

MID TERM PROJECT

The project is meant to be a research paper that goes in depth into some of the topics of the class that relate to organizational behavior. The topic that needs to be written about is

- How different generations interact in the workplace as the scope,
- Focusing on the Impacts of a multi-generational workforce on organizations with recommendations about closing the generational gap between the various generations.

I have attached some research articles that can be used, if you choose not to use the articles provide please use peer reviewed articles that you find on your own and do not use anything from Wikipedia. Also an original paper must be written because it will be scanned for plagiarism.

Paper format

The project should be between 15-20 pages in length. All the project reports **must be written using MS-Word, 1 1/2 space, Arial 12 point font, and one inch margin all around**. Tables and Figures can be written using a minimum size font of 10 points and **must be single space**. The reports need to be submitted through Blackboard **in one file**. Tables and figures are expected to fit in one page (i.e., do not let the end of a page to break your tables or charts) and must be written using **single space Arial 10 points font**. The project reports must contain the following items:

1. Cover page: Old Dominion University, Engineering Management and Systems Engineering Department, Assignment name, Last name and first name, **E-mail addresses**, Course ID, and Semester. (**Just put cover page and I will fill in the rest**)
2. Table of Contents.
3. **Correct** citations and references using **APA style**, a minimum of 8-10 articles should be used as references

This paper needs to follow the format of an academic research paper. The following sections are suggested.

- Introduction
- Research Question/Research Goal
- Literature Review (this section is a review of studies to address your research goal)
- Discussion
- Limitations

GRADING RUBRIC

CONTENT & QUALITY		120 points
Describe your research question and area of interest		<p>120=Excellent to a general reader: clear, complete, logical</p> <p>100=Generally clear</p> <p>85=Adequate (average quality & content)</p> <p>60 = Not very clear but shows some understanding and includes some explanations but poor</p> <p>30= The content lacks clarity and does not include evidence of understanding of key concepts or enough research</p> <p>0=The paper does not include any relevant concept, is completely unrelated</p>
Provides a discussion based on the literature findings		
<ul style="list-style-type: none"> • Appears to have depth; thinks critically; questions ideas; 		
Provides conclusions		
<ul style="list-style-type: none"> • Conclusions are grounded on reliable sources • Lays out the limitations of the study 		
MECHANICS AND STYLE		40 points
<ul style="list-style-type: none"> • Correct usage of punctuation, spelling, grammar, • Correct references in bibliography and body of paper (if applicable) • Logical and concise: avoids repetition & narrative; emphasizes key points • Avoids poorly structured, long, run-on sentences • Easy to read and coherent; smooth transitions • Avoids vague, colloquial, imprecise vocabulary 		<p>40= excellent in all these areas; Hard to find improvements.</p> <p>34= Good in all areas, but with occasional weak points (eg, a few confusing sentences, a few poorly organized paragraphs);</p> <p>28=problems in over half of the areas; readable but with some difficulty; choppy;</p> <p>20= weak style but ideas are decipherable</p> <p>10= It is hard to understand what the author is trying to say.</p> <p>0= Not legible at all</p>
ORGANIZATION AND FORMATTING		40 points
<ul style="list-style-type: none"> • Divides information into the clear sections • Effectively uses headings and subheadings (where needed) • Uses valid references and provides sources ▪ Effective use of figures and graphs: relevant to the project and appropriate to illustrate ideas 		<p>40 = does all of these well; wouldn't know how to tell writer to improve</p> <p>34 = pretty good at paragraph level; may use headings but not subheadings; paragraphs may be clear but too long</p> <p>28 = does about half of this right; may have good paragraphing but no headings</p> <p>20 = paragraphs are hard to follow; don't highlight a key idea; hard to move from one paragraph to another; transitions are missing</p> <p>12 = almost unreadable at paragraph level; very incoherent</p> <p>0= No headings at all and completely ignored the format and organization of the paper</p>
TOTAL POINTS		200

APA Sixth Edition: An Introduction

IN-TEXT CITATIONS

1. If the author's name is mentioned in the sentence:
 - a. Johnson (2007) found that patients became focused...
2. When the author's name is not mentioned in the sentence:
 - a. Adjusting medication delivered the right results (Johnson, 2007).
3. If both the year and the author's name appear in the text:
 - a. In 2007, Johnson's study of patients found that...
4. Within the same paragraph, the dates must appear in all parenthetical citations, but the author's last name should only appear in subsequent citations if the study can be confused with another study:
 - a. Among different studies, Johnson (2007) found that patients with high anxiety became more receptive.....The study also showed major depression (Johnson, 2007).
5. Two authors' names must be included every time the reference occurs:
 - a. Johnson and Lincoln (2008) found... OR (Johnson & Lincoln, 2008)
6. The full last name of three or more authors (up to five) must be included in the first citation.
 - a. Johnson, Lincoln, Meyer, and Smith (2007) found...
7. In subsequent citations, the first author's last name must appear, followed by et al. and without the year.
 - a. Johnson et al. found....
8. No author: Cite the first few words of the title in quotation marks:

- a. (“Multiple Studies,” 2007)
9. Two or more studies in one citation:
 - a. Johnson & Miller, 2008; Molnar, Smith, & Mann, 1999)
10. Secondary sources:
 - a. One study (as cited in Jasper, 2007) suggests...

REFERENCE CITATIONS

1. Journal article with DOI and one or two authors:
 - a. Author, A. A. Author, B. B., & Author, C. C. (year). Title of article. *Title of Periodical*, xx, pp-pp. doi:xxxxxxxxxxx
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CAN'T WE ALL JUST GET ALONG? A REVIEW OF THE CHALLENGES AND OPPORTUNITIES IN A MULTIGENERATIONAL WORKFORCE

Max Macon, Nova Southeastern University, Fort Lauderdale, Florida, USA
James B. Artley, Nova Southeastern University, Fort Lauderdale, Florida, USA

ABSTRACT

Today's business world is more diverse than ever. One area of diversity, in particular, that exists is the differences in the various generations that make up the labor force in organizations. Four generations now span the workforce, and these different generations create challenges and opportunities for companies across the globe. Teamwork, communication, training, and succession planning are areas where these generational differences can create challenges and opportunities. Having the right processes and practices to deal with these challenges is imperative. Managers need to understand the generational differences and work to improve the effectiveness of teams made up of these diverse workers. The purpose of this paper is to discuss the characteristics and stereotypes of each of the four generations, the challenges created by having workers from the four generations working together to achieve success for the organization, succession planning and the opportunities created by these generational differences and challenges.

Keywords: Organizational Behavior; Veterans, Baby Boomers, Generation X, Generation Y, Management, Generational differences

1. INTRODUCTION

The new millennium offers many challenges and opportunities for businesses in an increasingly complex world. Diversity in the workforce, specifically, keeps growing more and more complex. A main area of diversity companies must deal with is the various generations that now make up the employee base. Four different generations now work together in most companies and most industries. Today, the Human Resources Department of any organization needs to understand and manage the challenges and opportunities created by such diversity. Organizations that are able to navigate these waters will be able to ensure they have a workforce that is efficient, competitive, and sustainable. Developing, motivating and retaining current employees will depend on it. Attracting, developing and retaining new employees will depend on it. Almost all organizations include this diverse workforce, so the future success of these organizations will also depend on it.

2. GENERATIONS IN THE WORKFORCE

Many organizations in today's business world are comprised of four generations of employees with ages that range over 60 years (Crumpacker & Crumpacker, 2007). Each generation is typically characterized by two main factors, including birth rate and shared exposure to significant social and historical events in their developmental years (Crumpacker & Crumpacker, 2007).

2.1 Veterans

Employees born in the years prior to 1945 are generally referred to as Veterans, Traditionalists, Matures or Pre-Boomers (Kyles, 2005). Individuals who fall into this generational category have had their life experiences shaped by events such as the Great Depression and World War II (Patota, Schwartz, & Schwartz, 2007).

2.2 Baby Boomers

The individuals born between the years 1946 and 1964 are typically called Baby Boomers (Kyles, 2005). This group grew up during the era of civil rights, the women's movement and Vietnam (Crumpacker & Crumpacker, 2007). Most of the modern technology has been introduced into the mainstream and

developed further during the lifetime of those in this generation. Economic prosperity has been a strong influence for this generation (Patota, Schwartz, & Schwartz, 2007).

2.3 Generation X

The smallest generation in terms of numbers in the workforce, Generation X, includes employees born between 1965 and 1979 (Kyles, 2005). Three Mile Island, the Iran Contra affair and the Iranian hostage crisis are major events that were influential for this group (Crumpacker & Crumpacker, 2007). Generation X is considered the generation of latchkey kids as most of them had parents who both worked, and they spent considerable time at home alone. Technology has been part of their developmental years and something these individuals have come to expect in life and in business.

2.4 Generation Y

Generation Y, also known as Generation Next, is the newest generation to join the labor force. Employees who were born between the years of 1980 and 1999 are considered Millennials, or part of Generation Y (Kyles, 2005). The social and historical events that shape the thoughts, ideals and expectations of this generation include the September 11th attacks, the Columbine High School shootings, and others (Crumpacker & Crumpacker, 2007). These individuals' have always been around technology and have been able to be constantly connected via computers, cell phones, and the Internet.

3. Generational Stereotypes

While people attempt not to do so, many stereotype others based on a number of factors. Age is one basis for stereotypes most common in the workplace. Each individual sees others in the same generation and in other generations through their own experiences, pre-conceived notions, and biases. Each generation in the workforce has both positive and negative stereotypes. Some stereotypes could be considered either positive or negative based on who is doing the judging – and based on which generation that person belongs.

3.1 Veterans

Some of the generalizations made about employees from the oldest generation in the workforce are their intense loyalty to their employers, their consistent performance, their strong work ethic and their conservative financial views (Crumpacker & Crumpacker, 2007). These employees strive to do what is best for the organization before worrying about their own successes or failures. In other words, they view what is best for the group as more important than what is best for the individual.

3.2 Baby Boomers

Boomers are considered idealistic, driven individuals who are willing to make both personal and professional sacrifices to achieve success (Glass, 2007). Employees from this generation are generally excellent at networking and seeking consensus with others, which are great traits for organizations that require teamwork and collaboration. However, these individuals can also be considered political, micromanagers who despise laziness (Crumpacker & Crumpacker, 2007). Many of those who hold influential positions in today's organizations are from this generation (Siriаs & Karp, 2007).

3.3 Generation X

The young group of managers and potential managers in the workforce today is much different than the previous two generations – they have feelings of pragmatism, alienation and cynicism (Siriаs & Karp, 2007). This generation is considered poor at networking and somewhat skeptical of authority (Crumpacker & Crumpacker, 2007). One of the strongest traits or viewpoints of Generation X employees is the importance of work-life balance (Johnson & Lopes, 2008). Also, because these individuals are assumed to be more independent and disloyal, they are considered more likely to switch jobs in order to improve skills for the next opportunity (Johnson & Lopes, 2008). Many of the viewpoints this generation has towards authority, corporations and work-life balance have to do with the breakdown of institutions such as marriage and with the corporate downsizing that most likely affected one or both of their parents (Patota, Schwartz, & Schwartz, 2007).

3.4 Generation Y

The most confident generation is considered to be Generation Y (Glass, 2007). Technology, as mentioned previously, has always been a part of the lives of those in this generation. Thus, there are certain traits and styles created that differ from previous generations. Employees from this generation are good at multi-tasking and at working in groups. They have high levels of optimism but expect and demand instant feedback from others (Crumpacker & Crumpacker, 2007). Some traits perceived as negative for this generation include having little understanding of history, having diminished intellectual capacity and being poorly read (Johnson & Lopes, 2008). Other traits perceived as negative include poor communication and problem-solving skills (Crumpacker & Crumpacker, 2007).

4. Challenges

Many different challenges arise by having such diverse traits and styles in the workforce. When generational collisions occur in the workplace, the results can reduce profitability, present hiring challenges, increase turnover rates, and decrease morale among all generations of employees in the organization. Understanding the various generational personalities is essential in building bridges and creating new learning and development opportunities in the work environment. However, there are three primary areas where generational differences can create work conflict: work ethic, managing change, and the perception of the existing hierarchy in the organization (Glass, 2007). Teamwork, communication, training, and career path/development are ongoing processes and efforts where those generational differences can create conflict. The aging of the workforce, including the two oldest generations, creates a challenge when considering training and career path/development within an organization.

Teamwork is an area of many challenges within a diverse workforce. Teams consist of employees from many different backgrounds and experiences, which includes age and work experience. The traits, styles and stereotypes mentioned earlier all affect the way in which people work with one another. Difficulties can exist when you have older workers worried about getting the job done and younger workers worried about fast-track progression in their careers on the same team. There is bound to be some friction in personal goals and the perceived goals of the team. In the process of forming an effective team framework, inputs such as conflict resolution, collaborative problem solving, communication between workers and personality traits are critically important (Sirias & Karp, 2007). This is why teamwork can be an area of concern when having multiple members from different generations working towards similar goals.

Communication is also affected by the norms and habits within each of the four generations now in the workforce. Many older workers prefer face-to-face and/or phone conversations. Younger workers, engrained in the technology of the day, prefer instant messaging and email. Generation X and Generation Y generally see older workers as resistant to these types of new technologies (Glass, 2007). These differences in communication styles create conflict in everyday operations/processes and can make teamwork more difficult.

Training and career path/development are other areas of concern for companies when dealing with various generations of employees. It is becoming increasingly clear that large numbers of older workers leaving the workforce could have adverse affects on the productivity of organizations and economic growth in the business world (Crumpacker & Crumpacker, 2007). However, there are a number of older workers continuing to work longer for financial reasons (Crumpacker & Crumpacker, 2007). Also, a larger number of mid-career workers are stepping back from current levels of responsibility to focus more on work-life balance (Crumpacker & Crumpacker, 2007). This creates a need for proper training, career path/development efforts and succession planning to ensure an efficient and sustainable employee base.

There are challenges in doing this, though. In some cases, the struggle of short and long term needs of the company undermines its ability to dedicate time and resources to proper focus in these areas (Anonymous, 2005). In some cases, age-based stereotypes can actually preclude new and innovative initiatives to recruit older workers to the organization (Piktialis, 2007). Recruiting older workers into the organization and recruiting them to stay within the organization are becoming increasingly important. The training and developing of younger workers depends on having the previous generations there to assist.

This is true because the retiring workforce takes with them unique industry and company knowledge (Frigo, 2006).

5. IMPLICATIONS FOR MANAGERS

There are many challenges created by having multiple generations in the workplace, and there are many ways to address those challenges. These approaches span the organization's operations in the areas of teamwork, communication, training and succession planning. All of these approaches have the common goal of creating an efficient, effective and sustainable business model that utilizes the best qualities within each of the four generations in the employee base. The implications for managers in today's business world are discussed below.

