

# What Makes a ‘Narrative Violation’?

Venture capitalists have a favorite new term.



By **Erin Griffith**

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There’s an easy way to sound smart and edgy in the tech world: First, identify a broad idea that people seem to agree on. Then, cherry-pick a single piece of data that refutes it. Call it a “narrative violation.” And tweet it bumptiously.

Venture capitalists, the tech world’s philosopher-kings, have embraced narrative violations. Earlier this month, Matt Turck, an investor at FirstMark Capital, noticed the term popping up frequently in work conversations.

He wasn’t entirely sure what it meant, so in the tradition of thought-leading V.C.s everywhere, he took to Twitter. He declared “narrative violation” the year’s “V.C. Bingo” buzzword.

The tweeting masses quickly schooled him. A narrative violation, he learned, is a way to express an idea that goes against conventional wisdom. It is a friend of “well, actually,” and a distant cousin to the devil’s advocate. It has been used as an investment framework, a conversational shortcut and, in at least one case, a defining personal identity trait.

Rob Go, a founder of NextView Ventures, defined it as “kind of like ‘contrarian,’ but more contrarian and complex.” In 2017, Geoff Lewis, an investor at Founders Fund, struck out on his own. “Against all odds, a few brave entrepreneurs violating the narrative today will come to define profound new truths tomorrow,” Mr. Lewis and his partner wrote in a manifesto they called it “a contrarian way to say contrarian.” Were on a mission to find them.”

The firm's success in the late 1990s, however, was not a foregone conclusion. In the late 1990s, Apple employed people like the "think different" in its ad campaign. In the late 1990s, Apple employed people like the "think different" in its ad campaign. In the late 1990s, Apple employed people like the "think different" in its ad campaign.

Contrarianism has long been a part of the tech industry ethos. In the late 1990s, Apple employed people like the "think different" in its ad campaign. In the late 1990s, Apple employed people like the "think different" in its ad campaign. In the late 1990s, Apple employed people like the "think different" in its ad campaign.

In July, Chris Ekerdt, the founder of Forsthaus, a differentiator, published a blog post titled "Why I'm a Narrative Violation." In it, he described his path to the start-up world — studying architecture in Europe instead of dropping out of Stanford — as a narrative violation.

His point was to inspire people "to not take the regularly trodden path," he said in an interview. "Don't go to Stanford and then drop out."

Perhaps it's not a surprise that the spread of narrative violation in the start-up world is taking place as the narrative around start-ups turns sour.

Mike Ortolano, a founder of a marketing and sales agency that works with start-ups, said the concept reminds him of postmodern philosophers. "I'm not in Paris in the '60s, so I can't watch Foucault and Derrida have conversations," he said. "So instead I have Geoff Lewis and Keith Rabois going at it on Twitter." (Mr. Rabois, an investor at Founders Fund, frequently tweets about narrative violations.)

"This is like my philosophical Colosseum of sorts," Mr. Ortolano said.

But the takeover of narrative violations does present a problem. The more popular it is to be a contrarian, the harder it is to actually be one. Venture investors are sometimes accused of lemming-like behavior. And if everyone is a contrarian, no one is.

Mr. Lewis, of Bedrock Capital, is already moving onto a new buzzword. In November he announced — in a tweet, naturally — that the "narrative violation" of 2020 will be "narrative mirage."