

**A DETAILED DESCRIPTION OF THE DEVELOPMENT OF
NINE ACTION LOGICS
ADAPTED FROM EGO DEVELOPMENT THEORY¹
FOR THE LEADERSHIP DEVELOPMENT FRAMEWORK**

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Introduction

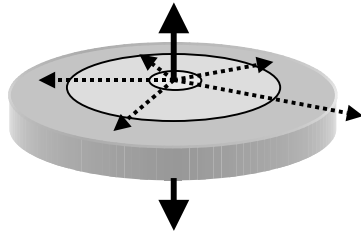
The Leadership Development Framework is best understood as one of the several models that portray the different levels of development in the Upper Left Quadrant in Ken Wilber’s All Quadrants, All Levels (AQAL) map of human experience. It describes the most common action logics found in today’s professional world. The table below shows how the LDF fits into Wilber’s full-spectrum model of consciousness. The table is meant to give you as sense of both its fine-tuned differentiations and its overall fit within the larger model. Despite the appearance of this diagram, the theory is not to be seen as a linear progression or a stair-case.

Tier	<u>Four waves or tiers</u> <i>K. Wilber</i>	% Of popul.	<i>Torbert</i> Action Logics	<i>Cook-Greuter</i> SCT
<u>IV.</u>	<i><u>SPIRIT</u> Transcendent</i>	<u>Postpostconventional, Transpersonal, Ego-transcendent</u>		
III.	Unitive view	<~1%	Ironist	6 Unitive
	<i>SOUL</i>	~1.9%	<u>Magician</u>	5/6 Construct-aware
	<i>Postconventional</i> Systems view	~8%	Strategist Individualist	5 Autonomous 4/5 Individualist
II.	<i>MIND</i> Conventional	~80%	Achiever Expert/technician Diplomat	4 Conscientious 3/4 Self-conscious 3 Conformist
I.	<i>BODY</i> Preconventional	~10%	Opportunist Impulsive	2/3 (Δ) Self-defensive 2 Impulsive

Table 1. *The position of the LDF in Wilber’s 4-tier model of human development*

Nine Action Logics and Their Development in Detail

Human development can be described in many ways although most theories see it as evolving in a spiral fashion, not lock step, with movement possible in all directions



Up = Transformation, vertical development

Horizontal expansion-transfer at same stage,
(new skills more knowledge):
Wilber calls this “translating.”

Down = temporary or permanent regression

Most growth in adults is of the horizontal, expansion kind. People learn new skills, new methods, new facts, even new ways of organizing knowledge, but their current action logic or mental model of the world remains the same. The Leadership Development Framework, on the other hand, describes a sequence of how mental models themselves evolve over time. Each new level contains the previous ones as subsets. Each new level is both a new whole logic with its own coherence, but – at the same time -- also a part of a larger, more complex meaning system.

In addition, the Leadership Development Framework describes a psycho-logical (sic) system with three interrelated components. The operative component looks at what adults see as the purpose of life, what needs they act upon, and what ends they are moving towards. The affective component deals with emotions and the experience of being in this world. The cognitive component addresses the question of how a person thinks about him or herself and the world. It is important to understand that each Action Logic emerges from a synthesis of doing, being and thinking despite the term logic, which may suggest an emphasis on cognition.

Metaphorically speaking, the Leadership Development Framework provides us with one possible account of how individuals navigate the straits of human existence by using navigational lore, common sense, increasingly complex maps, algorithms, and intuition.

Function	The LDF, a psycho-logy of human meaning making which addresses the following essential questions
DOING * coping * needs and ends * purpose	1. <u>Behavioral dimension</u> How do people interact? What are the needs they act upon, and what ends do they try to achieve? How do they cope and master their lives? What function do others play in an individual’s life?
BEING: * awareness * experience * affect	2. <u>Affective dimension</u> How do they feel about things? How do they deal with affect? What is the range of awareness and of their selective perception? How are events experienced and processed? What are the preferred defenses?
THINKING * conceptions * knowledge * interpretation	3. <u>Cognitive dimension</u> How does a person think? How do individuals structure experience, how do they explain things, make sense of their experience? What is the logic behind their perspectives on the self and the world?

Table 2. *Three dimensions of action logics*

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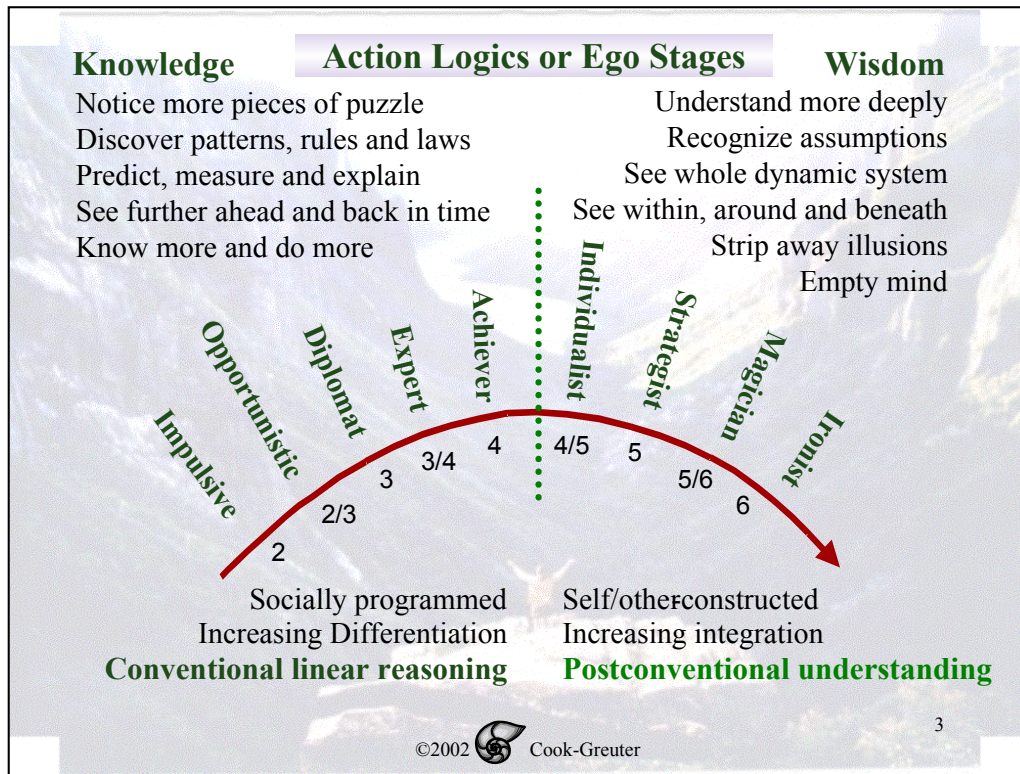


Figure 1. *Alternating stages of differentiation and integration*

Human development in general can be looked at as a progression of different ways of making sense of reality or different action logics. The action logics follow each other alternating between those that emphasize, on balance, differentiation over integration and those favoring integration over differentiation. This pattern can be observed both overall and from action logic to action logic.

In the mid-sixties psychologists² first postulated that human beings individuate by continuously renegotiating the balance between differentiation and integration. Angyal called it the innate double trend towards autonomy and homonomy. He defines homonomy in this way: "Homonomy is the wish to be in harmony with a unit one regards as extending beyond the individual self. The ... whole may be represented ... by a social unit—family, clan, nation—by an ideology, or ... by a meaningfully ordered universe" (1965, p. 15). We know this dual need better by other names such as differentiation and integration; separation and participation; mastery and relatedness; independence and connection; or care and justice. The action logics of the LDF follow this alternating pattern throughout.

Stages with a slashed number on the figure above are stages of differentiation. They include Opportunist, Expert, Individualist and Magician. Each time someone emerges from a previously shared worldview, they are apt to focus on their differences from the previous stage. They assert their newly won independence, but also express some distress because of the loss of the connection they leave behind. People at single number stages (Diplomat, Achiever, Strategist and Ironist) are generally more balanced because they are now in harmony with a new community to which they connect in ways that fits their current cognitive capacity. The sequence

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is from identifying with others who are externally alike at stage 3 (Diplomat), to the like-minded at 4 (Achiever), to the like-principled at stage 5 (Strategist), and with the like-spirited at Ironist action logic or stage 6---where spirit, is seen as radiant in all people.

An overall shift from differentiation to integration also marks the transition from conventional to postconventional stages. The first two tiers of development constitute a movement away from the symbiotic embeddedness of the newborn, or said differently, an overall trend of increasing differentiation towards the adult stage of abstract, analytic functioning. This development culminates in the Achiever action logic. The postconventional stages Individualist 4/5 through Ironist 6 show an overall trend of assimilation and integration towards an ever more conscious sense of belongingness and unity with the ground.

By most modern Western expectations, fully functional adults see and treat reality as something preexistent and external to themselves made up of permanent, well-defined objects that can be analyzed, investigated, and controlled for our benefit. This view is based on a maximal separation between subject and object, thinker and thought. It epitomizes the scientific frame of mind that is concerned with control, measurement, and prediction. It also represents the goal of much Western socialization. Most adults have little or no insight into the basic arbitrariness of defining the objects and are completely unaware that according to Koplowitz "the process of naming or measuring pulls that which is named out of reality, which itself is not nameable or measurable."³ They operate under the assumption that subject and object are distinct, and that by analyzing the parts one can figure out the whole. From the conventional Western point of view, the acquisition of this scientific, rational mindframe is seen as the end goal of socialization and is characteristic of fully grown adult.

The following table gives some perspective about the distribution of action logics in different populations.

Stage/Action Logic	535 managers & consultants in the UK	497 managers & supervisors in the USA	4510 USA mixed adult population
Impulsive/Opportunist (2; Δ)	0.4	2.2	4.3
Diplomat (Δ3; 3)	1.7	8.2	11.3
Expert (3/4)	21.1	47.8	36.5
Achiever (4)	33.5	34.8	29.7
Individualist (4/5)	23.4	5	11.3
Strategist (5)	13.5	1.4	4.9
Magician	5.6 ⁴	<1	1.5
& Ironist	0.9		0.5

Table 3: *Comparison of Percentage Stage Distribution in three different Samples*

From Impulsive to Ironist: The evolution of action logics

What follows is a description of how each subsequent stage is a whole action logic in itself as well as a part of a larger, more complex and integrated way of looking and acting in the world. Each action logic has its own stage-specific achievements over the earlier stages as well as its specific limitations and vulnerabilities.

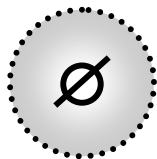
The earliest tier, the preconventional, is rarely seen in professional adults as these ways of seeing the world are usually traversed in childhood. They reside as memories in our subconscious and serve as fallback positions in times of extreme duress.