Managers must realize that workers look for the following in their work environment: challenging and rewarding work, stability, non-threatening environments, and fair compensation (Whitacre, 2007). Somewhat like the needs hierarchy, ensuring there is focus on these areas will help managers ensure they have a satisfied group of employees. It is also imperative that managers realize that different generations rank these needs differently (Whitacre, 2007). Communicating differently, focusing on the positives and addressing what the group can do instead of what it cannot do are three ways to get a diverse work group to march to the same tune (Whitacre, 2007). Choosing a communication style that is tailored to the audience and what makes that group of employees driven at work is one strategy for managing success (Kyles, 2005). Other strategies for achieving success through understanding are creating function and project oriented assignments, acknowledging strengths and commonalities, listening, looking beyond appearances, and keeping an open mind (Kyles, 2005).

Teamwork among diverse employees can be improved with the previously mentioned strategies, and it can also be made more effective by integrating the individual into the group. The "salad bowl" analogy is used to explain that the individuality of employees does not have to be compromised to achieve success with individuals working together towards group goals (Siriаs & Karp, 2007). As more Generation X and Y employees enter an organization, approaches need to be developed to modify team values and structures to meet the shifting needs of individuals in these teams. Flexibility is the key to continuing success when dealing with different generations existing, leaving and entering the workplace over time. It is also important to note that, as the shift in generations in the workforces occurs, it will be just as important to meet individual goals as it is to meet group goals – and perhaps even more (Siriаs & Karp, 2007).

Succession planning is a primary area of importance for managers in today's business world. As older generations mature and leave the workforce, the proper processes and policies need to exist to bring along the younger generations. It is also important for companies to assess the effects of changes in the workforce by conducting retirement and tenure profiles. These profiles will help companies know where they stand with respect to the upcoming changes in the workforce and where critical knowledge exists within the company (Frigo, 2006). Once an organization has an understanding of what is coming and where the risk areas are, it can develop ways to address the potential gaps or problems. Knowledge retention and transfer are extremely important in a company with an aging workforce. Having the right information technology, resource processes and practices, and the initiatives to transfer and recover knowledge are vital to a company's lasting success (Frigo, 2006). In order to recruit and retain older workers in the organization, a number of strategies exist and are beginning to be utilized by companies. Phased retirement and flexible career paths, age-related diversity training and strategic workforce planning are a few (Piktialis, 2007). Career development should be integrated with succession planning to ensure the proper number of qualified leaders exist and have gained experience in a number of different areas and assignments within the organization (Anonymous, 2005).

It is best to look for potential implications on one's own organizational systems and environments. As learning and wisdom increase, one can then appropriately use human systems on an individual and organizational basis to gain a true competitive advantage in the 21st century work environment. Current leaders, like past leaders, can reap bottom-line benefits from using big picture systems thinking to create user-friendly cultures that accommodate the needs of a diverse generation of workers (Lancaster,

Stillman, & Mackay, 2002). According to Lancaster et al., with the existence of four diverse generations of employees in the work system, misunderstandings might become a common everyday occurrence if teamwork and team learning is not encouraged.

6. CONCLUSION

Each of the generations now working in the business world has its own sets of stereotypes, values, norms, and styles. Managers need to study and understand the differences that exist between the generations and between the various employees who report to them. While having four different generations in the workforce does create a set of challenges for organizations to deal with, strategies and approaches to address these challenges do exist. It is important for companies to spend the time and resources to understand the potential vulnerabilities in their particular business and industry. Setting up the right processes and practices, and developing proper attitudes towards the need for succession planning will help companies remain sustainable over the long term.

In the final analysis, the continued sustainability and competitive advantage of an organization rests on the human capital, which is the current generational mix. Therefore the importance of creating an atmosphere in the workplace that embraces generational differences and maximizes their strengths becomes even more important in the future.

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AUTHOR PROFILES:

Mr. Max Macon earned his B.S. in Civil Engineering at University of Florida, Gainesville in 1998. Currently he is an MBA student at Nova Southeastern University and a Regional Manager of Major Accounts with Florida Power and Light Company.

Dr. James B. Artley earned his D.B.A. at Nova Southeastern University, Fort Lauderdale in 2008. Currently he is a Senior Strategic Intelligence Analyst for Blue Cross Blue Shield of Florida and an Adjunct Professor of Business Administration at Nova Southeastern University.

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SELECTING COMMUNICATION MEDIA IN A MULTI-GENERATIONAL WORKPLACE

**Zhezhu Wen
Patrick Jaska
Randall Brown
Barbara Dalby**
University of Mary Hardin-Baylor

ABSTRACT

Today's managers work in a multi-generational work environment. Generational tension is one of the commonly raised concerns in the workplace. This research examines the selection of communication channels in relation to generational differences in the workplace concerning Generation X and Generation Y. Three relevant areas of research are examined in this paper: 1) Media Richness Theory, 2) Generational Cohort Theory, and 3) Technology Acceptance Model Theory. A survey was conducted and the results have identified similarities and differences that exist between the two target cohorts.

Keywords: *Media richness theory, communication channel selection, multi-generation workplace*

INTRODUCTION

This research explores how managers can effectively select communication channels in a multi-generational workplace. Today's managers are witnessing a fast paced revolution in information and telecommunication technologies. Not only have these changes made daily communication convenient, but have resulted in an increase in communication channels and communication complexity in the workplace. In addition to technological changes, the demographic make-up of the workforce is also changing. In the United States, currently, there are four identifiable generation cohorts working together. These are the Silent Generation, the Baby Boomers, Generation X, and Generation Y. The Baby-Boomer Generation is the most dominant cohort of the workforce today, Generation X and Y will replace them within next ten years. Two generation cohorts were targeted as subjects of this research – Generation X and Generation Y.

There has been a recent proliferation in both academic and industrial writings aimed at exploring issues of generational diversity and inter-generational collaboration. Key issues discussed among these works are based on the notion that different generations should be approached differently in order to minimize the inter-generational tensions and maximize the synergy of working together (Wong et al., 2008; McIntosh-Elkins, McRitchie, & Scoones, 2007; Sirias, Karp, & Brotherton, 2007). Understanding the variations in the choice of communication channels of each cohort will not only help managers to understand the preferred communication channel of other generation, but will also cultivate more effective communication in today's multi-generational workplace.

Three relevant areas of research will be explored in this study: (1) media richness theory (Daft & Lengel, 1986), (2) generational cohort theory (Wong et al., 2008; McIntosh-Elkins,

McRitchie, & Scoones, 2007; Sirias, Karp, & Brotherton, 2007), and (3) the technology acceptance model (Davis, 1989).

PREVIOUS RESEARCH AND FINDINGS

Communication channel selection and communication performance can be examined by exploring the relationship between the medium of the channel and communication effectiveness (Trauth & Kwan, 1984; Lo & Lie, 2008). In the information systems field, research regarding communication channels has been extended to assess actual performance of looming communication technologies perceived by people as enhancing traditional means of communication (Dennis & Kinney, 1998; Tang & Austin, 2009). In management, similar studies were conducted to offer recommendations for improving performance of managerial communication (Lengel & Daft, 1988).

Trauth & Kwan (1984) illustrated the effectiveness of traditional communication (such as print, memo, and face-to-face) and reviewed new technology enhanced communication (electronic messaging and video display). Two important factors were identified: (1) an objective factor of channel effectiveness and (2) a subjective factor that the user's perceptions must be taken into consideration.

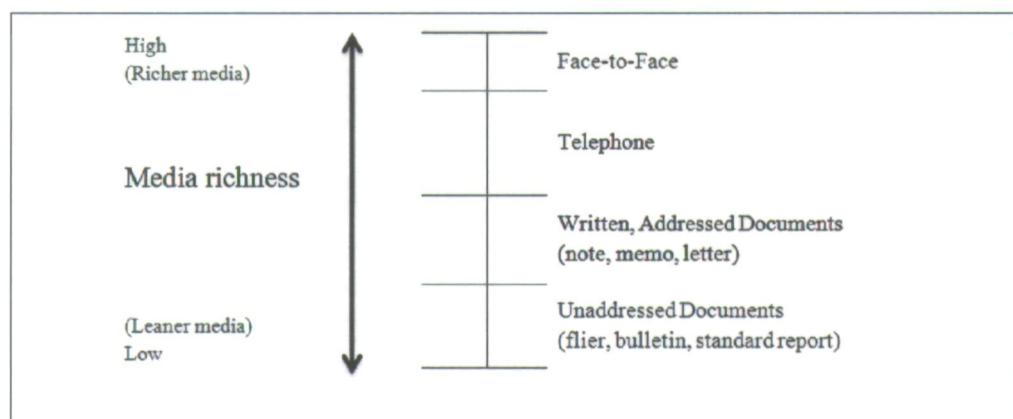
Daft and Lengel's work (1986) cited two different dimensions of information that drive organizational information processing needs – uncertainty and equivocality. There are two important reasons that information processing is vital to an organization's success. First, an organization needs to process information because it has to attain a certain level of performance; an adequate amount of information reduces uncertainty (Galbraith, 1973). Daft & Lengel, (1986) found a positive relationship between task variation and amount of information processed within the work unit. Second, an organization needs to process information because it reduces equivocality (Weick, 1979).

Media Richness Theory

Media richness theory categorizes different communication channels based on "richness" – how much information is carried within a certain time frame. For example, face-to-face is considered the richest media because the receiver can catch cues from the verbal message and non-verbal cues. In contrast, documents such as fliers, bulletins, and standard reports could be considered as media that carries limited cues or "leaner" media (Figure 1).

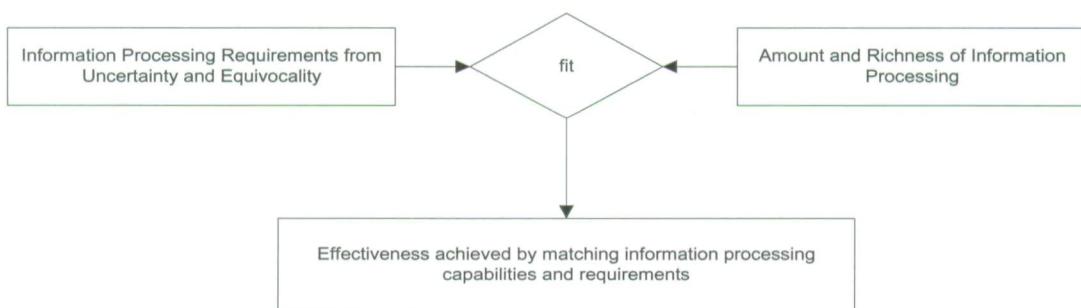
If information being processed is aimed at resolving uncertainties and equivocality in the workplace, then an optimization strategy is necessary during the course of designing the organizational communication channel. According to Daft and Lengel (1986), communication increases when a given communication channel offers the proper amount of richness, satisfying the information processing requirements of the task (Figure 2).

Figure 1
Hierarchy of Media Richness



(Daft, Robert, & Trevino, 1987)

Figure 2
Summary Model of Information Processing and Organization Design from Media Richness Theory



(Daft & Lengel, 1986)

Generational Cohorts Theory in Empirical Research and Popular Literature

Generational cohorts can play an intervening role in a manager's choice of communication channels (Takeda, 2007; Dennis and Kinney, 1998; Lo and Lie, 2008; Otondo et al., 2008). First, consider how generational cohorts can be used in the examination of social values and attitudes. Lyons, Duxbury, & Higgins (2007) conducted research to explore how four generations differ in their basic human values such as openness to change, conservation, self-enhancement, and self-transcendence. This research shows that generations differ in basic human values. Sirias, Karp, & Brotherton (2007) found that Generation Xs are more individualistic than previous generations.

Noble & Schewe (2003) used discriminant analysis to predict that a subject's ratings on certain value dimensions can precisely predict the generational cohort the subject belongs. The

results of this study shows that 45% of the people sampled were accurately classified into their cohort grouping. Jorgensen (2003) concludes that this area of research lacks the necessary supportive empirical evidence to predict generational differences.

However, organizations and researchers continue to use this notion of generational differences to offer advice for various workplace strategies and practices. Generational cohort theory provides useful insights as its core notion is built based on the understanding that failure to address key differences in work values and beliefs of employees from various generations can lead to conflict in the workplace, miscommunication, misunderstanding, lower productivity, poor employee well-being, and higher turn-over rates (Wong et al., 2008; McIntosh-Elkins, McRitchie, & Scoones, 2007; Sirias, Karp, & Brotherton, 2007).

Communication Media as Information System

As information and communication technology in modern communication becomes more prevalent, a relevant area of study to consider is how generations perceive and accept communication media as an information [transmitting] system. Two subsets of media are being used in today's organizations: 1) Responsive communication mechanisms and 2) Informative communication mechanisms (Murnan, 2006). Responsive communication is used to conduct two-way communication; informative communication is used to conduct one-way communication such as disseminating information through websites. This study will explore the first subset.

The following media were chosen as examples of responsive communication channels for this study. While the list is not exhaustive, it reflects the most commonly used media in today's workplace.

- Traditional Media: Landline Phone, Fax, Postal Mail, Face-to-face
- Mobile Phone Based Media: Cell Phone: Voice, Cell Phone: Text Messaging,
- Computer and Internet Based Media: VoIP (Internet telephony), E-mail, Instant Messaging: Text, Instant Messaging: Audio/Video assisted, Social Networking Sites

Some people choose certain communication tools, while refusing to use others. According to Davis (1989), among the many variables that may influence the use of a particular system, two are especially important. First, people tend to decide whether to use a tool or not according to their belief on whether such a system is going to help them perform their job better. This is referred to as perceived usefulness. Second, even though people perceive such a system as useful, they may, at the same time, believe that the system is too hard to use and that the effort of using the system out-weighs the performance benefits of usage. This is referred to as perceived ease of use.

CHALLENGES OF COMMUNICATION IN TODAY'S WORKPLACE

Macroscopic Observation – Challenges from Changes in the American Workplace

To help managers understand which communication media will promote success, it is important to understand how the workplace has evolved and the conditions that workers must adapt to and embrace. Eisenberg and Goodall Jr. (2005) have observed the changing workplace through the following three dimensions – World, Organization, and People.

- World: Globalization has brought new issues and impacts to the workplace.
- Organization: Fierce competition between businesses and more demanding customers has driven business to be obsessive with speed, by reducing product development time and responding to rapid market changes.
- People: In today's society, the power base has shifted from those who own tangible assets, such as land and equipment, to information resources.

Microscopic Observation: Specific Challenges of Today's American Workplace

According to data from United States Bureau of Labor Statistics, over the next 10 years, the current largest workforce group (baby Boomers) will gradually walk off the stage; Generation X and Generation Y will become the dominant workforce groups (USBLS, 2007).

As with previous generations, Generations X & Y will be going through a learning curve stage on how to better collaborate with each other. Unlike previous generational integration of the somewhat obedient Silent Generation versus the workaholic Baby-Boomer generation versus the much independent Generation X, this round of changes will be an integration of the highly cynical and pessimistic Generation X versus the high self-esteem and positive Generation Y.

