What is 'Vertical Learning'?

AN INTRODUCTION

MICHAEL HAMMAN

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Introduction

Organizations around the globe are struggling to adapt to an increasingly complex and turbulent social, economic, technological, and business environment—i.e. "VUCA"—whether they be banks, product development companies, or city councils.

Many are responding by embracing agility as a way of working—some with a primary orientation around operational agility (Agile software development methods such as Scrum and SAFe), others focusing on customer development agility (e.g., Lean Startup), while others are embracing a broader business agility.

In almost all of these cases, the prevailing notion of agility is concerned primarily with processes and practices, with systems and structures—a form of **outer agility**.

But, as seasoned agilists (of whatever stripe) are finding, the biggest challenges with agility revolve not so much around its *outer* aspects—its processes, practices, deliverables, and business outcomes—but around the sensemaking, communication, and relationship intelligence of an organization's people: its *inner* aspects.

This is where we find the characteristically human problems of resistance, conflict, communication breakdowns, broken promises, people going through the motions with little passion or conviction, deteriorating product quality, managers micro-managing—the world, that is, of mindset and culture—the world of **inner agility.**

Inner agility is essentially what we are referring to when we say things like "agile mindset" or "being agile", and the like.

In this domain of human performance, we want to better understand the inner capabilities that determine how people think; how they make sense of complex situations around them; the unexamined beliefs and

values they hold, both individually and collectively; people's ability (or inability) to hold perspectives that are different from their own; their ability (or lack thereof) to relate with others in ways that leave those others empowered and enabled.

But, beyond merely understanding the nature of inner agility, we want to know how we might help ourselves and others grow those capabilities. Again, not from the *outside in*—the world of processes and structures or even behaviors. But rather from the *inside out*—the world of sensemaking and consciousness, and from there out into the world of relationships and, beyond that, out into the world of organizational environments.

Such a learning methodology must, necessarily, be one that is transformative, not just informative.

In this short white paper, we introduce key ideas and distinctions related to the growing of such inner capabilities, which we call **Vertical Facilitation.**

First, we want to speak about what we mean by "inner growth", making a differentiation between *vertical* and *horizontal* growth, or learning.

Then, we dive into the unique qualities that characterize what *vertical learning* is, and, in particular, the necessarily *transformative* quality which such a manner of learning entails. It is our assertion if we are to grow our capacity for *inner agility*, we will need to get better at catalyzing *vertical learning*.

The Nature of Inner Growth

We begin by talking about *inner growth*. "Inner growth" refers to a quality of learning that equips the whole person—a learning process in which the learner is not merely left with a new skill or competence, but with an enhanced ability to reason, to understand, to relate, and manage her or his emotional world.

Horizontal versus Vertical Learning

In order to be able to speak more definitively about such a manner of learning—of such a manner of *inner growth*—we need to make a distinction between two realms in which inner growth can happen. In doing so, we will borrow terminology from the field of adult development and education—a field of psychological research that has gained significant traction in the world of leadership development.[1]

Researchers sometimes visualize these growth realms as two distinct *axes*:

The horizontal axis of growth—*horizontal learning*—refers to the kind learning we ordinarily think of when we think of "learning": acquiring new skills or developing competency and know-how in some particular subject matter area. For instance, we learn a new programming language or software tool; we learn how to communicate in a more affirming manner with others; we "learn the ropes" of a particular company,

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[1] There exists a growing body of research that shows the benefits to be gained by applying *vertical* learning distinctions and practices to leadership development. For a small sample, go to Center for Creative Leadership (ccl.org) and the recent collection of vertical leadership development chapters in the book *Maturing Leadership: How Adult Development Impacts Leadership,* edited by Jonathan Reams, 2020. There are also innumerable articles on the subject within the current business leadership literature—a sure indication that it is beginning to go "mainstream". Finally, there are the works of people like Robert Kegan, Lisa Lahey, William Torbert, Bill Joiner, and David Rooke, all of whom can be easily found with a google search.

which means we learn the rules of thumb for how to function in an effective manner within that particular environment.

This kind of learning—**horizontal** learning—expands the range of our *skill* and *competency*.

But, at some point, if that expansion process is to continue, such a skill--such competency—calls for a more enhanced capacity for complex reasoning, a more refined ability to draw more nuanced inferences, or a greater sensitivity to the feelings and perspectives of others.