THE PRECONVENTIONAL STAGES

The first tier actions logics, Impulsive to Opportunist, represent a child's normal maturation from birth to about age 12 as well as stages of "arrested" development in adults. Ego development theory further distinguishes among stages in this period, but these are not covered in the LDF. The earliest stage is given here for completeness only because all human beings are born undifferentiated and symbiotically merged with their initial caregivers. The toddler or "potty potentate" has already achieved major transformations away from the very earliest helpless days. The "Rule-oriented" stage between Opportunist and Diplomat is included here for theoretical reasons as well to show the evolution of one's increasing capacity for perspective taking. It is very rarely diagnosed in adults and not included in the action logics of the LDF. The references for the cognitive stages of development come from Commons and Richards, 1984.⁵

The presocial or symbiotic stage, Stage 1:

Perspective on the self: none



Cognitive: 1a; nominal actions

Self: Con-fused, confounded, undifferentiated self

Other: not distinct, source of survival

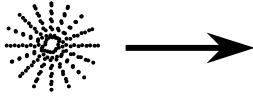
In the first stage infants construct a stable world of objects for themselves. In doing so, they separate themselves out as objects in the world. Constitution of the self and outer reality are necessarily correlative and depend on the use of language. This first stage can be further subdivided into a presocial or autistic phase and a symbiotic phase. Later adjustment in adulthood depends on the successful solution to the problems of these earliest periods in life including a healthy ego, intellectual, psychosexual, social and moral development. Strands of development later quite distinct are very much undifferentiated at this stage.

The symbiotic stage is not represented in the Leadership Development Framework, LDP Profile, or in the Washington University Sentence Completion Test⁶ as adults at this level of differentiation are nonverbal like babies and usually institutionalized or completely dependent on the care and protection of others. They do appear in the work world as clients and patients and

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their care requires great patience and inner strength. If cared for by people at preconventional stages, problems of exploitation and abuse sometimes arise, but are not inevitable.

Impulsive Action Logic, Stage 2:



First person perspective

Cognitive: 2a Primary actions

Self: rudimentary, physical self-labeling “me, mine”

Differentiation: crude dichotomies

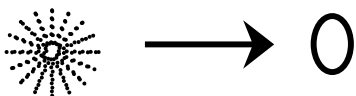
Other: fulfillment of needs on demand

This stage describes individuals who show signs of the beginning use of language simultaneously with the emerging ego as reflected in such statements as “I want” and “mine”. They are concerned with safety and the gratification of basic needs. It is the first stage that is measured with the LDP, and reflects the **first person perspective**. The inability to grasp fully the verbal clues to the instrument is a sign of this stage.

Children at this stage are governed by their impulses; hence this is called the impulsive stage. They assert their growing sense of self by the word “no,” and by ownership “mine.” Magical ideas prevail and a sense of unlimited power exists only curbed by punishment from various sources. These are not related to own behavior but perceived as random or retaliatory and as imminent in things. Other people are seen as primarily a source of need gratification or supply. Good people give to me, mean ones don’t. There is cognitive simplicity together with verbal **undifferentiation**. The impulsive individual has an inadequate conception of the complexities of adult life and of the world and can readily appears confused and overwhelmed.

Language Clues: Simple statements, repetitions of stem, present tense to past tense stimuli, unable to understand and respond to the longer stems such as “crime and delinquency could be halted if ...” Things are good or bad, clean or dirty, nice or mean. Affects are expressed in bodily terms rather than as feelings. Repetitiveness is the most conspicuous sign of the Impulsive action Logic. Many protocols contain the same or almost the same simple completion to several stems.

Opportunist Action Logic, or stage 2/3⁷



Cognitive: 2b preoperational actions

Self: single concrete features, minimal action-based self-description in terms of desire

Other: competing for goods, space, dominance, power

Differentiation: Beginning sense of others as having their own wants and will to get.

O = other / object

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This stage is familiar to most of us from watching or dealing with toddlers. For a time, with toddlers everything becomes a test of wills. Tantrums are the result of a thwarted will as well as a reaction to conflicting needs and desires. These behaviors are also common in adult Opportunists. Others experience them often as manipulative and exploitative. Opportunists are generally wary of others' intentions and assume the worst. Everything to them is a war of wills. Life is a zero-sum game. Their "I win, you lose" mentality inevitably causes friction wherever they go and also hurt feelings, especially with others at more conventional stages.

The Opportunist action logic describes people who see the world only from the perspective of their own needs and wants. They are as yet incapable of insight into themselves or others in a psychological sense. The only way one can get what one wants is by controlling others and protecting oneself. It is important, however to realize that Opportunists are so named because of their opportunistic, self-serving attitude as well as for their nose for opportunities and their energy to go after what they want.

Adult Opportunists are very self-protective to maintain their essentially fragile selves. The self is not really a separate adult self, but one synonymous with one's will, ideas, wishes. The self may be felt as having two sides, an inner real self, and an outer self or "a false face" to protect oneself. If others knew what you wanted, they would have power over you. Opportunists need to resist the will of others, to test limits and to assert their own control. Because there is a beginning ability to anticipate reactions in others, this is the first stage with an emerging awareness of others as separate people or "objects." The Opportunist action logic thus requires the rudiments of conscious social interaction. "If I understand what others are after, I can better manipulate them to get what I want."

Persons at this level often "*get into trouble*." Trouble happens inadvertently when you cross a boundary. Opportunists try to look out for trouble and to avoid its consequences. When they lose a test of will, or overstep a boundary, they see the cause as outside themselves. They get frustrated and tend to show free-flowing anger and hostility. Others are to blame, never oneself. Their own anger towards the world is projected outward, and others experienced as angry all the time. For Opportunists, the world is a hostile, dangerous place. Rules are recognized, but only followed for immediate advantage or to avoid punishment. Cleverness and taking advantage of all opportunities is necessary for survival. Self-respect is experienced in relation to the amount of control one can achieve in opposition to others. Opportunists often think they are the odd person out. They feel isolated, but do not know how to relate to others differently. "It's always me against the rest." This creates a self-perpetuating dynamic of very low trust and hyper-vigilance.

Opportunists have an expedient morality. Actions are only bad, if one is caught and punished. When caught, they are shameless and show little remorse. They do not feel responsible for failure or trouble they cause because they do not yet understand the connection between action and consequences, that is, linear causality. Blaming others for one's shortcomings is a way to protect oneself. There is much reliance on luck and magic to protect the self. Individuals who choose dangerous, but demanding jobs such as test pilots often represent the positive, daring aspects of this stage. They too are known to carry lucky objects, and are often loners.

Opportunists are not well embedded in social networks and do not understand subtle human interactions that are not based on power. Their relationships with others are volatile. Friendships blow up easily. Feelings are externalized and projected outward. We see little expression or reflection on own emotions both because of a lack of insight as well as for self-protection. Showing weakness of any kind is dangerous. "The more others know about me, the more they can take advantage of me." Unlike Opportunists in daring loner jobs, in a team or

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workforce of Opportunists there is often an atmosphere of general hostility and readiness for fight or flight.

Cognitive style: Thinking is concrete and dichotomous, based on global, undifferentiated judgments, and simple ideas. Things are only black or white.

Preoccupations: Favorite themes are those of domination, gaining control and advantage, or by deceiving them. On the other hand, Opportunists are always fearful that someone else is trying to dominate, control or deceive them.

Internal dimension: Psychology defined as what one does or wants to do now rather than in terms of psychological states or longer-term goals.

Decision-making style: This is your problem, not mine.

Organizational type: Power and coercion.

Defenses: Opportunists use blaming and a system of distortion to minimize anxiety and maximize self-esteem. Their defenses or coping style is immature. Fantasy, acting out, projection are the most common ones. All causality and all-important psychological action is seen to be part of the constantly threatening outside (see Vaillant's hierarchy of defense mechanisms).

Depression: There must be something wrong if I can't get what I want. I hate it when I am feeling controlled and constrained. Sadness most likely expressed in self or other aggression.

Sample character: "Archie Bunker"-types. They are self-protective, bull-headed and have tunnel vision, constantly blowing up and blaming others for what is happening to them. At times they have a biting humor that exposes others' soft sides. Opportunists are concerned with their concrete little world, often thrilled with bodily aspects and satisfactions. They show prejudice; polarize arguments and exploit others' weaknesses.

Language clues: Experience is described in simple dichotomies - good/bad, right/wrong, fun/boring or with concrete, physical words such as in "life is hard". Interested in concrete world of different "things" one owns. They may use physical terms for non-physical concepts and only differentiate among the simplest feelings such as feeling sick, upset, excited, and mad.

The Rule-oriented stage, Δ/3: (subsumed under Diplomat in LDF)

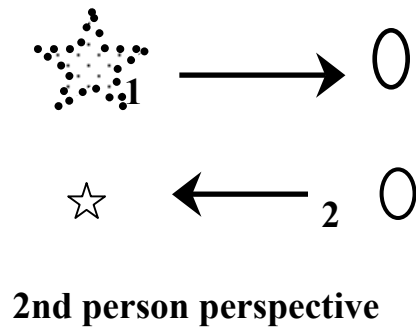
This stage is included here because it shows the cognitive differentiation from Opportunist thinking to Diplomat dependence and provides a logical link for mental growth. It is not included in action logics because statistically rare as mentioned in endnote #7.

At this stage people vacillate between points of view. Sometimes they wonder "how do I look to you; other times how do you look to me. They now observe external differences regarding features or behaviors. Often children entering school are exploring this developmental stage. The Rule-oriented stage describes people who are discovering the **second person perspective** and begin to make simple, external comparisons and who are capable of concrete mental operations.

They become preoccupied with finding out the social conventions and rules because of a beginning need to be accepted and liked. One wants to look "right," acceptable, therefore the emphasis is on external attractiveness and appearance. People at this stage show more trust since acceptance and protection can be gained by following the rules. The world is experienced as less hostile than for Opportunists. Persons want to be re-spected which means, "seen" by others.

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Respect can now be gained by adhering to group norms, not just by might. One also gives respect to others in the form of paying attention to them. People notice me when I am here. I listen to them, they listen to me. With the second perspective, one discovers the possibility for simple feedback. One can find out what others think about one. "I can ask my friends what they think; they will tell; and the world doesn't collapse! I can trust them." The ability to take a second person perspective is a milestone in the development of social interaction.



Cognitive: 3a primary actions

Self: single external features;
beginning comparisons, one
variable at a time

Other: Sees me also and notices how
I am and what I do; beginning
recognition that if I want
something from other I have to
make myself appealing.

Explanation

☆ = the self, the star (the center
of meaning making and
perspective taking

○ = The other /
or object

At this stage, the superficial likeness to others is discovered and experienced as comfort. One is not alone! This new feeling is enjoyed in loose associations such as clubs, in which one shares similar action interests.