Managers will need the skills to deal with generational issues. Traditionally, a dominant task for managers is communicating (Mintzberg, 1973). A typical day for a manager consists of more than half face-to-face communication, with another third occupied by written or voice communication (Panko & Kinney 1995). This phenomenon is supportive of media richness theory, which suggests that the nature of the task will lead managers to favor face-to-face communication more than technological means (Daft, Robert, & Trevino, 1987).

However, the dominance of face-to-face communication has changed much throughout the last decade. Organizations that rely on a team structure to improve productivity face challenges in its communication performance as sometimes members are located remotely (Dennis & Kinney, 1998). In 1996 Kinney and Panko found that more than half of business projects had at least one member working in another location, and 29 percent had half or more of their members from more than one location. In 2010, both small and large companies have adopted increased the number of employees working remotely (Lesonsky, 2010). This has forced teams to rely more (82%) on information and telecommunication technology for their collaboration. These facts add a layer of complexity in organizational communication today.

There has been an emerging trend of convergence in the information and communication technology industry for the past few years. Technically, convergence illustrates a "multimedia environment and/or a network where signals, regardless of type (i.e., voice, quality audio, video, data, etc.) and encoding methodology may be seamlessly exchanged between independent endpoints with similar characteristics" (Broadbent & Bauwens, 2008). For average users, it sets an expectation that it is possible to receive all types of information with a single device, for example a cell phone.

However these innovations and trends take time to replace existing communication means. Therefore, society goes through a co-existing stage of both traditional and newer tools of communication. At the personal operation level, it means one has to determine what communication tools to choose, among the great variety available, in order to communicate effectively (Lo & Lie, 2008). It poses an additional layer in communication complexity (Figure 3).

Figure 3
Escalating Communication Complexity



Defining organizational communication for the twenty-first century requires the identification of important social trends and the repositioning of communication practices in a changing landscape. In the present turbulent environment, traditional ways of doing business – and of communicating – are no longer effective. Instead, new principles of effective organizational communication must be developed, new challenges and potential improvement points should be addressed to reflect and make progress in improving communications in the workplace (Eisenberg & Goodall, 2005).

OBJECTIVES AND RESEARCH QUESTIONS

The following assumptions will be examined:

1. *Both generations will show a similar degree of perceived ease of use for technologically intensive communication tools.*

Both generations were exposed to modern information and computer technology that was easy to access. Generation Y was born with the Internet and computer technology, while Generation X's independent and explorative nature has helped them cope with difficulties encountered using technologies. Both generations should maintain a similar degree of maturity in operating technologically sophisticated communication tools.

2. *Generation Y will rate perceived usefulness of immediacy of feedback higher.*

Generation Y is more positive and prefer peer-to-peer relationships rather than going through different levels of authority or bureaucracy. Generation Y should favor communication that is perceived to return faster feedback.

3. *Generation X's use of media that transfer more cues will be greater than that of Generation Y.*

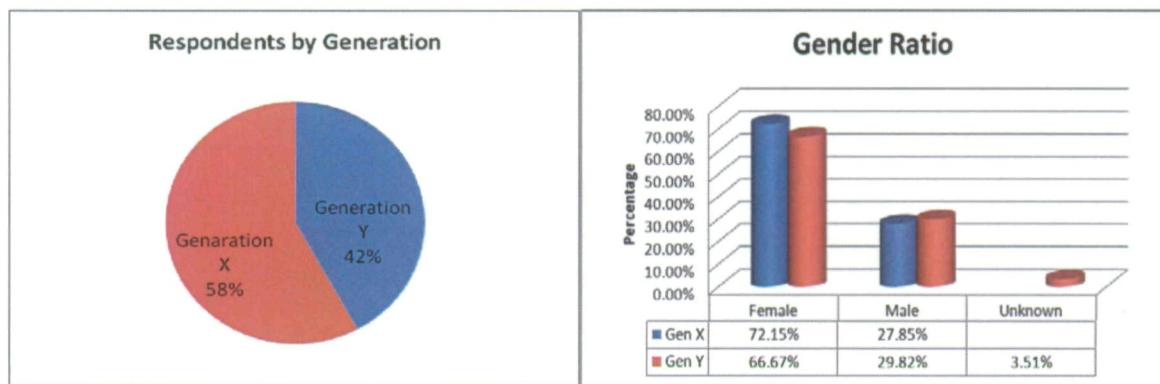
Generation X is stereotyped as cynical, pessimistic, and independent. According to these characteristics, Generation X should prefer media that delivers more information to satisfy their skeptical nature.

METHODOLOGY

Research Instrument and Data Collection

A questionnaire was developed to examine three assumptions in the previous section. (See the Appendix for the questionnaire.) Over a three month period, a survey invitation letter was posted on various online classified advertisement websites to invite survey respondents. By the end of the survey, a total of 205 responses were received. Responses from the Silent Generation (3%) and the Baby boomer Generation (16%) were removed because they were not the target populations for this study. Also invalid responses (responses with incomplete answers) were excluded. Among these, the total valid responses were 136. Of the 136 acceptable responses, the total number of Generation X and Y was 79 (58%) and 57 (42%), respectively (Figure 4).

Figure 4
Demographic Make-up of Respondents



The first part of the questionnaire includes questions about each respondent's demographic information: such as age, gender, industry, and position of employment. The second part measures a respondent's general awareness of media choice. In the third part of the questionnaire, a 5-point Likert scale was used to measure a respondent's perceived usefulness and perceived ease of use of the media, defined by the technology acceptance model. The last part measures self-predicted reactions from respondents in given communication situations.

RESULTS AND DISCUSSION

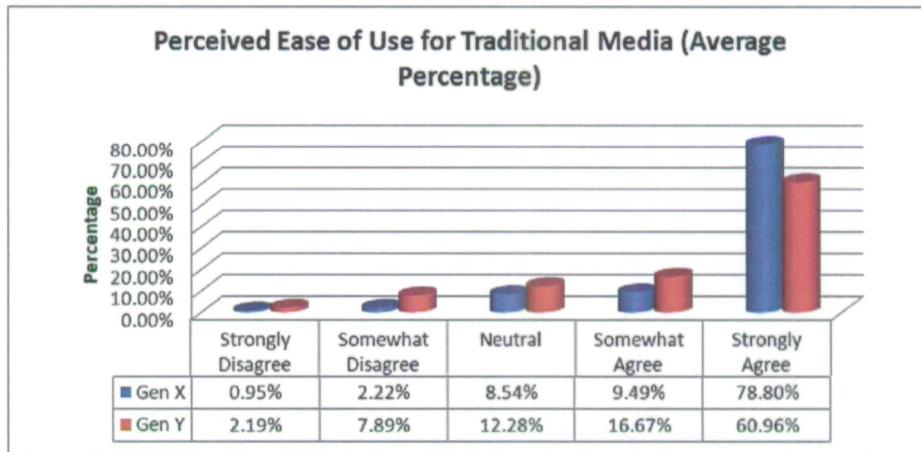
In this section of the paper, survey data are presented graphically, hypotheses stated, and data analyzed. Figure 5, 6, & 7 show the perceived ease of use for traditional, cell phone, and the Internet/Computer based media by X and Y generation workers. In Figures 8 & 9 media choices of both generations is shown in two different types of communication scenarios. Also, in Figures 8 & 9 two charts respectively depict each generation's favorability toward different aspects of media richness in the given scenario. Chi-square tests are performed on the hypotheses to determine if a significant difference exists between Generation X and Generation Y perceived use of technology.

To test the difference in traditional media usage by Generation X and Generation Y, a chi-square test was performed on the following hypothesis.

H_{01} : Generation X and Generation Y are different in their perception of the ease of use of traditional media.

The p-value for the chi-square test was 0.0000846. H_{01} is rejected. Therefore, according to the data in this study, there is no difference in the perceived ease of use of traditional media by Generation X and Generation Y.

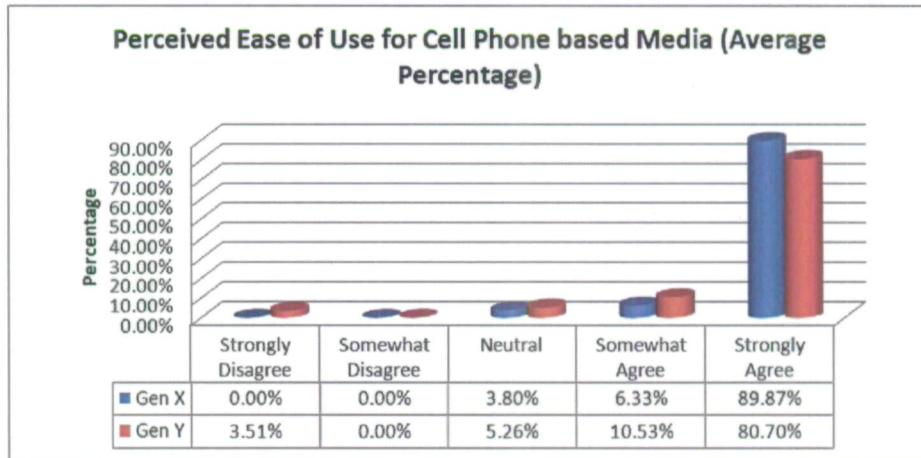
Figure 5



To test the difference in cell phone based media usage by Generation X and Generation Y, a chi-square test was performed on the following hypothesis.

H_{02} : Generation X and Generation Y are different in their perception of the ease of use of cell phone based media.

Figure 6

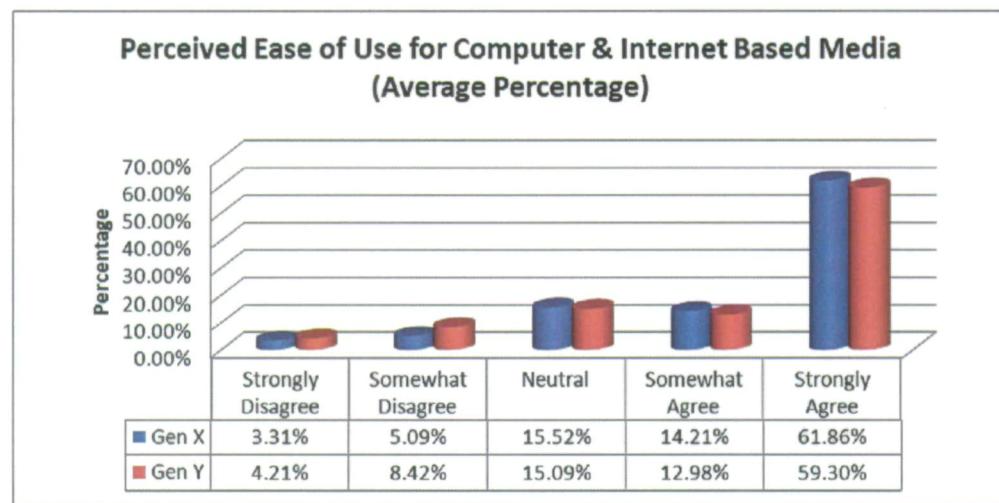


The p-value for the chi-square test was 1.9162E-61. Therefore, H_{02} is rejected and according to the data in this study, there is no difference in the perceived ease of use of cell phone based media by Generation X and Generation Y.

To test the difference in perceived ease of use for computer and internet based media, the following hypothesis is used.

H₀₃: Generation X and Generation Y are different in their perception of the ease of use of computer and internet based media.

Figure 7



The p-value for the chi-square test was 0.168. Therefore, H₀₃ is not rejected and according to the data in this study, Generation X and Generation Y are different in their perception of the ease of use of computer and internet based media.

Subsequently, the difference between the two generations in their tendency towards richness of media in a given communication situation was measured. Recall that research assumptions in the previous section were made based upon the understanding that each generation will favor different type of media to resolve different communication challenges according to their generational traits. Thus, the following sets of data will be presented and analyzed with respect to those assumptions.

In the first hypothetical situation, reactions of both generations in resolving equivocal issues were observed. Two hypothesis are formulated for this situation, each to measure the usage of different characteristics of media richness (Multiplicity of Cues vs. Immediacy of Feedback).

To test the difference in choosing media that transmitt higher volume of cues at once, the following hypothesis is used.

In communicating to resolve an equivocal issue:

H₀₄: Generation X and Generation Y are different in their choice of media that transmitt higher volume of cues at once.

The p-value for the chi-square test was 0.378. Therefore, H₀₄ is not rejected and according to the data in this study, Generation X and Generation Y are different in their choice of

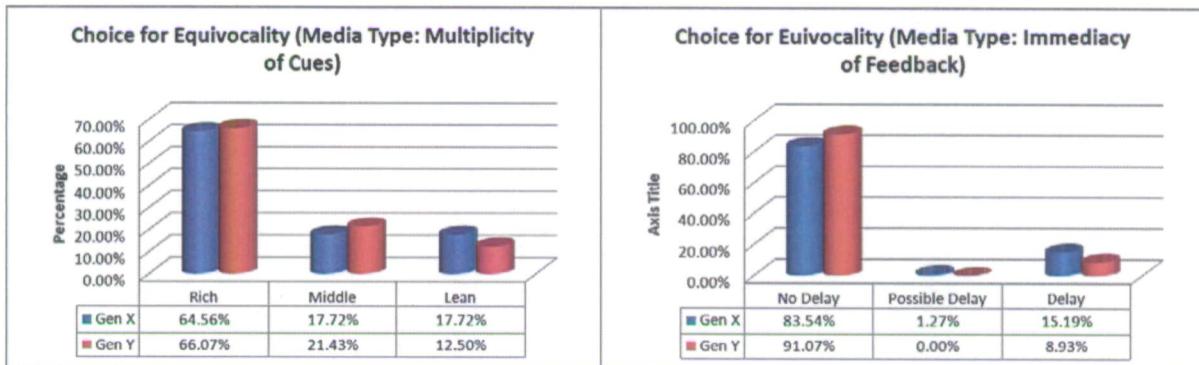
media that transmitt a higher volume of cues at once, in communicating to resolve an equivoical issue.

To test the difference in choosing media that return faster feedback, following hypothesis is used.

In commucating to resolve an equivocal issues:

H₀₅: Generation X and Generation Y are different in their choice of media that return feedback with less time interval.

