

The background of the entire page is a photograph of three people in a professional setting. On the left, a woman with dark curly hair and a black turtleneck is looking down at a document. In the center, a woman with short dark hair and glasses, wearing a grey blazer over a white top, is also looking at the document. On the right, a man in a blue button-down shirt is partially visible, looking towards the document. They are all gathered around a table, and the lighting is warm and focused on the document they are reviewing.

## Leading a Multigenerational Workforce

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# The Changing Landscape of Work

For the first time in modern history, workplace demographics now span four generations, meaning that 20-year-old new hires can find themselves working side-by-side with colleagues who are older than they are by 50 years (or even more).

**B**aby Boomers attempt to develop a spirit of camaraderie with team members whose on-the-job experience amounts to a semester internship. Generation Xers craft policies that will affect quality of life for colleagues old enough to be their grandparents. Members of the World War II Generation find themselves taking orders from new managers who are literally young enough to be their great-grandchildren.

This rich mix of generations in the workforce can be attributed primarily to labor shortages experienced in many industries and the rising average age of retirement. In recent years, some employers, especially those in the health care and service industries, have revised their recruitment strategy to include retaining nurses past retirement age and hiring retirees back into the workforce. For financial reasons, many Boomers are finding they need to wait longer to retire, perhaps into their seventies.

These developments have shifted workplace demographic proportions. In 2006, Boomers held the majority of positions of power and influence in organizations across the U.S. and around the world. By 2011, the percentage of Baby Boomers in the workforce is expected to drop while Millennial Generation workers will grow in numbers. These shifts impact corporate culture since priorities, attitudes, and work styles differ with each generation.



A photograph of four business professionals standing in a hallway. In the center foreground is a Black woman with short dark hair, wearing a dark pinstriped suit with a white collar, black tights, and black patent leather shoes. She has her arms crossed and is looking directly at the camera. To her left (viewer's right) is a man with short dark hair, wearing a light gray suit, a white shirt, and a yellow patterned tie. He has his hands clasped in front of him. Behind the woman in the center is a man with glasses and a beard, wearing a light gray suit and a dark tie. To the far left is a woman with short blonde hair, wearing a black turtleneck and black pants. The background shows a hallway with arched doorways and a green metal railing on the right.

## Generational Trends

Three important trends make it crucial that organizations become successful at addressing intergenerational dynamics:

## 1. Competition for talent is escalating.

- According to a 2005 AARP survey, “finding skilled employees” tops the list of the most important issues facing businesses. Yet only a third of employers have begun to educate managers about ways to utilize mature workers.<sup>1</sup>
- The cost of replacing experienced workers can range from 50 to 150 percent of their annual salaries when costs for recruiting, orienting and training new employees are combined.<sup>2</sup>
- The median age of the U.S. worker in 2006 was 40 years, which is the highest in history.<sup>3</sup> One-third of the white-collar federal workforce is between 50-59 years old.<sup>4</sup> The average age of a registered nurse in the U.S. is 47 years.<sup>5</sup>

## 2. More generations are working side-by-side.

- By 2014, nearly one-third of the total U.S. workforce (32%) will be age 50 or older. This will be a significant increase from 27 percent in 2005.<sup>6</sup>
- The oldest members of the Baby Boom Generation are nearing traditional retirement age. However, eight out of ten Boomers expect to work at least part time in their so-called retirement years.<sup>7</sup> To take advantage of this rich pool of talent, employers need to adopt policies and practices that appeal to this generation.

- Millennials are the fastest growing cohort, comprising 15 percent of the U.S. workforce. By 2011, their participation will swell to 25 percent.<sup>8</sup> To recruit and retain them, organizations will need to understand and appeal to their perspectives, communication styles, and work ethic.

## 3. Productivity and business results are linked to work environment.

- Companies need engaged employees—those who are willing and able to contribute to organizational success. Engaged employees can only thrive in inclusive work environments—those that value, reward, and develop employees from all generations and give them opportunities to contribute.
- Generational differences can lead to frustration, conflict, and poor morale. According to a survey by Lee Hecht Harrison, more than 60 percent of employers are experiencing intergenerational conflict.<sup>9</sup> However, those very differences can also lead to increased creativity and productivity—and ultimately to business success.
- After studying employee engagement for six years, professional services firm Towers Perrin reported that companies with highly engaged employees have a strong tendency to outperform organizations with less engaged workers. Engaged employees were more likely to produce high-quality products and services and meet customer needs.<sup>10</sup>





## The Business Case for Addressing Intergenerational Dynamics

An “age-neutral” workplace supports real communication and understanding across all ages, and builds on the unique values and strengths of each generation. Businesses that pay attention to intergenerational issues will see an impact on their bottom line in a number of areas:

### Corporate Culture

- Educating employees on generational issues boosts understanding, respect and productivity.
- A commitment to retaining corporate knowledge across generations prevents “brain drain” and keeps an organization competitive.
- Age discrimination claims are reduced through employment practices based on fairness and equal opportunity for all generations.

### Recruitment

- Recruitment messages geared to each generation will attract talent across the age spectrum.
- Workers age 55-64 make up the fastest-growing group in the labor force, while the 35-54 age group is growing much more slowly.<sup>11</sup> Targeted recruitment of mature workers gives employers a competitive advantage in acquiring the right talent.



- At the same time, knowing how to attract younger workers is crucial to ensuring future business success and leadership.
- Commitment to age diversity builds a company's reputation as an "employer of choice."

### Employee Engagement

- Managers who know what motivates employees of different generations are more effective in keeping them engaged.
- Engagement supports financial stability. A 2006 Gallup poll estimates the cost of employee disengagement at \$328 billion per year.<sup>12</sup>
- Employee satisfaction is higher when workers believe that career development opportunities are equal for all, regardless of age.

### Retention

- An engaged workforce results in higher retention and reduced turnover and training costs.
- Employee benefits which are geared to the needs of different generations can build loyalty and retention.
- All generations want their contributions to be recognized. Rewards and recognition should reflect each group preferences and priorities.