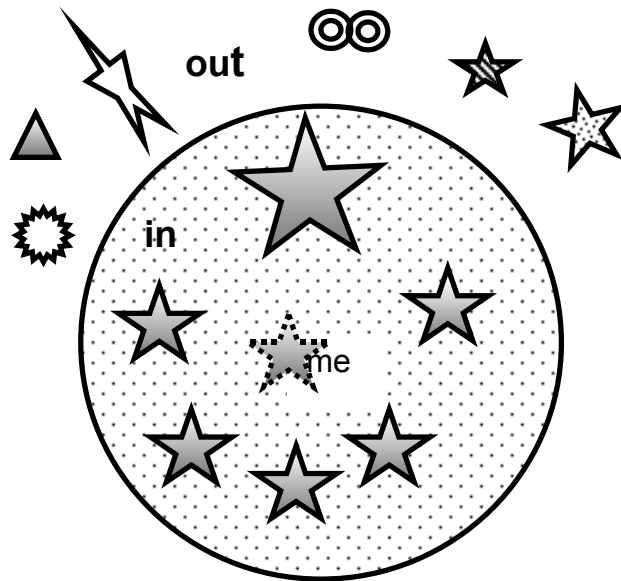
Language clues: Rule-oriented subjects make simple factual statements, refer to concrete behavior and single features of appearance. They are passively responding to stimuli, trying to avoid getting in trouble, but uncertain how to do this. They may feel they have done something wrong, but they can't say how or why. Overall their utterances often lack of affect.

THE CONVENTIONAL STAGES

The Diplomat, Expert and Achiever action logics, stages 3, 3/4, and 4 respectively, cover the ego stages of most people after about the age of 12. We have found that about 80% of adults populate these three action logics with most people moving from the Expert to the Achiever stage. In Piagetian terms, stage 3 represents functioning at the concrete operational level, stage 3/4 uses abstract operations and stage 4 individuals use formal operations in their meaning making. At the Achiever stage 4 people have a linear view of reality: objects are defined as having closed boundaries, causality is seen as linear and variables treated as independent. The Achiever stage 4 is widely considered the adult stage in much of Western culture; and society and institutions support and reward its achievement. It is a necessary precondition for democracy

to work since only a citizenry capable of rational deliberation and choice based on pertinent criteria (not external features or sameness) can safeguard the whole and at the same time allow changes to be reflected in the laws.

Diplomat Action Logic, Stage 3



Cognitive: 3b concrete operations

Self: several external features; vital statistics given; rudimentary internal states, negative avoided or suppressed

Two types of other:

- 1) own family, tribe, group, nation: provides identity, values and protection. Boundaries between self and in-group confused; over-identified
- 2) every one who is different, or not part of my group belongs to the out-group (threat: them vs. us)

The Diplomat stage 3 describes persons with an early adolescent frame of mind. Their self-identity is defined by their relationship to a group. This leads to confused boundaries between oneself and the group whether this be that the family, clan or nation. Being part of this larger entity allows one to be protected and share in its power. The price for protection is loyalty and obedience. Diplomats thrive on dependency and are apt to feel responsible in situations where they are not. The more status the group has, the better I am as one of its members. The boundaries between self and others are confused (sic) and blurred. There is total acceptance of the family and in-group (such as peer groups in adolescence), and blind rejection of deviance and out-groups. It's "them" against "us" now instead of the Opportunist's lonely stance of "me" against "them," a them which included everybody. You are either friend and approve of us and what we do, or you are our enemy. Ambiguity and ambivalence are not registered and cannot be acknowledged as they threaten the very being of a Diplomat.

Because of the need to be accepted, the language is impersonal, often overly positive and full of platitudes. Diplomats are quintessential conformists and do not want to rock the boat, be singled out or take initiatives other than for the benefit of their group. Constantly having to keep up with the neighbors and having material assets and status symbols are important as they indicate one's success and give satisfaction.

To be liked one has to have a pleasing social personality. It is important to be nice, pleasant, good-looking. People are judged by the way they look. Great care is taken on outward appearance, neatness, cleanliness of house. The self is defined by and generated by the expectations of those others to whom one "belongs. Diplomats have a tendency to accept norms

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without questioning or inspection. Their cognitive world is divided into simple categories, and types of people, mostly based on external distinctions. Having a holiday table just like seen in a famous magazine, or owning a car just like one's boss's might really make a Diplomat happy.

<u>Self</u>	← introjection---- Ideas, commands, swallowed without thinking	<u>Other</u>
“shoulds”		expectations
conform to expectations	← self-regard -→	approval/acceptance
positive wishes negative wishes	own desires split off: ---- projection →	<u>good other</u> (in-group) <u>bad other</u> (out-group)

Diplomats are identified with and bound to those with the same tastes, attributes, beliefs and expectations, and con-fused or threatened by differing demands, perspectives, diversity, and complexity. The values of one's own group get introjected as strong “shoulds,” while the values of those who are different are denigrated. One's negative feelings “I hate you” are split off and projected outside and the experienced as “They hate me.” Anger and other disagreeable feelings are suppressed. They never reach awareness. Blind conformism, fundamentalism and prejudice can be expressions of this frame of mind. Aggression against self (putting oneself down) and feelings or disappointment are often countered by demonstrations of overly positive feelings and enthusiasm.

To summarize, the Diplomat does not yet have a self in the sense of a separate adult identity. Instead, he or she is defined by others. The self-other boundaries are blurry and not yet differentiated. Thus, relationships have a “sticky, I-need-you” quality.

Impulse control, character development: Rules are now partially internalized; but obeyed without question. Shame is a common response for undesired consequences of one's actions. Life is governed by rules of what can be and cannot be done. Others with differing views are morally condemned. Sexual and aggressive feelings are denied or suppressed out of fear of rejection and abandonment.

Interpersonal style: Because Diplomats so desperately want to belong, they will conform to the rules and norms of whatever desired group, gang, political party they belong to. In companies they are the ones that smooth discontent or incipient conflict among coworkers and make sure that the place has a pleasant atmosphere. They value being nice and helpful. They see relationships in terms of expected behaviors (loyalty, being friendly) rather than in terms of feelings and motives.

Cognitive style: Diplomats are interested in the concrete, visible aspects of experience and tend to use superlatives and conventional clichés to describe it. These clichés are, however taken seriously and not seen as clichés. References to inner feelings are stereotyped and predictable and aligned with cultural expectations.

Conscious preoccupation: Diplomats put great value on appearance, status symbols, material possessions, reputation and prestige. They are concerned with social acceptance and attempt to adjust to group norms. They deeply care about other's opinions and evaluations.

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“What do others think about this or that, or about me?” Sense of “shoulds” and “oughts” and sense of shame and embarrassment if those shoulds are not fulfilled can be crushing.

Internal dimension: Being dependent on others’ acceptance, Diplomats do worry about what others think and feel at any given moment. In protocols the express simple “acceptable” feeling states: sad, happy, nervous, upset, but do not differentiate feelings into subtler graduations.

Problem solving: Generally, emerging problem are denied, or relabeled and white-washed. “Some call it a problem. If you look at the bright side, it’s not really so bad.”

Organizational type: People who seek acceptance and protection by a larger entity are most apt to be drawn into organizations with clearly defined identities and hierarchical structures.

Defenses: Diplomats’ main coping moves or defenses are projection and introjection. They imagine that others think, want, feel what they themselves think, want or feel (projection) and then try to fill those imagined needs. They also swallow others’ definitions, norms, values and opinions without questioning. If the boss says so, it must be true.

Counseling style: Diplomats like to give lots of advice → telling others what to do or not to do. They also tend to compare and evaluate others according to their values.

Character of depression: Most threatening to a Diplomat is being disapproved by or deserted by significant others, rejected by one’s group or experiencing disloyalty. Their chief anxiety is thus a fear of being “not-me”; a loss of self as a loss of “me-as-accepted-by-others.”

Sample character: Edith Bunker in All in the Family takes all kinds of abuse by others, particularly her spouse Archie, but she stays with him. She is fluttering and fussing around him, always trying to be positive, to see the best in everybody and in everything. Edith finds pleasure in taking good care of her loved ones. However, the character Edith also displays an open-mindedness which is not typical of this stage.

Language signs: Short, stereotypical phrases, love of clichés; exaggerated positive affect: most everybody and everything is fun, important, wonderful; concrete descriptions and factual information.

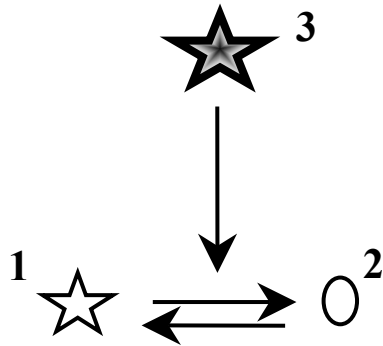
The Expert or Technician Action Logic; stage 3/4

Stage 3/4 or the self-conscious stage characterizes people who are able to step back and look at themselves as objects from a distance. They can see themselves as object and thus start to reflect upon the self. A conceptual watershed is crossed when one can take the **third person perspective**. This stage has a distinctly different clinical feel. Individuals begin to be capable of introspection and self-understanding. It also means they need to differentiate themselves from the immediate family context and assert and express their newly discovered personhood. The third person perspective permits operations with abstract objects and concepts.

Individuals are good at seeing alternatives. They can use them with a vengeance - offering innumerable solutions and permutations for every problem. Initial realization of self in linear time. At stage 3/4 one becomes aware of general “*traits*” in others i. e. familiar character patterns people display over time. This orientation towards patterns in behavior and the beginning self-consciousness lead to an interest in sharing more of one’s inner nature. One becomes interested in describing *traits* (lonely, jealous, serious), *norms* (feminine), and *conventional virtues* (honest, patient). The focus on likeness at the Diplomat stage changes to focus on individual differences

at the Expert action logic 3/4. People start to express their own personhood more often in contrast to others. They also assert more of their own needs and wants, which were suppressed at stage 3 for the sake of being accepted.

The Expert action logic (Stage 3/4)



Third person perspective: Self and others as separate persons with unique differences

Cognition: 4a abstract operations; beginning ability to take a 3rd person perspective or to look at oneself objectively

Self: Separate self differentiated from others; sense of specialness. Identity = clusters of external attributes, conventional traits, “self-conscious” in the sense of readily feeling uneasy.

Other: others too are seen as separate persons who are different from me. Need for constant comparison & measuring. Do others measure up to my ideas and standards?

