Probably the biggest Series A in construction software, you said. And you kept it lowkey.

Your words, in May. We went through 15 recordings since April 2025:
53 stories, **27** told only once.

Two things you've said, a year apart

You held back on purpose in 2025. Your Series A went out quietly too.

“We could have pushed PR and like advertisements or something a lot earlier than we did.”

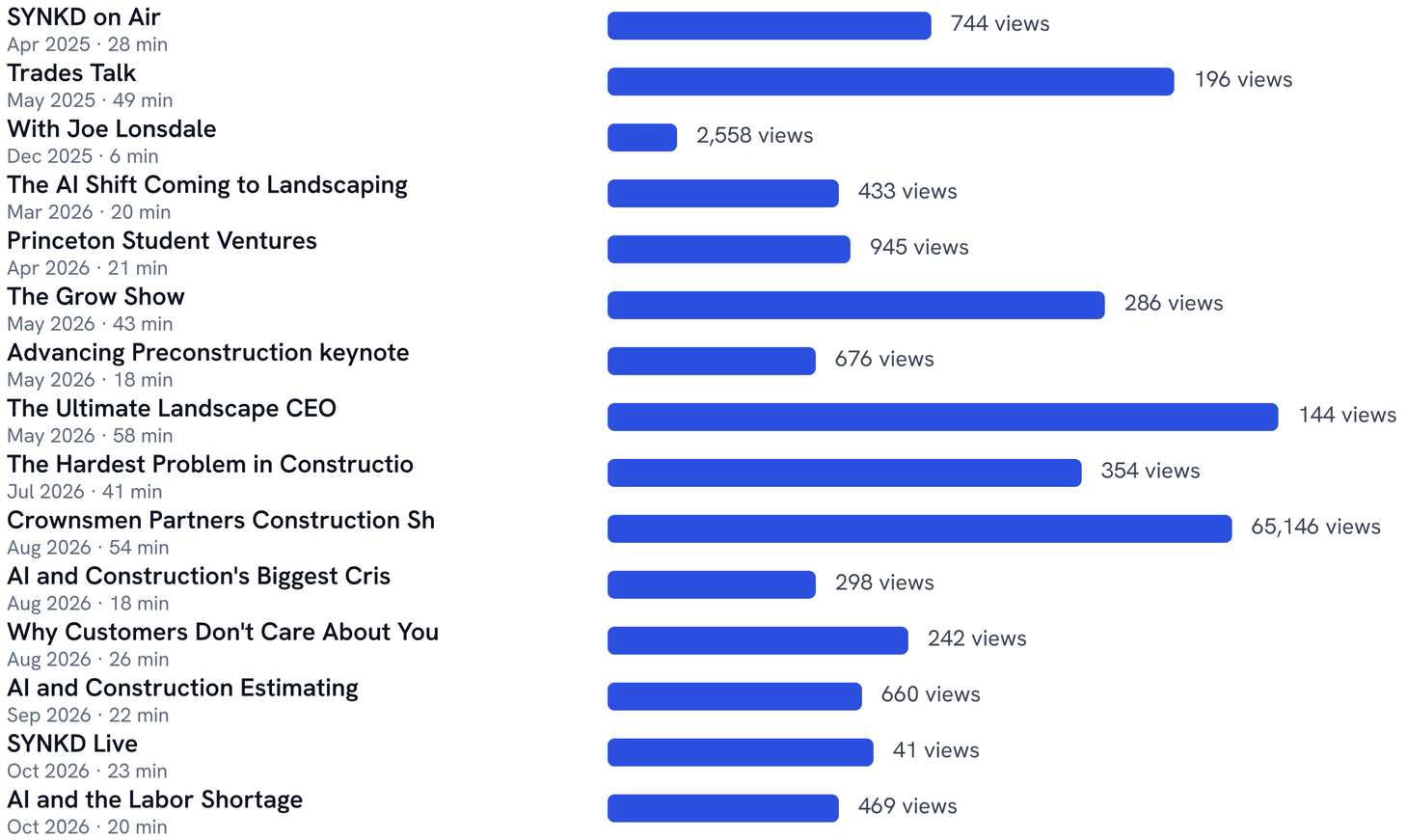
You, on SYNKD on Air, Apr 2025, at 11:45. April 2025: you waited until the product felt magical to customers.