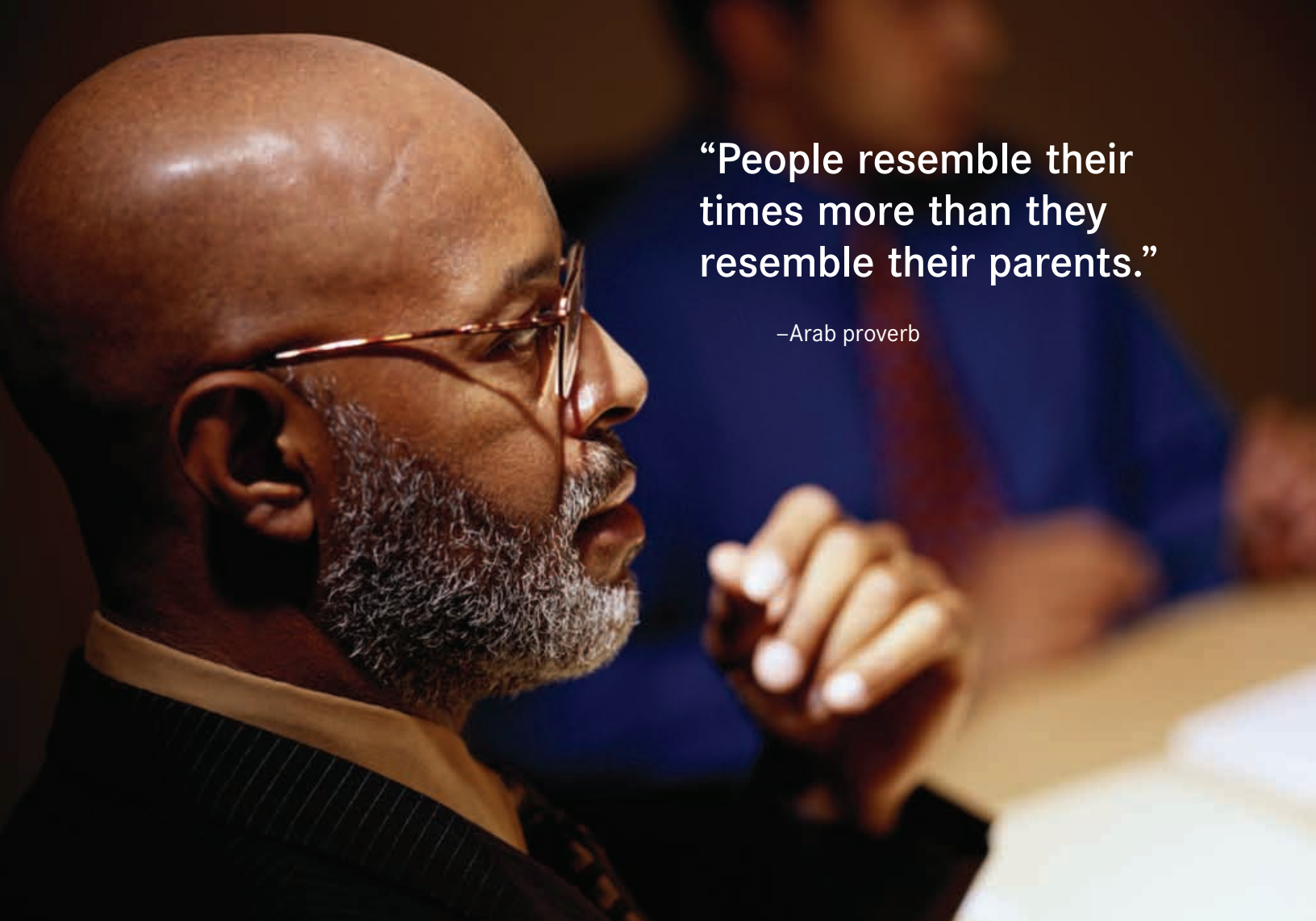
### Customer Service

- Each generation has unique service preferences. Businesses that understand and adapt to those preferences will attract and retain customers across the age spectrum.
- Appealing to different generations can open potential new markets and lead to new products and services.

## Benefits of the Multigeneration Work Team<sup>13</sup>

There are several benefits to be gained by the whole organization when a multigenerational team works well together. A positive, inclusive work culture can lead to business success by enhancing recruitment, retention and profitability.

1. The team can attract and retain talented people of all ages.
2. The team is more flexible.
3. The team can gain and maintain greater market share because its members reflect a multigeneration market.
4. Decisions are stronger because they're broad-based with multiple perspectives.
5. The team is more innovative and creative.
6. The team can meet the needs of a diverse public and can relate more effectively.



**“People resemble their times more than they resemble their parents.”**

–Arab proverb



# Overview of the Generations

A generation is a group of people who are programmed at the same time in history. During their first, most formative years, they are coded with data about what is right and wrong, good and bad, stylish and unstylish. A generation shares a common set of formative events and trends—headlines and heroes, music and mood, parenting style and education system. As they grow older, they learn and grow. They adjust their behaviors and build their skills. But they generally do not radically change the way they view the world.

Because each of the generations came of age in a distinct and unique era, each has its own perspective on such critical business issues as leadership, communication, problem solving, and decision making.

Just a few years ago, generations were separated at work by rank and status. In hierarchical organizations, the oldest employees filled executive positions, the middle-aged held mid-management jobs, and the youngest worked on the front lines. People weren't likely to rub elbows on a daily basis with those in other age groups. Today, members of the World War II Generation report to Generation Xers while Millennials present ideas to baby boomers. Four distinct generations work side by side to solve problems, make decisions, design products, manage projects, and serve customers.

## Varying Generational Models

The names and birth years for the generations vary from one model to another. All are somewhat arbitrary; a generation—or

an era—doesn't end one day while another begins the next.

In this publication, people born before 1946 are referred to as the World War II Generation. Although most of those from this generation who are still working are not old enough to have fought in World War II, they report that it was the single most important event of their childhood.

Those born between 1946 and 1964 comprise the Baby Boom Generation, corresponding to the post-World War II boom in births that began in 1946 and ended in 1964. People born between 1965 and 1980 are referred to as Generation X, and those born between 1980 and 2000 are called the Millennial Generation.

## Generations Globally

One of the most frequently asked questions about generational theory is whether it applies globally. This is an important concern, especially since so many American employees were born outside of the U.S. The model discussed here is an anthropological and sociological one; it is meant to apply in a general sense to all human beings regardless of where they were born. Global trends, especially in recent decades, have dominated mass media, particularly in urban, developed areas. For that reason, the younger a person is, the more likely he or she is to fit the generational profile. The model is less applicable to people who grew up in rural and impoverished areas with limited exposure to global influences such as television and the Internet.

