The Box

An Introduction to Vertical Development

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Table of Contents

Introduction 3

The Box 4

Horizontal and Vertical Development 5

When the Gap Is Structural, Not Conversational 6

The Seven Stages 8

- A note on the names 8
- The Defender (Torbert: Opportunist) 9
- The Harmonist (Torbert: Diplomat) 9
- The Expert 10
- The Achiever 10
- The Toughest Transition 11
- The Individualist 11
- The Integrator (Torbert: Strategist) 12
- The Transformer (Torbert: Alchemist) 12

You Are Not a Stage 14

The Leadership Zone: Expert to Integrator 15

- The Expert 15
- The Achiever 16
- The Individualist 17
- The Integrator (Torbert: Strategist) 18

When the Stage Doesn't Match 20

- In leadership 20
- In relationships 22

Locating Yourself 25

A Final Note 26

Introduction

This guide is about a different kind of growth.

Most leadership development focuses on skills: communication, strategy, execution, influence. These matter, but there is another kind of growth that receives less attention: it does not add to what you know but changes how you make sense of what you know. The researchers who study this call it vertical development.

This guide introduces the framework and focuses on the range of stages most relevant to senior leaders: from Expert to Integrator. It does not require prior familiarity with the field. It requires only a willingness to look honestly at the patterns you recognise in yourself.

The Box

Everyone has a box.

It is the structure through which you make sense of the world: what is safe, what is true, what a relationship is for, what you are supposed to become. Most people do not know they have one. From inside, it feels like reality, not like a box.

What changes across a lifetime of development is not the box itself but your relationship to it. At earlier stages, you are inside the box and cannot see it. At later stages, you can step outside and look at it. At the furthest stages, you have set it down, not abandoned it, but ceased to need it as the container of your identity.

The stages that follow each describe a different relationship to the box.

Horizontal and Vertical Development

Most leadership development makes you better within your current structure. You add knowledge, sharpen skills, refine processes. The box becomes better organised. This is useful, and it has a name: horizontal development.

Vertical development is different. The box itself grows. The structure through which you make sense of the world expands, and problems that were previously too complex to hold become manageable, not because you know more, but because the container is larger.

Horizontal development fills the box. Vertical development changes what the box can hold.

Capability is what you can do: the skills, knowledge, and methods you have developed. Capacity is the structure from which you do it: how much complexity you can hold, how many perspectives you can see simultaneously, how much pressure you can absorb without the quality of your thinking narrowing.

Horizontal development builds capability.
Vertical development grows capacity.

A leader can be highly capable and have limited capacity. The gap tends to show up not in day-to-day execution but in the moments that require something the current structure cannot yet hold.

When the Gap Is Structural, Not Conversational

Why does this matter now? The problems most senior leaders face today are not technical. They do not yield to more expertise, harder work, or better execution. They are adaptive, which means the solution requires a different kind of thinking, not just more of the same kind. A leader who has filled their box to the brim but not grown it is very capable within a known frame. Faced with genuine complexity, they reach for tools that do not fit.

Relationships have become harder to hold. The pace of modern life compresses the time available for genuine contact. Social media exposes people to more divergent worldviews, more comparisons, more noise about what a relationship is supposed to look like, while offering less of the slow, unstructured time in which real understanding develops. The complexity of what two people have to hold together has increased: different careers, different cities, children, ageing parents, diverging values, the ordinary weight of being alive at this particular moment.

The cultural response has been to reach for more technique: better communication frameworks, more intentional scheduling, couples therapy with structured exercises. These are horizontal moves, filling the box more carefully. They help, until the complexity of what is being asked exceeds what the current structure can hold.

A person who cannot yet see their own frame as a frame will apply technique to the wrong problem. They will work very hard at the surface of a difficulty that is structural at its root.

Sometimes the gap has nothing to do with what was said. It is about the difference in the size of the boxes.

The empirical research on vertical development is less extensive than the field deserves. What exists is consistent, if limited in scale: studies of senior leaders showing that developmental stage predicts effectiveness across competencies, not just one or two. But the more compelling case is structural. Either the container grows, or it does not. No amount of skill-building addresses that directly.

Vertical development does not add competencies. It grows the structure from which competencies emerge.

