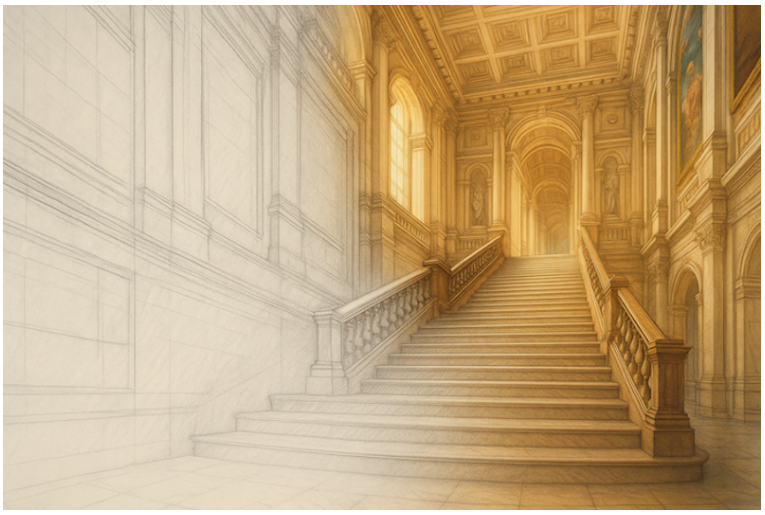
When Vision Meets Its Moment

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Every entrepreneurial journey is a bet on vision and a bet on timing. You see a possibility before others do. You work to bring it into being, often years ahead of the market. And then you wait — sometimes impatiently, sometimes with grim persistence — for the world to catch up.

With Skreens, Marc Todd's vision started in a surprisingly tangible way: with a box. In 2015, the company raised $471,000 on Kickstarter — nearly twenty times its $25,000 goal — promising "a revolutionary way to show all of your devices together on one display in 1080p/60 with no lag — just plug, play and play." The pitch was simple: imagine a single screen where your Xbox, your cable feed, and your streaming device could all appear at once.

It was clever, it was ambitious, and it was early. At the time, there wasn't yet the cloud infrastructure or compute economics to support a scalable, software-driven version of that vision. So Skreens began life looking like a hardware company — a box that gestured at a much bigger possibility. We knew that the box wouldn't stay a box, but as a deep tech company, we were ready to engineer whatever we needed to build in order to prove our core thesis: that Skreens software could enable a solution in which the cost of our core FPGA semiconductor design would be low enough to scale, and would fall dramatically in the years to come.

When you're early, you're still never alone. We surfaced a video by Corning from back in 2012 called A Day in the Life of Glass, which showed so well the future that we aimed to power that we used to send it as part of our introductory package when we met with prospective partners and investors. If the problem you're solving is big enough and if your fundamental advance is valid, there are always others building at a shared frontier. Xilinx (now AMD) grasped the power of this thesis and became a strategic investor. Their validation, just as much as their capital, propelled us forward over the years in which the long, steady force of the semiconductor cost curve brought the future we'd visualized closer and closer to reach.

Fast forward a decade, and the same core impulse that our box expressed – letting people experience multiple streams seamlessly – is now powering Comcast's multiview, through our partnership with MediaKind. Millions of households are living the experience that once existed only in a Kickstarter demo video.

Looking back, I see Skreens' journey in eras, much as I've written about companies progressing through the levels of a game. Each era has its own conditions of play, its own challenges, and its own necessary victories.

The first era was foundation-building: creating the core technology, protecting the IP, carrying forward the vision in an era when the economics of the cloud simply weren't ready. This was the box era — important, but inherently a bridge to something larger.

The second era is now. This is the era of competitive necessity. YouTube has reset consumer expectations with its multiview. Every operator must respond. And here Skreens has achieved the most important result that advances us from being a technology company to becoming a force in the industry: powering Comcast's multiview. This is the proof point that our vision works at Tier-1 scale, in the most demanding environment. It is the difference between being a clever Kickstarter idea and being a critical enabler of the next chapter of television.

The third era is coming into view. Marc has begun to sketch its outlines: AI agents that instantly compose custom layouts, learning each viewer's preferences, curating a one-to-one experience in real time. With compute costs falling, what once was unimaginable is now within reach. This era won't just be about multiple streams on one screen, but about personalization at the level of each individual.

The entrepreneurial lesson is that you can't skip eras. The box was necessary to prove the idea. The Comcast breakthrough is the point of inflection that establishes that our solution truly scales. And now, the path is opening to realize the full vision of one-to-one television.

For me, this story is a reminder of the distance that can be traveled when an entrepreneur holds steady to a vision for the long arc – which can only be achieved by having the scrappiness and tactical ingenuity to respond to the "ten thousand things" that come at you along the way. Ten years ago, we were promising Kickstarter backers a clever box. Today, we are enabling one of the world's largest operators to deliver experiences at scale. Tomorrow, we will be shaping the frontier of personalized media.

That is the work of entrepreneurship: to see the possibility, to stay with it through each era, and to fight for each inch of progress before the moment of ripeness comes, and when your vision meets the moment, to make the future you always knew would be.