Ethics: In Their Own Voices
Lessons from Companies Who Use the Enneagram Successfully
By Ginger Lapid-Bogda, Ph.D.

This is the third of three articles about the ethics involved when using the Enneagram in organizations.

In this article, you will read three real case studies where the Enneagram has been used effectively to help organizations deal with the challenges and opportunities each has faced, plus a discussion of the ethical issues that have arisen in each organization. The first case is from a company in the financial services industry; they have been using the Enneagram for almost six years in a variety of applications. The second case describes how a premier hearing aid manufacturer has been using the Enneagram primarily (but not solely) in their sales organization for over a year. In the final case, the organization in the health care industry has been using the Enneagram slightly under one year, but with multiple applications such as communication, leadership, and culture change.

The first and third organizations featured in this article were pleased to be included but were not allowed to use the company's name as a result of their organizations' legal restrictions; they cannot appear to endorse products or services nor can they give competitors insight into strategies and tactics contributing to their success. However, both are substantial companies with wide name recognition. The second company, NUEAR, was not under the same legal restrictions and has allowed us to use their name directly.

Each contributor – the sponsor or champion of the Enneagram within his or her organization – was asked to respond to the following questions:

- How you are currently using the Enneagram?
- How do you measure the success of your efforts?
- Has anything extraordinary or surprising occurred in this process?
- What ethical issues have arisen from these efforts, and how have you dealt with them?
- Do you have any suggestions for others regarding using the Enneagram in their organizations and/or the ethical issues involved?

As you read the following three cases, you'll find some remarkable similarities. These companies were selected because each is beyond "early-use" of the Enneagram, have been able to apply it successfully as more than a training program or self-development tool, and all have plans to continue its use over the next few years.

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CASE STUDY 1

Company: Financial Services Industry, Information Technology Division
Size of business unit: 200 employees in a company of 2000
Contributor: Manager, Information Technology Division

How you are currently using the Enneagram?

I was introduced to the Enneagram in a human resources (HR) coaching session and was hooked immediately. I brought it back to my staff, and we began studying together toward the end of 2000. The Enneagram was introduced to the rest of the Information Technology Division (IT) in response to issues raised in an employee opinion survey. The lowest scores on the survey were in the areas of communications and trust. As a result of my group's success with the Enneagram, the Chief Information Officer (CIO) approved offering it within the entire IT Division. The senior management team went through Enneagram training at the end of 2001, and training was offered to the rest of the IT management throughout 2002.

We developed two training classes: the first was a two-day introduction and the second was focused on communication issues associated with each type and how to improve communications. For the first few classes, we used a trainer from our HR department who was familiar with the Enneagram. When it became apparent that he did not have the knowledge to compare and contrast the types, we started hiring Enneagram experts who added tremendous value to the classes. To keep the subject alive for students who have taken the first two courses, we bring in outside Enneagram instructors to teach full or half-day sessions on particular topics.

We have continued to study with the guidance of many wonderful Enneagram teachers, and our efforts have focused on learning the Enneagram system and types, subtypes, centers of intelligence, leadership, coaching, communication, conflict, team building, and feedback.

How do you measure the success of your efforts?

In my group, we use the Enneagram for team building, and it has been a huge success. Staff members are very close and support each other based on what people need. The Five is given her space; the Two is given appreciation; the Six questioning is understood (rather than considered negative). We laugh at ourselves and with each other when things are not particularly tense, and we forgive each other for things done under stressful situations. Staff members understand themselves and their co-workers, which allows them to be more forgiving and to communicate better.

Some members of my department have left, and others have joined. All have expressed appreciation for the understanding the Enneagram gives them in dealing with their co-workers, family, and the world. Most work on themselves and try to increase their productive responses to the experiences life brings them at work and at home. The team is very close, supportive of one another, and high performing.

For the division, the hope was that learning more about ourselves and those we work with would improve trust and communications within the division. The first year we focused on the management group to help them recognize their unique styles of interacting with others and to give them an awareness to best use those styles to build and maintain effective working relationships with staff.

My first thought was that the divisional work with the Enneagram was not as successful as I had hoped. However, I think by most accounts it has been a successful endeavor. Most soft-skill training in IT never takes root. However, 150 of 200 staff have voluntarily attended training, and we continue to get requests, which means that the Enneagram has become part of our culture. In addition, six or so other departments (including the organization's Executive Staff) have requested the training.