“Looking back we probably should have done more publicity and marketing about that. I guess we were kind of lowkey about it.”

You, on The Ultimate Landscape CEO, May 2026, at 19:16. May 2026, about the $35M Series A. You said much the same at your keynote that month.

Fifteen recordings of you since April 2025

15 recordings. 73,192 views.



7.5 hours

of you on tape. Almost half of it is on Bobyard's own channel.

65,146

views on one of them, the Crownsmen interview. The other fourteen average about 575.

27 of 53

stories you've told in only one of the fifteen.

Stories hiding in your own talks

Ten lines that each open a bigger story.

“Software is no longer a moat.”
Princeton Student Ventures, Apr 2026, at 13:04

“Every few weeks there's like decision debt.”
The Ultimate Landscape CEO, May 2026, at 42:11

“We have one designer for every two engineers.”
Why Customers Don't Care About Your AI Models, Aug 2026, at 20:45

“They don't have nights and weekends because they're just bidding nonstop.”
With Joe Lonsdale, Dec 2025, at 5:20

“We always get two complaints.”
The Ultimate Landscape CEO, May 2026, at 30:40

“Our sales reps have calendars full, and we literally can't book any more demos.”
AI and the Labor Shortage, Oct 2026, at 11:00

“It's like there's no shot. No one solved it before.”
The Ultimate Landscape CEO, May 2026, at 16:05

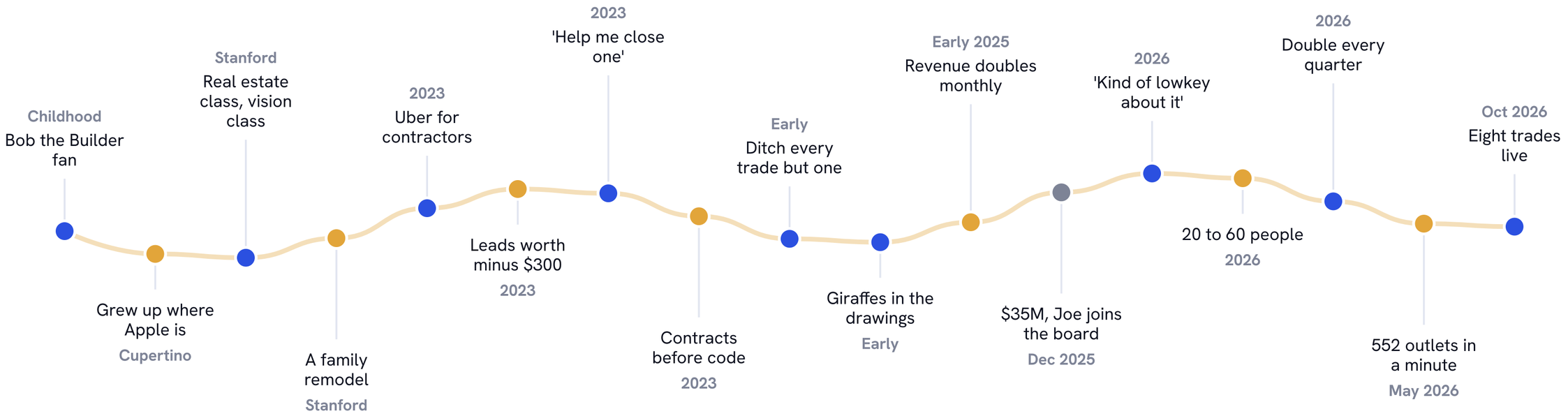
“We try to only take problems where there are no shortcuts for.”
The Grow Show, May 2026, at 20:35

“Landscaping is the only trade, the only discipline in construction where if your logistics are not good enough, your operations team is not good enough, your assets die on site.”
The Hardest Problem in Construction Software, Jul 2026, at 35:06

“It's like we can't actually afford to automate away people.”
AI and Construction Estimating, Sep 2026, at 4:31

Your route so far.

told once, in one room · told on more than one show · a fact, not a story yet



Before Bobyard: a kid who named a company after a cartoon.