## Generational Demographics: 2006 and 2011

WORKFORCE PARTICIPATION		
GENERATION	PERCENT	NUMBER
<b>WORLD WAR II GENERATION</b>		
born 1945 and before		
in 2006	8%	12.5 million
in 2011	5%	7 million
<b>BABY BOOM GENERATION</b>		
born 1946-1964		
in 2006	44%	66 million
in 2011	38%	60 million
<b>GENERATION X</b>		
born 1965-1980		
in 2006	33%	50 million
in 2011	32%	51 million
<b>MILLENNIAL GENERATION</b>		
born 1980-2000		
in 2006	15%	22 million
in 2011	25%	40 million

### About this chart:

The “percent” column shows the percentage of the total U.S. labor force represented by each of the four generations. The “number” column shows the numeric estimates of each generation’s presence in the U.S. labor force in 2006 and 2011.

This table was prepared using age-segmented labor force projections from the U.S. Bureau of Labor Statistics (BLS).<sup>14</sup> Because the BLS data is aggregated into age groups that do not align perfectly with the generation breaks, the numbers in the table are only approximations of each generation’s labor force participants and are not an exact depiction.

This model deals in generalizations. It provides a useful, high level framework, but should not be expected to be predictive for individual members of the generations.

# The World War II Generation (born 1945 and before)

## Also known as...

Traditionalists, Builders, Matures, Industrialists, Depression Babies, Radio Babies, GI Joe Generation, and Greatest Generation

“Looking back, I can recall that the grown-ups all seemed to have a sense of purpose that was evident even to someone as young as four, five, or six. Whatever else was happening in our family or neighborhood, there was something greater connecting all of us, in large ways and small.”

—Tom Brokaw, *The Greatest Generation*, Random House, 1998.

## Seminal events as this generation grew up

- 1937** Hindenburg tragedy
- 1937** Disney’s first animated feature (Snow White)
- 1941** Hitler invades Russia
- 1941** Pearl Harbor; U.S. enters World War II
- 1945** World War II ends in Europe and Japan
- 1947** Jackie Robinson joins major league baseball
- 1947** HUAC investigates film industry
- 1950** Korean War begins

With 12.5 million of them still working, this generation currently represents eight percent of the U.S. workforce. This generation built the infrastructure of modern American

business, and their values and work ethic will continue to influence policies and procedures for decades.

When they were children, strong nuclear and extended families were the norm. Parents practiced discipline and strictness; to spare the rod was to spoil the child.

Current employees from this generation grew up in the wake of a worldwide economic depression. World War II was the major event of their childhood. War heroes were celebrated with parades and homecomings. Their formative era was marked by a strong sense of commitment to families, soldiers, country, and community. The mood was watchful.

Members of the World War II Generation tend to be conservative in dress and language. They see work as a privilege. Their strong work ethic, discipline, stability, and experience make them invaluable employees.

## Compelling messages from their formative years

Make do or do without.

Stay in line.

Sacrifice.

Be heroic.

Consider the common good.

## Popular technology in the era that shaped them: Radio



# The Baby Boom Generation (born 1946-1964)

## Also known as . . .

Boomers, Vietnam Generation, and Me Generation

“With the largest 50+ generation in history entering their mature years, life is about to get even better. The boomers who make up part of this group are savvier about technology, about keeping fit, and about planning for retirement. Most important, they have been more engaged in social issues than many generations before them, simply by dint of their growing up mostly during the 1960s, a time of incredible social change around the world.”

—Bill Novelli, CEO of AARP and author of *50+: Igniting a Revolution to Reinvent America*. St. Martin's Press, 2006.

## Seminal events as this generation grew up

- 1954** First transistor radio
- 1960** Birth control pills introduced
- 1962** John Glenn circles the earth
- 1963** Martin Luther King, Jr. leads march on Washington
- 1963** President Kennedy assassinated
- 1965** U.S. sends troops to Vietnam
- 1966** Cultural Revolution in China begins
- 1967** World's first heart transplant
- 1969** U.S. moon landing
- 1969** Woodstock
- 1970** Women's liberation demonstrations

The Baby Boom Generation is the largest cohort in the workplace. Comprising 44 percent of the U.S. workforce with 66 million workers, Boomers continue to hold most of the power and control.<sup>15</sup> Trained as vision-

aries, they will continue to wield extraordinary influence on the workplace for at least another two decades.

They grew up in the post-World War II era. Parents who had lived through global depression and world war believed with all their hearts that life would be better for the next—and largest ever—generation. This belief was so pervasive that *Time* magazine awarded its Man of the Year in 1967 to the Boomer generation, then “Twenty-five and Under.”

Dr. Benjamin Spock revolutionized child-rearing, urging parents toward a flexible discipline. The parent's role, he said, is to teach the child “the how and the why of acceptable behavior, but never at the expense of his sense of self-worth and optimism.”<sup>16</sup> Many Boomers grew up in households influenced by Dr. Spock's views.

The first generation ever to be graded on their report cards for “works well with others” and “shares materials with classmates,” Baby Boomers learned to be good members of a team. Their formative years were marked by global rebuilding and recovering economies. The mood of the time was optimistic and future-oriented.

When the Boomers arrived on the job, they were committed to making things different. They insisted on having a voice, being involved in decisions, and influencing the direction of their organizations. They chose the workplace as a vehicle for proving their worth; as a result, they have tended to work evenings and weekends, doing “whatever it takes” and “going the extra mile.” With their

strong team orientation, they have been the primary force behind such practices as participative management, employee involvement, quality circles, and team building.

Members of the Baby Boom Generation tend to have a strong work ethic, good communication skills, and emotional maturity. They plan to revolutionize retirement. Some will continue well past traditional retirement age in their current jobs. Others will reinvent themselves by pursuing jobs in other industries, finding satisfying work in public and not-for-profit sectors, working for themselves, or starting new businesses. Or-

ganizations that don't create schedules and benefits that attract and retain Baby Boomers will miss out on one of the deepest and richest sources of labor that has ever existed.

### **Compelling messages from their formative years**

Be anything you want to be.  
Change the world.  
Work well with others.  
Live up to expectation.  
Duck and cover.

**Popular technology in the era that shaped them:** Television



# Generation X (born 1965-1980)

## Also known as...

GenX, Baby Busters, Twenty-somethings, Thirteenth Generation (since the American Revolution), and Post-Boomers

“With each passing year, these young men and women are gradually but surely making their mark. As a group, they aren’t what older people wish they were, but rather what they themselves know they need to be: street-smart survivalists clued into the game of life the way it really gets played, searching for simple things that work in a cumbersome society.”