The Seven Stages

Each stage is a different relationship to the box: a different way of making sense of the world, of other people, and of oneself.

My label	Torbert (2005)	Torbert (2020)
Defender	Opportunist	Opportunistic
Harmonist	Diplomat	Diplomat
Expert	Expert	Expert
Achiever	Achiever	Achiever
Individualist	Individualist	Redefining
Integrator	Strategist	Transforming
Transformer	Alchemist	Alchemical

A note on the names

Torbert's original 2005 labels have become the standard reference in research and academic writing. I have kept his names for Expert and Achiever, where the original word does the job. For others, I have chosen names that point more directly to what defines each stage from the inside. Harmonist describes the experience of that stage more accurately than Diplomat. Integrator captures what the Strategist is actually doing. Transformer names what makes the Alchemist distinctive. Where I have renamed a stage, Torbert's label is noted alongside it.

The Defender (Torbert: Opportunist)

The Defender does not know there is a box. There is only the world, and the world is dangerous. The box is reality, and reality must be protected. Attack is the best defence: get there first, control the perimeter, give nothing away that might be used against you. The box has no windows. What comes in is managed. What goes out is tactical. But the eyes are always moving: not just watching the door but scanning other people's boxes for the next opportunity to strengthen their own. Defence and opportunism are the same move from inside: get there first, leave with more than you arrived with. From inside, this is just being smart about how things work.

This stage is most at home where competitive instinct and fast decisive action are genuine advantages: certain sales environments, direct military roles, early-stage founding where survival is the metric.

The Harmonist (Torbert: Diplomat)

The Harmonist opens the box, but carefully. The door is unlocked for the people who belong: the group, the family, the team. Come in, take what you need, we are all in this together. The condition is harmony: what is inside the box must match what the group expects to find there. Nothing inside contradicts the shared arrangement. The Harmonist's box is decorated to match the others. Belonging is the point; the box is how belonging is maintained.

This stage is most at home in roles where relational attunement and group cohesion are the primary

contribution: community care, pastoral roles, team support functions, hospitality.

The Expert

The Expert's box is immaculate. Everything inside is labelled, sourced, and correct. Years have gone into getting it right, and the Expert knows the contents better than anyone. They will show you, at length, because the right answer matters more than the conversation. It is a point of pride. The box is maintained because accuracy is what you owe the world, and most people's boxes, frankly, are a mess.

This stage is most at home where technical precision is non-negotiable and the cost of being wrong is high: surgery, aviation, engineering, law, academic research, audit and compliance.

The Achiever

The Achiever's box is a project. There are targets on the inside wall and a timeline on the door. Last quarter, the internal system was upgraded. Next quarter, the output will be higher. Other people's boxes are interesting mainly as data: what can be learned, what can be applied. The Achiever is not defending the box or decorating it. They are making it better, constantly, because that is what the box is for.

This stage is most at home in execution-oriented environments: operational leadership, project delivery, scaling a business, managing performance. The engine of most organisations runs at this stage.

The Toughest Transition

The move from Achiever to Individualist is often the hardest move in a lifetime. Every previous stage built on the one before: more skill, more range, more effectiveness within a recognisable frame. This one is different. For the first time, the person is not improving the box. They are stepping outside it and looking back at a structure they may have spent twenty years building and treating as reality.

What tends to accompany this move is a period of disorientation. The goals that organised life stop feeling sufficient. The competent, ambitious, effective self that worked so well begins to feel like a role rather than a self. Questions that have no clean answers start to feel more urgent than the ones that do. For many people, this feels like a crisis before it is recognised as development.

The identity being questioned is real, and it was built carefully. The disorientation is not a sign that something has gone wrong. It is a sign that the box has become too small.

The Individualist

For the first time, the Individualist steps outside the box and turns around to look at it. When did I build this? Who told me to build it this way? They may go back in (they have to, sometimes) but they cannot quite unsee the shape of it from outside. Everything inside is now a question. Did I choose this, or did I inherit it? The Individualist is not sure

yet what to do with what they are seeing. But they cannot stop looking.

This stage is most at home in roles that require questioning the frame rather than executing within it: design, therapy, innovation, cultural change, independent research.

