

**You Weren't
Supposed to
Be Here.**

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Expertise teaches you how the world works. Outsiders, misfits and mavericks ask why it has to.

The Velvet Underground did not look much like the future. Their first album was abrasive, sexually explicit, commercially unsuccessful and wrapped in an Andy Warhol banana. Radio largely ignored them, yet their influence travelled far beyond their sales. Brian Eno later compressed the phenomenon into rock mythology: relatively few people bought the record, but seemingly everyone who did started a band. The number attached to that famous remark is disputed; the influence is not.

A decade later, punk attacked the distinction between audience and creator. Cheap guitars, photocopiers, fanzines and independent labels became infrastructure for a revolt against the idea that permission or virtuosity had to precede creation. One of punk's defining images was a crude drawing of three guitar chords in the fanzine *Sideburns*, followed by an invitation to form a band. It was less a lesson in music than an attack on permission.

Then came The Smiths. Johnny Marr had absorbed guitar music deeply enough to escape its clichés, constructing intricate, melodic arrangements at odds with the bombast of much early-1980s rock. Morrissey brought a different cultural vocabulary: literature, kitchen-sink drama, Northern English observation, romanticism, alienation and a refusal to inhabit the conventional rock frontman. Their creative force came partly from the tension between those sensibilities. Marr made beauty intricate; Morrissey made it uncomfortable. Neither alone sounded like The Smiths.

This is how many creative revolutions happen, not through ignorance of what came before but through an unstable relationship with it. You learn the language, absorb the masters and understand why the system works, then become sufficiently disloyal to your education to imagine that it might work differently.

Newton famously described seeing further by standing on the shoulders of giants. The creative revolutionary stands there too, but looks in another direction.

Every revolution begins as bad manners

Picasso had mastered academic drawing before he helped fracture the conventions of Western painting. *Les Femmes d'Alger* did not emerge from innocence but from collision: Cézanne, El Greco and Iberian sculpture were among its influences, alongside Picasso's encounter with African sculpture and masks at a moment when European modernists were appropriating forms largely severed from their original cultural meanings. The history is more complicated than the mythology of solitary genius suggests, which is precisely the point. Creative revolutions are rarely acts of immaculate invention. They are acts of recombination, borrowing, collision and sometimes uncomfortable appropriation.

Banksy understood the institutional version of this instinct. In 2018, seconds after *Girl with Balloon* sold at Sotheby's, part of the work passed through a shredder concealed inside its frame and subsequently became *Love is in the Bin*. An artist whose identity was built partly

outside the conventional art establishment had understood one of its most sacred rituals—the auction—well enough to make the institution itself part of the work.

Neither example says that outsiders possess some magical creative faculty unavailable to experts. Something more interesting is happening. They understand enough of an existing language to violate it intelligently.

That distinction matters far beyond culture.

The outsider's advantage is not ignorance.

It is useful distance.

Expertise has a shadow

Every successful field develops a body of common sense. Bankers know how banking works, engineers know what engineering permits, investors learn what an investable company looks like, and executives learn which answers survive a board meeting. Most of this knowledge is invaluable because expertise is compressed failure: it contains customers understood, technologies mastered, regulations respected and mistakes somebody already paid for.

Anyone romanticising the amateur should spend some time around aviation, surgery or a company running out of cash.

The problem begins when expertise stops being knowledge and becomes identity. Researcher Erik Dane has described a related phenomenon as cognitive entrenchment: deep expertise can create highly stable mental schemas that improve performance within familiar environments while sometimes reducing flexibility when those environments change. The qualification matters. Expertise does not make people unimaginative; it gives them extraordinarily efficient maps.

Trouble begins when the landscape moves and the map retains authority.

I have spent much of my career crossing those landscapes, from software engineering into automotive, consulting, enterprise technology, cloud, AI, advertising, founder-led ventures and private-equity-backed transformation. The recurring lesson is not that experts are usually wrong. It is almost the opposite. Organisations rarely become trapped because intelligent people suddenly become stupid; they become trapped because yesterday's hard-won knowledge quietly becomes today's unquestioned premise.

