ARMSTEAD HOLDINGS

Short Business Plan: Services Pay the Way Up

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The thesis in one paragraph

Armstead Business Consulting sells the job, not the tool, and the cash funds a technology climb we own end to end. Sequoia partner Julien Bek put the opening wedge in his March 5, 2026 essay: the next trillion-dollar company is a software company pretending to be a services firm, because companies spend about $6 on services for every $1 on software. Consulting runs $300-400 billion, staffing $200 billion and up, IT managed services $100 billion and up, and the layer above them is unclaimed. Armstead runs both sides: services are the revenue engine, software and chips are the compounding engine, and the top of the stack is space.

Phase one: the cash engine, live now

Three lanes, all priced so the customer pays for the outcome or pays before delivery: business and real estate financing under the Armstead Real Estate Financing name, with no up-front fee; fund services, formation and administration for clients raising their own capital; and property search at $99 a month or $999 a year charged up front, plus the $99 AI Security Check, a one-shot product that converts a stranger with one clean transaction. Packaging discipline comes from a 192,000-app study: up-front subscription products make about five times the revenue per user of free-trial products, one painful problem per page beats feature piles, and mid-size markets convert best.

Phase two: the stack (Armstead Technology)

The hardware thesis is one architecture, not a shrinking race: the wall is memory, not transistors. Two independent proofs from 2026: Colibri, an open-source pure-C MoE engine, runs a 744-billion-parameter model on a laptop CPU with no GPU at all; Strata, an open-source engine, runs a 125-billion-parameter sparse MoE on one gaming card because each token touches about 2 percent of the experts. The Asilicon answer: bonded memory on the die, wafer-scale assembly, in-chip cooling, and expert-granular addressing so the hot tier is on-die SRAM by construction. Distillation-first is the mainline, decided October 20, 2026: we build small, fixed models for the American small business, distilled from the largest open-weight teachers whose license and terms allow it, and the whole model fits on the die. The first market is the American small business, at $20-60 per always-on module: no internet, no subscription, no cloud. The capital-efficiency benchmark is Taalas, which reached its roughly $30 million outcome with about 25 engineers before its August 2026 acquisition by AMD.

Phase three: the flywheel and acquisitions

Four arrows, one loop: money and venture capital fund the climb up the stack; the owned stack and the deals feed money back down; ABC services revenue compounds; acquisitions buy everything around the stack. Acquisition criteria are fixed and patient: $300-700K deal size, 20 percent or more seller financing, a transition of three months or more with the owner running the business alongside Armstead, seller discretionary earnings of at least $90K, two years of financials before any offer, and 49 percent now with 51 percent in one year.

Phase four: space, the top of the stack

Space enters late and cheap, funded only by the flywheel, after services and the stack are paying. The play is to hold the top rung while everyone else fights for the middle, then demonetize space later and sprint past. The entry study is the gate: no dollar enters space that did not come out of the flywheel.

Milestones

Five gates, each one decision wide: the outcome-pricing pass across every Armstead Business Consulting offer and page; Asilicon feasibility to spec with the distillation mainline written in; the first acquisition closed under the stated criteria; the shorts engine in production for the Armstead channels; and the space entry study.

Discipline

No projections and no invented financials, ever. Every figure traces to a live offer, a public record, or fixed criteria. Decisions are Proceed or DON'T Proceed, and they belong to one person: Thomas Armstead.

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