Childhood

Bob the Builder

He watched it, went as Bob for Halloween (the photo opens two of his talks) and named the company after him.

Cupertino

Where Apple is

He grew up in Cupertino and loved building: Lego, then software, then games and apps in college.

Stanford

Two classes, one bike

He biked between a real estate class and a computer vision class until he connected the dots. The real estate professor later invested.

Stanford

A painful remodel

His family remodeled a house once. 'It was like really painful.' Most people know someone with that story.

2023

Uber for contractors

He dropped out to level bids and match contractors with homeowners. Good contractors already had too much work.

2023

Minus $300 a lead

In Palo Alto a lead was worth minus $200 to $300. You had to pay contractors to look at it.

“I was one of those little kids that watched Bob the Builder when I was a little kid and it's why it's named [Bobyard].”

The Grow Show, May 2026, at 3:27. He has told it on at least four shows.

Inflection points

Then ten turns made Bobyard.

2023

'Help me close one'

Contractors stopped taking his leads and asked him to help them win a bid instead.

2023

Contracts before more code

Contractors signed a paper: build this and we'll buy it. That raised the seed.

Early

One trade only

Happy customers in every trade. He kept the landscapers and dropped the rest.

Early

Giraffes

Every landscape plan has symbols no model has seen. They had to solve that first.

Design partners

No hype until it's magic

He held back PR and ads until customers called the product magic.

Onboarding

Hide the AI

New customers get plain takeoff software first. The AI buttons come later, one surprise at a time.

Hiring

A bar nobody should pass

Interviews so hard he doubts anyone can pass. Every hire must beat the team average.

Pay

Bonuses for what sells

Engineers get paid on the spot when their work raises the price or opens a market.

Dec 2025

$35M

What he calls the biggest Series A in construction software. Joe Lonsdale joins the board.

2026

Double every quarter

Said at every all-hands. Twenty people became sixty in four months.

3 of these ten you've told once, in one room. The rest are spread across shows that mostly have under 1,000 views.

Told on 2 shows

“I guess we were kind of lowkey about it.”

In December 2025 Bobyard raised $35M led by 8VC, and Joe Lonsdale joined the board. Michael's own research says it is probably the biggest Series A ever raised in construction software. In May 2026 he said twice, on a stage and on a podcast, that they should have made more noise. He also calls it 'a pretty crazy round' with a 'very interesting negotiating cycle' and has never told that story.

How it could open

We raised what may be the biggest Series A in construction software, and we were kind of lowkey about it.

You, on The Ultimate Landscape CEO, May 2026, at 19:19

$35M
Series A, led by 8VC

20 to 60
people in four months

2x
revenue every quarter, he says

1 line
is all he has said on tape about the negotiation

Told on 2 shows

“Stop giving me more leads or stop trying to compare these bids like how about you try to close one of these for instead.”

He left Stanford with an 'Uber for contractors' idea: level bids and match contractors with homeowners. In Palo Alto the good contractors already had more work than they could take, so a lead was worth minus $200 to $300. Then the contractors stopped taking his leads and asked for something else: help us win one. That became Bobyard.

> How it could open
>
> **My first startup idea was worth minus $300 a lead.**

You, on Trades Talk, May 2025, at 2:42

-$300
what a lead was worth to a good contractor

1
question that changed the company

2023
Bobyard starts

65-80%
of takeoff time saved, he says

Told on 4 shows

“We decided like to basically ditch everybody and focus on just landscapers.”

Early on Bobyard had design partners in electrical, mechanical, plumbing and landscaping, and they all liked the product. He dropped everyone but the landscapers: the biggest takeoffs (everything outside the building), the least standard symbols, and plants that die if you order wrong. By October 2026 the same models were live in eight trades.

