

Using the Enneagram in Organizations: Ethical Considerations

By Ginger Lapid-Bogda, Ph.D.

This first of three articles on ethics and the Enneagram covers the ethical considerations that are essential to consider when we provide services to organizational clients. This is offered with the intention of giving us all pause to think through where we each stand on some of the most important issues:

- Credentials and experience
- Hiring, firing, and job placement
- Certain types as the best leaders
- Maintaining client confidentiality
- Voluntarism
- Coaching and giving advice
- Manipulation
- Doing your own self-development work

Credentials and Experience

As we all know, the Enneagram is an incredibly powerful tool, but so are the theories and practices used in consulting, training, and coaching. In the hands of a knowledgeable and experienced professional, these theories combined with the Enneagram can do tremendous good. However, when used by individuals with insufficient knowledge and experience, they can cause professional and personal harm.

Almost all consultants, trainers, and coaches have academic degrees or certificates in their area of service – for example, a master’s degree or a doctorate; a coaching certificate from a reputable coaching institute; or a training or consulting certificate from a recognized organization. Practically speaking, very few companies ask about degrees when they hire you, but the purpose of the degree or certificate is to assure that you have a perspective and theoretical understanding that you can then apply to help organizations and the people in them become more effective.

An important supplement to a degree, or an alternative to it, is on-the-job experience. There are excellent coaches, trainers, and consultants who have no formal degrees in the field, yet learned to do organizational work by working in companies that gave them ample opportunities.

Usually, these individuals either go back for more formal training at a later date or they have extensive libraries.

The most accomplished consultants, trainers, and consultants have both strong academic backgrounds and a great deal of on-the-job experience. In all three fields – consulting, training, and coaching – there are general standards for what is considered junior, intermediate, and senior levels of experience, and ethical consultants, trainers, and coaches accept jobs that fit their qualifications and experience and refer jobs that do not.

Standards in consulting, training, and coaching

Consulting: junior (1-6 years); intermediate (7-15 years); senior (16+ years)

Training: junior (1-3 years); intermediate (4-8 years); senior (9+ years)

Coaching: junior (1-4 years); intermediate (5-10 years); senior (11+ years)

In the Enneagram field, we have neither the history nor the dialogue to offer such guidelines for either credentials or experience, but here is a start:

Enneagram Credentials

Credentialing is a challenge in the Enneagram community. Certainly, there are a number of excellent and thorough Enneagram programs that offer certificates. But, at the same time, completing a certification program does not necessarily mean a person has a depth of proficiency in the Enneagram. In a sense, anyone can offer a certificate, which is merely a piece of paper. Most legitimate certificate programs do have requirements that participants must meet to receive certification, but it is difficult to assure that everyone who receives a certificate from a *bona fide* program has achieved a level of excellence. In addition, there are many excellent Enneagram teachers worldwide who are self-taught or have studied with a number of very good Enneagram teachers, then synthesized their learnings on their own. There is clearly a need to establish some form of credentialing for Enneagram teachers beyond certificates from specific programs.

The International Enneagram Association may be the only organization positioned to do this, as every Enneagram school can be represented within the IEA, but their doing so could be controversial, at least in the beginning. It would be important that we all support such an effort and be willing to have our ideas included in this endeavor.

Enneagram Experience

It is difficult to determine how many years of Enneagram study it takes to be at varying levels of Enneagram expertise. Time may not be as significant as how well you learned it, from whom, how much your own background enables you to understand and integrate the information, and more. However, just to start the conversation, the following guidelines are offered:

Junior (1-3 years); intermediate (4-12 years); senior (13+ years)

There may also be a level past “senior” – clearly Helen Palmer, David Daniels, Claudio Naranjo, Oscar Ichazo, Don Riso, Russ Hudson, Jerry Wagner, and Tom Condon are senior to many of us who have more than 13 years of Enneagram experience.

Ethical considerations:

- *Do you have the academic background and on-the-job experience to qualify you to work with organizations in the way you do?*
- *Are you taking projects that are too far above your academic or experience level?*
- *Are you completely honest with your clients about your academic degrees and certificates as well as your on-the-job experience or do you portray yourself in misleading ways?*
- *Do you know the Enneagram well enough to be teaching, consulting, or coaching in organizations?*

Hiring, Firing, and Job Placement

In Barbara Ehrenreich’s 2005 book, *Bait and Switch*, an entire chapter describes and criticizes an Enneagram coach who clearly doesn’t know the Enneagram very well and who uses it to suggest that Enrenreich’s type indicates she has certain skills, but needs work in other areas, specifically, writing. Not only is Enrenreich a Pulitzer Prize-winning author, the Enneagram provides no information regarding a person’s skill set.