However, now they want to be accepted by others because of their difference. They also tend to want to be better than others, stand out from the crowd. The group is needed, but one stands at its periphery threatening to leave, without ever quite leaving. Stage 3/4 persons often feel they have “*figured it all out.*” They know all the answers. They know what to believe. They feel righteous and often put others in the wrong (resistance). They have high moral standards and a strong sense of what should be. They are concerned with fulfilling their responsibilities and duties. Individuals are often compulsive and perfectionist. The super-ego is very strong. Others are evaluated according to one’s own capabilities and standards. Severe criticism of how another thinks is a common form of intellectual aggression at this stage. A sense of superiority is not very well hidden. This is a very resistant and stable stage. No one can tell an Expert anything they don’t know already or know better. Experts will discredit material that does not fit into their scheme by dismissing counter-evidence or belittling others.

In interpersonal situation the “*yes, but*” syndrome is very common. One-upmanship - that is, listening to the other and then adding one’s own opinion to remain on top - is typical. On the plus side, Experts are very adept at finding new and different solutions, better ideas, more perfect procedures. Adolescents as well as adults with this action logic see multiple possibilities and alternative solutions. If managed skillfully, their positive contributions can be considerable. Because their process is additive, people at this stage cannot yet prioritize among alternatives or synthesize several possibilities. They don’t know when good is good enough.

While Diplomats try to suppress aggression for the sake of acceptance, it now reemerges. Experts often have a hostile sense of humor. Ridiculing others is a common sport. While there is a cognitive capacity to look inside, one’s defense is to be ultrarational. Rather than being followers or bystanders, the preferred roles of the Diplomat, Experts may enjoy being movers, and initiators. They enjoy oppositional battles with others who defend different positions. They

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live in a world where things are sure and clear, and they feel very much entitled to impose their views on others.

Impulse control: Experts have societal shoulds and oughts well internalized. Their super-egos are strong and not available for inspection. Feelings of shame and guilt for transgressions are expressed in simple terms or rationalized away.

Cognitive style: Experts are capable of abstract thought and operations, including multiple views, permutations, and careful comparison between pairs of items.

Internal dimension: “Psychology” is understood in terms of stable moods and traits of self and others. Experts tend to generate innumerable solutions without being able to prioritize among them. The decision process gets often hung up. The necessary synthesis and analytical weighing of different solutions becomes a capacity at the next action logic.

Organizational type: Engineering types, technocrats, bureaucrats, and a percentage of professionals of every ilk are at home here. Being in charge of oneself and one’s environment is chief trait. Clear-minded (unencumbered by understanding the complexities of issues) supports a pragmatic leadership style. “Do what I do.” Expert capacity is necessary for the running of every society, every group and works especially well in today’s technological world Their contribution to society must not be underestimated as it is crucial in the running of society’s routine affairs.

Chief defenses: Experts intellectualize, rationalize and explain away what doesn’t fit their expectations or set beliefs. They are rarely lost for an answer or an explanation. They often blame the structure, the tools, or the incompetence of others for what is not working as it should.

Counseling style: As managers and consultants, they are asking many questions and accumulate facts. They want to know the causes and ask “why did you....? This can readily be heard by employees or clients as criticism and blaming. They proffer advice and share their opinions and interpretations without a sense that they are theirs and not necessarily the clients’.

Main anxiety: Having just recently discovered their own separate personhood, Experts fear losing this sense of uniqueness. They fear being reabsorbed and getting drawn back into the fold, into the mass of others. They also fear that if they should open themselves to others’ views, they might lose their current certainty and strong sense of self. This fear of incompleteness and vulnerability is often counteracted by having a strong front.

Language clues: More complex syntax. Beginning qualifications and conditions. Contrast is expressed in polar dimensions. Passive interest in causality “I wonder why?” Beginning psychological vocabulary and explanations. Beginning references to the passing of time “sometimes, often.” Consistently responds with past tense to past tense stems. Simple comparisons “too much, not enough, similar to”. Express and perceive multiplicity.

The Achiever action logic or Stage 4

The Achiever action logic is the target stage for Western culture. Our educational systems are intended to produce adults with the mental capacity of the Achiever stage, that is, rationally competent and independent adults. Democracy as a form of government is based on the capacity of its independent-thinking voters to make reasoned and informed choices.

Achievers add linear time (consciously thinking of their past and future selves) as concern to the third person perspective. This stage expands the meaningful social context to others within the same society and others with similar ideologies and aspirations. Achievers are more likely than Diplomats and Experts to associate with people who have made choices about their ideals

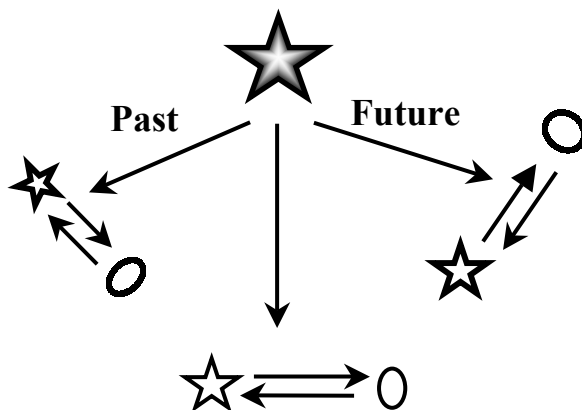
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and the kinds of goals they value. They may belong to diverse groups with different agendas and characteristics without feeling torn among them or getting confused regarding loyalties.

Persons at this action logic are interested in reasons, causes, goals, consequences and the effective use of time. They are curious what makes themselves and others “tick” in more than a “why” way. Achievers may also become interested in the truth about themselves through feedback and introspection. They learn to understand themselves backwards and forwards in time, and describe past feelings, personal dreams and future goals, although their emphasis is generally future-oriented.

Achievers generally believe in the *perfectibility of humankind* and in the scientific method to “uncover” truth. Formal operations and abstract rationality are at their peak. People believe that the proper scientific methods of investigation and procedures will eventually lead to the discovery of how things really are, including human nature. Achievers are willing to work towards the betterment of the world according to what they deem as good for all. They have more tolerance than Experts for some delay between positive action and results, research and findings, questions and answers and are less likely to believe that they do not need others to achieve their goals.

Achiever Action Logic, stage 4



Expanded 3rd person perspective:
Able to see self and others both backwards and forward in time → patterns of behavior

Realm: Self in society, others with similar goals and aspirations

Time frame: Self as it is (traits), self as it should be (goals, ideals)

Cognition: 4b, formal operations; clear separation of subject and object, knower and known.

Preoccupations: Reasons, causes, goals, achievement, effectiveness, contracts and agreements.

Positive equilibration: rational, analytical determined, conscientious, fair; successful; competent with high self-esteem

Truth: Can be found through appropriate scientific methods if not now → later.

Achievers have internalized societal standards. They are no longer as proud of what they have come up with as Experts and are more aware of how they have become and are still in the process of growing. It is with the Achiever stage that people have enough of a perspective on themselves as objects and on their life as changing to become truly introspective. “Do I live up to what I believe in?” is a serious concern and *Guilt* is a central emotion. When aggression is turned inside, self-criticism can be severe. Achievers fall prey to hypercritical, neurotic self-criticism especially easily because their plans and intentions are so single-minded and high-aiming.

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With awareness of time as a linear progression, there is also a greater capacity to observe one's motivations across different periods and in different actions. "Why do I do what I do?" Achievers are always looking for the *root causes and reasons*. They believe that the truth about themselves can be found. They are capable of distinguishing feelings from appearance and are motivated to figure things out.

Thus, the analysis of others and self-analysis become a favorite pastime and challenge. Many typologies and theories about human behavior come out of this motivation to classify and understand other human beings. Achievers, often cherish self-knowledge, and work on expanding it. They generally have positive self-regard based on their successes, ability to be the master of their ships, the sense of independence and self-authorship that they have gained. As captains of their own self enterprise, they are no longer as vulnerable to being accepted or excluded as Diplomats and Experts.

Because of the genuine interest into who others are and the concomitant need *to share* one's experience, interpersonal relationships become intense and meaningful. Thus social contacts become increasingly diverse and rich. Others are appreciated for having different expertise as long as they don't encroach upon my beliefs and values. "We agree to differ" is a typical Achiever motto. Increased self-differentiation and personal independence does not, however, involve increased egotistical and self-centered. On the contrary, others can now be valued for who they are independently of one's own needs and wishes. One joins any group or society as a contract in order to accomplish certain goals, to fulfill responsibilities, and to actively partake in the well-ness and governing of the given enterprise. One's loyalty is to a chosen ideology rather than to the individuals in a group. Unlike Diplomats and Experts, Achievers can function in different teams and contexts depending on the task or problem to be tackled.

Time is money and the medium to accomplish things. Achievers are preoccupied with getting things done with responsibility, conscientiousness and expediency. They may have a driven quality to accomplish something in this world or to improve the world versus the need of later stages to improve oneself. The mood of the stage is *earnest conviction*, seriousness, *idealism* and enthusiasm always generally oriented towards action. Individual change others' minds by using their powers of conviction to prove themselves rather than by putting them down. Their self-esteem depends on achieving their own set goals and lesser on external affirmation and approval. The drive to succeed and achieve, can readily lead to over-extension and exhaustion. Limits are difficult to acknowledge for the Achiever. Engaged in their projects, they hardly slow down to look at the present moment, to reflect upon life as a whole.

Given their cognitive capacity, Achievers are in love with the hypothetical, with theories at the espoused level. Achievers are convinced that society can be controlled and improved. They have the frame of mind where formal operations are at their peak and progressivism, positivism and reductionism have their strongholds.

For Achievers, rationality will triumph! Thus they are interested in analysis (ana-lysis = breaking up). Truth can be found. One can come closer to it by consistently applying the scientific method, by looking at things rationally, by continuously improving and refining one's methods of inquiry and measuring tools. While Experts tend to rely on authority or received knowledge to orient themselves (book knowledge), Achievers can become skeptical. Achiever researchers are known for their *intellectual skepticism* towards things that are not yet proven. However, they do believe that the laws of the universe can be figured out eventually and proved.

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Impulse control/character formation:

Societal values and morality are internalized if they fit self-evaluated standards and one's personality. Achievers tend to be self-critical, even hypercritical. They now may feel guilt for consequences of actions even when these were unintentional or unavoidable. They are self-reliant, conscientious, and efficient and preoccupied with attaining goals and ideals.

Interpersonal style: Achievers have a sense of responsibility and obligation towards others even while they pursue their own agendas and ideas. They see themselves as viable members of the larger community or society, yet separate and responsible for their own choices. They are conscious of the importance of communication and appreciate the mutual expression of differentiated feelings and ideas.

Cognitive style: Achievers can think in terms of formal operations and are beginning to appreciate conceptual complexity as well as the nature of a closed system. They are aware of contingencies and perceptions of alternatives and begin to notice contradictions and inconsistencies both within themselves and in the belief systems they adhere to. They are concerned about consequences and priorities and are planful about their actions, capable of revision and assessment as well as reorienting towards new goals.