Stupidity is relatively easy to identify. Assumptions arrive disguised as experience.

Sometimes the wrong expert is exactly right

There is unusually interesting evidence for the value of distance in solving certain kinds of problems. Lars Bo Jeppesen and Karim Lakhani studied 166 scientific challenges opened to more than 12,000 external scientists and found that, in this particular broadcast-search setting, winning solutions were positively associated with greater distance between the solver's technical expertise and the field of the problem.

That finding should not be inflated into a universal law. It does not establish that outsiders outperform specialists, still less that ignorance produces insight. It suggests something subtler: someone outside the conventional framing of a problem can sometimes possess precisely the knowledge required to reframe it.

An engineer may see systems where a marketer sees customers; a designer may see behaviour where an engineer sees functionality; a commercial operator may see willingness to pay where a technologist sees capability. What appears inevitable inside one discipline can look strangely optional from another.

The interesting outsider, then, is rarely an empty vessel. They are usually an insider somewhere else.

Innovation often happens when knowledge crosses a border and refuses to behave itself.

Learn the rules. Then distrust them.

There is a childish version of disruption that treats convention as cowardice and rebellion as intelligence. Business has suffered enough from it.

Picasso did not reinvent painting because he could not paint. Punk did not emerge without antecedents; it metabolised garage rock, glam, reggae, art-school experimentation and economic frustration into something more combustible. The Smiths did not reject musical history; Marr studied it obsessively and recombined it. Banksy depends upon the visual and institutional languages he subverts.

Revolution is usually recombinant. The maverick always steals fire from somewhere.

Founders and investors make two symmetrical mistakes around this. They can fetishise expertise until nobody can imagine anything outside the category, or fetishise disruption until people who have never operated the system dismiss constraints they do not understand.

I have spent enough time around both to distrust them equally. Starting as a software engineer taught me respect for systems; moving into business taught me how rarely the technically elegant answer is sufficient. Working across Microsoft, Amazon, founder-led ventures and PE-backed transformation taught me something harder: technological possibility is not customer demand, growth is not necessarily quality growth, and an organisation can become brilliantly optimised around an assumption whose useful life has expired.

The outsider needs the insider because reality contains constraints, while the insider needs the outsider because not every constraint is reality. Knowing the difference is judgement.

The most expensive sentence in business

There is one sentence I have learned to distrust more than most: *That's not how this industry works.*

Sometimes it contains decades of expensive wisdom. Sometimes it is an obituary being written in the present tense.

At Microsoft, working across cloud, data and AI made that distinction impossible to ignore. Industries had accumulated architecture, procurement processes, regulation, incentives and organisational boundaries for reasons that were often entirely rational. You could not credibly reinvent those industries without people who understood why their systems existed, but neither could you reinvent them if everybody assumed the reasons for their existence were permanent.

The useful question was therefore not simply *How do we improve this process?* but *What constraint caused us to build it this way?* If the constraint survives, respect it. If it has disappeared, everything constructed around it deserves another look.

AI makes this question urgent. Companies can apply extraordinary new capabilities to existing workflows and produce genuine productivity gains, but the more consequential opportunity lies beneath the workflow itself: which products, processes, roles and organisational boundaries were created because intelligence, content or software were previously expensive to produce?

Making an old bureaucracy faster does not prove that you still need the bureaucracy.

Success manufactures orthodoxy

The problem becomes harder as companies succeed because scale requires repetition, repetition creates standards, and standards become processes, ownership and incentives. Eventually the business develops an immune system whose purpose is to protect the model that made scale possible.

That is rational, and it is precisely why reinvention becomes difficult.