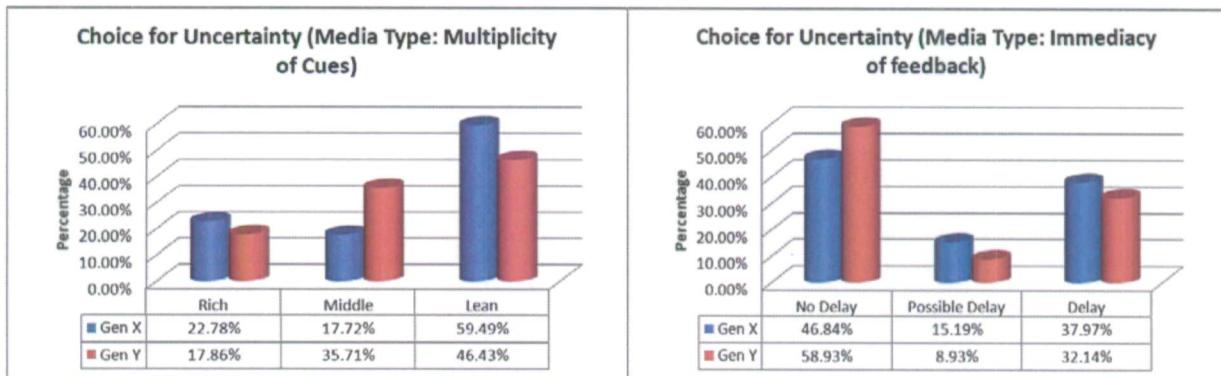
Figure 8



The p-value for the chi-square test was 0.664. Therefore, H₀₅ is not rejected and according to the data in this study, Generation X and Generation Y are different in their choice of media that return feedback with less time interval, in communicating to resolve an quivoical issue.

A second hypothetical situation was given to observe reactions of both generations in resolving uncertainty issues. Two hypotheses are fomulated for this situation, each to measure the usage of different characteristics of richness of media (Multiplicity of Cues vs. Immediacy of Feedback).

Figure 9



To test the difference in choosing media that transmitt higher volumes of cues at once, the following hypothesis is used.

In communicating to resolve an uncertainty issue:

H₀₆: Generation X and Generation Y are different in their choice of media that transmitt higher volume of cues at once.

The p-value for the chi-square test was 0.323. Therefore, H₀₆ is not rejected and according to the data in this study, Generation X and Generation Y are different in their choice of media that transmitt higher volume of cues at once, in communicating to resolve an equivoical issue.

To test the difference in choosing media that return feedback faster, the following hypothesis is used.

In communicating to resolve an uncertainty issues:

H₀₇: Generation X and Generation Y are different in their choice of media that return feedback with less time interval.

The p-value for the chi-square test was 0.060. Therefore, H₀₇ is not rejected and according to the data in this study, Generation X and Generation Y are different in their choice of media that return feedback faster in communicating to resolve an equivoical issue using a 0.05 level of significance.

IMPLICATIONS AND LIMITATIONS OF STUDY

This research implies that the perception of the ease of use of traditional and cell phone based media by the two generations is not significantly different, but differences exist in computer and internet based media. Differences were found within the preferences of two characteristics of media richness (multiplicity of cues and immediacy of feedback) when both generations were required to resolve two hypothetical communication tasks.

Managers need to be aware of these similarities and differences when choosing communications channels. Generation X and Generation Y use traditional media in similar ways, but their perceptions of ease of use in computer and internet based media are different. Generation X appears to be more apt to use the internet as a communication tool. In decision-making situations Generation X and Generation Y will choose different types of media. Generation Y appears to need more richness of media and faster feedback to resolve equivocal issues. With uncertainty issues, Generation X appears to prefer more richness while Generation Y appears to prefer more immediacy of feedback. Generation Y's keenness toward immediacy of feedback embraces previous research in their generational traits (Kipnis & Childs, 2004; Dulin, 2008).

This research has several limitations. The first limitation is the subjects of this study. Because the survey was distributed through classified advertisement websites in order to reach the most people with the least resources, the subjects might share certain homogeneities. For example, the fact that they are already using the internet to surf classified advertisement websites could imply that non-internet users might have been excluded from the research. The second limitation is the sample size. The third limitation is the ratio of the two populations. Also, the industries of employment and the position held by the individual respondent may not accurately

represent the actual population and employment make-up. It is recommended that data be collected from a more representative group of subjects.

Attempting to build up a holistic understanding and explanation of generational differences in communication media choice has added much complexity and many challenges to this study. Future research activities in the field could involve improvement of the reliability and validity of survey, and its use in more homogeneous and controllable groups of subjects. This will allow research to draw more meaningful and practical conclusions by comparing generations working in similar types of professions with a similar socio-economic background. Similarly, investigation of the usage pattern differences of a certain type of communication medium in heterogeneous subject groups will make observations more meaningful by eliminating the complexity of the research. Also, measurement of subjective responses could be extended by bringing communication scenarios into the experiment.

This research shows that people who grew up under the influence of a fast-paced advancement of sophisticated communication technologies indeed differ from their counterparts in the skill sets of utilizing communication tools and in the preferences towards different characteristics of media richness in different occasions. The results also imply that in order to effectively manage today's multi-generational workforce, besides all the conventional managerial skills, a manager should also be equipped with a generational sensitivity (or awareness) in order to best promote the synergy of working together.

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About the Authors:

Zhezhu Wen received his Master of Science in Information Systems degree from the University of Mary Hardin-Baylor in December 2009. Mr. Wen's research interests include the social and global impact of information and communication technologies.

Patrick Jaska (Ph.D. in Business Administration) is the Chair of the Department of Business Computer Information Systems at the University of Mary Hardin-Baylor. Dr. Jaska has authored and co-authored many articles in business disciplines.

Randy Brown (Ph.D. in Business Administration) is an Assistant Professor in the Business Computer Information Systems Department at the University of Mary Hardin-Baylor. Dr. Brown's research interests include Web Design, Information Security and Networks, and Customer Relationship Management.

Barbara Dalby is an associate professor of management and chair of the management, entrepreneurship and marketing department in the College of Business at the University of Mary Hardin-Baylor. She graduated from the University of Texas at Austin. Dr. Dalby research interests focus on teams, pedagogy, and current management/marketing practices.

APPENDIX QUESTIONNAIRE

(1) Please indicate in what year range you were born. _____

A. Before 1946 B. 1946–1962 C. 1963–1977 D. 1978–1986 E. After 1986

(2) What is your gender? _____

(3) Industry of employment?

- A. Manufacturing
- C. Education
- E. Transportation, communication & utilities
- G. Health services/hospitals
- I. Currently Unemployed
- B. Finance, banking & insurance
- D. Wholesale & retail
- F. Government agencies
- H. Full time student
- J. Other (Please indicate)

(4) Position held?

A. Executive management C. First level supervisor E. Professional employees without supervisory responsibilities F. Currently Unemployed	B. Middle management D. Other operating personnel G. Other	(Please indicate)
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(5) How much do you agree with the following statement?

I choose communication tools selectively according to the situation.

(Examples of communication tools are:

Cell Phone: voice, Cell Phone: Text Messaging, Land line phone, VoIP (internet telephony), Fax, Instant Messaging: Text, Instant Messaging: Web cam (or Video Conference), Postal Mail, Social Networking Site, Email, Face-to-face)

Strongly
Disagree 1 Somewhat
Disagree 2 Neither agree nor
Disagree 3 Agree 4 Somewhat
Agree 5 Strongly
Agree 6

(6) In choosing a communication tool, rank the following factors from most important to least important.

A. Convenience	B. Waiting time for feedback	C. Comfort
D. Security	E. More information at once	F. Cost
G. Appropriateness		

1. (Most important)
2.
3.
4.
5.
6.
7. (Least important)

(7) Overall, I have NO technical difficulties in using the following communication tools.

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Cell Phone: Voice	1	2	3	4	5
Cell Phone: Text Messaging	1	2	3	4	5
Land line Phone	1	2	3	4	5
VoIP (Internet Telephony)	1	2	3	4	5
Fax	1	2	3	4	5
E-mail	1	2	3	4	5
Instant Messaging: Text	1	2	3	4	5
Instant Messaging: Web Cam (or Video conference)	1	2	3	4	5
Postal Mail	1	2	3	4	5
Social Networking Site	1	2	3	4	5
Face-to-face	1	2	3	4	5

(8) Overall, I have found that these tools are helpful in improving my work productivity.

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Cell Phone: Voice	1	2	3	4	5
Cell Phone: Text Messaging	1	2	3	4	5
Land line Phone	1	2	3	4	5
VoIP (Internet Telephony)	1	2	3	4	5
Fax	1	2	3	4	5
E-mail	1	2	3	4	5
Instant Messaging: Text	1	2	3	4	5
Instant Messaging: Web Cam (or Video conference)	1	2	3	4	5
Postal Mail	1	2	3	4	5
Social Networking Site	1	2	3	4	5
Face-to-face	1	2	3	4	5

(9) In a work related situation, I prefer the following tool to communicate when the matter requires a simple answer or confirmation from my peers. (Circle One)

A. Cell Phone: Voice B. Cell Phone: Text Messaging C. Land line Phone
 D. VoIP (Internet Telephony) E. Fax G. E-mail
 F. Instant Messaging: Text G. Instant Messaging: Web Cam (or Video conference)
 H. Postal Mail I. Social networking Site J. Face-to-Face

(10) In a work related situation, I prefer the following tool to communicate when the matter requires a complex decision made with my peers. (Circle One)

(11)

A. Cell Phone: Voice	B. Cell Phone: Text Messaging	C. Land line Phone
D. VoIP (Internet Telephony)	E. Fax	G. E-mail
F. Instant Messaging: Text	G. Instant Messaging: Web Cam (or Video conference)	
H. Postal Mail	I. Social networking Site	J. Face-to-Face

(12) In a work related situation, I prefer the following tool to communicate with 2 or more of my peers for information only purposes.(Circle One)

A. Cell Phone: Voice	B. Cell Phone: Text Messaging	C. Land line Phone
D. VoIP (Internet Telephony)	E. Fax	G. E-mail
F. Instant Messaging: Text	G. Instant Messaging: Web Cam (or Video conference)	
H. Postal Mail	I. Social networking Site	J. Face-to-Face

(13) In a work related situation, I prefer the following tool to communicate when I have to inform 2 or more of my peers about an important decision.(Circle One)

A. Cell Phone: Voice	B. Cell Phone: Text Messaging	C. Land line Phone
D. VoIP (Internet Telephony)	E. Fax	G. E-mail
F. Instant Messaging: Text	G. Instant Messaging: Web Cam (or Video conference)	
H. Postal Mail	I. Social networking Site	J. Face-to-Face

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Four generations, one workplace: Watch us work

Understanding and leveraging workplace diversity can help an organization maximize retention, productivity and employee motivation.

By Denise Zaporzan, CMA, FCMA

Never before have we seen and experienced such a diverse and multi-generational workforce in the workplace. Today's business leaders face the challenge of not one, but four generational groups, each with different attitudes, beliefs, experiences and work habits.

While it's easy to imagine the challenges this might pose to a leader, less obvious is how this diversity presents opportunities for maximizing team performance. But understanding and leveraging these differences can help an organization maximize retention, productivity and employee motivation.

What exactly is a "generation?" It's big. Just ask Pepsi, which successfully branded an entire generation of young adults as "the Pepsi generation," or Canadian author Douglas Coupland, who coined the term "Generation X," or American author Landon Jones who did the same for "baby boomer."

Zemke et al. (2000) define it as "a group of people who share birth years, history and a collective personality as a result of their defining experiences." Historical, social and political events shape each generation's values and attitudes.

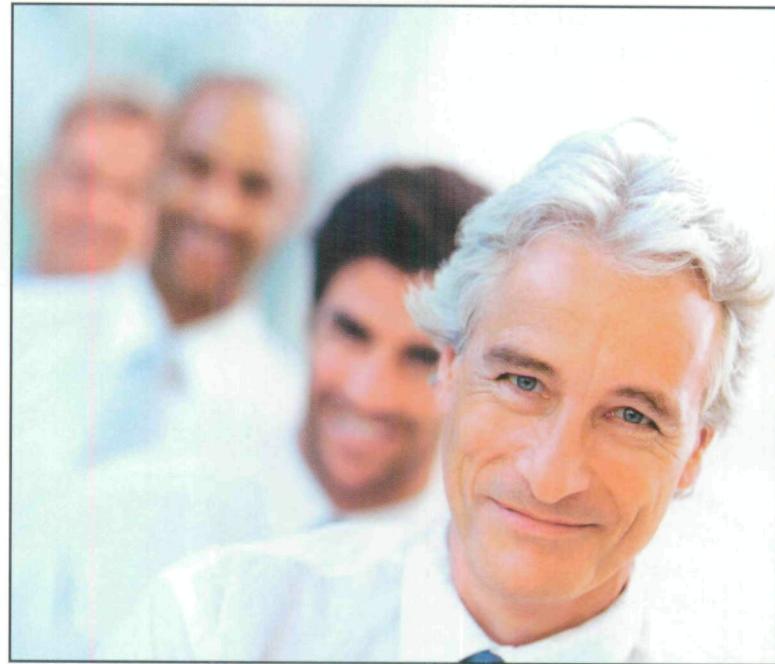
The four generational groups:

1. Traditionalists (born before 1945)

The Depression and World War II heavily influenced this generation. Their experiences make them hardworking, financially conservative and cautious. Organizational loyalty is important to them and they feel seniority should determine career advancement. This group is waning in influence, as most have now retired from the workforce.

2. Baby boomers (born between 1946 and 1964)

Baby boomers grew up in a healthy post-war environment. They are optimistic and value self-



expression. Baby boomers are known for their strong work ethic, and are sometimes described as "workaholics." Work is a defining part of their self-worth and how they judge others.

3. Generation X (born between 1965 and 1980)

Generation X experienced a major shift in the family structure. Many Gen Xers were raised in a single-family home, as divorce rates soared, and this was the first generation where both parents worked full-time. The term "latchkey kids" was defined in this generation. During their formative years, there were great advances in technology and massive layoffs, which led to values of self-reliance and work-life balance.

4. Generation Y (born after 1980)

Generation Y grew up in a time of economic prosperity, but also in the peak years of terrorism and drugs. The lives of Gen Ys were nurtured and structured by their parents. This is the techno-savvy generation for whom technology and instant communication are part of everyday life.



So what does this mean in terms of coaching and motivating, communicating, and resolving conflict? Each generation has its own unique needs in each of these areas. Leaders must recognize these as "needs," not simply "preferences."

1. Coaching and motivating

- Traditionalists prefer a one-on-one coaching style, which is accompanied by formal performance reviews. They value recognition that is personal (award plaques, photos with the president, etc.)
- Baby boomers enjoy working with colleagues on projects and peer-to-peer coaching. They value lifelong learning, public recognition, perks, prestige, professional rewards and long-term compensation.
- Generation Xers believe recognition and advancement should be based on merit and expect rapid advancement toward their goals. They value time off, work flexibility and cash awards, and dislike micromanagement. They need to feel empowered and want to be asked for feedback.
- Generation Ys expect more coaching than any other generation. They want structure, guidance and extensive orientation. They want to challenge and change things, but also require personal feedback. They seek out internships, self-improvement opportunities, formalized coaching and mentoring programs, and work flexibility. If their needs are not met, they will leave for a new opportunity somewhere else.

