Scaling Leadership Potential:

A Success Roadmap for Founders, Executives, and Investors

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Meet the Authors

Behind every successful company is a leader learning to navigate new levels of complexity. The greatest risk to growth isn't the product, the market, or even emerging technologies—it's whether leadership can keep pace with the demands of the business. We've seen firsthand how founders stall when they don't evolve, and how organizations accelerate when leaders expand their capacity.

This paper reflects what we've learned working with founders, executives, and investors at pivotal stages of growth. Our intent is to provide a roadmap—grounded in research and practice—that helps leaders anticipate these developmental shifts, boards guide transitions with clarity, and investors assess leadership fit with greater precision. When leadership evolves in step with the business, risk is reduced and far greater value is unlocked.

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Executive Summary

For investors in startups and growing companies, the biggest risk isn't the market or new technology like AI—it's whether the leadership team can grow as fast as the business. A strong company culture is essential for long-term success, and that culture is shaped by its leaders. However, when leaders don't evolve, the company's growth stalls - when they transform, the company can propel forward.

This paper offers a clear framework to help leaders grow in ways that match their company's changing needs. We go beyond focusing only on the leader as an individual to instead examine how they interact with the demands of their environment. The biggest obstacle to growth isn't a lack of knowledge. It's a leader's ability to adapt and think in more complex ways. This is especially critical now with the paradigm shift occurring with AI.

We focus on two types of growth:

- Horizontal Development: Learning new skills and knowledge, which we call "competence."
- Vertical Development: Expanding what we see, are aware of and therefore the choices we can make in complex situations, which we call "capacity."

Both are essential. To lead a growing company, leaders must not only know more but also see, think, and act differently. Many founders struggle with this shift, which is why strong early-stage leaders sometimes fail as CEOs later on.

This paper provides:

- An introduction to the distinction of horizontal vs. vertical development and why that matters for scaling organizations
- Case studies of leaders navigating across the vertical lens
- A roadmap for how leadership needs to grow at different company stages.
- A way for investors to assess leadership during due diligence.
- A shared language for boards to guide leadership transitions.
- A practical guide for leaders navigating the challenges of scaling.

When we intentionally grow leaders in sync with business growth, we reduce risk and unlock much greater value.

The Leader-in-Context Framework:
A New Formula for Performance

Many startups fail or don't reach their full potential not because of bad products, but because of "bad management" or "people problems". More often than not, these are actually leadership issues. This is rarely because the leader isn't trying hard or doesn't care. More often, the leader's competence and capacity don't match the bigger challenges that come as the company grows. As a company scales, complexity increases rapidly. If leaders don't grow at the same pace, they can feel "in over their heads" (Kegan, 1994).

This isn't a sign of personal failure, but of a mismatch between the external demands of the business and our internal capacity to make sense of them. When a leader's mental and emotional capacity doesn't match the increasing complexity of the organization, they can become the biggest bottleneck to growth.

To solve this, we offer a simple but powerful framework:

Performance = Leader Capabilities × Contextual Demands

In other words, success depends on how well a leader's strengths fit the challenges they're facing. To grow strong leaders, we need to focus on two things at once:

- What the leader is capable of today.
- What the business needs from them now and in the near future.

This framework helps investors and boards proactively assess the fit between a leader and their role. Instead of waiting for a leadership problem to cause damage, they can spot and address development gaps early, protecting their investment and unlocking greater value.

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The Two Axes of Growth:
Horizontal and Vertical Development

As highlighted by Nick Petrie, leaders grow in two key ways:

1. **Horizontal Development – "Filling the Cup":**
This is the traditional way we think about growth. It's about gaining new skills, knowledge, and experience. For example, learning how to read a financial report, mastering a sales strategy, or understanding how to give feedback. Horizontal development is important for getting things done and running the day-to-day business.

2. **Vertical Development – "Expanding the Cup":**
Vertical development is about upgrading how leaders think and see the world, not just what they know. While horizontal development focuses on adding new skills, vertical development shifts how a leader interprets situations, makes decisions, and responds to uncertainty. It expands their mental and emotional capacity to lead through complexity and ambiguity. Think of it as upgrading a leader's internal "operating system".

This shift helps leaders move from being strong tactical managers to being able to lead entire organizations through change and uncertainty. Researchers like Robert Kegan and Jennifer Garvey Berger have shown that this kind of growth enables leaders to step back, see the bigger picture, and integrate competing demands more effectively.

Many leadership breakdowns happen because a leader hasn't yet made the mental leap required for the company's next stage. That's why a strong due diligence and leadership development approach must assess the fit between the demands of the organization and the leader in terms of both horizontal and vertical development.