—Neil Howe and William Strauss, *13th Gen: Abort, Retry, Ignore, Fail?* Vintage Books, 1993.

## Seminal events as this generation grew up

- 1973** Global energy crisis
- 1976** Tandy and Apple market PCs
- 1978** Mass suicide in Jonestown
- 1979** Three Mile Island accident
- 1979** Margaret Thatcher becomes first female British Prime Minister
- 1979** Massive corporate layoffs
- 1980** John Lennon killed
- 1981** AIDS identified
- 1986** Chernobyl disaster
- 1986** Challenger disaster
- 1987** Stock market plummets
- 1989** Exxon Valdez oil spill
- 1989** Berlin Wall falls
- 1989** Tiananmen Square uprisings

Generation X accounts for 33 percent of the U.S. labor force with 50 million employees, and is poised to move into—or at least to share—leadership and authority.<sup>17</sup> Named

by Canadian novelist Douglas Coupland, this generation has always defied labels. As children, Generation Xers heard parents and teachers worrying aloud about recession, inflation, and stagflation. They watched leaders like President Nixon and Reverends Baker and Swaggart fall from grace. The mood of the era was cautious.

The role of women around the world began to change, and many of their mothers worked outside the home. Those children became latchkey kids who had to learn to take care of themselves. Virtually all Generation Xers were affected by divorce—if it wasn’t their own parents, it was their aunt and uncle, or their best friends’ parents. As a result, they may be reticent to make commitments and to give their loyalty away.

On the job, Generation Xers tend to be self-reliant. Of those with divorced parents, many lived in two different neighborhoods every week, and they learned to thrive in the midst of chaos and change. They enjoy achieving measurable results and streamlining systems and processes. Currently in their prime, Generation Xers will seek out and stay with flexible, results-driven organizations that adapt to their preferences.

## Compelling messages from their formative years

Don’t count on it.  
 Heroes don’t exist.  
 Get real.  
 Take care of yourself.  
 Always ask “why?”

**Popular technology in the era that shaped them:** The personal computer



# The Millennial Generation (born 1980-2000)

## Also known as...

Generation Y, Internet Generation, Echo Boomers, Boomlet, Nexters, Nintendo Generation, Sunshine Generation, and Digital Generation

**“People born in the last two decades have begun to change corporate office culture and small businesses in much the same way they’ve influenced pop culture.”**

—Tom McGhee, *Denver Post*

## Seminal events as this generation grew up

- 1990** Nelson Mandela released
- 1993** Apartheid ends
- 1995** Bombing of Federal building in Oklahoma City
- 1997** Princess Diana dies
- 1999** Columbine High School shootings
- 2001** World Trade Center attacks
- 2002** Enron, WorldCom and corporate scandal
- 2003** War begins in Iraq
- 2004** Tsunami in the Asian Ocean
- 2005** Hurricane Katrina

The fastest growing cohort, the Millennials comprise 15 percent of the U.S. workforce with 22 million workers. The era that shaped them began with major change around the world—the end of apartheid and the fall of the Soviet Union.

This generation grew up with technology. Twenty percent of college students surveyed in 2002 (i.e., born approximately 1980-1984) first used computers between the ages of five and eight.<sup>18</sup> They were the busiest genera-

tion of children ever; in high school, many of them carried DayTimers™. With pen pals in Singapore and Senegal, they grew up seeing the world as global, connected, and 24/7.

In an era of “soccer moms” and close supervision, parents put children first and acted as their advocates. With a nearly egalitarian relationship between parent and child, Millennials tended to feel comfortable discussing what had previously been thought of as adult issues—domestic violence, AIDS, and marital infidelity—with parents and teachers. They grew up with a much more casual exposure to multiculturalism than any earlier generation.

Members of the Millennial Generation tend to be goal- and achievement-oriented. Many were required to serve time volunteering in order to graduate from high school, and they exhibit high levels of social concern and responsibility.

They arrive on the job with higher expectations than any earlier generation and, with a click of the mouse, they can notify thousands of their cohorts about which companies match or fall short of their ideals.

## Compelling messages from their formative years

You are special.  
Leave no one behind.  
Connect 24/7.  
Achieve now!  
Serve your community.

## Popular technology in the era that shaped them: The Internet

# Workplace Characteristics

## The World War II Generation

### Assets

Experience, enhanced knowledge, dedication, focus, stability, loyalty, emotional maturity, and perseverance

### Liabilities

Reluctant to buck the system, uncomfortable with conflict, reticent when they disagree

### They prefer to work for managers who ...

Are directive and identify a clear direction  
Take a logical approach  
Set long-term goals;  
Are fair and consistent  
Spell out clear job expectations  
Are respectful

### Motivation

They tend to be motivated when managers connect their actions to the overall good of the organization.

### Messages that motivate

“Your experience is respected here.”  
“It’s valuable to the rest of us to hear what has and hasn’t worked in the past.”  
“Your perseverance is valued and will be rewarded.”

### Rewards

Tangible symbols of loyalty, commitment, and service including plaques and certificates

### Preferred methods of communication

Memos, letters, and personal notes

### To recruit and retain

**Use a personal touch. Make face-to-face contact. Computer-driven communication sometimes alienates members of this generation.**

**Be mindful of age and experience. Show them that their experience is viewed as an asset rather than a liability.**

**Capitalize on experience. Consider setting up mentoring relationships that match senior employees with younger ones.**

### Managers who drive them crazy...

- seem too touchy-feely
- are indecisive
- worry about making unpopular decisions
- use profanity and slang
- use experimental, trendy management style
- are disorganized



# Workplace Characteristics

## The Baby Boom Generation

### Assets

Service orientation, dedication, team perspective, experience, and knowledge

### Liabilities

Not necessarily “budget minded,” uncomfortable with conflict, reluctant to go against peers, may put process ahead of result

### They prefer to work for managers who...

Are consensual and treat them as equals  
Take a democratic approach  
Work with the group to define a mission  
Show warmth and caring  
Assure them they are making a difference

### Motivation

Baby Boomers tend to be motivated by leaders who get them involved and show them how they can make a difference.

### Messages that motivate

“Your opinion is valued.”  
“You can work as long as you want to.”  
“Your contribution will be recognized.”  
“We need you.”