2. Communication strategies

- Traditionalists prefer inclusive, face-to-face or written communication.
- Baby Boomers prefer open and direct communication that is less formal. They enjoy staff meetings and face-to-face or phone communication.
- Generation Xers prefer technology-based communication (e-mail, cell phone). They are bored if meetings include a lot of discussion prior to making a decision. They like the bottom-line approach — results and plenty of them.
- Generation Ys prefer text messaging and immediate feedback. They like having informal team meetings to communicate, and dislike having to read and remember lengthy policies and procedures.

3. Conflict resolution

- Differences in generational values, behaviours and attitudes can naturally lead to significant conflict.
- The two major sources of conflict in the workplace for

these generational groups are: perceived differences in work ethic and use of technology. However, as a leader, you must understand and work with the characteristics of each generation to maximize employee satisfaction and team performance. Each generation offers unique value based upon their attitudes and experiences.

- Traditionalists have wisdom and organizational history.
- Baby boomers have organizational experience and a passion for lifelong learning.
- Generation Xers have innovative ideas and creative approaches.
- Generation Ys have a deep understanding of technology and insights on how it can be used.

What leaders can do

Given these vast differences among generations, what's a leader to do? Simply put, now more than ever, the strategies we use to communicate, coach, motivate and resolve conflict need to be tailored to the profiles of each of these generations. To do this — to understand, communicate and lead your workplace — there are a number of strategies you can employ:

1. Conduct an employee "generational inventory." Know the generational makeup of your organization and tailor your messages accordingly.
2. Hold all of your employees, no matter what generation, to the same expectations. Your expectations of each group should remain the same, it is your approach that should vary.
3. Consider individual needs and generational differences when dealing with employees one-on-one. This is particularly important when accommodating for coaching, motivating, communicating and conflict resolution.
4. Capitalize on differences to enhance productivity (e.g. Generation Y can teach baby boomers new technology, and baby boomers can explain business processes, etc.)

As a leader, you have an opportunity to work with a diverse group of employees. It's an exciting time to develop a dynamic workplace based on each of these generations' traits and skills. If you can effectively manage these different generations, you will not only achieve employee satisfaction and fulfillment, you will optimize team performance and organizational results. ■

Denise Zaporzan, CMA, FCMA, is the president of Denise Zaporzan & Associates. She may be reached at denise@denisezaporzan.com.

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Bridging the Generation Gaps in the Retirement Services Workplace

BY SARAH SIMONEAUX, CPC, AND CHRIS STROUD, MSPA, MAAA, EA

“*Understanding the psychology of the various generations can be a powerful tool in ensuring the effective operations in our firms, both from a standpoint of employee interactions and in regard to advancing the quality of the work we do. So, this article asks: What are the generation gaps that exist today and how can we bridge them to bring harmony to the workplace and position our businesses for future success?*

Sarah Simoneaux, CPC, and Chris Stroud, MSPA, MAAA, EA, provide consulting services to third party administrators and financial institutions through Simoneaux & Stroud Consulting Services. The firm specializes in strategic business planning, general consulting, industry research, professional development, customized brainstorming sessions, and skill building workshops (including dealing with generational differences) for the retirement services industry. They are both past presidents of ASPPA.

For several years, we have heard about the “Graying of America” as Baby Boomers approach retirement. The retirement services industry is experiencing a similar type of “graying.” Many third party administration firms (TPAs) were created in the ERISA (Employee Retirement Income Security Act of 1974) era, just before or just after the “Act” changed the retirement services’ world forever. Some of these TPA firm owners (Radio Babies and Baby Boomers) have passed their businesses on to heirs or sold their businesses to other entities, and some have held on and are now dealing with succession issues. Many of the industry experts and managers that financial institutions and TPAs rely on are Radio Babies or Boomers.

Fortunately for the profession, the children of the Baby Boomers are entering the workplace and advancing through the ranks. According to the U.S. Census Bureau, there are approximately 80 million Millennials and 50 million Gen Xers, and the Millennials are even more numerous than their Baby Boomer parents. Within the next year or two, Gen Xers and Millennials are likely to make up 50–60% of the country’s workforce. Their sheer size and their immersion in technology give them the power to radically transform every aspect of society. As these talented individuals permeate the retirement services sector, businesses are faced with unique opportunities and challenges resulting from the interactions of three or four generations working side by side. One of the major challenges will be the knowledge transfer required in such a knowledge-intensive business. Rapid technological change combined with the need for sophisticated customer service will make collaboration across the generations essential to a successful business model.

Understanding the Generations

Although every individual is unique and some may not fit their generational mold, for the purposes of this article, we will look at “generational generalities.” To better understand a single generation, we look at the similarities. To compare generations, we look at the differences. Generations are similar to cultures, with common values and beliefs and shared experiences. Many of the people from a distinct generation have been “programmed” to view the world and filter information through their own “generational lenses” based on experiences during their formative years.

We often have misconceptions about other generations. For example, the older generations tend

to think Gen Xers and Millennials are very much alike, but in fact, the most significant thing these two groups have in common is technology. They are extremely different in most other aspects, and overall, Millennials are actually more similar to Baby Boomers. Once we gain a better understanding of each generation, it is easier to identify and accept the differences. From there, we can seek out commonalities, capitalize on opportunities and bridge the gaps.

Although there are no exact lines drawn for the start and finish of a generation, the chart below indicates the way most resources categorize the generational timeline. As in astrology, generation members can find themselves “on the cusp,” where traits of two generations might be relevant. Thinking about where we ourselves fall on the timeline will also give us insight into our own thoughts and beliefs.

Radio Babies

Radio Babies grew up in close family environments and looked up to heroes. In their younger years, they never knew the luxuries or technology that the subsequent generations came to know. They were a hard working generation who wanted jobs, security, and decent wages in order to take care of their families. They were loyal to their employers, and in return, they relied on company pensions to take care of them in retirement and repay them for their years of loyalty. They were most significantly impacted by the Great Depression and World War II.

Baby Boomers

As Baby Boomers were growing up, they began to see the deterioration of the traditional family as divorces became more popular. They believed in the “American Dream” and went for it. Historically, the Boomers were the largest workforce group and because there were lots of them, they were conditioned to compete for position and recognition. They were workaholics who believed in throwing time at work to solve problems. They were the first generation exposed to technology in the workplace. They were heavily influenced by political events and women’s rights, and they pushed for change to make the world a better place.

Gen Xers

Gen Xers were the first wave of Baby Boomer children. Many Gen Xers were latch-key children and had less adult supervision than prior generations as

they were growing up, primarily due to dual working parents or single parent environments. They also were conditioned not to trust strangers. As a result, Gen Xers are very independent and not as social as other generations. Because they experienced parents who worked long hours, work/life balance is very important to them. They represent the smallest generational group of available workers. For most of them, their first exposure to technology was in school. They were influenced by the Challenger disaster, AIDS, and the prevalence of technology and the media.

Millennials

Millennials are the product of either later or more mature Baby Boomers or Gen Xers, and their generation has the lowest parent-to-child ratio in US history. This generational time frame gave birth to the term “helicopter parents.” Millennials’ parents were very involved in their activities, controlled their schedules, oversaw their schoolwork and, in essence, “hovered” over every aspect of their lives. Millennials were groomed to learn and achieve, and they were frequently rewarded (i.e., gold stars, participation awards) for their endeavors. Growing up, their mouse and computer represented what pencils were to Boomers, and the Internet became their virtual library. They learned about technology and the underlying logic of how it works in the same “native” way that they learned to speak a language. Their technological abilities far exceed even Gen Xers. Technology is integral to the way they live, think, communicate, and the way they work. They are very social, collaborative, and the ultimate multi-taskers. They see themselves as part of a global community where diversity is an advantage, and their work should make a difference in the world. They are energetic and like to participate in activities inside and outside of work. They were heavily influenced by terrorism, which reinvigorated new respect for family and community, the Internet, and environmental issues.

The Retirement Services Workplace

We naturally expect others to think and feel as we do. When we understand more about the generational differences, we gain insight into how others thoughts and actions might differ from our own.

The chart below shows workplace traits that help us understand why the Baby Boomer comes in early and stays late, why the Gen Xer might be a little cynical, and why the Millennial asks a lot of questions and wants constant feedback.

Table 1

Category	Radio Babies	Baby Boomers	Gen Xers	Millennials
	1930–1945 (<1940)	1946–1964 (1940–1960)	1965–1980 (1960–1980)	1981–2000
a.k.a.	Silent generation, Veterans	Boomers, Sandwich generation	Generation X, Xers, Busters	Gen Y, Gen Why?, Nexters, Echo Boomers, Bridgers
Shaped their beliefs	Parents' views	Views of family and friends	Television/world events	Television/world events
	Values held in community	Political events	Views of family and friends	Parents' and grandparents' views
	Views of respected leaders	Civil rights	Respected mentors	Values held in community
Mantra	Sacrifice/duty	Change the world	Be careful out there	Protect the environment
Core values	Loyalty	Involvement	Skepticism	Optimism
	Discipline	Optimism	Diversity	Achievement
	Duty	Personal gratification	Pragmatism	Diversity/global awareness
		Work	Informality	Sociability/fun
				Civic duty, volunteering
Views on authority	Respects authority	Questions authority	Distrusts/ignores authority	Respects authority and expects mutual respect from authority
Family	Traditional, moms at home	More working moms, more divorces	Latch-key kids, career working moms, single parents	Split families, some stay-at-home dads, soccer moms, "helicopter" parents
Money	Don't borrow, pay cash, save	Buy now, pay later	Conservative, save now	Earn enough to buy what you want, save later
Education	A dream	The way to get ahead in life	Means to an end	A huge expense
			Personal growth	Life long learning
Telephones	Rotary phones/party lines	Touch tone phones	Cell phones	Smart phones
Exposure to technology	Radio	TV	Nintendo, PC, MTV	Internet, X Box, Wii
	Learned technology at work	Learned technology at work	Learned technology in school	Learned technology while learning to walk and talk
Music	Big band	Rock & Roll	Rap	Pop rock, techno
Work & family life	Keep work out of home	No balance; work to live	Work/life balance	Life/work balance
The People	John F. Kennedy	Bill & Hillary Clinton	Jeff Bezos (Amazon)	Mark Zuckerberg (Facebook)
	Robert F. Kennedy	Bill Gates	Pierre Omidar (eBay)	Ezra Klein (political blogger)
	Martin Luther King Jr.	Stephen Spielberg	Tiger Woods	Kelly Clarkson
	Warren Buffett	Oprah Winfrey	Kurt Cobain	Danica Patrick
Influences/ events	The Great Depression	JFK, RFK & MLK assassinations	Challenger explosion	Columbine, 9/11, terrorism
	Pearl Harbor	Civil rights, women's rights	AIDS	Parents laid off work
	Atomic bomb	VietNam War/Cold War	Parents laid off work	Difficulty finding work
	Launching of Sputnik	Watergate	Recession, dot.com crash	Recession, global economy
			CNN, USAtoday, Internet	Social networking, blogs

As part of the retirement services profession, what do we need to change in our recruiting practices, employee retention and reward systems, management policies, approaches to training, technology, and the operational aspects of our

business? How can we foster a knowledge-sharing environment that has the generations working together effectively and efficiently? What can we do to help the various generations in our offices get along?

Table 2

Category	Radio Babies	Baby Boomers	Gen Xers	Millennial
	1930–1945 (<1940)	1946–1964 (1940–1960)	1965–1980 (1960–1980)	1981–2000
Communication style	Respectful	Politically correct	Informal, abrupt	Eager to please, inclusive
Work ethic	Hard work	Workaholic	Be efficient, get it done	Multi-taskers, what's next?
	Duty before fun	Personal fulfillment	Career development	Goal oriented
	Letters/memos	Call me anytime	Call me only at work	E-mail, text or IM me at work
		Faxes/Express mail	E-mail	Social networks
View of technology	Difficult and complicated to use and learn	Improves personal productivity, source of information, good for data storage, and processing transactions	Critical for personal and work efficiency, interactive way to connect	Core to life and work and way of thinking, always looking for the next cool thing
Workplace needs	Organization	Mission	Efficiency/results	Values
	Long term goals	Status/recognition	Technology	Collaboration
			Independence	State-of-the-art technology
			Values	Ability to learn/grow
Feedback/rewards	No news is good news	Money, title, recognition	How am I doing? Freedom	Needs continuous feedback, meaningful work
Interactive style at work	Individual	Loves meetings	Entrepreneur, independent	Team player/seeks input
	Hierarchical	Team player	Focused on product	Engaging/helpful
Work advantages	Committed	Team players	Independent	Collaborative
	Respectful	Service oriented; good at relationships	Technoliterate	Technologically savvy
	Wealth of experience	Technical experience	Creative	Multi-tasking abilities
	Hard worker	Driven	Adaptable	Heroic spirit
Work challenges	Resistant to change	May put process before results	Impatient/cynical	Need for supervision and structure
	Difficulty accepting direction from younger generations	Judgmental of those with other viewpoints	Poor people skills	Inexperienced, especially with difficult people issues

Perceptions: Respect, Loyalty, and Work Ethic

Approach to authority is one of the areas where the different generations diverge. Radio Babies were taught to respect authority, while Boomers learned to question authority. For the most part, Gen Xers ignore authority. Millennials actually respect authority, but they expect mutual respect in return. Gen Xers do not like to be given "orders," but Millennials need guidance and structure. Millennials get along well with their elders and actively shop for mentors. A Boomer may feel it is disrespectful if a Millennial speaks with improper grammar, while a Millennial may feel that it is disrespectful when a Boomer points out that the Millennial is inexperienced and young enough to be his or her child. It becomes evident that even our definitions and perceptions of respect are different across generations.

Loyalty to businesses may be a thing of the past for all generations, given the increase in layoffs and downsizing efforts across the U.S. Many Gen Xers and Millennials may never experience the luxury of working for a company for 30 years or more like many Radio Babies and Boomers did. The younger generations saw their parents work hard and long hours, only to get laid off after giving years of loyalty to an employer. Even some of the Gen Xers and Millennials have already been victims of layoffs and downsizing, no matter how hard they worked or how loyal they might have been. Loyalty has to work both ways, and it has to be based on mutual trust and job security. Gen Xers have shown loyalty towards respected supervisors that they trust, which may be the best that we can hope for in today's environment. The jury's still out on Millennials, but there's hope, given that they are an optimistic bunch.

The older generations tend to think the younger generations have no work ethic. Work ethic can no longer be measured solely by how many hours you spend in the office; it is being redefined in terms of results produced, with less focus on how, when, or where the work is done. Gen Xers and Millennials have a very strong work ethic when it comes to quality standards, getting the job done, and contributing to the company's success. Gen Xers and Millennials can demonstrate to Boomers that working long hours isn't necessarily the best way to inspire creativity and solve problems. Work/life balance is very important to Gen Xers and Millennials, especially after seeing their parents work long hours away from home. Radio Babies and Boomers should keep that balance in mind when they set schedules and expectations. Don't

assume that if employees are not in the office, they are not thinking about work. Millennials are known to surf the web for hours seeking solutions to issues, and they don't mind as much as Gen Xers do if they are contacted after work hours about a work issue. Millennials thrive on constant connectedness via cell phones, text messages, and social networking.