What Does Vertical Development Look Like?

Leaders, like all adults, can continue to grow and mature in their understanding of the world. This growth, often called vertical development, provides new awareness, deeper insights, and a broader range of choices. This process isn't about simply acquiring new skills, but about fundamentally changing how a leader makes sense of their experiences.

The way a leader interprets the world is referred to as an "action-logic." This isn't a fixed personality type or a set of characteristics you're born with. Instead, it's a developmental stage that shows how a leader constructs meaning and makes decisions. Each action-logic represents a unique level of cognitive complexity and is tied to a specific way of taking action. These action-logics follow a predictable progression, with each new stage building on the one before it.

Unlike many leadership assessments that focus on traits or behaviors, action-logics get to the core of how a leader makes sense of the world around them. They have a greater awareness of their own thoughts and feelings, the dynamics within their team, and the larger systems they operate in. This increased awareness allows them to make more nuanced and effective decisions in highly complex environments. This ability to see the bigger picture and connect the dots is a key differentiator for highly effective leaders. These stages aren't just descriptive—they help us identify which kinds of developmental interventions will be most effective at different points.

Below are brief descriptions of each action-logic as adapted from the Global Leadership Associates definitions and rough percentage estimates of those leaders who have completed the Global Leadership Profile (GLP) :

Opportunist (less than 1%)

This leader prioritizes self-preservation and personal gain above all else.

Diplomat (less than 1%)

This leader values fitting in, loyalty, and seeking approval from authority.

Expert (5-10%)

Driven by logic and efficiency, this leader is a skilled problem-solver but can be overly critical.

Achiever (30-50%)

This leader is highly goal-oriented and values feedback to improve performance.

Redefining (20%)

Challenges the status quo and is highly collaborative and open to different perspectives.

Transforming (2%)

Thinking in terms of broader systems, this leader embraces complexity and paradox to achieve both process and goal-oriented results.

Alchemical (less than 0.1%)

This rare leader who can who can fundamentally change a system. They can hold two opposing ideas at once, seeing events and time less literally and more as meaningful symbols.

It's important to note that later action-logics aren't 'better'. What's important is the fit between the context and the action-logic. As highlighted in Table 1 as a leader's meaning making shifts, the way they think about their influence, their identity and their role, the time horizon they tend to operate in, and their relationships and interdependence with others also shifts.

Table 1. Action-Logics and Constructs (adapted from Global Leadership Associates, Gohal and McCormick, 2023)

Action-Logic	**Power**	**Identity**	**Time**	**Relating**
Opportunist	Unilateral control	Winning	Reactive - in-the-moment	Self-oriented
Diplomat	Status - control	Appearance - behaviors	Short - weeks	Comply, fit in with group
Expert	Control - expertise	Mastery - technical	Short - 1 year	Aligned with social cues, control
Achiever	Outcome influence	Achievement	Short - 2-5 years	Responsible, conscientious
Redefining	Partnering - collaborative	Questioning society/stereotypes	Mid 5+ years	Mutual, collaborative
Transforming	Outcome - mutually enhancing	Self-fulfillment transformation	Long - decades, intergenerational	Interdependent, developmental, accepts uncertainty
Alchemical	Construct oriented	Disturbing/disturbance identities	Intergenerational and moment-to moment	Cherishes individuality and patterns

**These developmental stages provide the diagnostic lens for understanding leadership capacity. The roadmap and toolkit that follow show how to apply this lens in practice.*

CASE STUDIES:

Leaders at a Crossroads

Here are a few examples of CEOs who approach leadership based on how they make sense of the world, how vertical development might help them and their organizations and the Investor takeaway. Each of the leaders brings strengths and limitations when considered with their contextual demands.

CASE 1: Erica

Her Journey:

Erica, a leader who profiles at the Expert action-logic, prides herself on creating disruptive technologies, like her company that develops printing devices for the orthopedic industry. With a double Ph.D. and a track record of raising significant capital, her brilliance is undeniable.

Her Struggle:

The board is concerned about her over-involvement in every detail. She struggles to let go of control, receive feedback, and listen to other experts. Her lack of emotional awareness and her high standards unintentionally create a toxic culture, as her team is afraid of her and simply complies with her direction. Erica doesn't see a problem with her competitive nature and believes the issues are all external. She reacts to problems as they arise, creating more last minute demands and dependencies.

The Crossroads:

Erica's brilliance has become her biggest bottleneck. The company is in a gridlock because it is so dependent on her. While she might be the right CEO to sustain success, she must learn to loosen her grip. The board has suggested that a CEO who can handle greater complexity across time, relationships, and the market may be a better fit.

