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it feels clear to me that...

1. the future of AI will NOT live in a Chat app

2. the winning interface to AI will be more familiar to us than different

3. examining computer history makes #1 & #2 feel obvious in retrospect

an experiment in "showing our work" aloud:

people like to compare AI to previous evolutionary step changes in computing:

business computers ➡️ personal computers

personal computers ➡️ mobile computers

mobile computers ➡️ AI computers

and when you look at those previous shifts a clear pattern emerges...

all of these evolutionary step changes in computing were precipitated by a catalyzing INTERFACE innovation

specifically, taking an EXISTING type of tool + layering the catalyzing interface innovation on top of it

it was never a new category – it was a familiar, existing tool

for example, let's look at the jump to Personal Computers (PC)

the Commodore 64 (and others) already existed! look how familiar it looks too.

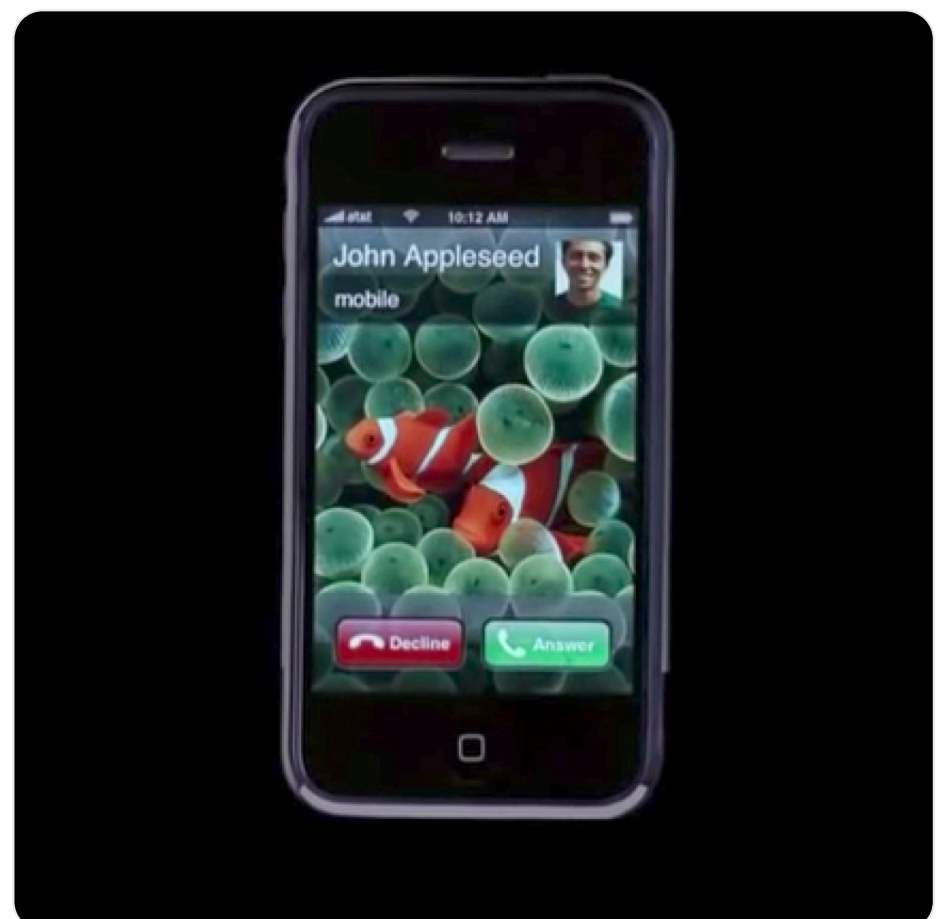and then the Apple Macintosh layered in the Mouse and GUI – and voila!

the o.g. Mac Ads even focused on that one key difference

ditto with the jump to "smartphones" precipitated by the iPhone.

they already existed! cellphones themselves. but also PDAs, Blackberrys, etc. Apps and all!

the iPhone just layered Multi-Touch Gestures and a larger, more performant touch screen

so the formula, according to history:

1. take an existing, popular type of tool

2. layer catalyzing interface innovation on top

3. unlock unique value at that intersection

#1 is key – people are busy, they don't have time to learn how a net-new thing fits into their life

it's much more romantic to pretend like the Macintosh and iPhone (or even iPod and Web 2.0) came out of NOWHERE.

but they were existing tools in our life, simply made a step change better thanks to a breakthrough interface on top of the well worn and familiar.

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and for AI?

the catalyzing interface innovation of AI is....

1. Computers can now read and see

2. Computers can now mimic humans

now the question is which existing tool do you layer those breakthroughs on top of to unlock the most original value?

it feels obvious that the answer is either a PC operating system, Mobile operating system, or cross-platform web browser.

these tools have the TAM, access to data (personal & professional), and access to authenticated applications that is truly needed for this AI play-doh

but it feels more unlikely that the winning tool will innovate on top of a messaging chat app:

1. it's not a tool you've historically used to interface with computer systems (vs. people)

2. it's not a tool you've historically used for dynamic information manipulation

but...

this new play-doh of AI DOES benefit most from natural langauge and linear thought, which means those two things should make their way from AI chat apps to the AI computer interface of the future

but i do think the primary interface to the AI computers of the future will look more like an existing too in our lives than not.

the novelty instead will come at high-leverage points that "meet us where we are" today in the tools we're already familiar with

but we'll see!

i'm a big believer that nobody knows what they're talking about (incl me). our #1 company value is "assume you don't know."

so sharing these thoughts to spark an open convo and bc, quite frankly, it's fun and thrilling to be in this moment of change as an industry.

wdyt?

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