The Integrator (Torbert: Strategist)

The Integrator can see many boxes at once, including their own. They understand that each box looks different from inside than it does from outside, and that the person inside cannot see what someone standing outside can see. They know their own box is a box. They can work within it and step outside it, and they can sometimes help others begin to see the shape of theirs, carefully, because pointing at someone's box tends to wake the Defender.

This stage is most at home in complex organisations and cross-sector work: senior leadership roles where multiple stakeholders hold genuinely different worldviews that need to be held, not resolved.

The Transformer (Torbert: Alchemist)

The Transformer has set the box down. Not abandoned it; they can pick it up when needed, and they understand it well. But identity is no longer housed in it. The box served them well, and they carry it with a lightness that can be mistaken for not caring. What remains when the box is not being carried is harder to describe. The Transformer is not anxious about the difficulty.

This stage is most at home at the largest scale of complexity: societal transformation, paradigm-level change, leading across deep difference where no existing framework is adequate.

You Are Not a Stage

The stages describe patterns of meaning-making, not fixed identities. You are not a stage. You gravitate toward one, your centre of gravity, the place you most reliably operate from under normal conditions.

The range around that centre matters as much as its location. The leaders who perform best are not always those at the highest stage, but those with the widest range, who can work effectively from more than one stage depending on what the situation requires. Stage is the ceiling. Range is how much of it you can actually access.

The leading edge. On a good day, under conditions that are stretching but not overwhelming, you may briefly operate from the stage above your centre of gravity. These moments are glimpses, not a reliable home base.

The trailing edge. Under pressure, the calibration reverts. This is what the trailing edge means: not a loss of ability, but a default to an earlier pattern when the situation becomes threatening enough. An Achiever under sustained pressure may slide to Harmonist, managing relational tension instead of driving results, keeping the peace instead of naming the problem. An Expert under threat may slide to Defender, protecting their knowledge as territory rather than offering it as contribution.

You can slip more than one stage. An Achiever under severe pressure may slide past Individualist to Expert, Harmonist, or even Defender, landing wherever they instinctively feel they can restore safety: by establishing the correct answer, by restoring harmony, or by defending and attacking.

Where you go under pressure is worth paying attention to. It tends to point at what remains unresolved.

The Leadership Zone: Expert to Integrator

Senior roles most commonly attract people operating between Expert and Integrator. This is where the most significant development tends to happen in professional life, and where the gap between stages creates the most visible friction in teams and organisations.

The Expert

The Expert's authority comes from knowing. They have spent years developing genuine mastery, and they are right more often than most people around them. This is real, and it creates a specific problem. The Expert trusts knowledge more than relationships and tends to experience disagreement as error rather than perspective. Being right is not just satisfying; it feels like a moral obligation.

In a leadership role, the Expert often finds the human dimension frustrating. People do not process information cleanly. They are influenced by politics, emotions, and loyalties that have nothing to do with what is correct. The Expert finds this wasteful, and sometimes beneath them.

The shadow is expertise used as a weapon: the leader who wins every argument and loses the room.

What growth looks like from here

Three questions to sit with, not answer quickly.

1. When you disagree with someone's approach, what is the first thing you reach for: the evidence that you are right, or a question about what they are seeing that you might not be?
2. Think of a time your technical expertise prevented you from hearing something important. What did that cost?
3. What would it mean to be equally committed to being useful as to being correct?

The Achiever

The Achiever is oriented toward results. They are effective, self-motivated, and able to hold complexity within a goal-oriented frame. Unlike the Expert, the Achiever can subordinate being right to getting things done. They are interested in feedback, but primarily as a tool for improvement. They do not question the goal itself.

The Achiever's leadership is often impressive: clear direction, high standards, personal accountability. The shadow is that the Achiever tends to treat everything, including people, as variables in the project. The team exists to deliver the outcome. When people need something other than a clear task and a target, the Achiever is often baffled.

The deeper limitation is the frame itself. The Achiever is excellent at executing within a given system. Questioning whether the system is right, or whether the goal being pursued is serving the values it claims to serve, is harder. The box is a project, and the project is making the box

better. The possibility that the box needs to change shape is difficult to hold.

What growth looks like from here

1. When you achieved something significant, what did you not notice in the process? Who was affected in ways you were not tracking?
2. Is there a goal you are currently driving toward that you have never questioned? What would it mean to examine it?
3. When someone on your team is struggling, what is your first instinct: to fix it, to work around it, or to understand it?