Knowledge and Technology

The two greatest generational challenges in the workplace today are technology and knowledge transference.

Technology is pervasive, constantly evolving and changing the way we connect with our coworkers and our customers. For all Millennials and most Gen Xers, even a fairly high-tech workplace is a step backward from what they are accustomed to in their personal lives. For Radio Babies and Boomers, however, that same high-tech workplace may be a considerable leap forward from how they operate outside the office. The technology gap remains one of the most challenging to bridge, and it will continue to widen with technological innovations. The older generations understand that technology is a great tool to access data and process transactions, but they are not as quick to see its applicability in all aspects of the business. Gen Xers depend on technology to make them more productive. Millennials especially rely on modern technology to fill in their experience and knowledge gaps, to problem solve, to interact, and to stay fully engaged in their work. However, increased technology in the workplace can lead to increased security risks. Technology policies must be established and properly communicated. Gen Xers and Millennials are all too familiar with debates over technology (e.g., violent video games, inappropriate Internet sites, illegal music downloading), but since their productivity and motivation hinge on the ability of their employer to meet their technological expectations, understanding the reasons behind any technology restrictions is critical to their acceptance of those policies.

While technology plays a critical role in shaping a business, human capital is by far a retirement services company's greatest asset. Transferring knowledge from generation to generation within the workplace is just as important as it is at home. Many Radio Babies and Boomers hold the key to years of industry experience, law changes, internal processes, and customer relationships that enhance the company's ability to operate. However, highly skilled Boomers are accustomed to control and power that stems from their knowledge

and access to privileged information. To successfully transfer that knowledge, they should agree to share the information freely through knowledge databases that can be used to make the knowledge transparent. Knowledge transference can be threatening to Boomers, especially if they are not great masters of technology, because it can create a feeling of minimized importance. However, impending retirements, as well as trends of younger generations changing jobs more often, make a culture of knowledge transference imperative in today's workplace.

One solution to the knowledge transfer challenge is to create a two-way mentoring program that provides opportunities for the older generations to transfer technical knowledge and relationship experience to the younger generations, while the younger generations mentor the older generations on technology. By understanding more about Twitter and Facebook and wikis, the older generations can begin to understand how social networking and "bottom-up" self-evolving information systems can apply to the workplace. Mentoring opens up the channels of communication and sets the stage for other types of collaboration, helping to bridge the generational gaps. Job shadowing is another technique that is frequently used to transfer knowledge across generations. These types of programs can help bridge the technology and knowledge gaps, while at the same time help the generations to develop mutual respect for their individual abilities and contributions.

The Company Perspective

If your company were a person, which generation would best fit its characteristics? If your company has an older center of gravity, a tightly-run senior management group and a conservative approach to technology, this approach may not be sustainable over the next decade. As the retirement services business becomes more commoditized, services that are relevant to the workforce and valued by the customers are more important than ever. The younger workforce might cease to find your business relevant, and most likely, your customers will start feeling the same way. You may need to bring a more youthful perspective to your firm in order to survive and thrive.

Strategic Business Planning

Your company needs to develop or update and document its strategic business plan. A Mission Statement and Values Statement are important to establish the purpose and culture of the firm. The

goals, objectives, and strategies laid out in the plan will provide the roadmap for work to be done. Remember that Millennials and Gen Xers care about company values and want their work to make a difference in the world. A Mission Statement about "helping people to retire with dignity" may have more meaning to these groups than one of "providing effective retirement plan services."

Start by looking ahead three to five years. What will be important to your company at that time? Start creating the strategies that will get you there. Many retirement services firms have not planned adequately for succession, and must develop a succession plan and knowledge transference strategy that will bring new talent in the door and up the management chain. Consider technology and operational experience, and forecast the key functions that will need to be done. Look at your current workforce in the same way you would do a defined benefit emerging liability study. Who is nearing retirement and who needs to be replaced? Where will you find their replacements? What programs do you need to put in place to preserve your human capital—cross-training, two-way mentoring, phased retirement for key individuals nearing retirement, support of remote workers, and/or creation of a central knowledge database?

Bridging generation gaps is a "top-down" issue, and the underlying theme is communication. The strategic business plan should be a living, breathing document that is communicated to employees and frequently referenced so that employees from all generations will accept the business culture and understand the important roles they play in achieving company goals.

Management, Professional Development, and Communication

If your workforce is starting to look like an age barbell, with lots of younger and older workers and not many workers in-between, your firm may be experiencing generational issues. Generational issues are not new to the workplace—what is new is that the gap is much wider, primarily due to rapidly changing technology.

Acknowledging that generation gaps exist is the first step in managing the "age barbell." Managers who solicit input and involve employees from the various generations to help develop policies will create a positive, productive working environment. A structured brainstorming session before stressful times such as tax season can help to solve problems and bring the generations closer together. Millennials will often

suggest ways to deal with data more efficiently, while asking for more cross-training and professional development. Boomers will offer to lead training sessions and provide insight into good client communication skills.

Structured brainstorming sessions centered around education will point out to management that different employees have different training needs, and some of those needs are generational. Credentialed employees need continuing education. Boomers need better technology skills. Gen Xers and Millennials are technologically savvy, but they need technical training and training in social skills. The temptation in a difficult economy is cut back on training dollars, but this strategy can be short-sighted when plan sponsors and referral sources are looking more than ever for services that provide value. Communication and relationships are at the heart of everything we do in business. Don't overlook the importance of education—especially in technical communication and relationship skills.

How training is delivered should take into account different generational learning styles. Boomers prefer traditional classroom style learning, with or without interaction. Gen Xers typically like self-directed learning through webinars or podcasts. Millennials like a learning environment that has many components—classroom, group activities, interaction, fun, and technology. Technology is transforming education. The way Millennials access and process information is much different than former generations, and it keeps morphing. Change up your own internal training to appeal to all groups, and make outside opportunities for education available in a range of styles.

Face to face meetings are a critical component of management and communication, but understand that the different generations view meetings in different ways. Boomers are usually willing to meet any time, any place, and for any length of time. They grew up with the top-down style of communication at meetings. Gen Xers prefer meetings that are structured, brief, and to the point. Millennials prefer meetings that are very conversational and interactive. Change up your meeting styles on various occasions to have a broader appeal. Let someone else, perhaps a Millennial, lead part of the meeting to gain confidence and establish credibility. Try 10–15 minute “stand-up meetings” to address one or two brief topics. As much as everyone—especially Millennials—would like to think, electronic communication is not always a substitute for face to face or phone communication.

Other areas that cause generational friction can be addressed by management through effective communication. Appropriate (and inappropriate) office dress, flexible work hours, virtual office work, and expectations for meeting deadlines are examples of policies that should be clearly communicated.

In today's workplace, it is not uncommon to have a 35-year-old managing a 55-year-old or a 65-year-old managing a 25-year-old. Clear, cross-generational lines of communication are key in dealing with these demographics. For example, a Boomer manager might say to a Gen Xer, “This ADP test needs to be done.” Although the Boomer meant the statement to be an order with urgency, the Gen Xer might merely see it as a statement of fact. The Gen Xer may or may not get the test done within the Boomers' desired time-frame. When speaking across generations, it is important to be very clear about your intent—don't make assumptions! Instead, the Boomer should say “I need you to complete the ADP test and have it on my desk by Friday so I can review it.” That statement would be clear to any generation.

Operations

Many retirement services firms operate in teams, so there is already some coordination across generations. We can make the interaction more effective by promoting collaboration on projects that makes everyone feel that they are contributing. Collaboration creates trust, an appreciation for others' skills and talents, and a unified effort to fulfill firm goals. Be sure to identify the *what, when, how, and why* when defining projects or tasks. Millennials especially need a clear picture of what success looks like so that their jobs seem meaningful, but this type of clear communication helps everyone. Millennials are also the ultimate multi-taskers and capable of juggling numerous projects at once without feeling overwhelmed.

Because of the intense technical aspects in retirement services work, the older generations sometimes discount the younger generations' abilities to contribute solutions to operational issues unique to our industry. If your firm is considering new software for a given purpose, explain the purpose to a Millennial and let him or her preview it and report back to you. Be creative in how you use Gen Xers and Millennials to problem-solve. With a little education around the technical aspects of an issue, they are frequently able to find technological solutions to complex problems and operational bottlenecks. Let's take a look at two actual case studies from our industry.

Case Study #1

An institution providing bundled retirement services to a large group of plans on one plan document was struggling to provide accurate and timely testing results during tax season. Most of the problems had been traced to the receipt of inaccurate data or data that had been incorrectly imported into the computer system. The administrators were experienced Baby Boomers, and two of them held ASPPA credentials. They were excellent at analyzing the failed tests, but they were frustrated from spending too much time chasing down data errors.

When a Millennial employee was hired to help, he was initially dismissed by the team as too inexperienced to be of much use in solving their backlog problems. He annoyed them by asking endless questions about how they handled the census data, why they ran the tests, and why they needed the data they were collecting. He formulated an idea about how to deal with the data in a new way, but because he had no credibility with the team, he went over their heads to the department manager with his idea. The team became even more annoyed with him when they heard what he had done.

Notwithstanding the negative reaction to his efforts, the Millennial pushed forward with his idea of handling the data in a new way. With his manager's support, he worked with the internal IT department and with the software vendor to implement automated data importing and data scrubbing solutions that acted upon the census data for the entire group of plans at one time. The project was an overwhelming success. He taught the administrators how to use the new automated tools to run their tests overnight using the scrubbed data. Ninety percent of the tests were completed before March 15, and only a handful of them had any remaining data problems.

The Baby Boomer administrators had a newfound appreciation for the Millennial employee's specific skills, and they were excited about collaborating with him on future projects. Although the Millennial learned some things about testing by approaching the problem from the data end instead of from the technical end, he recognized that he still had a lot to learn and was eager to fill in the knowledge gaps. He asked the Boomers to teach him about qualified plan administration. They were flattered and happily complied. They set up a lunch time study group to help him and others learn the basics and work through the ASPPA Retirement

Plan Fundamentals program. A generation gap was bridged.

Case Study #2

A large TPA firm had 2,000 Form 5500 extensions to file. In previous years, this process had taken four to six weeks, even though the TPA was using sophisticated government form software. An administrator's recent college graduate daughter (a Millennial) was looking for a short-term job and asked her mom if there were any opportunities to help out in the TPA office. The mom discussed this with her boss, and it was agreed that the daughter would be hired on a temporary basis to do the Form 5500 extensions. At first explanation of the task at hand, the Millennial realized that the current process was cumbersome and time-consuming. Upon questioning the process, she was assured that this approach was the way that the firm had done it for the last couple of years, and the current process was much more efficient than the prior process. She continued to ask questions and explore the software that generated the forms. She discovered features in the software that could generate the forms in batch mode using an export file from the database in a specific format. In approximately one week from the time she started the project, she learned the software and created a new process that would expedite the project. She was able to complete her task and generate the extensions in a couple of days using the new batch process. Her work was done—and she was able to take the rest of the summer off!

Recruitment, Retention, and Rewards

Recruiting talented people is especially important in retirement services. What should future employees of your firm look like and how will you find them? Different media will reach different generational audiences. For example, Millennials are not likely to work through recruiters, whereas Boomers will. Gen Xers and Millennials turn to the Internet to search for jobs, so companies seeking these employees should use web services and consider adding "Career Opportunities" to their own web sites. Use social networking tools such as LinkedIn—over 45% of employers are using these sites to find and vet employees. Boomers expect a detailed job description, which is helpful for any generation. Gen Xers will be attracted to short to-the-point descriptions that stress individual contributions, a fast pace, and work/life balance. Corporate values and opportunities for growth are important to

Millennials and may be the reasons they take a job or walk away.

If you offer and your recruit accepts the job, your work is not over—it has really just begun. You want that person to feel like a part of your organization as quickly as possible. A welcome gift is a great way to make them feel a member of their new “home.” It is also nice to assign a fellow employee to show the new hires around and teach them what they need to know to get started. Boomers will want to get involved right away and understand how they can make a difference. Gen Xers like to work more autonomously. They like flexibility not only in work hours but also in how they do their work. (Sometimes such flexibility in retirement plan processes is a problem from a compliance perspective, so give them this message up front.) They also want to learn new skills that they can put on their resume, since they don’t believe in job security. Millennials are impatient; they need to buy into the culture right away and understand how their job fits into the bigger picture. Millennials want a relaxed work environment where they can collaborate with fellow coworkers directly and through technology. Work/life balance is important to Millennials and Gen Xers. A more relaxed work environment—casual dress, occasionally working from home, free soft drinks and snacks, games—will be much more appealing to Gen Xers and Millennials and may bring more balance to them while they are in the office.

Try to get new employees involved in a team project. Give constructive and frequent feedback. Think of new reward programs that appeal to each generation. While the older generations like status and appreciation for commitment, Gen Xers and Millennials may prefer free time or educational opportunities. Millennials also expect to get awards or other tangible tokens of recognition. For example, consider developing an award or recognition for someone who saves the firm money or comes up with an innovative idea. Although all groups like money, it is not always the most important thing to an individual. Time off or recognition might be equally as motivating. Peer to peer recognition is also effective—especially for Millennials. For example, providing gift cards or movie coupons to everyone to distribute to a colleague who was especially helpful is a powerful teambuilding technique.

Consider creating multi-generational teams to participate in charitable events. Buy office games to promote social interaction in the workplace (e.g., Foosball or Wii in the lunchroom). Host a

generational awareness week where employees can bring in photos and mementos from their childhood years. During that week, allow them to post generational messages around the office, play generational music during lunch, and create generational trivia questions.

Our Customers and Our Industry

News flash! It’s not just our employees who are generational. We are selling plans and services to firms that are multigenerational also. If we understand our own firm’s generational differences better, we will also come to understand our customers better, which can translate to increased profitability. Ask your own employees what is important to them in terms of the operation of your own retirement plan.

Gen Xers and Millennials are changing jobs much more frequently than the generations before them. Many of them are cashing out their assets from their 401(k) plans each time they change jobs. As an industry, we need to emphasize the importance of retirement savings at younger ages. Institutions are ramping up to retain these assets, and they are establishing rollover programs to keep retirement funds invested with them once employees leave their employer. Easy access to rollover options and single-step simple execution are a must. Products and services that allow Millennials and Gen Xers to understand savings concepts, make decisions quickly, and even have fun (think YouTube videos) will be in demand. Millennials will also expect the technology to give them feedback on how they are doing, like telling them if they are moving in the right direction with their retirement savings (the gold star approach). Gen Xers and Millennials are the wealth accumulators and the wealth inheritors of tomorrow. The Boomers, on the other hand, are moving toward a decumulation stage. Providing services for Boomers’ phased retirement options and distribution strategies is another burgeoning market opportunity.