### Rewards

Personal appreciation, promotion, and recognition

### Preferred methods of communication

Phone calls, personal interaction



### To recruit and retain

**Offer flexible work arrangements:** telecommuting, adjustable scheduling, personal time to handle family and caretaking matters.

**Provide challenging work opportunities,** horizontal movement, learning opportunities.

**Offer phased retirement programs.**  
**Offer health and wellness programs to foster healthy life styles.**

### Managers who drive them crazy...

- aren't open to input
- are bureaucratic
- send a “my-way-or-the-highway” message
- are brusque
- don't show interest
- practice one-upmanship



# Workplace Characteristics

## Generation Xers

### Assets

Adaptability, techno-literacy, independence, creativity, willingness to buck the system

### Liabilities

Skeptical, distrustful of authority

### They prefer to work for managers who are...

Competent, direct and straightforward  
Genuine  
Comfortable giving them a deadline and turning them loose to meet it  
Informal  
Supportive of training and growth opportunities  
Flexible  
Results-oriented

### Motivation

Allow them to get the job done on their own (what might seem unorthodox) schedule.

### Messages that motivate

“Do it your way.”  
“We’ve got the newest hardware and software.”  
“There aren’t a lot of rules around here.”

### Rewards

Free time, upgraded resources, opportunities for development, bottom-line results, certifications to add to their resumes

### Preferred methods of communication

Voice mail, email

### To recruit and retain

Show them lots of options for their workplace schedule.

Allow them to work autonomously. Tap into their adaptability. Generation Xers are typically flexible, and many are independent operators. Give them an important task that needs to get done; they’ll likely get it handled!

Give FAST (Frequent, Accurate, Specific, Timely) feedback in order for them to build their skills and improve their resumes.

### Managers who drive them crazy...

- micro-manage
- don’t walk the talk
- spend too much time on process and too little on results
- are flashy
- are bureaucratic
- schmooze



# Workplace Characteristics

## The Millennial Generation

### Assets

Collective action, optimism, ability to multi-task, and technological savvy

### Liabilities

Need for supervision and structure; inexperience—particularly with handling difficult people issues

### They prefer to work for managers who are...

Educational and know their personal goals  
Positive  
Comfortable coaching and supporting them  
Collaborative  
Organized and create a reasonable structure  
Achievement-oriented  
Motivational

### Motivation

Millennials tend to be motivated when their managers connect their actions to their personal and career goals.

### Messages that motivate

“You will be working with other bright, creative people.”  
“You and your co-workers can help turn this company around.”  
“You can be a hero here.”

### Rewards

Awards, certificates, tangible evidence of credibility

### Preferred methods of communication

Instant messages, blogs, text messages, emails

### To recruit and retain

Tap an outstanding employee from the Millennial Generation to talk to the candidate about the company.

Provide flexibility to allow them to pursue their many outside interests.

Get them involved in meaningful volunteer efforts. These workers are community-oriented and are graduates of required community service hours.

Count them in on benefits like 401(k) plans. Millennials are financially savvy.<sup>19</sup>

Use their capability to access and share information quickly. This is the most technologically and globally aware generation.

Pair them up with older mentors. On surveys, Millennials say they resonate most with the Baby Boom and World War II generations.

Help them learn interpersonal skills for the workplace. They may need to be rescued from difficult situations while they develop these skills.

### Managers who drive them crazy...

- are cynical and sarcastic
- treat them as if they are too young to be valuable
- are threatened by their technical savvy
- are condescending
- are inconsistent and disorganized

## Challenges for Managers

The generations have different perspectives on issues like work ethic, leadership, and authority. These differences, though subtle, can cause conflict, frustration, and misunderstanding if not managed well.

	WORLD WAR II	BABY BOOMERS	GENERATION X	MILLENNIALS
OUTLOOK	Practical	Optimistic	Skeptical	Hopeful
WORK ETHIC	Dedicated	Driven	Balanced	Ambitious
VIEW OF AUTHORITY	Respectful	Love/Hate	Unimpressed	Relaxed, polite
LEADERSHIP BY...	Hierarchy	Consensus	Competence	Achievement, pulling together
RELATIONSHIPS	Self-sacrifice	Personal gratification	Reluctance to commit	Loyal, inclusive
PERSPECTIVE	Civic-minded	Team-oriented	Self-reliant	Civic-minded
TURN-OFFS	Vulgarity	Political incorrectness	Clichés, hype	Cynicism, condescension

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## Six Principles for Managing Generations Successfully

1. Initiate conversations about generations. Individuals often make judgments about each other without realizing those judgments are generational in nature—and they tend to keep those judgments under the table. When they get them out in the open, the issues become less personalized and more generalized. They become easier—and sometimes even fun—to talk about.
2. Ask people about their needs and preferences. Out of the best intentions, human beings often project their preferences onto others. The only way to know for certain what someone else's needs and preferences are is to ask!
3. Offer options. Working successfully with a mix of generations means offering as many choices as possible to suit



the needs and preferences of a diverse workforce.

4. Personalize your style. Be flexible. Learn about preferences of others on the team and find creative ways to meet their expectations.
5. Build on strengths. The best mixed-generation work teams recognize the unique strengths of each individual. Urge people who are different to become more of who they already are, rather than trying to blend in with the rest of the team.
6. Pursue different perspectives. Many work teams would say they tolerate differences, but the mixed-generation teams that truly succeed go beyond tolerance. Choose people with varied backgrounds and perspectives to work on projects together.<sup>20</sup>

## Myths and Reality

Negative stereotypes and outdated notions abound—for all generations. These need to be addressed at all levels in order to create a productive intergenerational organization.

**Myth:** Millennials are only in it for themselves.

**Reality:** The Higher Education Research Institute has surveyed college freshmen and found the highest levels of social concern and responsibility since 1966. In 2006 “the importance of helping others” was the third highest common value held by incoming students.<sup>21</sup>

**Myth:** Millennials have a sense of entitlement and want opportunities handed to them.

**Reality:** A major survey of U.S. employees revealed that Millennials have an entrepreneurial spirit that makes them self-reliant.<sup>22</sup>

**Myth:** Millennials have a lot in common with Generation Xers.

**Reality:** Millennials as a generation have more in common with Baby Boomers and

the World War II Generation than with Generation Xers.