The best candidates for jobs are those with the required skill set for the particular job and a sufficient degree of emotional maturity to manage their own behavior and to work effectively with others. No Enneagram type has better self-development capabilities or interpersonal skills than any other type. Each type simply has different strengths and growth issues.

It is tempting for companies to want to use the Enneagram for hiring, firing, and job placement simply because mistakes in these areas are costly. It is tempting for consultants, coaches, and trainers to offer these services because it can be quite lucrative. Temptation aside, it

is a very dangerous area for us to undertake, fraught with moral and ethical considerations and potential lawsuits.

Ethical Considerations

- *Are you tempted to use the Enneagram to assist companies in hiring, firing, and job placement?*
- *What would be your intention in doing so, and how do you justify this?*
- *How would you feel if your Enneagram type were being used to place you in a job, use your services, etc.?*

Certain Types as the Best Leaders

Formally and informally, I have heard Enneagram business consultants say that certain types make better leaders, and teachers who take this position usually include Eights, Threes, and their own type.

The reality is that type has nothing to do with being an excellent leader. What is accurate about type and leadership is the following:

- Certain Enneagram types tend to display particular strengths as leaders as well as certain development areas, but this will be less true the more developmental work they do.
- Certain Enneagram types tend to be more aggressive or controlling than other types, which might be mistaken for leadership. However, these behaviors can create a negative reaction from followers, which undermines their desire to follow these leaders.
- Specific organizations may have a bias toward certain types of leaders, which does not mean that these leaders are necessarily the best for the organization.
- Certain types of leaders may be more effective in an organization depending on the specific needs of the organization at that time, but when that time changes, a leader without flexibility and bandwidth will no longer be well placed.
- Emotional Intelligence is the greatest predictor of success as a leader, but emotional intelligence is not related to a particular type.

As a practical matter, how can you teach leaders to use the Enneagram for leadership development but then tell them that their type is really not suited for leadership?

Ethical Considerations

- *Do you believe that certain types are natural leaders?*

- *Do you teach that certain types make better leaders?*
- *Do you support organizations conveying that certain Enneagram types make the best leaders?*

Maintaining Client Confidentiality

The basic question is this: Is information about the Enneagram types of individuals in organizations confidential? The answer is clear in some areas and not in others.

Coaching

In general, all coaching information is confidential between the coach and the client unless they have a different agreement. More specifically, the client can share anything he or she chooses, but the coach is required to keep information confidential. This is the code of ethics among coaches and following it allows clients to feel trusting enough to be open about their issues and development.

Training and Consulting

This is more complex because individuals are learning the system and their types and/or working with the applications of type within a group setting. Because of this, everyone in the session will know everyone's Enneagram type and consequently, people's types will clearly not be confidential among participants. The question really becomes whether or not it is acceptable to discuss people's types with others who are not present.

The answer to this question is generally that the information is not confidential if team members are absent from a session. The rationale for this is that these absent team members do need to know the types of all team members if the entire team is going to use the insights of the Enneagram in their daily interactions. The consulting and training issue here is how to help absent members learn the system and accurately identify their own types, not whether they should know the types of other team members.

The more complex question is whether the Enneagram types of individuals should be public information to non-team members or people who have not participated in an Enneagram session. The answer to this can only come by asking the organization this question, challenging them if necessary, and then abiding by the organization's decision.

In the organizations in which I work, I encourage them to be open about making their types public and, at the same time, I discourage them from thinking about themselves only as a type. In most cases, they want to share information about themselves and do so spontaneously. In organizations or teams where there is some mistrust – or with individuals who do not trust others

or who want to remain more private – this needs to be respected. In most cases, it is far safer for the consultant or trainer to be circumspect about sharing the types of individuals in the organization, and it is really not necessary to do so.

Ethical Considerations

- *What are your beliefs about confidentiality in organizations?*
- *Do your beliefs coincide with the standard practices of consultants, coaches, and trainers as well as what the organization prefers?*
- *Do you raise questions of confidentiality with your clients and groups?*
- *Do you maintain your confidentiality boundaries effectively?*

Voluntarism

The issue of whether participation in organization-based Enneagram work should be voluntary – that is, at the discretion of each individual participant – illuminates the tension between what is ideal and what really happens in organizations. Ideally, every participant would choose to participate in Enneagram programs because people would then be committed and take responsibility for their choices.

