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Founder Profiles: Learnings (v0)

This is the first documentation of our learnings from studying Founder Profiles ([1](#), [2](#)).

Quantitative

We have profiled 45 founders so far, and we can begin drawing patterns from the biographical data. There have been some interesting immediate takeaways, but I'll cover those in the qualitative section. The following observations directionally support our empirical intuitions and hypotheses on the respective topics. Disclaimer that the statistics used here are subjective and not meant to declare conclusions. Although they are drawn from a large enough sample that it is statistically significant:

1. *Most had evidence of obsession*

>50% had evidence of obsessive streaks that were meaningfully prohibitive to a normal peer lifestyle early on, such as serious business endeavors, substantial technical undertakings, or physical achievements.

- a. >80% had a serious business endeavor early on, defined as having started or sold a prior company, run a revenue-generating side project, or operated a service or product.
- b. While the rest mostly had serious technical endeavors.
- c. The remaining include Brian Chesky bodybuilding; Alexandr Wang olympiad; Max Levchin clarinet, etc.

2. *Most original ideas at inception are noise*

Almost half the time, underwriting the idea would've been useless or worse (*Appendix*).

- a. Over a quarter had a meaningfully hard pivot, where the original idea was completely abandoned.
- b. Over a fifth originally had market-consensus bad ideas, where considering the idea would have negatively polluted the investment decision-making.

Qualitative

Some of the thematic frameworks we have built allow us to categorize individuals based on commonalities and contrasts within their peer set. These mental models allow us to make relative claims, as in we can now say that a person is more or less of:

1. *Single vs Multi-Genre*

Across the profiles, we repeatedly see two types of founders: single-genre and multi-genre. Single-genre founders are bottom-up: the idea precedes the company, and the business is the manifestation of something they were always meant to build. Their success is tightly coupled to building one specific kind of business – they are often inevitable for that outcome, but brittle outside of it. Multi-genre founders are top-down:

capability precedes the idea. Their early trajectories are less legible because the company is incidental, and the real constant is the person. They carry a generalizable ability to excel across contexts and could plausibly have succeeded in starting many different companies. This distinction helps explain why some founders require the “right” idea to surface, while others reliably find their way to one. I note that single-genre founders are theoretically easier to spot with intuition, given that the underwriting is entirely focused on the individual; whereas multi-genre founders have greater stochasticity in their potential trajectories, leading to more false negatives.

2. *Underbaked & Pulled-Forward*

Sometimes we come across underbaked founders with not very impressive track records who go on to extraordinary success (Jack Dorsey at 29). In consumer businesses especially, sometimes these founders catch the right tail of the distribution, and the momentum pulls forward their potential personal growth: the presence of real users and organic growth acts as a forcing function, pulling capabilities forward that were latent but unproven at first impression. In these cases, the market finishes forging the founder. What looks underdeveloped in isolation becomes coherent once demand shows up, often aided by timing and virality that set the stage for rapid personal and organizational maturation. The practical implication is to actively consider the scenario and likelihood of an organic breakout, and whether the founder’s skills will snap into place.

3. *Prodigy Signal*

Global outliers are often visible locally long before they are legible to institutions. We observe a disproportionate amount of the most talented founders were newsworthy or noteworthy early on: Patrick Collison was given a national award by the Prime Minister of his country at 14 for inventing a new language of LISP; Henrique Dubugras had built and was running a business with dozens of employees at 15, and was profiled in LatAm press; Alexandr Wang was a two-time USAPhO gold medalist at 16 and covered in local press; Scott Wu was appearing on national television at 13 solving live competitive math puzzles on a game show; Jeff Bezos was so smart at 5 years old that they wrote an anonymized book about gifted children after him. In other cases, the signal surfaced in narrower circles – Stanley Tang publishing a book on internet entrepreneurs at 14; Palmer Luckey became sufficiently well-known in technical communities to attract John Carmack at 18; or Marc Andreessen achieved early renown through Mosaic at 21. The practical implication is to just keep an eye out for child prodigies from around the world.

4. *Aptitude & Archetypes*

We looked for a “silver bullet” throughline that exists among all these biographies that definitely correlates with success, and landed on high [aptitude](#). We also began cataloguing different [archetypes](#) of founders. I’ve written separately on these both.

Conclusion

Future iterations will further explore historical and empirical data.

Appendix

Hard Pivots (~30%)

1. Apoorva Mehta (Instacart): multiple failed startup ideas → on-demand grocery delivery
2. Jack Dorsey (Twitter): podcasting platform (Odeo) → real-time social network
3. Tobi Lütke (Shopify): snowboard e-commerce store → commerce operating system
4. Max Levchin (PayPal): cryptography and security software → online payments network
5. Ben Silbermann (Pinterest): shopping catalogs → interest graph discovery platform
6. David Helgason (Unity): indie game project → game engine and development platform
7. Howie Liu (Airtable): enhanced spreadsheet tool → programmable software platform
8. Vitalik Buterin (Ethereum): Bitcoin Magazine → decentralized world computer
9. Henrique Dubugras (Brex): VR payments → financial operating system for startups
10. Melanie Perkins (Canva): online yearbook tool → accessible design platform
11. Dylan Field (Figma): defense drone software → collaborative design platform
12. Sebastian Siemiatkowski (Klarna): invoice-based payments → consumer credit network
13. Ivan Zhao (Notion): web app builder → notes-first workspace and operating system

Near-Consensus “Bad” Ideas (~20%)

1. Alexandr Wang (Scale AI): data labeling services → services don't scale, low-margin
2. Palmer Luckey (Oculus): consumer VR hardware → capital-intensive, unclear demand
3. Evan Spiegel (Snap): disappearing photo messages → gimmicky toy for teens
4. Daniel Ek (Spotify): licensed music streaming → label-controlled economics graveyard
5. Matt Mullenweg (WordPress): open-source blogging software → no monetization path
6. Tim Sweeney (Epic Games): PC game studio → hit-driven business
7. Brian Chesky (Airbnb): strangers renting rooms → trust, safety, and regulatory nightmare
8. Pavel Durov (Telegram): encrypted messaging with no monetization → illegal hub, no business model
9. RJ Scaringe (Rivian): electric vehicle manufacturing → capital-intensive auto graveyard
10. Rob Kalin (Etsy): handmade crafts marketplace → niche hobbyist market

Idea As False Signal = 23 Instances

Total Founder Profiles = 45 → 23 / 45 ≈ 51%