**Myth:** Generation Xers aren’t willing to work hard.

**Reality:** Generation Xers are willing to work hard, but believe it’s unfair to expect a 70-hour week for 40 hours of pay. Generation Xers want a life beyond work.

**Myth:** Baby Boomers are a selfish “me generation.”

**Reality:** Baby Boomers want to make contributions to their clients, employers and community. A 2005 study found that 58% of those 50 to 59 are interested in finding work that contributes to the greater good, naming education and social services among their top choices.<sup>23</sup>

**Myth:** Baby Boomers have quit learning.

**Reality:** Baby Boomers are enrolling in adult education and college programs at record rates.<sup>24</sup>

**Myth:** Baby Boomers are workaholics.

**Reality:** Baby Boomers today are committed to a slower pace and eager to find creative ways to simplify their lives. One study found that nearly half of Baby Boomers would prefer to work an average of eight fewer hours a week.<sup>25</sup>

**Myth:** Older workers are just “putting in time” before they retire.

**Reality:** A 2005 AARP study reveals that across all industries, employee engagement is highest among workers age 55+. There is a direct connection between high engagement levels and increased revenue, decreased turnover, and positive customer experiences.<sup>26</sup>

**Myth:** Older workers get sick more often than younger workers.

**Reality:** Mature persons are less likely to have dependent children and they use less sick time for short-term illnesses.<sup>27</sup> One 2006 survey showed that World War II generation workers took the fewest sick days.<sup>28</sup>

**Myth:** Older workers can’t learn technology.

**Reality:** Older adults are willing students when training is done respectfully and in an environment with low stress. A 2005 study found that mature workers were more willing than their younger counterparts to learn new technology.<sup>29</sup>

**Myth:** Older workers are not as productive as younger employees.

**Reality:** Several studies have found no significant relationship between productivity and age, as measured by work output and supervisory ratings. Further, the knowledge and experience of older workers can offset cognitive declines that may occur with age.<sup>30</sup>



## Valuing the Generations: A Study of Scripps Health

Scripps Health in San Diego has become a leader in developing a culture that values multiple generations in the workplace. They've been honored repeatedly as one of the AARP Best Employers for Workers Over 50, while receiving additional awards from *Working Mother* magazine and *Forbes*. They received the Multicultural Heritage Award and were chosen a Best Place to Work in San Diego.

In 2001, Scripps developed a system-wide strategic plan that included workforce development as one of its key initiatives. At that time, Scripps was experiencing high turnover, labor shortages, broken communication channels, and conflict with labor organizations. The human resources department was not connected to operations, business needs, or customer needs. Leaders surveyed employees about what they wanted and the leaders listened.

Scripps implemented a system-wide approach to attract and retain employees from all generations. Specifically, they:

- Conducted training for all leaders about generations. They learned about communication styles for each of the generations, studied workplace motivators and de-motivators, and committed to specific leadership strategies.
- Analyzed the percentage of Scripps workforce by generation.
- Developed a life cycle employment and benefits program based on what employees need at certain stages of life and work.
- Created work/life and wellness programs including health assessments, concierge services, and on-site massage services.
- Implemented training and re-skilling scholarships, career pathways, and coaching.
- Offered a clinical mentor program which gives experienced nurses the opportunity to teach, coach, and connect with nurses in the early stages of their careers.
- Conducted a life equipment and ergonomic needs analysis.
- Revamped their new employee orientation.
- Created meaningful work opportunities, and enhanced communication strategies on the topic of careers.

As a result of this system-wide strategy, Scripps Health has experienced tremendous success on many fronts. Retention, number of qualified new hires and employee satisfaction scores have increased. The company's turnover and indemnity claims have decreased. Its Great Place to Work® Trust Index® increased dramatically from 58 in 2001 to 82 in 2006.



# Best Practices

As employers strive to recruit and retain the best and the brightest, attracting mature workers as part of that mix is critical. The right combination of policies and practices is the key to a productive, engaged, and “age-neutral” workforce. Organizations that are highly successful at managing the multigenerational workplace have adopted many of the best practices and benefits listed below. (The employer examples are from the 2007 AARP Best Employers for Workers Over 50.)

## Workplace Culture

- Study the generational composition of your workforce—and use that information to guide your HR strategies. According to a Conference Board survey from 2003, only about a third of companies have taken this essential step.<sup>31</sup>
- Facilitate regular conversations about generational differences. This increases understanding and helps employees develop respect for other generations. It is also important to provide management training on age diversity in the workplace.
- Create work environments where employee opinions are valued. The 2003 AARP Working in Retirement study of workers 50-70 found this to be the top-rated attribute that mature workers want in a job.<sup>32</sup>
- Match the generational composition of your workforce to the generational composition of your customer base or desired customer base. Customers prefer to be served by “people like them”—someone who understands their perspective, attitude and point of view.

## Employee Retention

- Reward managers for retaining the people who report to them. Managers are rewarded by the organization for many things, but usually not for employee retention.
- Offer many possibilities for horizontal movement. **Mercy Health System** in Janesville, Wisconsin, offers a formal job rotation program, as well as opportunities to develop new skills through temporary assignments in other departments. **Volkswagen of America** encourages retention from the moment of hire: its College Graduate in Training Program offers high-potential recent college graduates the opportunity to experience a 21-month rotation with different three- to four-month assignments.
- Develop ways to transfer knowledge so that crucial expertise and resources are not lost.
- Consider phased retirement options, whether formal or informal. At **Stanley Consultants** in Muscatine, Iowa, about 75 percent of employees (called “members”) continue to work in a reduced capacity during the initial two years after their retirement date.<sup>33</sup> In many cases, the member will begin to work reduced hours before retirement, and then continue to work in some capacity following the retirement date, often for many years.
- Thoroughly publicize career opportunities internally. Career opportunities can be posted on the organization intranet, on bulletin boards, and in the newsletter

so that employees of every work schedule can be aware of open positions.

- Set up and maintain an alumni program for former employees. Returning employees already understand the corporate culture, policies, and systems of their prior workplace. They usually require less training than fresh hires. **The Principal Financial Group**, Des Moines, Iowa, partners with a major staffing company on its “Happy Returns” Program. Retirees return to work on a temporary basis as employees of the staffing company while maintaining their pension benefits. **Argonne National Laboratory’s** “Special Term Appointees” are retirees with specialized professional and technical knowledge who can fill temporary positions.