In reality, many training programs endorsed by a company and particularly those considered by the company to be strategic are not optional, so the issue of voluntarism is not Enneagram-specific. To engage in a consulting project is almost always a decision made at the discretion of the manager, not the individual employee. With team-building projects, a team may be given different options, with the Enneagram as one alternative, but decisions about how to proceed may not be made by a majority vote. With coaching, there is more client discretion because the coach chooses methodologies he or she believes will work best with each client. A client who is adverse to the Enneagram will not benefit from its use, so most coaches would simply use other approaches.

To give an example, in one of my consultations, all managers are required to participate in the Enneagram programs, but it is optional for individual employees. The organization's rationale for this is that all managers need to understand the Enneagram because it gives them a common frame of reference and because most of the employees who work for them are learning the system. Individual employees are told, "The Enneagram is optional, but self-development is not. If the Enneagram doesn't work for you, you need to find something else that does." Over 90% of the employees in this organization have elected to participate in the Enneagram

programs, a far higher compliance rate than for programs that are mandatory. Perhaps this is partly a result of the voluntary nature, but it is also a consequence of the excitement that is generated from the programs.

Ethical Considerations

- *Can you comfortably raise the issue of voluntarism with clients, highlighting the issues involved?*
- *When clients make programs mandatory when they don't need to be so, can you effectively challenge them on this issue?*
- *Do you know how to work with the fact that some programs may be required and not every participant wants to be there?*
- *Can you help clients feel okay about being skeptical or not wanting to participate fully and also give them the space to choose to participate fully?*

Coaching and Giving Advice

Coaches are supposed to listen more than they talk and to offer advice sparingly. The best coaches help clients gain perspective, embrace more options for their behavior, and take responsibility for their choices. In reality, many coaches give abundant advice, some of which may be good and helpful and some of which may be harmful. When a coach gives advice and it backfires on the client when implemented, most coaches justify this by saying that the client chose to use the advice and so it is the client's responsibility.

Excellent coaches usually give little advice because they focus more on helping clients develop their own inner capacity to examine alternatives and make effective choices. The second reason for limited advice giving is that seasoned coaches are aware that clients often follow their advice. This presents a problem because most advice is speculative and it could be wrong.

The reason this is a particularly important issue when we use the Enneagram in coaching is that clients may ask our guidance and advice on how to interact effectively with someone with whom they work. Although this is a legitimate request, (a) we or they may not know the other person's type, and (b) our advice may be ill-advised.

Here is an example from my own coaching experience. My client, a One who knows the Enneagram quite well, got a new boss who is a Three. Another Enneagram business consultant who was also working in the company advised her to approach her new Three boss by flattering him, telling him how great he was, etc. She tried this approach but her behavior put their

relationship in jeopardy. When we discussed what had gone wrong, I told her that this way of approaching Threes rarely works and that she likely came across to him as insincere. Moreover, since she really didn't believe all that she was saying to him, it was difficult for her to be insincere and he may have perceived her as trying to manipulate him. The client said this is exactly what occurred.

To suggest that Threes want applause and direct admiration is to misunderstand the nature of Threes. Most Threes read and value the subtleties that indicate respect, such as tone of voice, eye contact, and other forms of body language; excessive adulation, particularly if it feels insincere, is interpreted as strategic manipulation. In addition, most Ones – and my client is a good example – have trouble not telling the truth, especially if it is pre-planned. They feel unnatural, don't do it very well, and engage in self-recrimination afterward.

Ethical Considerations

- *Do you give too much advice to your coaching clients?*
- *Do you know the Enneagram well enough to use it in your coaching?*
- *Do you stereotype or make negative remarks to your coaching clients about any of the Enneagram types?*
- *Do you help your coaching clients use the Enneagram as a tool, but not as the answer to every personal and interpersonal challenge?*

Manipulation

The coaching example can also be understood as the coach advising the client to manipulate her new boss, even using a misunderstanding of the Enneagram to do so. But what is manipulation? What are the ways in which either we or our clients use the Enneagram in a manipulative manner?

Manipulation means exploiting others, controlling them in devious ways, or influencing them without their knowledge to our benefit and at their expense. Certainly, the Enneagram can be used in this way unless we are very conscious and very responsible when we use it.