In order to learn a new programming language, for example, one has to develop in oneself an inner, mental capacity for what developmental psychologists call "formal operations"—the ability to think *abstractly*. Without this deeper inner capacity of mind, it would be difficult, if not impossible, to learn to develop software of the kind of complexity required in today's world.

Similarly, in order for one to become a therapist, one must develop in oneself an inner, emotional capacity for empathically sensing another's emotions, and an awareness of, and an ability to manage, one's own emotions. Without such a deeper, inner capacity, it's hard to imagine someone being effective in such an emotionally refined role.

This leads us to the other kind of inner growth: **vertical** growth, or **vertical** **learning**.

Vertical learning focuses on growing the complexity of our way of seeing the world: What we are able to notice, the nature of the meaning we are making from what we are noticing, our capacity for self-awareness (and self-management), and the range of actions that we can sensibly pursue (and those we can't), given all of this. It is through *vertical* learning that we adjust the lenses and filters which determine how we make sense of the world, in order to allow us to take in the greater complexity around us. It is also through *vertical* learning, that we gain the quality of self-awareness, and other awareness,

necessary for navigating the complex psychological landscape we so often find ourselves in.

Vertical learning has happened when someone is able to comprehend the bigger picture of a given task or activity. When someone is not merely able to carry out a complex task, but is able to do so with a degree of mastery, perhaps even *artistry*.

When a highly accomplished software developer, for instance, is willing to relinquish control over a code base for the sake of the learning of another, more junior developer. When a manager is truly able to hear another person, such that that person, in feeling genuinely heard, can let go of that particular gripe they've been harboring, perhaps for years. When an executive leader is able to integrate larger social, economic, and political forces into a strategic design and, in doing so, bring about a more comprehensive and sustaining design. When a therapist is able to see past their own projections in order to truly take in, and contribute to the development of, the psychological world of another.

Vertical Learning is Key to the Growing of 'Inner Agility'

Vertical learning is key to our inner growth, and hence our leadership capacity, in that it points to growth in the complexity of our meaning-making, and to the degree of environmental complexity that meaning-making is able to integrate and translate into effective action.

As the complexity of our inner meaning-making grows, so grows the complexity of the tasks we are able to undertake, and the task domains into which our skillful performance expands—the domain of our *Horizontal* learning. Research shows that our actions are correlated to the complexity of meaning-making from which they

derive: The more complex our meaning-making, the more capable and effective is our action.[2]

Vertical learning is, as such, key to growing human capacity more generally, and the capacity for <u>inner agility</u> specifically.

If we are to grow our capacity for inner agility, we will need to somehow work with the filters and lenses that determine how we make sense of the world. We will need somehow put them in front of ourselves as objects for us to look at, examine, even perhaps interrogate somewhat.

This calls for a very different kind of learning than the *skills acquisition* model we are accustomed to: We need to embrace a manner of learning empowers and enables us to examine the nature of the filters which determine how we see the world.

Only when we can see that which governs what and how we see things, can we shift our way of seeing. Only when we can *look at* the very meaning-making constructs we normally *look through* can we transform our capacity for right and intentionally leaderful impact in the world.

When we remove the source of our distortions, we alter those distortions, freeing ourselves to see the complexity around us, and to act accordingly.

<u>Vertical Facilitation</u> is a manner of leaderfully interacting with others, usually over the course of time, in ways that deliberately catalyze vertical learning.

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[2] See David Rooke and William Torbert, "Organizational Transformation as a Function of CEO's Developmental Stage." Also, see theLeadershipCircle.com for studies that show an overwhelmingly strong correlate between greater complexity of mind and leadership performance, based on a study with a sample size in the 10s of thousands.

It is the process by which we design environments, and manage the moment-by-moment interactions and exchanges that occur within a facilitated event or series of events (e.g. workshop, offsite, series of leadership team interventions, etc.). It does so in a manner that deliberately catalyzes the growth of complexity of an individual's and collective's Action Logic. From one of lesser complexity to one of greater complexity.

To learn more about vertical learning and, specifically, *vertical facilitation,* join us for our next learning journey. The first part is **free**, and consists of webinars, emails, white papers, and recorded materials. Join us!

www.verticalfacilitator.com.