Takeaway:

A leader like Erica who profiles at Expert can build a brilliant product, but her need for control and avoidance of feedback makes her a significant risk for scaling. The firm must decide whether her role needs to be supplemented, whether she should be moved to another position, or if she can and is willing to be developed through executive coaching. The firm would benefit by developing Erica and the team around her.

CASE 2: Ariel

Her Journey:

Ariel, a leader who profiles at Achiever, successfully scaled a multi-billion dollar company by coordinating high-performing leadership teams and placing the right executives in the right roles. Her performance reviews glow with praise for her ability to empower others, create autonomy, and maintain a poised presence.

Her Struggle:

Despite her success, Ariel can struggle at times with being reactive and is continuously "burning the candle at both ends". She's hitting strategic obstacles yet can't seem to get ahead of the market. There is no strategy beyond one year. Her teams are siloed with little integration, which is starting to erode the company culture into competitive sub-cultures. There are some patterns that she can't quite put a finger on that are creating back door politics and workplace drama.

The Crossroads:

To take the company to the next level, Ariel needs to learn how to run a marathon, not a sprint. She feels isolated and is on the brink of burnout or medical leave. A critical crisis is looming because departments aren't integrating effectively.

Takeaway:

A leader like Ariel is highly effective at building a team and driving results, but her focus on short- to medium-term goals and inability to see and address systemic issues will limit future growth. She requires coaching to shift from a "doer" to a "systems thinker" who can handle greater complexity, competing tensions, and contradictory views.

CASE 3: Rahul

His Journey:

Rahul, a leader who profiles at Redefining, values innovation and challenges the status quo. He partners with competitors, has created an inspiring company culture, and craves creative authentic approaches.

His Struggle:

Rahul is a big-picture thinker but struggles to make bigger, riskier decisions that would position the company well. His desire for continuous innovation and change is viewed as chaotic by some stakeholders. While he charges forward, he also wrestles with doubt about his capabilities and whether he is on the right track. While some have wondered if he has imposter syndrome, his doubt allows him to be open to new possibilities.

Takeaway:

A leader who profiles at Redfining, like Rahul, is a powerful force for innovation and culture, but they can be a risk if they struggle to translate their visionary thinking into a decisive, cohesive strategy. Coaching and team interventions that focus on strategy, decision making frameworks and long-term visioning can help Rahul build an aligned framework to embrace difficult decisions.

CASE 4: Tasha

Her Journey:

Tasha, a leader who profiles at Transforming, is a principled systems leader who has successfully started and scaled multiple companies. She is known for sensing systemic patterns that have enabled her to pull the right levers at the right time, and to focus on process over short-term goals or conflicting personalities. During the pandemic, she anticipated second and third order ripple effects that allowed her to be proactive about how to handle a remote-first environment and the transition back to in-office work. Her proactive leadership ensured the company could adapt to the ever changing shifts in demand.

Her Struggle:

While Tasha thinks systemically, her relentless and at times heroic nature can lead to burnout and isolation. Tasha is intentional about integration and sets up processes that allow for an appropriate amount of collaboration. Her complex thinking is often misunderstood by others who find her a bit cerebral and abstract. Her primary challenge is translating and communicating her ideas into practical and accessible terms to ensure others will be able to join her on the journey.

Takeaway:

Tasha, like leaders at previous action-logics, is a valuable asset. She is capable of leading through uncertainty and complexity through increased systems thinking. Her opportunities for growth could include continuous coaching, especially in translating her ideas to be understood and embraced. Tasha could also further elevate her environment by setting up team coaching and leadership development programs that increase the capacity of those around her to create a “flywheel effect,” where she can harness the system further. She would also benefit from continuing to mentor others as well as learning alongside peers. Her primary challenge is effectively translating her thinking for others. And, harnessing the strengths and capabilities of leaders (at various action-logics) around her.

As these case studies demonstrate, the leader’s action logic and the context in which they’re leading is critical to help them scale successfully and develop vertically. Several valuable, yet underused approaches exist.

The Psychological Engine of Vertical Growth:

Methodologies to support leaders at all stages of development

Real vertical growth doesn't happen through books or workshops alone. It happens through experiences that challenge how leaders think and act in real time and by reflecting on those experiences afterward. George Vaillant, a researcher who contributed to the 80-year longitudinal Harvard adult development study, highlights several ways to support developmental maturity, which are adapted below for leaders:

Challenging experiences with support:

New challenges can reveal limitations in our thinking. Without support like a mentor or coach, leaders may revert to outdated strategies.

Holding competing points of view:

This means embracing paradox and living with different, sometimes clashing, perspectives.