Has anything extraordinary or surprising occurred in this process?

One person was initially very turned off by the Enneagram (reported to HR that IT was assigning numbers to staff) and gave it another chance by attending a class a few weeks ago. The person apologized and said he could now see the value.

The only really bad class we had was when a manager made it mandatory for her staff to attend. The class was intended to be voluntary and that proved to be a good rule. The participants forced to attend were negative, close-minded, and acted superior to anyone who could believe such rubbish. It was the one time I considered killing the program.

What ethical issues have arisen from these efforts, and how have you dealt with them?

There were some crazy rumors about satanic symbols and such, but they never reached a credible level. One valid issue was the natural resistance in many people to being labeled. As people understand the Enneagram, they come to accept that labeling goes on all the time, and the Enneagram actually gives you a way "out of the box." The Enneagram instructor's ability to explain this clearly is important.

Though not an ethical issue, an issue that also came up was that some people use their number as an excuse for their behavior. Rather than use the Enneagram as a developmental process, for these people it became a light-hearted way to deflect criticism, e.g. what to expect from a XXX? Instructors and managers need to continually remind people to not use the Enneagram as a rationale for unproductive behavior.

Do you have any suggestions for others regarding using the Enneagram in their organizations and/or the ethical issues involved?

1. The name "Enneagram" was a challenge to be overcome. In retrospect, I would use "Nine Ways of Working" or something like that for business applications.

2. I think it is critical to have professional Enneagram instructors teach the system inside organizations. The right instructor needs to have a strong knowledge base as well as passion and experience with the Enneagram.
3. Have participants voluntarily choose to attend the training rather than making it mandatory; this increases the probability of acceptance.
4. Classes of 8-10 students seem to work best for us. It is a small enough group for people to share, yet large enough to have energy and multiple viewpoints.

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CASE STUDY 2

Company: NUEAR Electronics-Starkey Labs, Hearing Devices Industry

Size of business unit: 120 employees in a company of 3000

Contributor: Chad Jorgensen, Managing Director, NUEAR

How you are currently using the Enneagram?

Over the past year, we have been using the Enneagram in several areas: sales, consulting with patients, and organizational dynamics. Over 100 managers, staff and sales consultants have been learning from Enneagram teachers Tom Condon, Ginger Lapid-Bogda, and Kathy Hurley and Theodorre Donson. The training has been extended to 400 plus independent retailers who dispense NUEAR hearing instruments.

Kathy Hurley and Theodorre Donson provided the basic Enneagram training through which participants learned the system, identified their types, and began the process of self-awareness through the Enneagram. Tom Condon has been working with us to integrate the Enneagram with NLP (Neurolinguistic Programming) and to apply this integrated approach to the sales process. In addition, we have sent key people through Ginger Lapid-Bogda's business-focused Train-the-Trainer program to better learn how the Enneagram applies to organizational dynamics.

All of the training is intended to help management and sales staff to identify their own types and become more self-aware. This internal focus helps develop compassion and an appreciation for the worldview of others.

The Enneagram is also being used as a tool to aid the NUEAR consultant in learning his or her own habituated consulting strengths and weaknesses. After developing an appreciation for their own patterns, the hearing aid consultants are made aware of the eight other worldviews of the Enneagram. The consultants learn how to better adapt to their patients and especially how to get out of their own way. Consultants develop respect and compassion for the patient's

perspective, and this shared understanding helps in developing rapport. Communication is improved through a deeper understanding of and empathy for the patient's viewpoint.

NUEAR is developing customized sales training and consulting DVDs that use type panels as a resource to improve communication skills of all NUEAR practitioners who interface with hearing impaired patients.

How do you measure the success of your efforts?

We are measuring our success in the following three stages, although some results are being attained in all areas simultaneously.

Stage 1: Success was measured in scope of training and commitment to budget.

Stage 2: Success is being measured by completion of applications (consulting DVDs).

Stage 3: Success will be evaluated based upon results to business performance.

Results: We've kept within budget (stage 1), and the training has recently been customized to demonstrate the use of the Enneagram and NLP in hearing aid consulting. NUEAR is producing a two-day DVD of type panels for each style, having recently completed the DVD for Enneagram style One. NUEAR has been authorized to produce DVDs for the eight remaining type panels. This work may take several years of development.