A Bright Future

President Obama was the first President to use email and a Blackberry®. The 50+ age group has been extremely successful with online dating services. Gen Xers and Millennials are heavy users of blogs, Facebook, LinkedIn, and Twitter—and they are the pacesetters when it comes to carrying these trends into the business world.

There is a growing trend towards knowledge management and client-centric models in the workplace.

Businesses are scrambling to transfer and document technical and client relationship information before it walks out door. Companies are turning to portal based technology solutions. Although for the next few years Boomers and Gen Xers will likely manage

these changes, many of the changes themselves will be driven by what we've already learned and continue to learn from the Millennials. Their future is our future. The future is bright, and so are the talented young individuals entering our workforce. ■

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Leadership for a New Age

Diverse talents of a multigenerational workforce must be harnessed to keep up with organizational productivity.

By Jennifer J. Salopek

MUCH HAS BEEN WRITTEN about the presence of four distinct generations in the workforce simultaneously and the ways in which their view and values are changing the way we do business.

This multigenerational workforce has major implications for organizations and, in particular, for managers and leaders who must harness the diverse talents of these groups to operate productively. According to Laura Bernstein, CEO and president of VisionPoint in Des Moines, Iowa, the various characteristics of these workers combine to create the ideal employee.

"Imagine an employee who brings enthusiasm and energy, shares fresh ideas and new approaches, displays wisdom that typically comes with years of experience, demonstrates unflagging loyalty to the organization, and refuses to take 'no' for an answer when pitching a breakthrough idea," she writes. "Realistically, the chance of finding all these characteristics in a single employee is practically zero. However, these same desirable characteristics, and many more, can be found in today's multigenerational workforce."

Harness the potential

The Federal Executive Institute in Charlottesville, Virginia, which is part of the Office for Personnel Management's Center for Leadership Capacity Services, provides leadership development training for senior-level civil servants. Peter Ronayne, dean of the faculty at the institute, and one of his graduate students began designing a multigenerational leadership course, "From Vets to the 'Net,'" five years ago after observing the impact that generational differences had on their own small organization. The institute employs about 30 staff and faculty, and "represents a microcosm of the effects that demo-

graphic shifts are having on the federal government overall," says Ronayne.

As he began to investigate the issue, Ronayne admits that he was skeptical at first. "I was more of the opinion that differences came from a life-stage point of view," he says. "However, as I did my research, I began to realize that the generational approach has a lot of validity. I'm a convert."

Many organizations, however, have yet to recognize the value of generational awareness—and typically wait for failure to occur before taking action.

"I am not seeing organizations recognize that things have to look different. This knowledge acquisition and understanding will become increasingly necessary in the next five years," says Bernstein. "This is not only a supply and demand issue. This understanding is necessary for organizations to stay strategically in front of their competition. By harnessing the potential of each generation, companies will get much more than they have to give up."

"We are most often engaged by traditionalists and baby boomers who are attempting to lead dysfunctional teams, whose organizations are experiencing high turnover and low morale. They often discover that generational differences are the root of the problems," say Giselle Kovary and Adwoa Buahene, managing partners of N-Gen, a consulting firm in Toronto.

Walk the talk

It is crucial for leaders to understand each generation's characteristics, values, and motivations; to adopt new competencies to harness the best of each; to facilitate cooperation; and to explore new ways of thinking that incorporate the critical differences among generations.

And, according to Ronayne, it's helpful to review the trends driving corporate

changes that make multigenerational understanding necessary now. "We've talked about generation gaps at work in the past," says Ronayne. "However, organizations are flatter now, and there is much less space between the mailroom and the boardroom. This, plus the rise of teaming to get work done, presents workers of different generations with more frequent opportunities to interact."

To gain a firm understanding of the workforce diversity, organizational leaders must follow a few simple rules.

Acknowledge generational differences. An excellent overview of the generations and their characteristics can be found in Paul Harris' article, "Boomer vs. Echo-Boomer: The Work War?" in the May 2005 issue of *T+D*. Traditionalists, baby boomers, Generation Xers, and millennials have varying views on what Bernstein terms "key workplace dimensions" such as work style, leadership, communication, recognition, family, loyalty, and technology.

Define your role. For leaders, understanding the differences in how generations approach authority, leadership, and loyalty can be especially important. In their book *First, Break All the Rules*, Gallup Organization researchers Marcus Buckingham and Curt Coffman reveal that employees do not leave companies. They leave managers. Tailoring your management style to conform to the personality of your staff helps to ensure that they don't leave you.

Work smarter. As Kovary and Buahene advise, the manager's job isn't getting any easier. "The one-size-fits-all approach is outmoded, and the mandate for leaders is to gain greater traction by working smarter. By becoming more transparent, more responsive, and more collaborative managers—and their companies—will become more productive and enjoy higher employee retention rates."

Reorganize and refocus your teams. "Most leaders, in government especially, are baby boomers," says Ronayne. "Teaming as a leadership competency is very central to the way work is done. This is a boomer-driven phenomenon, as they

were the first generation of young Americans to be observed for sociability and a group dynamic." Ronayne also notes that many boomers inherited a bureaucratic approach from traditionalists that have been slow to change. "Age is just another aspect of diversity. We encourage our clients to consciously cross-populate their teams. More diversity equals greater creativity and innovation."

Hone your people skills. "There is new pressure on managers to be more than functional experts," says Bernstein. Younger workers in particular expect more feedback, more coaching, and more communication. "Leaders' competencies are not necessarily changing, but their methods are. Xers and millennials seek communication that is direct and constructive."

Walk the talk. While traditionalists and boomers placed their loyalties with the organization and its mission, younger employees are loyal to their managers and to their own sense of integrity. "Leaders must demonstrate character by acting consistently with the values, vision, and mission of the organization. This means doing things right even when nobody is looking," Bernstein says.

Reframe retention and loyalty

The concept of an "ideal employee" who devotes an entire career to a single organization is long past. "We must reframe our ideas of retention and loyalty," say Kovary and Buahene. "To younger employees, five years in one job seems like a life sentence. To retain them, organizations must focus on engagement, learning, and involvement."

Ronayne notes that recruitment and retention are urgent issues for the federal government, where Generation Xers are already underrepresented in the workforce and a "retirement tsunami" of older employees is pending.

Ronayne advocates a program of "nonlinear retention," whereby leaders provide employees with excellent work experience and learning opportunities, even if they stay only two to three years. The hope is that they will return at some point in the future as their spiraling career pattern brings them back through the revolving door.

Variety and responsibility can be the key to creating excellent work experiences. Ronayne cites a program in the General Accounting Office known as virtual promotion, in which employees rotate through all areas of the operation. "They are constantly given new challenges and opportunities, and this experience provides them with a corporate perspective," he notes.

Buahene and Kovary report that some of their more innovative clients introduced "intrapreneurship" programs, which are designed to appeal to Generation Xers who value independent work and making a difference. In these programs, a senior leader identifies a second-tier project, one that holds promise for the organization but requires a substantial time commitment. The leader assigns the most talented young employees to work with a multidisciplinary team that will present the business case for the project to the CEO.

"This is so exciting for employees," Buahene says. "It gives them access and exposure to company leadership, as well as real experience in problem solving and skill development."

Manage multigenerational learning

Workplace learning and performance professionals play a vital role in helping organizations train their leaders to manage a multigenerational workforce.

"This is a very exciting time for learning and development, as younger employees demand the move to action-based learning that is increasingly embedded in the job. Further, WLP professionals can be creative as they leverage their knowledge of learning styles and layer it with generational awareness, becoming a strategic partner in creating workplace performance," Kovary says.

Our profession can act as a bridge between leaders and employees, helping younger workers to understand what feedback means and how to act on it, and helping managers give feedback that is meaningful to workers.

WLP professionals also must help organizations adjust their definitions of leadership and their defined competencies. Many employers think that younger

employees have unrealistic expectations and overvalue their own skills and experience. Many managers are unprepared to address those challenges. By helping to define strong competency models, WLP practitioners can help take much of the guesswork out of managing.

Trainers must also reevaluate their own methods, notes Bernstein. "Younger employees simply do not relate to our examples and case studies. We need to get new stories."

There are 70 million baby boomers in the workforce and only 55 million Generation Xers to replace them. The cost of losing an employee is estimated at 50 to 300 percent of that person's salary. The need to retain older workers while attracting younger ones is urgent.

Jennifer J. Salopek is a contributing editor to *T+D*; jsalopek@covad.net.

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Managing Human Capital: How to Use Knowledge Management to Transfer Knowledge in Today's Multi-Generational Workforce

Roxanne Helm Stevens (Corresponding Author)

School of Business and Management, Azusa Pacific University

901 East Alosta Avenue, Azusa, CA USA 91702

Tel: (626)-815-6000 x 3481 E-mail: rhelm@apu.edu

Abstract

The purpose of this exploratory study is to examine knowledge transfer strategies within the framework of a multi-generational workforce. It is common to consider different generational perspectives in the workplace and its impact on knowledge management and transfer strategy. This research compares differences in workforce generations and examines different methods to pass knowledge cross-generationally. Companies must design knowledge transfer strategies conducive to multi-generational workforce dynamics keeping in mind the generational diversity that exists in the workplace. The present study endeavors to provide insight into this issue.

Keywords: Organizational learning, Intellectual capital, Knowledge management, Multi-generational workforce

1. Introduction

Nonaka and Takeuchi (1995) consider knowledge and intellectual capital as a company's primary source of production and value. Human capital, recognized by organizations as the strategic value of the human assets, is the collective value of the workforce. Human capital is not the worker in a company- it is what that person brings and contributes to the success of the organization. Human capital is the collective value of the capabilities, knowledge, skills, life experiences, and motivation of the workforce (Aldisent, 2002). Also called intellectual capital to reflect the thinking, knowledge, creativity, and decision making that people in organizations contribute, human capital includes these organizational contributions (Kaplan & Norton, 2004).

Ulrich (1998) explained the importance of knowledge management within an organization - knowledge is an organization's only appreciable asset and knowledge work continues to increase. Knowledge and knowledge management are recognized as valuable corporate resources in the same vein as land, buildings, financial resources, people, capital equipment, and other tangible assets (Kipley, Lewis & Helm, 2008).

As employees in organizations progress with age, they acquire a set of knowledge that is customized to the firms' operations, structure and culture. More importantly, it is the unique insights and understood idiosyncrasies about the company that is developed over time which make the learning difficult to replicate or replace when aging employees transfer out of their positions (Lesser, 2006). It is this combination of explicit and tacit knowledge that mature workers possess which has become the most 'strategically significant resource of organizations' (Calo, 2008, p. 404).

To remain competitive companies need to develop strategies to retain this knowledge from older workers and transfer it successfully to other employees in the corporation (Calo, 2008). "As the Baby Boomer generation prepares for retirement, many firms want to be sure that the knowledge and experience gained by the current leadership does not walk out the door when they do" (Glick, 2007, p. 11). A growing concern among organizations is the vast wealth of knowledge and experience built by Baby Boomers walking out the door (Paton, 2008). Experienced executives contain important know-how, if this information were to be lost, it would result in a pricey undertaking for the organization to recover that information, if even at all (Martin, 2000).

This study explores generational diversity workplace variables that affect achieving optimal knowledge management within organizations. Further, this paper seeks to reflect upon knowledge management strategies from the perspective of knowledge transfer within multi-generational workforce environments.

2. Information versus Knowledge

Knowledge found within an organization's human capital must be first captured and then transferred in order to be exploited for advantage. But, what constitutes knowledge? According to Blanchard and Thacker (2009), knowledge is defined as 'an organized body of facts, principles, procedures and information acquired over time' (p. 18). According to Noe (2008), knowledge refers to what individuals or teams of employees know or know how to do (human and social knowledge) as well as a company's rules, processes, tools, and routines (structured knowledge).

When is information knowledge? Companies have information based on sales, inventory, and methods of payment but that has been primarily used to help with financial reporting. Information has potential if it properly managed. All knowledge is based on information but all information does not rise to the level of knowledge. Can knowledge management help make piles of information into trends, products, and increased profitability for businesses?

In the purest form, all robust knowledge management processes start with a database. But, information becomes knowledge when it is understood, manipulated and can become tied to a purpose and or idea. For example, businesses have used consumer purchase trends from previous years to try and order proper inventory. Data mining or looking for a correlation in information has been long included in most social science fields.

The relationship between a consumer and their shopping habits has psychological implications that can be managed and utilized by the businesses frequented by the consumer (Lacey & Sneath, 2006). Creating databases of information tying the purchase of an item to a specific consumer and including factors such as frequency of purchase and average amount spent required is a huge undertaking that requires a huge payoff for businesses to continue the practice.

Databases should help an employee learn from the information. "There should be a process for guaranteeing that the knowledge everyone carries around with them is retained in a permanent place for use by others" (Glick, 2007, p. 11). But, commitment to information technology infrastructures does not always lead to better business performance or significant return on investment (Malhotra, 2005).

Indeed, Booth (2008), states "information without context is simply raw data, which is not knowledge" (p. 22). When the Baby Boomers began to retire, many companies began to find silos of information throughout the company and began to crudely put together all the information with the hopes of helping but instead created a data monster that hindered the productive process (Booth, 2008). The use of the information within databases depends upon the need for the knowledge management process.

3. Knowledge Management

For many years, the exact definition of what knowledge management is has been ambiguous. The use of knowledge management across various fields has given the subject several different interpretations and meanings. Additionally, on the surface, knowledge management is difficult to define. This difficulty stems from the confusion existing in a term which is commonly used in organizations to describe the practice (and technology infrastructure system) of managing its knowledge - the process of collecting, codifying, accessing and transferring the totality of an organization's knowledge.

Knowledge management, an evolving term, has a glut of contributions surrounding a formal definition. Debates are ongoing as to concepts involved and how to properly convey it in a universal fashion (Slagter, 2007). Indeed, Sveiby (2001) states, knowledge cannot be managed and therefore knowledge management is a poor term. Sveiby (2001) offers that knowledge focus or knowledge creation, coined by Nonaka, are better terms because they describe a mindset in which knowledge is an activity not an object.

McInerney (2002) broadly described knowledge management as a common business practice and as a theoretical field of study. Others have simply concluded that knowledge management is the creation, transfer and retention of knowledge by organizations (Martin de Holan & Phillips, 2004). In practice, knowledge management is a conscious effort to gain from the knowledge that lies within in an organization by using it to achieve the organization's mission (McInerney, 2002). Thus, having knowledge about something, some process or method, can allow executives to make judgments and proceed in a manner that is just and coherent.