## Benefit Options

- Offer flexible work options. Workers of all ages want to be able to work without sacrificing home, family, and personal interests. Not only do younger workers favor flexibility, but three-quarters of workers 45+ name it as a prime quality of the ideal workplace.<sup>34</sup> Employers can help by offering incentives such as flex time, part time, compressed scheduling, job-sharing, and working from home. **Lee Memorial Health System** in Fort Meyers, Florida, has created a “Seasonal Months Off” program. It allows employees to take time off up to six months (typically during the summer months) while maintaining their full health benefits and life and long-term care insurance at the same rate.
- Offer various appealing benefits. Auto and homeowner’s insurance, adoption benefits, life insurance, paid time off, dependent loan scholarships, dental and vision plans, and long-term care insurance are appealing to workers of all ages. Childcare and elder care benefits are especially welcome: **Principal Financial Group** implemented “Working Caregiver Leave,” which offers the option of a part-time schedule for up to 12 weeks per year while maintaining job security and full benefits. **George Mason University**, where nearly half the workforce is over 50, provides 32 hours of leave annually to use for caregiving or any other family need.<sup>35</sup> **SC Johnson**, Racine, Wisconsin, offers a \$50 a night reimbursement to cover childcare and elder care costs



when traveling on company business.

- Offer benefits suited to an employee's stage of life.<sup>36</sup> For mature workers, this could mean advice on long-term care insurance and maximizing retirement savings. Employees with families will need savings options for education and generous family health coverage. During open enrollment, encourage employees to anticipate expenses and life changes they will face in the coming year, and offer benefits that match their needs.
- Offer health and wellness programs. In addition to health screenings, stress management classes, and flu shots, consider long-term initiatives and the use of incentives. **Brevard Public Schools** in Viera, Florida, sponsors an annual Wellness Challenge to encourage employees and their families to practice healthy behaviors. Participating workers receive a full range of on-site health screenings, plus educational information about their identified risk factors. **Atlantic Health System**, Florham Park, New Jersey, has a Wellness Rewards Program in which employees improve their health by reducing risk factors. Under the program, employees who meet their health goals receive a \$100 gift certificate.

## Compensation

- Reward performance and productivity, not just years spent on the job. Many service award programs reward employees 50+ for their seniority. A good Pay for Performance system encourages and rewards productivity without regard for age or seniority.
- Offer employer-match contributions to saving plans via 401(k) programs and

profit sharing. **The YMCA of Greater Rochester**, New York, contributes 12 percent of the employee's salary to its 403(b) plan for employees who have been with the organization for more than a year. New hires are automatically enrolled.

## Training & Development

- Offer training on generational diversity in a variety of formats—classroom style, online, experiential, interactive, and in staff meetings.
- Train leaders how to lead multigenerational teams and train co-workers how to communicate with customers and colleagues.
- Include representatives from all generations in some capacity on boards and councils.
- Offer continuous learning and tuition reimbursement, and market these benefits to workers of all ages. **Massachusetts Institute of Technology** (MIT) fosters a lifelong learning environment that serves the diverse needs of its mature workers, 36 percent of whom are 50 and over. **Massachusetts General Hospital** expanded its tuition reimbursement program to include certifications, and started "Steps to Success," a training program that supports employees through stages of career development.
- Offer mentoring programs, along with training programs on how to mentor, to ensure that critical skills sets and job knowledge are transferred to employees. Also consider reverse mentoring, for example, having younger employees help older ones adapt to new developments in technology.



# Strategic Questions



Organizations who are ahead of the curve will carefully analyze the composition of their current and future workforce, as well as their current and future customer base. Here are some key questions for your organization to consider:

## 1. What are the current human resources practices in your organization that support generational differences?

### General statistics about your organization

- What is the generational composition of your current workforce?
- Does the proportion of generations in your workforce reflect the proportion in the profession?
- Is there a concentration of generations in line vs. staff positions?
- Is there a higher attrition rate among members of one generation?

### Career paths

- Are all generations involved in making hiring decisions? Since people tend to hire others like themselves, hiring decisions that are made by mixed generational groups tend to result in new hires from various generations.
- Regarding promotions within a given level, are members of all generations considered? Are promotion decisions made by a mixed generation group? People may see other generations in a somewhat skewed light. Considering input from other generations could bring insights to decisions.
- Are 50+ workers passed over for

promotions because it is assumed they are near the end of their careers?

- Do performance appraisals consider generational differences? Are there general categories based on subjective criteria like “attitude” or “work ethic” in your performance appraisal system?
- Are all generations included in succession plans? Does the succession planning committee have representatives from several generations? Often people view others from their own generation more positively.
- Regarding career paths, which generations are most likely to be given critical assignments on task forces or in high visibility work groups?

#### Workplace culture

- What strategic capabilities are needed from employees?
- Are there generational gaps that should be addressed through training, recruiting or retention?
- Are quality of life programs used equally by members of all generations? Are these programs encouraged and championed in some areas but discouraged in others? Are any generations discouraged or career jeopardized from taking part in these?
- Do the results of internal employee surveys and polls vary for the different generations? If so, how will you address the differences?
- In the exit interview process, do you probe for reasons why the best and brightest leave? Are there generational issues that affect exits? What would have caused them to stay?

- Has the organization considered conducting a “Regretted Loss Analysis”? To conduct this analysis, the organization identifies employees who have left the company in the past one to three years that the organization wishes had stayed. These employees are contacted and asked: “Why did you leave? What would it have taken for you to stay? What are you doing now?” Information from these interviews can help identify issues that contribute to retention problems.

### 2. What will the generational composition of the workforce likely be in five years?

Nationally, the proportion of Generation Xers is going to remain about the same while the percentage of Millennials will increase. Certainly, some Baby Boomers will have left. What is the organization doing to prepare for this change?

### 3. How are the generations represented in your current customer base?

Does the proportion of generations in the workforce reflect the proportion in the customer base? How are marketing strategies developed? Are generational differences taken into account to ensure communication about the product can be “heard” by members of all generations? Which generations use the products or services?

### 4. What will your customer base look like in five years?

Will current product or services still be in demand in five years? If so, by which generations? If not, what is the strategic plan for developing products and services in order to thrive? Is the future target generation larger or smaller than the current target?