With regard to success at the individual level, managers and employees are at the intermediate stages of being able to use the Enneagram for their personal and professional development. By this we mean they are beyond simply learning the system and are now able to apply it in an increasing number of situations. NUEAR has many success stories in terms of attitudinal and behavioral changes. In addition, many of our accounts are at either the beginning (early use) or intermediate stage of using the system.

Has anything extraordinary or surprising occurred in this process?

Most of the early resistance to the Enneagram has been eroded as practitioners are recognizing the value of this customized application. The Enneagram can be complex and a translation to an application-specific paradigm is crucial. We've learned that it takes an extensive amount of work on our part to thoroughly adapt the Enneagram so that our practitioners can use it effectively.

What ethical issues have arisen from these efforts, and how have you dealt with them?

Although no ethical issues have arisen of which we are aware, we are still early in the process. We would highly recommend ethical compliance training as a precursor to introducing the Enneagram in sales and consulting. All three Enneagram consultants -- Condon, Lapid-

Bogda, and Hurley/Donson -- teach ethics in their training programs. NUEAR has also developed several video excerpts that deal with the issue of ethics of selling using the Enneagram and NLP.

Do you have any suggestions for others regarding using the Enneagram in their organizations and/or the ethical issues involved?

1. Start with a program focused on self-awareness to teach the importance of becoming adaptable and recognizing one's own patterns.

2. Highlight the ethical underpinnings of using the Enneagram in your organization.

   - State philosophical intentions for the use of the Enneagram and its applications.
   - Provide training on ethics of using the Enneagram.
   - Create a documented List of Ethics for NLP and the Enneagram in sales and consulting.
   - Display the List of Ethics in the intro to videos or presentations.
   - Document complaints or misuse – counsel on proper technique.

3. Only use the most notable Enneagram consultants – pay for the labor rather than teach it yourself – and make sure they talk about ethics.

4. Encourage people from your business to join the IEA.

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CASE STUDY 3

Company: Health Care Industry, Information Technology Division

Size of business unit: 589 employees in a company of 9000

Contributor: Vice President, Information Technology

How you are currently using the Enneagram?

We are using the Enneagram in multiple applications throughout information technology. It began a year ago with an off-site team development session for my senior staff. We were looking for something new and different, and although I was familiar with the Enneagram, my direct reports were not. My nine direct reports were so enthused about the daylong event, they wanted to bring it to out 130 managers and non-management leaders, which we did last July. The event was taped so we could share it with those unable to attend and future managers, although we ended up sharing the tape with all our employees as well.

The leaders at the July session were so enthused, they wanted to program brought to all individual contributors (non-managers) in IT. We have now trained over 350 individual contributors in groups of 35-55 and will have trained all those who choose to participate in the training by February '06. After that, we plan to run one training program per quarter to enable our new hires to become oriented to the Enneagram system. The training programs focus on learning

the system, identifying your Enneagram style, and then applying this to areas such as communication, feedback, conflict, and leadership.

In addition to the trainings described above, we are engaged in several other Enneagram-related activities. The most comprehensive venture is that we are taking our core leadership competencies (13 in all) and integrating each competency with the Enneagram styles. Each month, we roll out one competency – the first competency was *Obtaining Results* – and link the competency with each Enneagram style's related strengths and development areas. Fundamental to this project is the notion that no style is better or worse at any competency but that everyone can and must learn and grow in each competency area. These monthly competency modules, designed in workbook format, are being delivered in management teams where each senior manager is responsible for facilitating a three-hour learning community discussion on the competency.

Also in the works is a series of taped type panels for each Enneagram style where a mixture of managers and individual contributors will discuss their styles, what motivates them, what discourages them, how to work best with them, and their development areas. These tapes will be a resource for both managers and individual contributors and will also be used as part of a new employee orientation package.

How do you measure the success of your efforts?

Right now, we are measuring success by enthusiasm people are showing and the stories they are telling us. Each time we have done more with the Enneagram, it has been in response to suggestions from those who have experienced it and want more for themselves and others. For example, the entire leadership training idea came from my senior managers and the employee training idea came from the managers.

The manager training is required (so they know how to speak the same language, even if they don't all embrace the Enneagram, which almost all of them do), and the employee training is optional. This latter training will include about 95% of our employees taking one day of work to do this, and we have been offering these trainings during our busiest time of the year. The managers report that their learning community sessions have been very informative and have had a strong team building effect on the group. We also know that the many employees and managers are having great discussions about their working styles and that co-workers are using it as a way to understand one another better. Individual contributors continually express their appreciation for making the program available to them and many of them are using their information at home and in their work with customers.