Conscious preoccupations: Achievement of long term personal goals as measured by inner standards is important as are the attaining of one's ideals and values. These are often the ones currently most salient in the cultural surround. Thus, the money motive and the focus on individual success of many Achievers fit very well with the capitalism and the western outlook on reality. Achievers are often also concerned with motivation and reasons for behavior. Many reflect on themselves and express more differentiated feelings or contradictory traits. "I'm an optimistic pessimist."

Internal dimension: Achievers are interested in feelings, moods, traits, and motivations. "Why do I do that? What causes others to be what they are and to behave in certain ways?" How can I use my knowledge of them, to help us achieve our goals.

Decision making: When they take responsibility to do something about a recognized problem, Achievers can move with conviction. They are concerned with how to get started. "How do you get people to help? What is the most efficient and effective strategy to get this job done?" Achievers are willing to take risks and to fail to a degree people at earlier action logics cannot.

Organizational style: Alliances are task-related or problem-oriented. How one relates depends on the specific task or problem and one's role in the group which changes in different settings.

Chief defenses: Intellectualization, rationalization, suppression (bracketing out) of negative pole and shadow side are the chief ways the Achiever defends against doubt and criticism. "Better to concentrate on the positive and on what can be done than to dwell on the problems and difficulties."

Character of depression: Achievers most often suffer depression in the form of guilt for not having fulfilled their goals and ideals, for the loss of a sense of being able to accomplish them, and the ongoing fear of loss of control and independence.

Fear: More even than Experts, Achievers fear the Diplomat frame of mind with its dependency and submission. Blind obedience and uncritical absorption of ideas is seen as "bad-me." Achievers must make sure they are not pulled back, unconsciously subsumed in someone else's goals. Fear of loss of new progress, control and separateness are overcome with action and relentless forward moving.

Counseling style: Like Experts, Achievers tend to ask lots of questions. However, they also ask questions like “How is it? What does it feel like?” They have a greater ability to listen to others’ experience and play-back (restate) expressions without adding their own interpretation.

Language clues: Achievers recognize and express conceptual complexity and explicitly refer to causal relationship, consequences and priorities. We find many terms related to time (efficiency, planning, goals, future) as well as implicit references to lapse of time (now, used to, when I was a child; is growing). Achievers begin to describe themselves as complex psychological being using differentiated psychological vocabulary. In protocols one begins to be able to get a sense of the unique individual. “I” statements that are revealing, not cliché and often contain some elements of contrast, self-criticism and ownership of responsibility.

The major limit of the conventional mind set is its acceptance of facts as real and its blindness to the constructed nature of beliefs, especially the grand myth of science. Although complex scientific analysis is applied, the underlying assumptions of any system are not questioned or made explicit. Especially at the Achiever stage, knowledge, measurement and prediction are taken for granted means to control nature and society. This changes dramatically with the postconventional development.

THE POSTCONVENTIONAL STAGES

a) The General Systems Stages⁸

At the first postconventional level people come to realize that the meaning of things depend on one’s relative position in regard to them, that is, on one’s personal perspective & interpretation of them. Although the objects themselves are seen as permanent, their meaning is seen as constructed. “Variables are now seen as interdependent, causality experienced as cyclical and boundaries of objects as open and flexible” (Koplowitz, 1984) depending on one’s definition of what is to be considered within a system or outside. This view of reality is called the systems view because it allows individuals to look and compare systems of thought or organizations with distance. At the Individualist action logic *context* enters as a crucial element in thinking and understanding. A main concern of postconventional adults is to lay bare underlying assumptions and frameworks. The Individualist action logic 4/5 represents systematic operations in Commons’ General Stage Model. The Strategist stage 5 expands cognition to metasytematic operations. Strategists are now able to integrate different frameworks of the self into a coherent new theory of who they are, that is, into a complex, coherent self-identity.

The Individualistic action logic, or Stage 4/5:

The Individualist action logic or Stage 4/5 describes what a person can “see” with a fourth person perspective. People now realize that things are not necessarily what they seemed at earlier stages because the interpretation of reality always depends on the position of the observer. Thus the idea of the participant observer, the observer who influences what he observes, is now becoming a conscious preoccupation. One can never be as totally detached and “objective” as the rational/scientific outlook of Achievers would have it.

The same object/event can have different meanings for different observers, for the same observer in different contexts or at different times. Individuals become interested in watching themselves trying to make sense of themselves. This constitutes an important change in thought

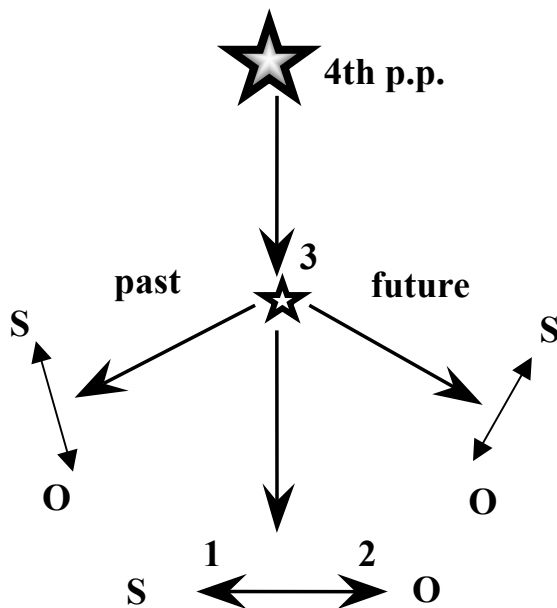
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mode. Individualists abandon purely rational analysis in favor of a more holistic, organismic approach in which feelings and context are taken into account and the process becomes as intriguing as the product or outcome. Individualists also favor more relativistic or psycho-logical approaches over a merely logical ones. The need to explain everything is gone, and head trips are less appealing.

Individualists distrust conventional wisdom and the hyper-rational tenets of the Achiever action logic. They need to distance themselves from all that went before. In this case, one must reevaluate the self-adopted, yet sanctioned role identities of society and redefine oneself uniquely and independently of them based on one's own experience and conclusions. When one fully realizes that most prior meaning making was socially and culturally conditioned, scientific certainty and the judgmental frame of mind break down. Moreover, Individualist learn to consciously scrutinize their beliefs in order to test their assumptions or to relish the novel mental freedom such a maneuver allows.

Since one's old identities are no longer accepted without questioning, Individualists are preoccupied with a desire for unique personal accomplishments independent of any socially approved roles or tasks. They often withdraw to some degree from external affairs or the daily workings of their companies. Instead, they turn inward in search of their unique gifts or pursuing their own burning questions. Left room to be themselves, they can often provide creative input to the workplace, novel ways of looking at problems or inspire others with their enthusiasm in pursuing their interests and questions.

Individualist Action Logic or stage 4/5



4th person perspective

Relativism: discovery of personal and cultural conditioning and defensive self-deception

Cognition: 5a, systems theory concepts perceived

Positive equilibration: vivid individualism; →concentrate and relish experience in the here and now

Truth: can never be found. Everything is relative; no place to stand or judge → postmodernism

4th person perspective: Standing outside the system

With the 4th person perspective, individuals realize that things are not always what they were thought to be. Paradoxes (rather than contradictions) do exist. Thus, Individualists may

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come to enjoy paradoxes and contradictions and no longer try to explain them away “to heck with it! Everything is relative.” Linear, intellectual logic gives way to a more holistic understanding of things. One can have one’s eyes opened -> image-ination. Seeing sometimes is believing. There is no need to prove everything in order to live by it. Individuals have a new, non-hostile type of humor that is often directed towards the self. It is based on an insight into the futility of meaning making.

Rather than trying to analyze everything, Individualists want to enjoy the subjective experience. It is all that can be trusted. Thus, there is a major shift from the Achiever’s preference for “doing” to focusing on “being and feeling”. Instead of marching into the future, individualists become now-oriented. They begin to notice how feelings affect the body and vice versa and how feelings are diffused throughout body. There is a new sense of body/mind connection. Therefore, the shift from conventional to postconventional action logics also reflects a shift from a more intellectual to an organismic, somatic awareness.

Wilber and Spiral Dynamics emphasize almost exclusively the communal aspects of this stage (called green) which parallels our Individualist action logic in mental complexity and self-differentiation. Indeed, Individualists do not want to impose their interpretations on others. They seek instead to respect and understand them. Individual differences are celebrated, and paid attention to in a way that Achievers cannot understand. When groups of Individualists get together, they may make room for everybody to express their voices and opinions. This tendency, however, can be driven to an extreme, and radical postmodernism is the result or what Wilber calls “Boomeritis.” In the worst case, postmodern individualists claim with absolute certainty that there is no position from which to judge anything. They do not recognize the inherent contradiction in this stance which values or privileges this idea over all others, which of course is a form of judgment. Much diversity training focuses on the differences so much that the bonds of common humanity get overlooked in the process. In organizations or teams where everybody’s opinion is equally valued, meetings can run on forever and little is resolved, yet everybody feels heard and acknowledged. This more egalitarian experience is an important step towards further differentiation. Although it is difficult for both Expert/Achievers and Strategists to tolerate, Individualists with this concern, prepare the way for an even deeper appreciation of difference, one that allows for difference and similarity.

We have found in our data that Individualists may or may not have a communal bend. Some turn towards their own meaning making and exploring their own minds and are less concerned with diversity issues. Either way, they do recognize the relativity of all positions. Individualists are therefore less apt to judge others and indeed may appear “amoral” in their capacity to let others be what they are and do what they want.

Individualists often replace the focus on causality (past) and goals (future) of the Achiever with a fascination with the immediate present. They need to understand and watch how things unfold. Their focus turns from outcomes and deliverables to an interest into the process, relationships and non-linear influences among variables. Individualists watch how they themselves and other people change and behave differently in different contexts. There is an existential sense of how each moment differs from the next and therefore the present is newly infused with importance.

Individualists may become confused by the seeming contradictions and describe themselves as having many personalities or voices which cannot be readily synthesized into a coherent picture. “Sometimes I act, feel, think one way, other times in another. There is struggle

within myself, different voices competing for attention. And all seem real and important parts of me. Who am I? What is going on?" Thus, the prevalent anxiety is around integrating different parts of oneself. "I can be both my old rational self, and a new, different kind of person; I am afraid I am two or more personalities instead of one. I feel confused, split, ambivalent." Depression in Individualists often centers around these inner conflicts and despair about ever finding one's true self. Because Individualists explore their feelings and motivations, they also begin to become aware of how easily one can fool oneself. The possibility of defensive self-deception and culturally-biased distortion are now experienced as ever-present dangers.