# When Communicating with Your Employees: Follow the Titanium Rule

Creating an attitude of respect for all generations must happen throughout the organization, colleague by colleague. Perhaps the most useful skill employees can learn for showing respect is the Titanium Rule:

**Do unto others, keeping their preferences in mind.**

Most people have heard of the Golden Rule: Do unto others as you would have them do unto you. The Golden Rule works well when dealing with someone who has the same background, style and preferences. The Golden Rule may not work as well when applied to someone from another generation.

When communicating with an associate from another generation, it is critical to remember that he or she likely has different preferences and interests. It's a matter of adapting to the other person's preferences instead of sticking with one's own personal style. Using the Titanium Rule makes messages far more persuasive.

## When communicating with a member of the World War II Generation:

Words and tone of voice should be respectful, with good grammar, clear diction, no slang or profanity. Language should be a bit formal and professional, and the message should relate to company history and long-term goals.

## When communicating with a Baby Boomer:

This conversation should be more relational, perhaps over coffee or lunch. Boomers tend to see relationship and

business results as intertwined. Ask about mutual interests (e.g. "How is your son doing in college?"). Make the conversation participative by getting the other's input, and link the message to the team or individual vision, mission, and values.



## When communicating with a Generation Xer:

Don't waste the person's time. Be direct and straightforward. Avoid corporate-speak. Send an email or leave a voicemail that states clearly what you want, how it will serve the Generation Xer, and when you want it.

## When communicating with a Millennial:

Be positive. Send a text message or meet face-to-face. Tie the message to the Millennial's personal goals or to the goals the whole team is working toward. Don't be condescending. Avoid cynicism and sarcasm.





## Similarities Across the Generations

Although there are important differences between the generations, they also have important commonalities. Successful organizations are leveraging these similarities to ensure that leaders not only understand these similarities, but create work environments that support them.

The similarities among the generations include:

1. People of all ages view work as a vehicle for personal fulfillment and satisfaction, not just for a paycheck; yet they want compensation that's in line with the current marketplace.<sup>37</sup>
2. Workplace culture is important to the job satisfaction of all employees. For all generations, the highest indicator of satisfaction is to feel valued on the job.<sup>38</sup>
3. More than 70% of all employees want a supportive work environment where they are recognized and appreciated.<sup>39</sup>
4. Career development is a high priority. But while three-quarters of employers also rated it highly, only half of employees give their organizations good marks in this area.<sup>40</sup>
5. Flexibility is important. More than seven out of ten workers would like to be able to set their own hours, as long as the work gets done.<sup>41</sup>

# Do You Value Multiple Generations in the Workplace?

The statements below can help a workgroup, team, department, or organization diagnose their effectiveness at creating a culture where all generations can thrive. The more statements that match behavior in your workplace, the more your organization is likely to be “generations-friendly.”

- ☐ There's not just one type of person who is successful here.
- ☐ When we put a project team together, we consciously include a variety of perspectives.
- ☐ We treat employees like customers.
- ☐ We talk openly about our different viewpoints.
- ☐ We talk openly about what we want from our jobs.
- ☐ Our policies are based on what customers and employees want.
- ☐ Our work atmosphere is relaxed and informal.
- ☐ We have a lot of fun together.
- ☐ We're known for being straightforward with each other.
- ☐ The people who work here have the big picture along with specific goals and measures, and feel free to find their own best way of reaching them.
- ☐ We expect the best from everyone here, and we treat them as if they have great things to offer and are motivated to do their best.
- ☐ We focus on retention every day.
- ☐ Our work assignments are broad, providing variety and challenge, and allowing each employee to develop a range of skills.<sup>42</sup>



# Frequently Asked Questions

## Don't the generations have more commonalities than differences?

Yes. It's important to remember the commonalities, but it is the subtle differences that cause conflict at work. That is why it is important to understand and deal effectively with the differences.

## Isn't this stereotyping?

This generational data comes from a variety of sources, including demographic surveys of tens of thousands of people. It's a matter of how the information is used. If it is used to stereotype and pigeonhole others, it can be extremely detrimental. However, the value of studying this information is that it can be used to develop empathy and understanding, to become better listeners, to improve communication—and ultimately, to make an organization more effective and profitable.

## How do race and ethnicity factor in?

All members of a generation grew up in the same era. As a result, most of them saw the same news events on television, read the same headlines in the papers, and listened to the same music on the radio. However, racial and ethnic differences, along with socioeconomic differences, are every bit as important, probably more important, than generational differences in shaping perspectives.

## Isn't this an age thing? Don't value systems become similar as people reach milestones in their life cycle?

Each generation approaches each stage of

life with its own unique style. For example, the Baby Boomers will be different as older adults than the World War II Generation. Aging Boomers are enrolling in far more adult education courses, starting entrepreneurial ventures, and joining sports leagues. Today's Millennial teens and young adults are more optimistic and have more heroes than the Gen Xers before them.

## When adapting management styles to the needs of each generation, isn't it also important to get to know people as individuals and treat everyone respectfully across all generations?

Yes, learning about the generations does not mean managers do not need to know people as individuals. That's still required. But, what it means to "treat people respectfully" varies from generation to generation. Many Gen Xers would say that respectful treatment means being direct and straightforward, while a member of the World War II Generation might define "respectful" as saying "Sir," "Ma'am," "Please," and "Thank you."

## Don't the generations overlap?

Yes, generations overlap by as much as seven or eight years. Just as eras do not have a start and end date, a generation does not end one day and another generation commence the next day. For that reason, many people identify with at least two generations.

## Aren't there a lot of people who don't fit the profile for their generation?

Yes. Research on generations is displayed on a bell curve, and with generations the focus

is on the millions of people in the middle of the bell curve. There are, however, many people out on the tails of the curve. This is why it is essential to get to know people as individuals.

### **With a wave of retiring Baby Boomers and the influx of a younger generation, how is the workplace culture changing?**

Many Boomers plan to continue working past traditional retirement age and many will still be in positions of leadership. The things important to Millennials and Generation Xers, and increasingly to Boomers as well—like work-life balance, flexible scheduling, rewards for results, and options to work from home—will become more integral parts of the workplace culture.

### **How can management ease this transition?**

They can help people become more aware and accepting of generational differences. There's a tradition of viewing young people as rude, disrespectful, violent and ill-mannered. The facts show that young people today are generally positive, respectful, patriotic, and goal-oriented. On the other hand, a youth-focused culture can cause people to devalue older workers. If managers start the generations conversation—by doing things like offering training on generational differences—employees stop judging and find the positives in their differences. Creativity, productivity and morale increase.

## **Resources**

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