How it could open

We dropped customers who liked our product.

You, on SYNKD Live, Oct 2026, at 3:13

100,000s
of plants on one project

Weeks
of counting by hand

4+
trades of design partners, cut to one

8
trades live by October 2026

Told on 2 shows

“We define ownership as how easy a night does everybody else sleep knowing you're in charge of the things you're in charge of.”

Every page of the product has one owner and no backup. Engineers get a bonus on the spot when what they ship raises the price or opens a market. Interviews are written so hard he doubts anyone can pass, and every hire has to beat the team's average. 'We don't care about Y-intercept, we care about slope.'

> How it could open
>
> **At Bobyard, ownership is measured in other people's sleep.**

You, on The Grow Show, May 2026, at 34:21

1
owner for each page of the product

Every hire
better than the team average

On the spot
bonuses for what sells

PhDs
who choose landscaping over AI labs

War stories

The ones you tell in passing.

2023

Minus $300 a lead

His first idea needed him to pay contractors to look at his leads.

Early

Stupid hard

'How has no one done this?' Then they built it and understood why.

Demos

The hardest drawing they had

Prospects send their worst plans. Two hours of counting a page, done live in about 20 seconds.

Always

Two complaints

'It doesn't automate enough.' 'Will it take my job?' Sometimes from the same company.

Busy season

That bid took a week

A few weeks later Bobyard calls back: that project could have taken a day or two.

Every few weeks

Decision debt

He puts off the hard calls, the company stalls, and he tells himself: Michael, make the call.

Hiring

The PhDs

Princeton and Stanford PhDs with offers from every lab. Landscaping wasn't on their list. They join anyway.

Series A

Jack of all trades?

Investors asked if taking on every trade would make Bobyard master of none. His answer: don't settle, do both.

“It turns out to be a stupid hard problem to actually train models to [read construction drawings].”

The Ultimate Landscape CEO, May 2026, at 16:41.

Fights you already pick on tape.

Weekend products

“If you can build the product in a weekend then probably so can someone else.”
Trades Talk, May 2025, at 34:46

Splitting the difference

“The answer is not the average of the two numbers.”
The Ultimate Landscape CEO, May 2026, at 44:06

Bid capacity

“The ability to bid on a project has nothing to do with your company and the quality of your work.”
The Ultimate Landscape CEO, May 2026, at 27:18

Hype both ways

“Both narratives cannot be true at the same time.”
Princeton Student Ventures, Apr 2026, at 12:28

20-year-old tools

“They're stuck using a tool that's like 20 years old.”
SYNKD Live, Oct 2026, at 21:14

Selling

“We never we try never to sell the product.”
SYNKD on Air, Apr 2025, at 26:46

Software is no longer a moat. You said it.

> “The only real observation you can make is that like software is no longer a moat.”

You, on Princeton Student Ventures, Apr 2026, at 13:04

> “If you can build the product in a weekend then probably so can someone else.”

You, on Trades Talk, May 2025, at 34:46

Ten companies sell AI takeoffs now, most promising 50 to 80% faster. Nobody can copy the Bob the Builder costume, the customers you dropped, or the round you kept lowkey. Today they're spread across fifteen recordings. One reached 65,000 views; the other fourteen average under 600.

The next ten we'd tell.

1 **“We raised what may be the biggest Series A in construction software, and we were kind of lowkey about it.”**
You, on The Ultimate Landscape CEO, May 2026, at 19:11

2 **“Our Series A had a very interesting negotiating cycle.”**
You, on The Ultimate Landscape CEO, May 2026, at 56:54

3 **“Bobyard is named after a cartoon I watched as a kid.”**
You, on The Grow Show, May 2026, at 3:20

4 **“My first startup idea was worth minus $300 a lead.”**
You, on Princeton Student Ventures, Apr 2026, at 0:43

5 **“Contractors told us to stop sending leads and help them win one.”**
You, on Trades Talk, May 2025, at 2:38