On the other hand, the very heightened capacity to contact the self and to introspect leads to a greater capacity to empathize with others and to tolerate different ideas, behaviors and reactions. Stage 4/5 individuals are often admired by others, especially by other postconventional persons, for their unconcerned, energetic self-expression, their spontaneity, and their ability to live a life according to their own unique style free from restrictive conventions. But they may also be feared as unpredictable or dismissed as dreamers and non-doers, especially in an Achiever environment. Their relationships with others are intense and mutually rewarding when there is synergy and choice. When they have to manage others as part of a job, they can be autocratic or idiosyncratic to such a degree, that others find them "impossible to nail down" or "aloof and unapproachable."

Language clues: Syntax contains contingencies, non-banal qualifications, several contrasting ideas. "And" is starting to replace "or" or "but." Even though, despite etc." signal cognitive complexity. The writings contain vivid personal information (often with exclamation marks) and more nuanced psychological vocabulary. The verbal rejection of "should"- clichés in SCT sentence stems such as , "How can I generalize?" indicates beginning awareness of cultural conditioning.

The Strategist Action Logic or Stage 5:

The Strategist action logic represents an enlarged fourth person perspective which places the individual's experience into the context of particular societies and within the totality of a person's lifetime. With the expanded time frame and wider social networks, Strategists can perceive systemic patterns or long-term trends and are often valued for that "strategic" capacity. Cognitively they have a general systems view or reality, that is they can comprehend multiple interconnected systems of relationships and processes.

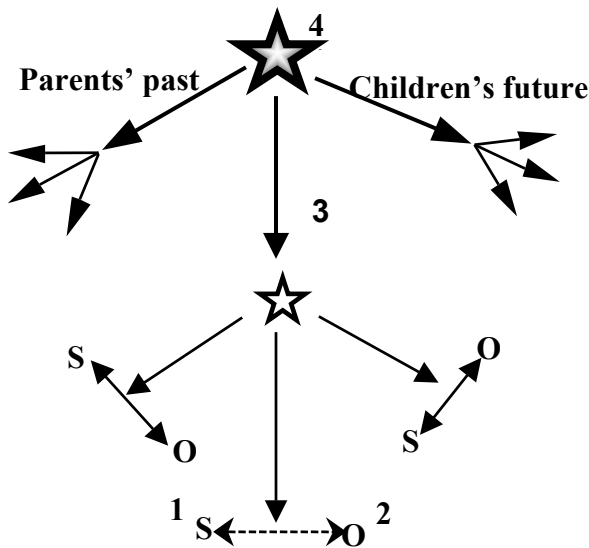
Strategists realize that they may notice different conflicting aspects or polarities in themselves at different times and in different context, but -- unlike Individualists, who may despair about ever knowing who they really are -- Strategists are capable of "owning" and integrating whatever is part of themselves. This includes integrating previously compartmentalized sub-identities of the self. Thus, Strategists can become whole. The crucial new capacity is to realize one's power to generate meaning and to tell a new story, precisely because everything is an interpretation to start with. We all tell stories about what is happening all the time. Strategists consciously commit to actively create a meaningful life for themselves and for others through *self-determination* and *self-actualization* within constantly shifting contexts. They possess a relatively strong, autonomous self that is both well-differentiated and integrated. This includes the capacity to see and accept paradox and tolerate ambiguity.

Strategists become fine-tuned to their own psychological well-being. Theirs is a different emotional tone than that of individualists, much less cynical and distrusting. Relativism changes

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into personal commitment and responsibility for creating one's own meaning. Strategists are attuned to their inner workings. They are now capable of rediscovering and owning parts of the self which have previously been disowned, because they seemed too negative or too threatening. The shadow side of the self can be acknowledged to a greater degree and therefore a new integration and *wholeness* is possible. Although they experience role conflicts and dilemmas strongly, they recognize that these are inevitable and that ambivalent feelings are natural. Unlike later action logics, Strategists try very hard to keep their act together and to come across as reasonable and mature. They feel themselves responsible for being able to orchestrate among conflicting needs and different subidentities.

Strategist Action Logic or Stage 5



Expanded 4th person perspective:
Self in embedded in history and multiple cultural contexts.

Realm: Society and others with similar convictions and principles

Time frame: own “history, lifetime”

Cognition: 5b, metasystematic operations; General systems thinker

Preoccupations: own development, self-actualization, self-fulfillment; process

Positive equilibration: well-balanced body/mind integration; autonomous, tolerant, insightful, growth-oriented; high self-esteem; overarching principles

Truth: can be approximated; higher stage is better since not all arguments and positions *s* are qualitatively equal. Higher is more adequate and more realistically complex.

Even more than at the Individualist stage, experiences are accepted for their immediate qualities. Distressing emotions become more tolerable, they can be acknowledged within oneself and shared with others. Strategists have access to a logical system which can integrate psychologically paradox elements, therefore less energy needs to be spent on “defending”. This in turn, allows them to be *more tolerant* and *spontaneous* than adults at conventional stages. Self and others are accepted as complex human beings with good and bad traits. Exchange with others makes it possible to get in touch with things one would otherwise tend to disown. Good feedback makes one aware of what one is defending or blind to. One needs the caring presence of others to become the most one can be. Thus, others are vital to one's well-being because only through a dynamic and intimate exchange with them can one gain deeper self-knowledge and wisdom. Mutual interdependence with other human beings is inevitable and experienced with awe and an awareness of one's responsibility towards them. Strategists can sometimes experience non-possessive love (or being love) because of this profound appreciation of other people as mirrors of themselves.

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The greatest fear of Strategists is to feel that they have not fulfilled their potential, or to have failed to observe those universal principles they value deeply (justice, tolerance, dignity of all people). Depression is often based on loss of courage, loss of self-agency and guilt for not having fulfilled one's unique human promise. When using defenses, Strategists use mostly mature ones: suppression, altruism, humor, anticipation. When they use less mature defenses, they are able to forgive themselves and move on. "Right now I need to be like this, but I intend to act more maturely again later."

Inner processes are complex and demanding to observe. As much as Strategists need others, they also need privacy, time for self-reflection. The self is experienced as unfolding and constantly reappraised. Watching this "unfolding" of things is one of the main satisfactions for the Strategist. One's precious life work consists in trying "*to become the most one can be.*" Personal growth, self-actualization and self-fulfillment are chief motivations at this stage. Others seen as the actors in their life dramas, which are equally fascinating to Strategists. Wanting to help others grow is one of the strongest motivators for Strategists. Psychologists, coaches and consultants often inhabit this stage, as do effective executives and leaders. When this need to have others "become the most they can be" encounters resistance, Strategists may feel impatient with others' slow development and frustrated with their "unwillingness" to grow despite their efforts. This is likely the central flaw of this stage. Strategists tend to be those most convinced that higher development is better and should be fostered at all costs. Higher is believed to be better because the more differentiated and the more autonomous an individual becomes, the more one can claim that one has an objective (non-distorted) and realistic self-identity (Kegan, 1982), that is a claim to an authentic, truthful self. Authenticity, is therefore an important concern to Strategists.

Many Strategists see life as an open-ended journey. They believe that there is no predetermined way to follow for all human beings. Each individual has to find and create his/her own life style and is responsible for his or her self-fulfillment. Strategists are interested in psychological questions and how to come to terms with inner conflict. Unlike people at the conventional stages, seeking therapy, advice, or consulting from others, is not seen as a weakness, but as an opportunity. They have faith in their own and other people's capacity to make meaning out of messes and difficulties. They construe their own personal meaning without having to impose it on all others. They may welcome others' solutions to conflict and respect their need for autonomy. Sometimes Strategists find the work to make a living and other ordinary constraints of life stultifying. They would prefer to enjoy their passions on their own terms. If leading an organization to greatness is one of those passions, it may be a fortuitous match.

Strategists may genuinely feel *principled anger* and righteous indignation towards the injustices of the world. They will stand up against society to express their personal convictions or to uphold their principles. Their anger is directed does not usually seek a victim. They live their personal conviction according to self-evaluated, internal standards. "To walk the talk" becomes an expression of one's moral character and authenticity and role conflicts are felt deeply. Some Strategists become charismatic moral leaders. When they defend what they believe to be a worthy cause, they often disregard negative consequences for themselves. But they may also be overly forceful with their convictions especially when they are fueled by principled anger. The combination of charisma and moral conviction can be a powerful negative force if not kept in check.

The greater awareness of their inner depth also allows Strategists to use dreams, fantasy, and imagination much more freely than persons at earlier stages. Their thoughts are allowed to

take off and *creativity* is released. Their imagination is no longer constrained by logic and convention. Because Strategists are aware of human frailty as part of the human condition, they often express existential humor and their irony has a lighter touch than before.

Language clues: Strategist use a complex, flexible syntax; with a wide array of topics and concerns. They try to do justice to the complexity of life in their verbal expressions. They try to present a coherent exposition of their thinking and themselves. They use differentiated vocabulary and insights into circular causality in human relations. “Identity, growth, self-fulfillment” are favorite terms and topics.

b) The Unitive Stages or Action Logics

At the second level of postconventional stages (Magicians and Ironists)⁹ people come to realize that all objects are human-made constructs, including such abstract constructs as the ego, three-dimensional space and time. All are based on layers upon layers of symbolic abstraction. Even such an everyday concept as “a chair” is an enormous simplification. No two people’s mental picture of a chair is alike and no two chairs in the world are identical. And yet we all use the term “chair” and it works well for most purposes of communication. To become cognizant of the pitfalls of the language habit as well as its tremendous gift to humanity, is a unique feature of the Unitive stages

Beginning with the earlier postconventional discoveries about interpretation and meaning making as peculiarly human actions, the unitive But reality is the undifferentiated phenomenological continuum or chaos, the creative ground, “das All”, or whatever other terms human beings have created to express this awareness of an underlying unity. To deal with the fundamental assumptions about human nature and one’s need to make order out of the chaos is one of the main existential concerns of men and women at these two highest stages of self-development. They represent cross-paradigmatic operations, as only the creation of a new paradigm can hierarchically supersede and integrate all previous knowledge.

The Magician/Clown Action Logic or Stage 5/6

The Magicians are people who have become aware of the pattern of development that encompasses an ever broader realm of experience and thought. They realize that the “ego” has functioned both as a central processing unit for all stimuli and as a central point of reference and self-identity. Once they realize this fundamental *ego-centricity*, it is felt as a constraint to further growth and understanding. Magicians start to wonder about the meaningfulness of more and more complex thought structures and integrations such as can be imagined with a fifth or nth person perspective. They start to realize the absurdity or automatic nature of human map making in the representational domain.