One issue is transparency. When we do something to influence our clients and we tell them what we are doing, it is not manipulative because they know what we are doing. It is extremely important that coaches act in transparent ways when using the Enneagram with clients. This means being very explicit with them about what we are doing, why we are doing it, and helping them examine their reactions.

A second issue is intention. Are we using the Enneagram or helping our clients do so from a place of positive and constructive intention, to help them and others be more effective? Or is it coming from ego, helping them to maintain their position and power in relation to someone or something else? Are we using it to prove how insightful we are as coaches rather than using the Enneagram to help them understand, take responsibility for, and have more options regarding their own behavior. Both we and our clients need to be deeply honest about our intentions.

A third issue is benefit. Are we suggesting to our clients that they act in ways that benefit them but are at someone else's expense? For example, if we can help a client deal more effectively with a Nine by helping her help the Nine to express thoughts and feelings directly, both benefit. But if we are coaching a client how to work around a Four with whom she works by listening to the Four's issues and acting as if she is compassionate and understanding but this is not true, then we are helping our client be manipulative.

In addition to the above issues of manipulation, what about clients such as managers who want to use the Enneagram to manipulate people who work for them? To deal with this as a trainer, coach, or consultant takes skill and courage. The skill involves being able to observe the manipulation and call it to the client's attention in ways that help the client learn and grow, if at all possible. The courage involves being willing to not take projects in which you sense the client has a manipulative intention or to extricate yourself from clients who are acting manipulatively and refuse to change.

Ethical Considerations

- *Can you observe yourself acting in manipulative ways with your clients and then change your behavior?*
- *Are you transparent when you coach?*
- *Are you truly honest and clear in your intentions with clients?*
- *Can you help clients be forthcoming about their true intentions?*
- *Are you able to sort out who is benefiting from the work you are doing, who it might be hurting, and then change your behavior as needed?*
- *Do you have the skills to constructively engage your clients regarding their manipulative behavior?*
- *Do you have the courage to walk away from clients who are manipulative, even when they are paying you or you have long-term relationships with them?*

Doing Your Own Self-Development Work

This may be a surprising area to cover in an article on the topic of ethics and the organizational use of the Enneagram, but it may be one of the most important. Minimally, it is the area over which we have the most control.

In my Train-the-Trainer programs, I often insert the following exercise:

1. Write down the number of the Enneagram type you like the best and why.
2. Then write down the number of the Enneagram type you like the least and why.
3. Finally, reflect on both choices and make notes to yourself about how these selections say something to you about the work you still need to do on yourself.
4. Now find a partner and share your insights.

This simple activity usually stuns people. First they have to admit they like certain types more than others. This is honest and human. Second, it helps them become more aware of how their reactions to others is really a reflection of unfinished psychological issues far more than it is a reflection of the Enneagram styles they have selected. This is a very important insight.

It is even more significant for trainers, coaches, and consultants because any overly positive or negative reactions we have about different types will be conveyed somehow to the people we teach. It might be through a story we tell, our tone of voice, or the length of time we spend on a type. I suggest that before organizational professionals go into any training, consultation, or coaching session, they do this activity, just to increase their awareness and resolve residual issues.

There are several issues involved when we are not engaged in our own self-development work. First, given that no type is better or worse than any other type, when we convey that one type is better than another, we do damage to people of types with which we have issues or elevate people of types we like. Second, if we do not continually work on ourselves, we will not be modeling the very behavior we want clients to emulate: self-honesty and self-acceptance, lifelong learning and growth, and fundamental humanness. When I bring other consultants to work with me on Enneagram projects, I always say this: “Be professional, but don’t try to be perfect. Fundamentally, if we want people to be real and learn to be fully themselves, so must we.”

How does this relate to ethics? In addition to transferring our unfinished personal work to clients and to unintentionally damaging participants, there is the issue of “guru” status. When we use the Enneagram to elevate ourselves above others, we are using our Enneagram knowledge

and our roles as consultants, trainers, or coaches to enhance our egos, not work on them. This is the exact opposite of the Enneagram's biggest intention.

Ethical Considerations

- *Do you do your self-development work on an on-going basis or only when under duress?*
- *Do you do anything to undermine any of the Enneagram types, even if this is unintentional?*
- *Do you truly model the behavior you want from others?*
- *Are you using the Enneagram to feed your ego rather than to challenge it?*

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