More than anything, we are changing the culture by changing the social system in our division to one of self-development, self-responsibility and, at the same time, highlighting the

importance of interpersonal communication and respect and emphasizing the need for leadership excellence.

In the near future, we plan to develop an assessment to measure the results of our work in progress.

Has anything extraordinary or surprising occurred in this process?

We've been learning as we go, trying to pace all the initiatives so that we have the time to do them but do not let too much slip so we miss capitalizing on people's enthusiasm and interest. We are seeing a systems level change in a relatively short time because of the number of well-placed, simultaneous efforts. However, because we are creating as we go without a large master plan, we need to make sure we sustain this work over time. I believe I will look back on my career (I am in my early 40s) and think of this as one of the top ten highlights of my career.

It is not a surprise to me that people in IT would be drawn to the Enneagram. Most IT employees are very bright and think in terms of systems. Both the intellectual framework and complexity/dynamism of the Enneagram appeal to them. In addition, some people in IT work with computers and may not have highly developed social skills; the Enneagram provides them a good roadmap for development. Others in IT have excellent social skills, so the Enneagram would be something they enjoy.

What ethical issues have arisen in these efforts, and how have you dealt with them?

More than anything, the individual contributors have wanted to know that their Enneagram styles would not be used as a basis for hiring, promotion, or demotion. We have given them this assurance and worked with the managers to understand how to use the Enneagram ethically. The only other issue that has arisen is that of over-emphasizing type or boxing people in (stereotyping) by type. In every Enneagram training program or other Enneagram related activity, we emphasize that this would *not* be a very useful way to use the Enneagram and that they shouldn't think of themselves or others as types – we are far more complex than that, and it is disrespectful. I also highlight the importance of *not* using your Enneagram type as an excuse for your behavior.

Do you have any suggestions for others regarding using the Enneagram in their organizations and/or the ethical issues involved?

1. Have a clear intention for why you are using the Enneagram in your organization.
2. Be willing to experiment because most of this is new.
3. Use the best outside help you can find in creating and delivering your efforts.
4. Lead or champion the effort yourself and also listen to feedback regarding your approach and timing.

5. Integrate or link the Enneagram with your other development efforts so that it is relevant and applied to the work.

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Summary

Although all three organizations above are in different industries and using the Enneagram with different size business units with different applications, their stories bear striking similarities for long-term institutional use of the Enneagram in organizations. Some of these include:

1. Have a strong and well-respected internal champion or sponsor who understands, values, and is passionate about the Enneagram; this person needs to drive, sustain, and provide resources for the initiative.
2. Use an outside consultant or consultants with Enneagram expertise to foster, advise, teach, and partner in the effort.
3. Link the Enneagram to real business needs.
4. Deal with the ethical issues regarding the Enneagram upfront and take strong and consistent stands about the ethical use of the system.
5. Create the effort as you go, using an intention or vision at the start and making programmatic and operational adjustments as you proceed.
6. Don't underestimate who will be interested in the Enneagram; two of the three case studies above occurred within information technology divisions, groups one might think at first would have minimal interest.
7. Measure the success of these efforts -- not only at the end point but also along the way -- so that mid-course corrections can be made at every stage.

As the Enneagram becomes more widely used in organizations and its applications become more sophisticated, it is increasingly important that we take a close look at the ethical issues involved. Here are some questions to ask yourself:

- ❑ Do I know the Enneagram system deeply and accurately enough to teach it to others?
- ❑ Are my training skills up to par?
- ❑ Do I know organizations well enough to be able to apply the Enneagram in organizations?
- ❑ Are my consulting skills well developed?
- ❑ Do I have enough experience with organization development theory and practice so that I can help clients and also do them no harm?

- ❑ Do I know when to use the Enneagram to help organizational clients increase their capacity – whether it is an individual, a pair, a team, a business unit, or a total organization -- and when it is not applicable?
- ❑ Do I have other approaches in my toolkit to use in conjunction with or instead of the Enneagram when these are more appropriate and effective?
- ❑ Am I continuously upgrading my knowledge and skills in all areas – e.g., the Enneagram, training, consulting, and coaching?
- ❑ Do I make sure to highlight the ethical issues involved using the Enneagram in organizations in every training and consulting project?
- ❑ Do I model the ethical behaviors I wish to see in others?

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