The Individualist

The Individualist has stepped outside the frame. They are often the most reflective person in the room, and sometimes the most unsettled. They have lost certainty that the system they have been operating in is simply correct, and they have not yet found what comes after that.

In leadership, the Individualist brings a capacity for genuine inquiry that earlier stages find uncomfortable. They ask questions that do not have clean answers. They notice the human experience inside the process, not as a distraction but as data. They can hold complexity without collapsing it into a decision prematurely.

The shadow is that this can look like indecision, or like a leader who over-invests in exploration and under-delivers on resolution. The Individualist can become so attuned to

what is uncertain that they fail to act from what is clear. They may also become absorbed in their own internal process in ways that leave their team without the direction they need.

The Individualist is often lonely. They can see what the Achiever cannot see, but they cannot yet do what the Integrator can do with what they see.

What growth looks like from here

1. When you see a systemic problem that others are not naming, what stops you from acting on it rather than only observing it?
2. Where in your leadership are you holding too much uncertainty, refusing to land somewhere because landing feels like giving up the complexity?
3. What would it look like to bring others into the questions you are carrying, rather than carrying them alone?

The Integrator (Torbert: Strategist)

The Integrator can see the system and their place in it simultaneously. They understand that different people are operating from genuinely different frames, not because some are smarter or more aware, but because each frame is coherent from inside. This makes the Integrator unusually effective at holding conflict: they can understand why each party sees what they see without collapsing into either position.

The Integrator's leadership is often systemic. They work on the conditions that produce outcomes rather than the outcomes themselves. They develop people, not just for performance, but for capacity. They can name the frame without demonising the people inside it.

The shadow is that the Integrator can see so much that they become difficult to follow. Their communication is nuanced where people need clarity. Their capacity to hold multiple perspectives can read as evasion. And occasionally, the Integrator uses their systemic view as a distance from which they do not have to take responsibility for the immediate.

What growth looks like from here

1. When you can see the larger system, what do you do with that visibility, and who benefits from it other than you?
2. Where are you using complexity as a reason not to act, rather than as information that shapes how you act?
3. What would it mean to lead in a way that grows the people around you, not just the organisation?

When the Stage Doesn't Match

Every stage has work it is genuinely suited for. The problem arises when the complexity of what is being asked exceeds the capacity of the structure doing the asking.

The result is a mismatch, like asking a tool to do a job it was not designed for. The tool may be excellent. It is simply the wrong tool.

In leadership

A senior vice president overseeing an international operation of a thousand people is working with a level of complexity that has specific structural demands. They must make sense of competing regulatory environments, lead through layers of indirect authority, develop leaders who are themselves developing leaders, navigate stakeholder interests that cannot be resolved through better execution, and hold strategic ambiguity without forcing a resolution before the picture is clear.

An Achiever in this role will organise all of it as a project. Clear goals, tight accountability, quarterly targets, high standards of delivery. This works, until the complexity of the system outgrows what project management can hold.

What tends to happen then is characteristic. The Achiever drives harder, clarifies expectations more precisely, changes personnel when results don't land, adds more structure. For a less complex system, these would be the right moves. At this scale, they tend to produce performance anxiety in the layers below, under-investment in developing the next generation of leaders, and cultures that become very good

at hitting numbers and quietly terrible at naming what is not working.

The EVP may be among the most capable people in the organisation. The structure they are working from is simply not yet large enough for what the role requires.

The gap shows up most clearly at the edges: the conversations that need to be held but aren't, the systemic patterns that persist despite personnel changes, the quiet sense that the organisation is running hard but not learning.

Other mismatches have their own signatures. An Expert in a C-suite role will keep gravitating toward the domain they know best, second-guessing their subject-matter direct reports, and finding the political and relational dimensions of senior leadership draining and slightly beneath them. A Harmonist managing a team will keep the atmosphere warm and avoid the performance conversations that would disrupt it, until the underperformance becomes unavoidable and they are blindsided by the crisis they have been sustaining.

None of these leaders are making bad choices from inside their frame. The choices make perfect sense. The frame is working in a context it was not built for.