Taking ownership:

A key shift is moving from blaming external factors to taking personal responsibility and accountability for outcomes.

Peer learning and social support:

Leaders who engage with support from peers tend to take a broader perspective and use more mature coping strategies.

Paying attention to the culture and system:

People will act according to what is permitted and they will grow toward the ideal you set.

Bill Torbert, an adult development theorist, illustrates how "Action-Inquiry" is the engine that drives this development. This practice intentionally moves through three levels:

Intrapersonal:	Interpersonal:	Context/Systems:
Reflecting on your own thoughts and feelings.	*Understanding your interactions with others.*	*Seeing the bigger picture of the organization and market.*

This holistic view allows leaders to track decision-making, adaptation, and agility, helping them thrive over time. Action inquiry is the bridge between action-logics and interventions—it is the practical method that helps leaders shift from one developmental stage to the next.

Three Levers for Vertical Growth

Research shows that three things help leaders grow in this way:

1. ***High-Stakes Experiences:*** These are intense, high-pressure situations where a leader's usual way of thinking stops working. These moments force them to grow, such as a top performer leaving, dealing with a major cash crisis, or leading through a major policy change.

2. ***Colliding Perspectives:*** Leaders grow when they are exposed to people who have different points of view. This forces them to question their assumptions and expand how they see things, for example, hiring experienced peers and executives who challenge their thinking.

3. ***Elevated Sense-Making:*** This is the habit of stepping back and reflecting. A leader might ask, "What is this challenge really asking of me?" or "What assumptions am I making?".

These moments create a psychological "shake-up" that forces a leader to rebuild their mental model with more complexity and maturity. This is the core of vertical development: challenging old ways of thinking, letting go of outdated beliefs, and learning to see the world in more nuanced ways.

Leadership and Organizational Evolution:

A Roadmap for Growth

As companies scale, the demands on leaders change - often requiring them to step into greater complexity. The ability of a leader to match that complexity can either support or inhibit organizational capacity to scale.

We offer a roadmap that outlines how leadership needs to shift across three stages of company growth.

Table 2: A Roadmap for Growth

Stage	***Stage 1: Early Stage (1–50 employees)***	***Stage 2: Growth Stage (50–250 employees)***	***Stage 3: Scale-Up Stage (250+ employees)***
Leader Profile	The Player-Coach	The Architect of Systems	The Institution Builder
Contextual Demands	High uncertainty, focus on survival	Build scalable systems without losing culture	Manage complexity, lead leaders, shape vision
Horizontal Needs	Functional skills, quick decisions	Hiring processes, financial planning	Strategic leadership, board management
Vertical Needs	Shift from “I do it” to “we do it”	Lead through influence, not control	Elevated sense-making, balancing competing values/demands
Common Pitfall (The Derailer)	The Micromanager	The Over-Heroic Founder	The Over-Consensus Builder / Covert Hero
Case Study Illustration	Erica (Expert) — a brilliant technical founder, deeply trusted for her expertise. When overdone, her hands-on control creates bottlenecks, slowing the whole organization.	Ariel (Achiever) — a tireless operator, results-driven and team-oriented. When overdone, MVP-style heroics cause burnout and silos, limiting scaling capacity.	Rahul (Redefining) — a visionary, inclusive leader who inspires innovation. When overdone, over-collaboration and excessive perspective-taking slow decisive strategy. Tasha (Transforming) — a system-level thinker who integrates competing demands. When overdone, covert heroics (“pulling strings behind the scenes”) risk eroding trust and transparency.

*While this roadmap highlights how leadership needs shift as companies evolve, the Toolkit that follows translates these insights into concrete actions for investors, boards, and executives.

- ***The Micromanager:*** In the early stage, a leader who struggles to delegate becomes a bottleneck.
- ***The Nostalgic Founder:*** In the growth stage, a leader who resists building systems sees process as a threat to culture.
- ***The Operational CEO***: In the scale-up stage, a leader who stays focused on day-to-day operations fails to build for the future.

The transition between these stages is often a "messy middle". Leaders are pulled between doing the work themselves and building the systems for others to do it. Recognizing and supporting the personal and emotional cost of this shift is critical to sustaining growth.

The ROI of Vertical Development

Investing in vertical development is a direct way to reduce risk and increase the capacity of leaders, which in turn furthers a company's value.

For Early-Stage Investors

A founder's ability to grow alongside the business is a major driver of higher valuations. When a founder shows the capacity for vertical development, it gives investors confidence that the company can keep scaling. In fact, a founder's ability to make the leap from startup to growth-stage CEO is one of the best predictors of success.