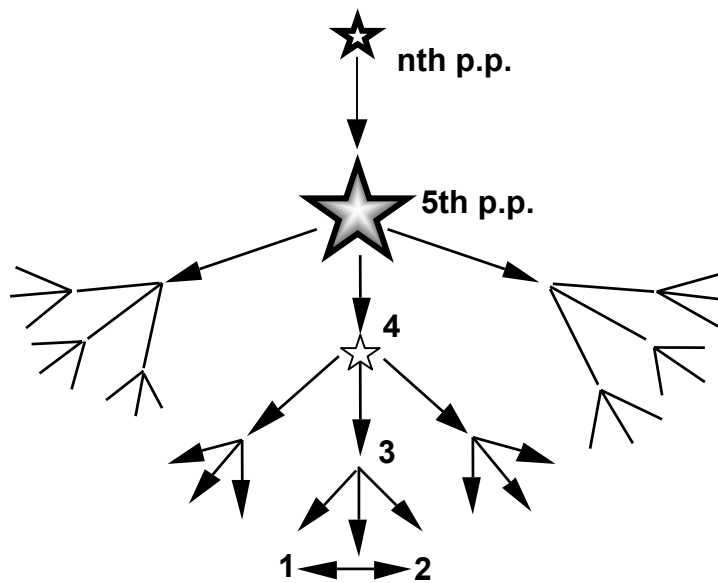
Unlike earlier stages, Magicians are aware of the ego’s clever and vigilant machinations at self-preservation. This is the first time in development that the ego becomes transparent to itself. Final knowledge about the self or anything else is seen as illusive and unattainable through effort and reason because all conscious thought, all cognition is recognized as constructed and, therefore, separate from truth.

By turning further inward, Magicians start to see through their own attempts at meaning making, and become aware of the profound splits and paradoxes inherent in rational thought. In many ways, they individually rediscover the notion that “the map is not the territory.” The linguistic process of splitting into polar opposites and the attending value judgments can become

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conscious. Good and evil, life and death, beauty and ugliness may now appear as two sides of the same coin, as mutually necessitating and defining each other. Moreover, the constant judging of what is good and what is not creates much of the tension and unhappiness so prevalent in ordinary consciousness. Magicians generally have a dynamic and multi-faceted understanding of human nature and the complexities of human interaction. They want to face their own profound need for theories and explanations. They hope to unearth the limits of the rational mind, and to unlearn their automatic, conditioned responses based on memory and continuous, everyday cultural reinforcement.

Magician Action Logic



The 5th person perspective etc.
→ nth person perspective

Realm: Beyond own culture

Time frame: beyond own lifetime;
global-historical perspective

Cognition: 6a, unitive concepts
perceived; cross-paradigmatic

Preoccupation: inner conflict
around existential paradoxes and
intrinsic problems of language
and meaning making.

Positive equilibration: Acceptance
of tension and paradox,
committed to service of self and
others; humility in face of task

Truth: No matter what level of
abstraction and what level of
cognitive insight one gains, one is
always separated from the
underlying nondual reality

Construct-aware Magicians start to pay attention to their emotional & rational processing. They pay attention to the automatic judgment habit as well as the habits of mind such as our endless analyzing and reflecting in order to create ever more accurate theories of life. All of these endeavours are understood as partial defenses against knowing the impermanence of the embodied self. Thus, at the Construct-aware stage not just cultural conditioning is seen through, but the predicament of living in language. When people see through the filter of the symbolic construction and mapping of reality, their disposition towards the language habit can change profoundly. In general, Magicians try to remain aware of the pseudo-reality created by words. They realize that the pursuit of objective self-identification and rational, objective explanations of the universe are futile--artifacts of our need to make permanent and substantive that which is in flux and immaterial. To reiterate a crucial point, the language habit works to support the ego's supremacy whenever we make meaning through representations regardless of the specific tongue, power base, or cultural or personal context. At the same time, Magicians appreciate the vital function language plays in human affairs, in social interaction and development.

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As the process of self-awareness deepens and reasoning becomes further differentiated for Magicians, access to intuition, bodily states, feelings, dreams, archetypal and other transpersonal material increases. More than that, these sources of knowledge can become as important as rational deliberation for making sense of experience and for finding meaning in life. Indeed, the capacity to draw from and appreciate insights from non-rational sources of information increases throughout postconventional development.

Most importantly, the more regular practice of turning inward and observing one's own mental processes also often leads to the spontaneous experience of a direct mode of being in which knower and known momentarily merge, and the personal self-sense disappears. These states are variously called peak moments, flow states, or bliss experiences. Maslow (1971) and Csikszentmihalyi (1990) give excellent profiles of the nature and consistently positive qualities of these states. I am not saying here that all contact with the numinous is blissful, only that flow states tend to be so, and thus, beckon the traveler to yearn for more such experiences. The process of dismantling the vestiges of the conditional self can also be harrowing as described in alternative states of consciousness entered through other means such as drugs or conscious meditation practices.

Magicians report more often than people at earlier stages that they are watching or witnessing the parades of thoughts and feelings come and go without trying to direct them. Thus, they experience moments of freedom from the ego's constant efforts at control and self-affirmation. Yet, such experiences are short-lived. As soon as one evaluates and judges peak experiences, the magic is broken.

We are naturally reluctant to relinquish our familiar mode of functioning. We do not want to give up the illusion of our enduring separate identity, which we so laboriously learned to define, cultivate, and rely on for most of our conscious lives. Even if we understand that letting go of our attachment to the known will bring freedom from suffering, attempts at doing so are mostly ineffective and always lead to intractable paradoxes. The more one becomes attached to the idea of non-attachment, the more firmly one remains fettered. The more one is conscious and proud of one's psychic powers and ego-transcending quest, the more clearly one's ego is still enthroned. Trungpa (1987) in *Cutting Through Spiritual Materialism* has perhaps given one of the most cogent analyses of how the ego can usurp transpersonal episodes for its own glorification.

It is a fact of Magician life that there are few others like them. They may fear that almost nobody understands them in their complexity and sympathizes with their experience, and fearing this, they feel culpable of hubris, of feeling "better" than others. They also observe their own self-attachment and their need for a permanent self-identity by means of ever bigger self-theories. On the other hand, they truly appreciate others' need to make sense of their lives within their own means. They therefore have a much deeper toleration for other's solution to life's conditions without being blind to the possible shortcomings and limitations of such solutions. Sometimes Magicians express a sense of envy at the simplicity of very young children because their own world is experienced as so complex. However, given their ego maturity, most are capable of arriving at a dynamic and hopeful balance within these fundamental conflicts: They fulfill their perceived or chosen destiny independently and courageously in full realization of their basic despair and aloneness. When they cannot integrate this awareness, their depression is about man's essential aloneness and inability to create lasting meaning through the rational enterprise.

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Magicians are at the first action logic that looks at all experience in terms of evolution and change. They are thus even more sensitive and capable of understanding others in developmental terms. If they have chosen to work in public, they usually have superbly fine-tuned interpersonal skills and insight into others' complex and dynamic personalities. They can listen and be with others in an empathic manner and they can give transformational, non-distorted feedback.

Magicians have access to their own past ways of meaning making in a much deeper way than earlier stages. This allows them to effectively tailor their interactions to the recipient. Thus, a Magician may have access to influencing an Opportunist by unilaterally asserting his or her power like an Opportunist. As consultants and mentors, they can optimally adjust their style to clients' needs, letting them find their own way within their own means through empathetic listening, challenging ideas at the best moments, helping them reframe their experience, tell new stories, gain courage and experiment with the boundaries of their current way of meaning making. As counselors they do not presume that they can fully understand the experience of another person in their uniqueness while they feel an affinity with them on a human level. Magicians reject the self-importance and self-centeredness of the previous stage as they re

Sometimes Magicians are least tolerant of the Strategist action logic and its fervent desire to help others to become the most they can be. This desire for others to be different than they are represents what Magicians see as a basic flaw in themselves, namely, seeing oneself as the center or a valid measure of the world as well as not living in the present. As highly differentiated individuals some may be over-critical of themselves when they first become aware of their ego-attachment. With experience of the process of identification and letting go, they can become tolerant of themselves in their vacillating complexity. Magicians generally use mature defenses (sublimation, non-hostile humor, bracketing out) as they become aware and insightful about their own foibles and defense styles. They may deliberately choose less mature behavior styles or tolerate their own raw responses when they occur spontaneously. The conscious experience of non-ordinary states of consciousness in peak experiences -- where one loses track of self and time -- helps to put in perspective the self's temptation for an exaggerated sense of power and responsibility.

Magicians are capable of perceiving the structure of their own thinking processes, comparing them to that of others and discovering the fundamental limitations of all rational thought and the limits of language. Usually they come across as very bright, but often impatient with their own cleverness as they see it as just that. They are intrigued by the human need for meaning making and its all-pervasive expression. They understand for the first time the underlying process of how such meaning is constructed through the invention-construction of ever more complex theories which are based on the segmentation and reification of the underlying flux of phenomena. Thus they are often preoccupied with the limits of rational thought and with learning how to live with the paradox of language.

As leaders, Magicians tend to build their own novel organizations or work on their own doing what they perceive to be their best contribution to humanity. They like to take on the roles of catalysts or transformers, but readily leave when they feel their transformational work is done. They feel successful when they have made themselves dispensable, that is, if the organization itself has become transformative and self-reorganizing.

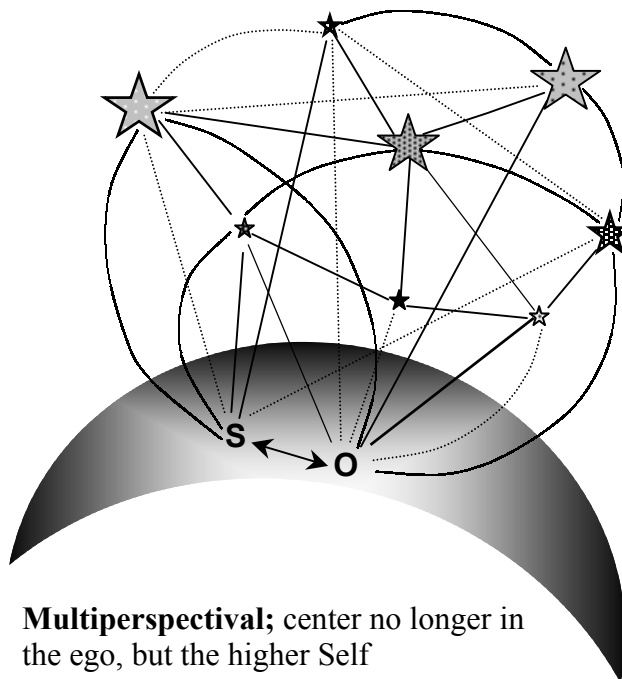
Language clues: The language of Magicians is often complex, vivid, authentic and playful. It is more direct, sometimes rawer than that of Strategists' because there is far less need to show

one's best side, to impress as at previous stages. Magicians express a vast matrix of topics, concerns, questions, insights and commentary cleverly united into one complex sentence structure. Responses that have a stream-of-consciousness quality, or thought-in-progress mode belong here as expressions of one's attempt to let go of conscious structuring. Vivid expressions about the constructed nature of reality occur at this stage as well as fundamental questions about meaning making as a defense, about definitions, and epistemology.

