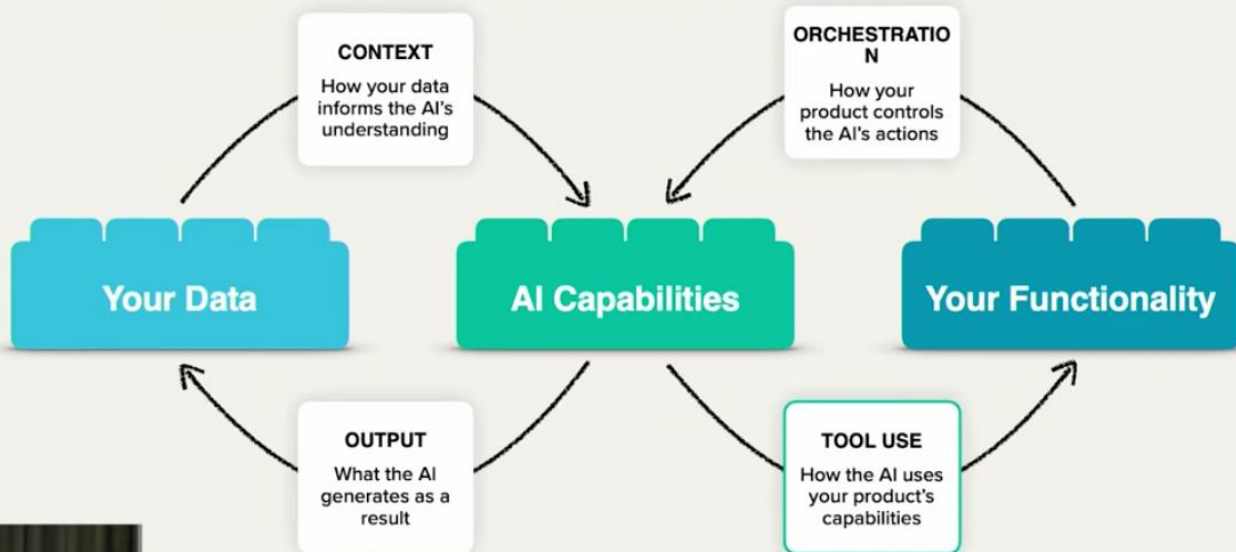
Your Functionality



Anatomy of a Winning AI Product

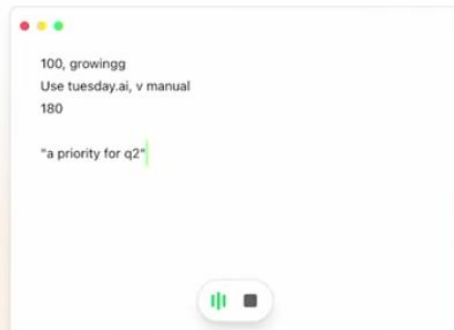


Anatomy of a Winning AI Product

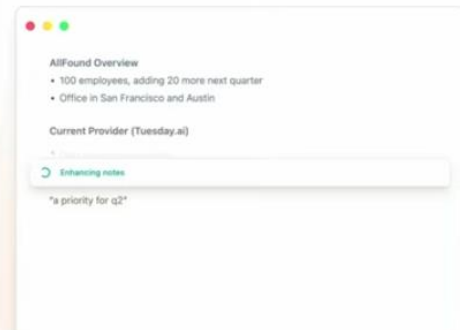


granola

Granola is like Apple Notes, but it also
transcribes your meeting



When the meeting ends, Granola
enhances the notes you've written



Your competitive advantage will come from what's uniquely yours:

1. Your data
2. Your functionality
3. Your understanding of unmet customer needs

Granola makes your notes awesome



granola

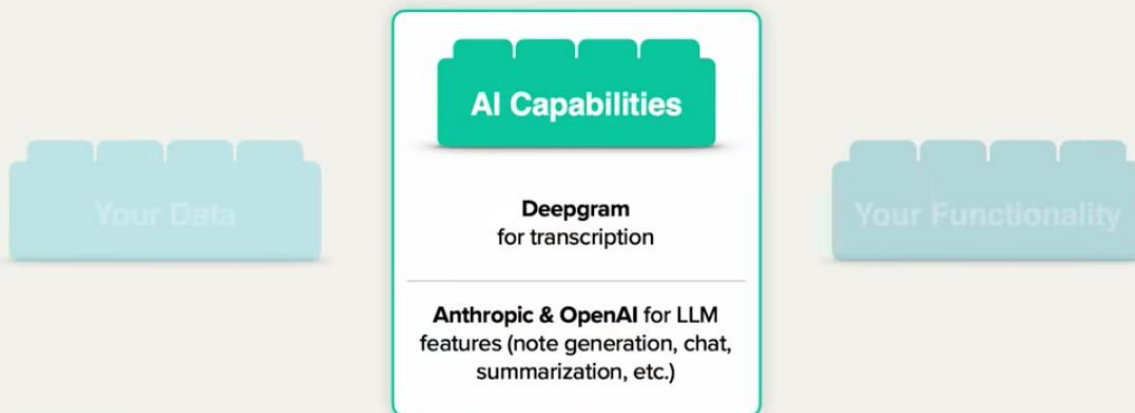
I want **someone else**
to take my notes

I want to take
better notes

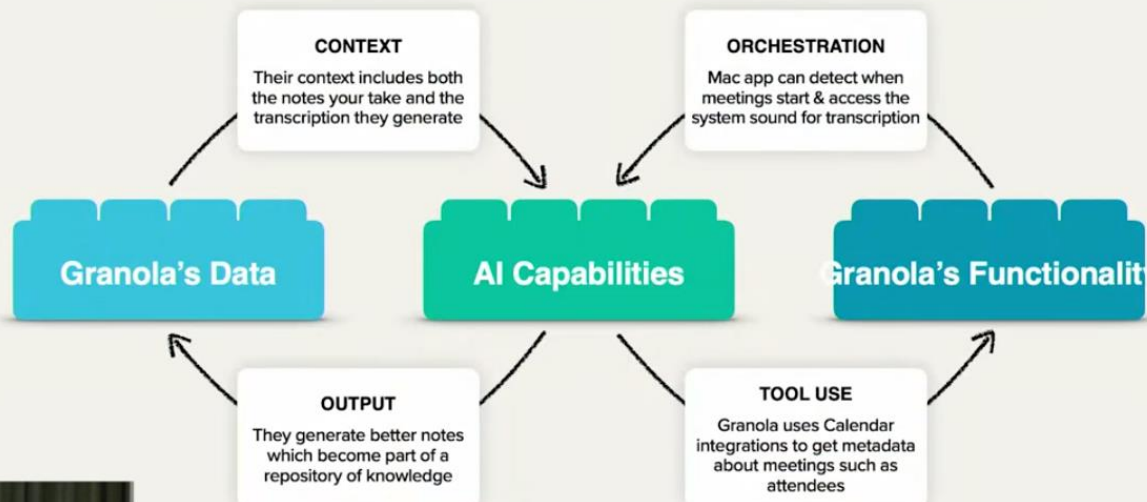
AUTONOMY

AMPLIFICATION

Granola uses off-the-shelf AI capabilities...



...assembled into a winning formula





**You can't stop there.
You need to sequence.**



“The real moat is just a sequence of smaller moats stacked together. Each one buys time. What you do with that time, how fast you execute, how quickly you evolve, determines whether you stay ahead. If the moat time used to be 6 - 12 months, ***today it's 2-3 weeks.***”

Jamin Ball

Partner, Altimeter Capital

To win with AI, ask four critical questions:

1. What **unmet customer problems** need to be solved?
2. What AI capabilities can solve those problems in **novel ways**?
3. What **proprietary data** can power those solutions?
4. What **superpowers** can our product give to AI?



Thank you!
(and good luck)