At Amazon's Brand Innovation Lab in Europe, I encountered this tension around bespoke creative work. Customisation could create substantial customer value, but bespoke work carries an obvious scaling problem: when each increment of revenue requires another increment of customised effort, complexity follows growth. The challenge was not simply to apply AI but to turn fragmented creative, product and delivery activity into a more productised, repeatable commercial system without stripping away the judgement and craft customers valued.

The lesson travels well beyond advertising. Standardise too little and the business struggles to scale; standardise too much and it can stop seeing. The operating model that compounds today's advantage can quietly encode tomorrow's blind spot.

For private equity, this problem has particular force. Every investment thesis contains assumptions about what will remain true long enough for management to create value: the durability of demand, pricing power, routes to market, margin expansion, organisational scalability and the strategic relevance of the product itself. A value-creation plan then concentrates people, capital and attention around those assumptions.

The dangerous outcome is not simply poor execution.

It is excellent execution against a decaying premise.

Pattern recognition helps investors identify businesses capable of compounding, but when the environment changes, the same instinct can encourage them to buy yesterday's winner twice. The question is no longer merely whether management is delivering the

plan. It is whether the assumptions underneath the plan are ageing faster than the company is learning.

The maverick is annoying before they are obvious

Companies know they need different thinking, which is why they surround themselves with its theatre: innovation labs, hackathons, entrepreneurs-in-residence, transformation offices, startup partnerships and futurists at the leadership retreat. Then everybody returns on Monday to the incentives, budgets and decision rights that produced Friday's orthodoxy.

Exposure to outsiders is not the same as permission to think like one.

The more interesting question is how many useful misfits already work inside the organisation: the engineer questioning the architecture, the salesperson watching customers use the product in a way nobody designed, the regional leader whose market refuses to behave like headquarters expects, the new hire asking embarrassingly basic questions, or the executive whose career crosses disciplines and therefore notices seams specialists have learned not to see.

These people are often irritating before they become valuable because the maverick is glamorous only in retrospect. Before the revolution succeeds, they are usually the person making the meeting run long.

Leadership therefore requires more than encouraging dissent; it requires distinguishing productive dissent from narcissism. Outsiders can confuse unfamiliarity with insight, provocation with intelligence and somebody else's accumulated scar tissue with bureaucracy. They can break rules without understanding what those rules protect, just as insiders can protect rules long after the conditions that justified them have disappeared.

The useful maverick does neither. They challenge expertise with evidence.

The cost of corrected belief

This may be the most useful lesson I carried from engineering into business: when something consequential can be tested, argument is an expensive substitute for evidence.

If a product supposedly has no market, find customers prepared to pay. If a new channel supposedly cannot work, test the acquisition economics. If a bespoke service supposedly cannot become a product, standardise the repeatable core and discover whether customers still value it. If an AI capability supposedly transforms the economics, follow it beyond the demonstration into implementation, reliability, cost-to-serve, willingness to pay, gross margin and retention.

The objective is not to prove the maverick right.

It is to make the organisation cheaper to prove wrong.

That is where outsider thinking stops being cultural posture and becomes commercially consequential. Every founder, CEO, board and investor allocates capital against assumptions about customers, pricing, distribution, technology, organisation and markets.

When conditions remain stable, those assumptions compound into expertise; when conditions change, some become liabilities.

The company that invalidates a consequential assumption while the commitment is still small preserves capital and strategic optionality. The company that protects the same assumption through another product cycle, acquisition, geographic expansion or transformation programme compounds the cost of being wrong.

This is the economic value of useful distance.

The outsider does not need to possess the answer. Their value can lie in seeing the assumption that everybody else has stopped noticing and forcing it back into the realm of evidence.

For founders, this means discovering that customers do not care before building the organisation around the proposition. For CEOs, it means recognising that the operating model has become part of the problem before another layer of technology automates it. For private equity, it means testing whether the original investment thesis still holds before the value-creation plan accelerates a model the market is leaving behind.

The outsider's advantage is not being right.

It is making the organisation cheaper to prove wrong.