6 **“We dropped customers who liked our product.”**
You, on SYNKD Live, Oct 2026, at 3:13

7 **“At Bobyard, ownership is measured in other people's sleep.”**
You, on The Grow Show, May 2026, at 34:18

8 **“We made contractors sign before we built more product.”**
You, on Princeton Student Ventures, Apr 2026, at 6:36

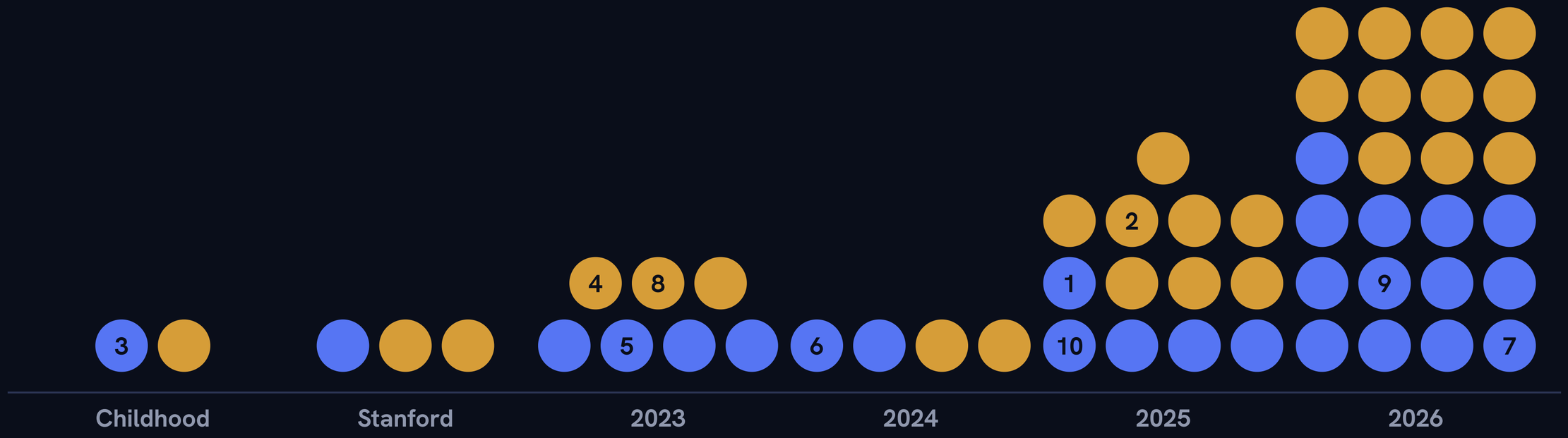
9 **“PhDs with offers from every AI lab are choosing landscaping.”**
You, on The Ultimate Landscape CEO, May 2026, at 53:41

10 **“Prospects send us the hardest drawings they have. Two hours of counting a page takes about 20 seconds.”**
You, on The Ultimate Landscape CEO, May 2026, at 24:51

All 53, by the year they happened.

Every story we found on tape, linked to the second you said it. Gold: told in one recording only; numbers are the next ten. Where you don't give a year, we placed it by what came before and after.

1. The lowkey round
2. The crazy round
3. Bob the Builder
4. Minus $300 a lead
5. Help me close one
6. The customers we dropped
7. Ownership and sleep
8. Contracts before code
9. PhDs who pick landscaping
10. Two hours in 20 seconds



You talk. We write. You say yes.

You talk

One call every two weeks. We bring the questions, starting with the round, the leads and the customers you dropped.

We write

Posts built from your own words, with the recording behind every line. Your numbers, your way of saying it, your customers.

You say yes

You fix a draft or kill it. Nothing goes out without your yes.

Month one: the lowkey round, minus $300 a lead, the customers you dropped, and seven more.

“You have to sell to current employees, to future employees, to current customers… to future customers.”

You, on Princeton Student Ventures, Apr 2026, at 17:31

All four of them read. You keep selling; we'll write it down.

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