For Growth Investors and Boards

A leadership team with higher cognitive and emotional capacity is better equipped to handle complex tasks like integrating a newly acquired company, turning around underperformance, or entering new markets. Vertical development prepares leaders for exactly this kind of complexity, making a growing company a more durable, long-term asset.

By focusing on vertical growth, investors and boards are protecting their investment and building a stronger foundation for value creation.

A Proactive Toolkit for Investors and Leaders

To unlock the full value of leadership development, investors, boards, and executives must take a proactive, intentional approach.

This Toolkit complements the roadmap by showing how leaders and investors can act on these developmental insights at each stage.

For Investors and Boards:

- **Assess the "Fit"**: Look not just at the leader, but at how their skills and mindset fit the demands of the role. Use behavioral interviews and structured assessments to identify where development gaps exist.
- **Apply the Right Intervention**: Match the support to the need. Use training for competence gaps and developmental coaching for capacity gaps.
- **Evaluate Founder Readiness**: Boards need to be honest about whether a founder is the right person for the next stage. Look for red flags like becoming a decision-making bottleneck or blaming external factors (Wasserman, 2012). Proactively planning for succession is a strategic move, not a last resort.
- **Actively Support Development**: Provide candid feedback, connect the CEO to stage-ahead mentors, and bring in new perspectives to challenge their thinking.

For Founders and Executives:

- **Regularly Self-Assess**: Leaders should regularly reflect on whether their current skills and mindset match what the business requires now.
- **Seek Help as an Investment**: Engage with coaching, team coaching or leadership development programs as a strategic investment in your capacity to grow, not as a sign of failure.
- **Practice Elevated Sense-Making**: Build a habit of reflection. Just 15 minutes a week can be powerful. Ask questions like: "What was I assuming?" or "Whose perspective might I be missing?".
- **"Name the Messy Middle"**: When caught between doing and delegating, be transparent with your team. Saying, "I know I need to delegate this, but it's hard. Help me build a system," builds trust and creates shared solutions.
- **Grow the Full Leadership Team**: Shared leadership becomes a competitive advantage when the entire team is growing. Use team coaching to help the leadership team address their patterns of interaction and build the trust needed to lead at scale.

For Professional CEOs:

- **Bridge Legacy and Growth**: A professional CEO's biggest challenge is cultural—honoring what the founder built while bringing in the structure needed to scale. Your own growth is tested by your ability to carry the past forward while building what's next.

Conclusion:

Scaling leadership isn't just about adding skills, it's about upgrading how leaders think. For too long, leadership development has focused only on teaching new skills—things like giving feedback or financial modeling. These are important skills; and they are not enough. The most successful leaders and resilient companies evolve how they think. Performance isn't just about competence and personality; it's about how well a leader's ability to make meaning fits with the complex and changing demands of their business.

As those demands become more complex, leaders need to grow not just outward by learning more, but inward by expanding their capacity. By intentionally assessing a leader's abilities and the company's context, and by using tools like developmental coaching to spark vertical growth, investors, boards, and leaders themselves can shift from reacting to problems to preparing for what's next. This proactive approach doesn't just reduce risk; it builds organizations that are more adaptable, resilient, and built to last.

Leadership capacity is the biggest hidden risk in scaling-and also the greatest unlock.

Whether you are an investor conducting due diligence, a board guiding leadership transitions, or an executive navigating the messy middle of growth, the right support can make all the difference.

*At **Fractional Insights**, we partner with investors and organizations to bring research-driven insights that reduce risk and strengthen leadership teams.*

*At **Scaling Leadership Potential**, we provide coaching, immersions, and assessments that help leaders expand their capacity to meet the challenges of scale.*

Reach out to explore how we can support your organization:

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Appendix A:

The Vertical Development Assessment Toolkit (Sample Behavioral Questions)

- "Tell me about a time you faced a significant failure or setback. What was your role in it, and what did you learn about yourself?" (Probes for ownership vs. blame; ability to learn from experience).
- "Describe a time when you received feedback that was difficult to hear. How did you react, and what did you do with the feedback?" (Probes for openness vs. defensiveness; ability to update mental models).
- "Walk me through a complex, cross-functional decision you had to make. Who did you involve, and how did you weigh competing priorities?" (Probes for systems thinking vs. siloed thinking).
- "Think about your company's strategy a year ago versus today. What has been the biggest change in your own thinking about the business?" (Probes for cognitive agility and ability to evolve a worldview).
- "When have you realized that a deeply held belief you had about your business or market was wrong? What caused that realization?" (Probes for the ability to undergo a perspective shift).

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Appendix C: Suggested Further Reading

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