AI changes the economics of knowing

For much of corporate history, expertise was valuable partly because knowledge was scarce. Organisations hired people who had spent years accumulating answers unavailable to everybody else.

That scarcity is weakening. AI can retrieve, synthesise, translate, model, write and generate software across domains at remarkable speed. This does not eliminate expertise; in consequential situations it may increase its value because plausible answers become cheaper while sound judgement does not.

But the relative economics are changing. As competent answers become more abundant, advantage moves toward framing the question, supplying context, recognising consequences and knowing when the accepted answer belongs to a world that no longer exists.

That favours a particular kind of misfit: not the amateur, but the boundary-crosser. The engineer who understands markets, the commercial leader who understands technology, the designer who understands economics, the scientist borrowing a heuristic from another discipline, the entrepreneur who sees an inconvenience incumbents have learned to call an industry.

AI can give almost everyone more of the map. That makes recognising when the map is wrong disproportionately valuable.

Seven acts of constructive disobedience

Hire for useful distance rather than difference for its own sake. When the task is optimisation, deep category expertise can be decisive; when the task is reinvention, deliberately introduce adjacent expertise capable of exposing assumptions the existing talent model keeps reproducing.

Separate laws from habits. Ask what originally made a product, process or organisational boundary necessary and whether that condition still exists. When it does not, stop treating history as physics.

Pair mastery with mischief. Put the veteran and the outsider against the same consequential problem with shared accountability. One understands the scar tissue; the other may recognise that the organisation has mistaken it for strategy.

Make dissent falsifiable. Contrarianism without evidence is merely another performance. Turn disagreement into a proposition that customers, economics or operating reality can reject before management converts it into a large commitment.

Put outsiders near capital. Different thinking matters only when it can alter what gets built, bought, funded, priced, stopped or sold. Innovation without influence over commitments is decoration.

Attack your own thesis first. Founders should know what would falsify the proposition; CEOs what would invalidate the strategy; investors what would break the investment case. The stronger yesterday's success, the more valuable this discipline becomes.

Reduce the cost of corrected belief. Measure not only how quickly the organisation executes but how quickly it discovers that something important is wrong. The ability to abandon a false premise while the commitment is still small is not indecision. It is capital discipline.

You weren't supposed to be here

There is a temptation to turn outsiders, misfits and mavericks into saints, but that misses the point. The Velvet Underground were not important because obscurity is virtuous, punk was not powerful because competence was bourgeois, Morrissey and Marr did not matter because musical history was irrelevant, Picasso did not reinvent painting because tradition was worthless, and Banksy is not interesting merely because institutions make good targets.

What connected them was harder than rebellion. They understood enough of the existing language to violate it intelligently.

That is the paradox at the centre of creative and commercial revolutions. You stand on the shoulders of giants because there is nowhere else to begin, inheriting their discoveries, disciplines, techniques and scars while learning why the rules exist. Then, when the evidence demands it, you become willing to betray them—not because rebellion looks good on a poster, but because the world those rules explained has changed.

My own career has crossed enough technologies, industries and operating models to leave me with less faith in categories than when I began. Engineering taught me to respect constraints; building businesses taught me that some constraints are merely old decisions

whose authors have left the building. The harder skill is knowing the difference before customers, competitors or markets make the distinction for you.

For founders, CEOs and investors, this is not a cultural argument about celebrating unconventional people. It is a question of what gets built, what gets killed, where capital goes and how long an organisation continues defending a world that no longer exists.

The people who change industries are rarely outsiders because they know nothing. They become outsiders because, having learned enough to understand why the rules exist, they retain the capacity to imagine that those rules are temporary.

So the boardroom question is not whether you have enough expertise. It is whether anyone still has enough distance to recognise the assumption everybody else has learned to call reality.

Every institution eventually discovers that some of its most dangerous ideas came from people who belonged completely.

The next one may come from someone who wasn't supposed to be there.

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