In relationships

Stage mismatch in intimate relationships has a different texture from the professional version. It is harder to name, easier to feel, and more frequently mistaken for a problem of compatibility or character.

Consider a couple where one partner operates from Integrator and the other from Expert. The Integrator can see the system of the relationship: the patterns, the dynamics, what the recurring argument is really about beneath its surface. They are drawn to inquiry, not to avoid action, but because premature resolution closes off something important. The Expert arrives with a diagnosis. When the relationship has a problem, there is a correct account of what is happening and a correct response. They want to understand it accurately and apply the right fix.

The Integrator experiences the Expert's certainty as closing the question before it has been examined. The Expert experiences the Integrator's inquiry as a refusal to say what they think. Both are right from inside their own frame. The Integrator is right that there is more complexity. The Expert is right that endless examination can become a way of avoiding the relationship.

What the Expert wants is for the Integrator to take a position, stop observing, and just speak. What the Integrator wants is for the Expert to hold the question a little longer before landing on an answer. Both requests are legitimate. Neither registers as legitimate to the person being asked.

The asymmetry that makes this particularly difficult is visibility. The Integrator can see the Expert's frame: can identify it, name it, understand why it operates the way it does. The Expert cannot see the Integrator's frame from inside their own. This is what it means to be at a particular stage: you can see the stages below yours from the outside, and the stages above yours are largely invisible. The Integrator's perspective looks to the Expert not like a wider view but like evasion, or intellectual superiority dressed up as curiosity.

A specific kind of loneliness follows. The Integrator sees what is happening in the relationship with some precision and finds that naming it lands as criticism. The Expert applies their best thinking and finds it is experienced as missing the point. Both are trying. The structure makes both feel, at different moments, that they are the only adult in the room.

A different pairing produces a different dynamic. The Achiever wants directness: what do you want, what are the expectations, what does success look like? The Harmonist cannot answer these questions cleanly because their response is always shaped by what they sense the other person wants, and they fear that naming what they actually want might disrupt the arrangement. The Achiever reads this as passivity. The Harmonist reads the Achiever's directness as pressure. Over time, the Achiever becomes frustrated at the absence of genuine contact. The Harmonist becomes increasingly careful, reading the emotional temperature of every exchange and managing it before anything uncomfortable can land.

Both pairings are workable. But the gap has to be seen for what it is, a structural difference in how each person makes sense of the world, before it can be worked with. The common mistake is to make it personal: to read the Expert's certainty as arrogance, the Integrator's inquiry as avoidance, the Achiever's directness as aggression, the Harmonist's carefulness as manipulation. These behaviours are real. Their source is structural. Treating them as character flaws tends to produce the very defensiveness that makes the gap harder to cross.

Locating Yourself

Robert Kegan described development as moving from being had by your patterns to having them. What runs you, you cannot see. It shapes every perception and every decision without appearing in any of them. The moment you can name it, hold it at some distance and look at it, it has become something you have. You have not lost it. You have gained a relationship to it.

The questions below are an attempt at that move.

Under normal conditions, which stage feels most like home, the natural way you approach problems, people, and authority? Under pressure, where do you go? What does the version of you that is threatened, exhausted, or overwhelmed actually do? On your best days, what becomes possible that is not usually available to you?

These three questions, your centre of gravity, your trailing edge, your leading edge, are more useful than any quiz. The goal is not to locate yourself precisely on a chart. It is to develop enough perspective on your own pattern that you can work with it rather than be run by it.

A Final Note

This framework is not a ladder to climb. It is a map of how meaning-making develops across a life, drawn from decades of research into what actually changes when leaders grow.

The stages are not judgements. Each one is a coherent and functional way of being in the world. The Achiever who delivers results and inspires their team is not inferior to the Integrator who holds system complexity. The question is not which stage is best but whether your current structure is equal to the challenges you are facing, and if not, what conditions might allow it to grow.

Development is not a project. You cannot target a stage the way you target a revenue number. What tends to work is creating the conditions: genuine challenge that cannot be resolved from within your current frame, contact with people who see the world differently than you do, and enough space to reflect on what you are experiencing rather than simply continuing to experience it.

The box does not grow by being forced. It grows when it becomes necessary.

The conversation is where the work begins.

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