

Introducing TheoryOS

Say you had an idea for starting a new business. It could be anything.

Maybe it's a food truck built around protein bowls. Perhaps it's a clothing brand. Or an AI app that helps businesses with their logistics. Anything.

Here's the problem. Most businesses fail.

Now—you obviously hope you are the exception. You want yours to be the next billion-dollar business. Even if you're just opening a neighbourhood bakery, you want it to be a success.

So, where do you start?

Many will tell you the answer is simple: Don't waste time thinking or planning. Dive straight into building your business. Develop a minimum viable product. Get early feedback, iterate, and pivot. Then let market reactions guide what to do next. Ok, that sounds about right. Surely doing beats thinking.

But how can you be confident that you're heading in the right direction?

Standard startup advice doesn't answer that question. It just tells you to keep going where the market takes you.

So, what if you started somewhere else entirely? Not with a prototype, not with market data, not with a customer survey.

What if you started with a theory?

Now, I know what you're thinking - a theory?!

This is precisely what great founders do. They develop a theory about how to create value. A theory is a path to creating something that doesn't yet exist—something that could be possible in the future, because you saw an opportunity for value creation that no one else could see.

Great startups don't just ask, "what do customers want today?" They ask, "what might customers want tomorrow?" "What is everyone else missing?"

If you have an idea that's already obvious to everyone, then you are unlikely to create real value. You'll just be another bakery or AI company that went out of business. So, ask the question: "what do you believe that almost no one else believes?"

That's what Airbnb did. While most of us believed the universal rule "never open the door to strangers", Airbnb believed that there was a huge amount of unused "hotel capacity" sitting inside ordinary homes. Empty bedrooms. Vacant apartments. Guest rooms. Couches. Spaces people already have and own—but aren't using. Airbnb believed those spaces could be unlocked and turned into a marketplace.

Okay, having a crazy belief is one thing. But it's not enough. The next question is, "what problems do we need to solve for this belief to become a reality?"

The founders of Airbnb didn't just see the obvious problem: that there was a shortage of hotel rooms in periods of peak demand. They saw a set of less obvious problems that needed to be solved before the enormous value of empty bedrooms and vacant apartments could be unlocked. What would it take to get strangers to trust each other enough to open their homes to one another? How do we facilitate secure payment online? How can we ensure property listings look professional?

Those problems, clearly framed, helped Airbnb to see the next steps clearly. They didn't just need a website—they needed profiles, reviews, identity verification, secure payments, and ratings.

Ok so that's what a theory does: it changes everything. It describes the world not as it is, but as it could be. And then it tells you what you should actually do to make that world a reality.

But a theory doesn't just guide you as the founder—it's also the key to persuading others to fund your business. Ok so when you walk into a pitch meeting with a clear theory, you're not asking investors to take a leap of faith in your idea. You're laying out a path to value they couldn't see before you started talking. That's like a different conversation entirely.

Without a theory, Airbnb—or any truly novel business idea—looks fanciful, infeasible, or just plain ridiculous. With a theory, it becomes possible, actionable, and fundable.

This is what TheoryOS is for. We'll help you develop and test your own, unique theory so you can find the problem no one else has named, build the path no one else has seen, and create the value no one else believed was there.

Now—this isn't easy. If it was, everyone would have done it. But you're already ahead of most—because most people never stop to think this carefully about what they're building and why. TheoryOS will help you go the rest of the way.

Let's begin!