The Ironist¹⁰ Action Logic or Stage 6:

From the ancient wisdom literature to recent research in higher stages of consciousness there is evidence of many more stages beyond the rational, personal realm or postconventional tier of meaning making (see table 1 for Wilber's full-spectrum model of consciousness). How many such stages exists depends on the literature consulted and the criteria by which stages are defined. The data from using a Sentence Completion Tests did not allow me to make any finer distinctions in the ego-transcendent realm. My description of the Ironist action logic may thus confound several distinct higher levels of consciousness. Still, the characteristics were carefully taken from actual utterances from individuals who did score at this highest stage of the LDF measure.¹¹

The Unitive stage 6 or Ironist Action Logic



Multiperspectival; center no longer in the ego, but the higher Self

Realm: universe

→time/space continuum

Time frame: eternity

Cognition: Unitive concepts embraced

Preoccupation: Being, non-controlling consciousness; witnessing of flux of experience and states of mind

Positive equilibration: Accepting, unassuming presence; fully empathetic, non-interfering ability to be with whatever is.

Truth: immanent; experiential truth of interconnectedness and nonseparateness, existence as changing states of awareness within timeless spirit

The Ironist action logic presents an entirely new way of perceiving human existence and consciousness. The previous way of viewing reality solely from the self's perspective and through the medium of language is transformed. The new paradigm has a *universal* or *cosmic perspective*. Ironists individuals experience themselves and others as part of ongoing humanity, embedded in the creative ground, fulfilling the destiny of evolution. The two sides of the Pascalian paradox are integrated: feelings of belongingness and feelings of one's separateness

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and uniqueness are experienced without undue tension as changing perceptions of many possibilities of being. At this level of integration, adults can look at themselves and at other beings in terms of the passing of ages, of near and far in geographical, social, cultural, historical, intellectual and developmental dimensions. They can take multiple points of view and shift focus effortlessly among many states of awareness. They feel *embedded in nature* - birth, growth and death, joy and pain - are seen as natural occurrences, - patterns of change in the flux of time.

Consciousness or rational awareness is no longer perceived as a shackle, but as just another phenomenon that assumes foreground or background status depending on one's momentary attention. Ironists can see a world in a grain of sand, that is, they can perceive the concrete, limited, and temporal aspects of an entity simultaneously with its eternal and symbolic meaning. Because of this unitive ability (Maslow, 1971, p. 111) they can cherish the humanness in the seemingly most undifferentiated beings and feel at one with them. They respect the essence in others and therefore do not need them to be different than they are. It is important to realize that from a unitive point of view higher stages are not better than lower ones because all are necessary parts of interconnected reality and an overall evolutionary process. Unitive thinkers also accept themselves "as is" in a non-controlling way. No matter how great their achievements may be, they are aware that these are only a drop in the pool of ongoing human endeavors. Sensitive others are often struck by the humility and grace that they experience in the presence of Ironists. It's one of the most salient differences between personal and transpersonal ways of meaning making.

On the other hand, Individuals at the Ironists stage may be perceived as "aloof", as not enough engaged in the goals, pursuits, concerns of common humanity especially from the perspective of Experts and Achievers, even Strategists may feel that way. What is not evident to these critics is that Ironists often act as catalysts in shaping others' lives. In being what they are without excuses, they challenge others' perspectives, and demonstrate a way of being human that is different from the evaluative, conventional ideas about what it means to be an adult. They manifest a deeper security about being, than is possible with a rationally generated self-identity. In contrast to all other stages, Ironists seems to have intense, non-demanding relationships with people regardless of their development, age, gender, or any other identifications. Because they see the dignity in all manifestations of life, they can make others feel worthy and whole.

Ironists have a completely internalized transpersonal or interindividual morality. Inner conflicts and conflicting external demands simply are part of being and need not be resolved or denied, only witnessed. Ironists are no longer driven by desires to be one way or another, to achieve one state or another. Instead they can let go of the unattainable. Concerned with global justice, spontaneity, existence & creativity..

Reality is the *undifferentiated phenomenological continuum* or the creative ground or unified consciousness. Every object, word, thought, and every theory is a human construct: separating out, creating boundaries where there are none. The quest for meaning and connection is an essential aspect of the human condition. Stage 6 individuals feel interconnected with others as they all struggle to survive and make sense of their existence. They have tolerance, compassion and an affiliation with all manifestations of life. The simplest flatworm is in some way as close to the truth as the most sophisticated thinker. Peak experiences no longer have an out-of-this-world quality, they have become a familiar way of being and experiencing. The present is where the past and the future interpenetrate. Total openness releases individuals to be in tune with truth and beauty, to have visionary experiences, that is, to comprehend things in a holistic, analog way, not through the filter of the rational mind.

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Ironists can shift focus without effort and behold the whole simultaneously with its constituting variables. They operate within an expanded time frame which includes all of earth's history and its future. Life is seen as a form of temporary and sometime voluntary separation (Bodhisattva vow) from the creative ground to which it will eventually return. Though the Ironist is aware of him or herself as such a separate and unique embodiment, he or she identifies with all other living beings. The separation of self from others is experienced as an illusion, an invention to safeguard the ego's need for permanence & importance and to defend against the fear of its death.

Ironists therefore seem to transcend narrow ego-boundaries. They have open boundaries and are attuned to rather than preoccupied with whatever enters awareness. The term witnessing (rather than observing) can be used here to describe the capacity of Ironists to metabolize experience without the conscious, willed focus and preoccupations of earlier stages. The Truth is imminent in the universe and can be apprehended in this ready, open-process stance, but it cannot be grasped by purely rational means.

Ironists have an integrated sense of unique identity as participants in the evolution of the universe. They are in tune with their precious "life's work" as a simultaneous expression of their unique selves and as part of one's shared humanity. They also care about the fundamental dilemma of the human condition. They work for justice, fairness, and benevolence towards all. Individuals themselves are responsible for making their lives meaningful, but Ironists don't perceive themselves to be the sole and lone masters of their souls as envisioned by the Strategists and to some degree Magicians. Ways of being are infinite. Clues for the variety of possibilities of being are offered by the study of human history, by our current experience of human diversity and likely with new forms of being human evolving in the future), in nature, and in alternative, non-waking states of consciousness. Life can appear as fulfilling a cosmic purpose and therefore it is essentially simple. Doing or thinking are just modes of existing, but not intrinsically more valuable than feeling, being or non-being. The last is probably the most difficult idea to grasp by most people who have not developed beyond the personal realm. A Buddhist motto says: Understanding is the ultimate illusion.

In summary, Ironists are more likely to have a balanced, integrated sense of both their belongingness and separateness as individuals because they feel part of the ongoing evolution of the universe in all its aspects and cycles of creation, destruction, and recreation.

Language clues: Ironists use a global array of topics and concerns which are sometimes expressed within one response. They have a vast mental space to roam in because of the unitive ability. Kaleidoscopic responses bridge different levels and types of contrasts: concrete--practical; theoretical--philosophical; personal--global; serious--humorous; physical--psychological--metaphysical, mundane and sublime. Ironists may use unique and vivid expressions, or creative metaphors to express their ordinary and non-ordinary experiences. Occasionally one finds very simple responses in an Ironist's protocol. Although rated at face-value, this is not counter-indicative as spontaneity and straightforward simplicity is an essential element of ego-transcendence. While Magicians have the most complex and richly differentiated action logics, Ironists stand outside the "desperate" need for meaning making common to all earlier stages seeing as they do the non-necessity to defend and bolster the ego.

- ¹ Adapted and expanded from Cook-Greuter, S. (1985). *A detailed description of the successive stages of ego-development*. Prepublication chapter not for citation without permission of author.
- ² Angyal, A. (1965). *Neurosis and Treatment: A Holistic Theory*. New York; The Viking Press. Bakan, D. (1966). *The duality of human experience*. Chicago: Rand Mc.Nally.
- ³ According to Koplowitz (1984, page 289)
- ⁴ The higher number of post-autonomous clients in the UK sample is likely due to a self-selection bias. People who are committed to transformation and growth seek to be tested on their own. Most of the participants in the USA general population sample come from a variety of research projects.
- ⁵ The cognitive definitions of the stages come from Commons and Richards, 1984, *Beyond formal operations*.
- ⁶ Loevinger and Wessler, *Measuring ego development*, vol. 1, Jossey-Bass, p.4 or in Hy and Loevinger, Erlbaum, *Measuring ego development*, 1996
- ⁷ I have made the decision of changing the numeric label for the Opportunist action logic and the Self-protective ego stage Delta to better communicate with a non-academic audience and to make the numeric labels “look” consistent. Opportunist is now referred to as stage 2/3 since it comes out of the Impulsive stage two and evolves into the Diplomat stage 3. This move, ignores earlier subtle distinctions in ego development in the LDF, but does not eliminate them when actually dealing with populations in which they are theoretically of importance. Given that the preconventional stages are rare in the professional environments we work with, this move can be justified. For research in the preconventional arena, the earlier distinctions remain important. The earlier sequence differentiates among stages 2, 2/3, Delta, Delta3, 3. It is now replaced by the sequence 2, 2/3, 3, where 2/3 stands for Delta and Delta3.
- ⁸ The terms General systems and Unitive stages are explained in Cook-Greuter, S. (1999). *Postautonomous ego development: its nature and measurement*. Doctoral dissertation. Cambridge, MA: Harvard Graduate School of Education. Available from author for \$35.00.
- ⁹ The higher the stage, the less my characterizations coincide with Torbert’s. Torbert’s insights are based on interviews with some dozen leaders and high-ranking company officers, while mine are based on hundreds of records from individuals of all walks of life. Thus, my data access a wider range of occupations. It is very possible that leaders in organizational settings do display the specific traits that Torbert observed. In this text, I am describing the characteristics of Magicians and Ironists wherever they may be found. Few of them, in my experience, choose to be company men and women.
- ¹⁰ The choice of labels for the various stages or action logics has long been one of the hardest tasks for all who work in the field of constructive developmental psychology. I do not find the term Ironist especially fruitful in characterizing individuals who have the frame of mind that is developed after the Magician. *Faute-de-mieux* and to avoid confusion, I will be using Torbert’s term in this context.
- ¹¹ Cook-Greuter and Torbert developed an instrument, *The Leadership Development Profile* (LDP) that measures a person’s main action logic or center of gravity. It is a 36-item sentence completion test based on Loevinger’s model and adapted and refined for professional use. It is unique in the field as it incorporates the subtle criteria for distinguishing among the highest stages.