A more substantial definition was supplied by Gephart, Marsick, Van Buren, and Spiro (1996), 'knowledge management refers to the process of enhancing company performance by designing and implementing tools, process, systems, structures, and cultures to improve the creation, sharing and use of knowledge' (p. 71). Similarly, Rastogi (2000) defines knowledge management as a systematic and integrative process of coordinating organization-wide activities of acquiring, creating, storing, sharing, diffusing, developing, and deploying knowledge by individuals and groups in pursuit of major organizational goals. It is the process through which organizations create and use their institutional and collective knowledge. While many definitions stress system processes with an IT focus, Rastogi (2000) clearly points out the necessary human involvement beyond those processes.

Rastogi's (2000) rich definition also includes the process of knowledge from the creation or acquisition of knowledge to its use. Internal knowledge is knowledge that is created within the company through innovative attempts while external knowledge is gained from outside sources (Seidler-de Alwis & Hartmann, 2008).

Whichever way knowledge is acquired, it needs to have a way by which it can be stored, shared and ultimately deployed.

4. Workforce Demographic Trends

In the US, over the next ten years, a considerable number of experienced employees will be retiring, changing to part-time, or otherwise shifting their employment (Cotis, 2003). Workers ages 65 and above make up almost 30% of the labor market in America based on the September, 2009 U.S. Bureau of Labor Statistics (BLS) Current Population Survey (BLS, 2009).

The steadily aging workforce is a reflection of declining birth rates and the graying of the Baby Boomer generation. According to a report by Forrester Research, 76 million Baby Boomers will retire in the next 10 years with only 46 million younger employees as replacements (Lesser, 2006). This means that the labor pool will have shrunk nearly 60% by 2016.

Shifting workforce demographics are having a notable effect on organizations across a variety of industries and geographies (Lesser, 2006). Hence, many organizations are looking to solve a number of important knowledge and learning related challenges. Industries, as diverse as electric utilities, oil and gas producers, healthcare and the public sector, are clearly feeling the effects of employee retirements and the difficulty in sourcing new talent.

In some companies, increasing numbers of employees are retiring, many leaving with sizable amounts of knowledge that can place the organization at risk. For others, the challenges include maintaining a productive workforce in the face of potentially shrinking labor pools and the increased mobility of the younger generation of employees. According to a joint study by American Society of Training and Development (ASTD) and International Business Machines (IBM), the majority of organizational learning executives report that the maturing workforce coupled with the smaller labor pools will impact their organization (Lesser & Rivera, 2006). The study period runs from 2005 through 2006. Basic descriptive statistics are provided in Figure 1.

4.1 Multi-Generational Workforce

Pre-Baby Boomers -also referred to as Silents, Traditionalists, and Veterans -were born between 1900 and 1945 during the grey market (Kyles, 2009). Some consider Pre-Baby Boomers as a split from the Baby Boomer generation, being the older cohort segmentation (Reisenwitz & Iyer, 2007). Able to witness the rise of television networks and mass marketing, Pre-Baby Boomers have purchasing power with money to spend (Reisenwitz & Iyer, 2007). Influenced by the Great Depression and World War II, they did not like to challenge authority, were very loyal, consistent, and conforming (Kyles, 2009). As a result they were “most comfortable with conformity and a top-down management style” and motivated by “verbal or written recognition, awards, and public acknowledgement” versus the next generations following (Kyles, 2009).

Baby Boomers, born between 1946 and 1964, are nicknamed the “forgotten generation” as some marketers have more aggressively begun to target other generations (Reisenwitz & Iyer, 2007). Being raised after the war, this generation was associated with optimism, team orientation, and personal gratification” (Westerman & Yamamura, 2007). As one of the largest cohorts in our history, Baby Boomers significantly impact our society, business, and the economy (Westerman & Yamamura, 2007). The Baby Boomer generation experienced post-war stress and, hence, was not willing to conform like pre-boomers. Their primary “focus was on work and were rewarded for their loyalty and commitment” (Cennamo & Gardener, 2009). One of their top values is relationship building.

The next generation entering the workplace, Generation X, is described as independent in comparison to the first two. Generation X, born from 1965 to 1979, witnessed the rise of technology and social changes representing financial, family, and social insecurity without expecting job security (Cennamo & Gardener, 2009). Mirroring this generation, organizations were also suffering from the economic downfalls from the oil shocks in 1973 and 1979 (Cappelli, 2008). Hence, Generation X is described as having more commitment to their own careers than to their organizations as they highly value skill development, and productivity (Cennamo & Gardener, 2009). However, due to their independence they are considered to be disloyal and do not care much about corporate politics (Kyles, 2009).

Generation X worked hard and was referred to as selfish; however, this was the first generation to start balancing work and family (Cennamo & Gardener, 2009). Baby Boomers experienced stay home moms; but Generation X had working parents and was the first generation to experience single parenthood. In addition, Generation X suffered from corporate lay-offs and economic recession; hence, they do not find building relationship with upper management as beneficial, but instead a “degree of bootlicking” (Kyles, 2009). They are mostly rewarded

by receiving career opportunities and having autonomy - a requirement for them to be happy and productive in the workplace (Kyles, 2009).

The next cohort, Generation Y, born from 1980 to 1999, is also referred to as Nexters or Millennials (Kyles, 2009). This generation witnessed economic crisis from the recession in 1981 (Cappelli, 2008). Generation Y members are changes – most notably in the “growth of the Internet” as they are very comfortable with the internet and technological advances (Cennamo & Gardener, 2009). Generation Y values being able to balance work and life, advances in the career world, and traveling more (Kyles, 2009). Similar to Generation X, they are also products of non traditional families. Generation Y, concerned with careers that better the world, want their contributions recognized and acknowledged (Kyles, 2009).

Wide age spreads present significant challenges and barriers to businesses as they encounter issues pertaining to age bias and differing values and work habits among their multi-generational workforce (Lesser, 2006). These differences create knowledge transfer barriers.

5. Facilitating Knowledge Transfer within a Multi-generational Workforce

Certainly, there are many methods to transfer knowledge. Companies which recognize the challenges of shifting workforce demographics are utilizing an assortment of knowledge management strategies to transfer knowledge from experts in the Baby Boomer cohort to members of Generation Y. And, while a variety of knowledge management strategies have been successfully implemented setting the stage for knowledge to be captured and shared, companies must design knowledge transfer strategies conducive to multi-generational workforce dynamics keeping in mind the generational diversity that exists in the workplace. Indeed, Lahaie (2005) states, effective knowledge management and knowledge transfer within the organization are fundamental for ongoing organizational effectiveness: but to transfer knowledge effectively, there has got to be planning. Organizations are challenged in gathering the best available knowledge. This is not always easy; organizations must understand who holds key knowledge; otherwise knowledge management loses all importance.

Piktials & Greenes (2008) examined knowledge loss gaps and stress two of the best methods to capture and pass knowledge cross-generationally are to customize knowledge transfer methods with regard to the present needs and to be clear as to how each generation prefers to learn. Similarly, Wagner (2009) states knowledge transfer methods need to be varied due to existing age- diversity of the workforce.

Further, Wagner (2009) suggests because of the diversity of learning styles among generations represented in the workforce, various methods of transfer should exist accommodating formal education and training, apprenticeships, simulations and games, storytelling and conferences, blogs and papers. Technology has further perpetuated the need for the diversity and presents opportunities to make use of what would be more appealing to Millennials. They may feel more comfortable utilizing Instant Messages, blogs or podcasts to transfer their knowledge to others in the workplace. This suggestion poses unique challenges. Although the Millennial generation is comfortable with technology; the Baby Boomer generation is not. Therefore consideration must also be given to how knowledge is converted when transferred.

A joint study conducted by International Business Machines Corporation and the American Society of Training and Development revealed that 60% of respondents utilize mentoring as a method of passing on knowledge, while approximately one-half still use document/heavy repositories as tools for capturing knowledge (IBM & ASTD, Lesser, 2006). The study also notes that mentoring is most effective in learn-while-doing scenarios where mentors offer guidance to students in realistic situations they may be encountering. Thus, the one-on-one relationship between the mentor and the mentee helps facilitate the transfer of experiential and tacit knowledge. However, mentoring, a valid experiential and tacit knowledge transfer method is time consuming. Furthermore, the pairing of mentor and mentee is of concern. The mentoring relationship must bridge the generational gap. If the mentoring relationship cannot be established, then knowledge transfer will not occur.

Other forms of knowledge transfer include classroom training led by older workers, fostering learning communities to encourage sharing of learning and experiences between young and older workers, and leveraging multimedia tools, such as audio/video interviewing and story telling to preserve significant learning from aging employees (IBM & ASTD, Lesser, 2006). These knowledge transfer strategies assume training and development resources. Additionally, organizational culture must be examined since the use of a storytelling and contextually based transfer design may create discomfort. One of the challenges to instructional designers who consider using storytelling and contextually based design techniques is the issue of whether such approaches will be accepted within the culture of the organization. Another challenge in storytelling is credibility. In some instances, workers may feel that they are inappropriate as an approach to knowledge transfer.

Wagner (2009) states, for companies to be most effective and make great strides- engagement needs to occur between Baby Boomers and Millennials within their work environment for two-way learning to occur. In today's multi-generational workforce, evidence of reverse mentoring where younger workers assist older workers in a particular area may prove to be a successful knowledge management strategy as well. Reverse mentoring is usually used when executives need to understand operations or technology that can be shared by younger front-line or tech-savvy employees. However, generational perspectives make it difficult to establish and cultivate a reverse mentoring mindset. In order to have a successful reverse mentoring relationship it is necessary to create and maintain an attitude of openness to the experience and dissolve barriers of status, power and position. Although challenges exist, reverse mentoring is critical for older workers. As workers advance in age, they will need to refresh important skills to remain productive and effective in the workplace.

6. Conclusion

Certainly, many managers ignore the importance of intellectual capital and fail to capitalize on its benefits; however, the most important rule is that knowledge needs to be managed, so it requires vision and strategy (Ulrich, 1998). Conversely, by integrating knowledge management into a company's business processes, or changing the corporate culture a company can support the open sharing of knowledge (Uelpenich & Bodendorf, 2003).

Successfully identifying and retaining valuable industry and company knowledge can be very challenging for organizations. But, current economic demands and changing workforce demographics have pressured companies into action. Moreover, since the Baby Boomer generation is the largest generation to enter the workforce, companies are scrambling to retain their knowledge.

Indeed, Lahaie (2005), *The Impact of Corporate Memory Loss*, claims 42 % of corporate knowledge resides in the brains of the workforce and the institutional knowledge that accompanies the person out the door is both explicit and tacit. Hence, companies are directly and severely affected by the knowledge loss of their departing senior executives.

An organization committed to capturing and transferring critical knowledge within their ever-changing workforce demographics is a company that can retain organizational knowledge and improve its workforce. Organizational leaders of today, managing multi-generational workforces, possess the opportunity to utilize knowledge management for strategic advantage. Indeed, growth-oriented organizations increasingly rely upon knowledge-based competitive strategies in which learning, innovation and continuous individual development play crucial roles (Matlay, 2000).

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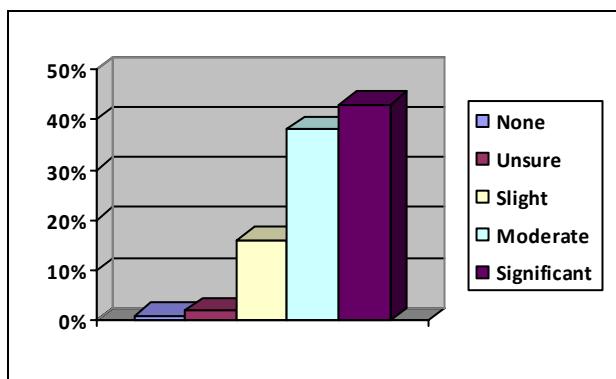


Figure 1. Organizational Impact of Changing Workforce Demographics. American Society of Training & Development & International Business Machines Learning and Changing Workforce Demographics Study. What impact will the changing workforce demographics have on your organization within the next 3-5 years?

Source: ASTD/IBM Learning and Changing Workforce Demographics Study. Closing the generational divide: shifting workforce demographics and the learning function. Source: American Society for Training and Development (ASTD) and International Business Machines (IBM). Learning and Changing Workforce Demographics Study. Lesser, E. & Rivera, R. IBM, 2006.

Helm Stevens joined the School of Business and Management faculty at Azusa Pacific University (APU) in 2000—teaching in both the Graduate and Undergraduate Programs. In 2007, she accepted the Master of Arts in Management Program Chair position. Her areas of teaching include organizational behavior, management, business, and employee development.

Prior to joining APU, Helm worked in public and private industry for 20 years, during which time she held management positions in various industries. Throughout her corporate career, Helm-Stevens received recognition and numerous awards for her work in performance improvement, benchmarking, and best practices.

Helm-Stevens received her MBA with specializations Leadership and Human and Organizational Development at Azusa Pacific University. Currently, she is in the dissertation stage of her doctorate in Strategic Management from Alliant International University. She has participated in national and international conferences, presenting and publishing on the topics of strategic business management, organizational behavior, educational leadership, and service-learning.

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Resolving Intergenerational Workplace Conflict

BY LARRY AND MEAGAN JOHNSON

FOR THE FIRST TIME IN HISTORY, FIVE GENERATIONS are working side by side. Since conflicts often arise in a multigenerational environment, it's important for managers to understand the differences among the generations.

Traditionals (born before 1945): "The Depression Babies" are influenced by the Great Depression and World War II. They are loyal and respectful of authority; stubbornly independent; dependable with a great work ethic; experienced with a lot to offer; high commitment to quality; great communication and interpersonal skills; able and willing to learn.

Baby Boomers (born between 1946 and 1964): "The Woodstock Generation" is influenced by the Sixties, the Vietnam War and postwar social change. They are interested in spirituality and making a difference; pioneers of antidiscrimination policies; well-educated and culturally literate; questioners of authority; good at teamwork, cooperation and politics; seekers of financial prosperity; not in a rush to retire early.

Generation X (born between 1965 and 1980): "The Latchkey Generation" is influenced by pop culture and may be children of divorce. They are highly independent workers who prefer to fly solo; responsible, family-focused; little patience for bureaucracy and what they consider nonsensical policies; constantly preparing for potential next job; hard-working and wanting to contribute; expect to be valued and rewarded; thrive on adrenaline-charged assignments.

Generation Y (born between 1981 and 1995): "The Entitled Generation" is influenced by technology and doting parents. They are into friends and socializing; at ease with technology and multitasking; used to hovering, involved authorities; value social responsibility; expect praise and notice; need constructive feedback routinely; want work-life balance; will stay put if their loyalty is earned.

Linksters (born after 1995) "The Facebook Crowd" is influenced by a chaotic, media-saturated world. They are still living at home; used to taking instruction; best friends with their parents; live and breathe technology; tuned in to pop music and TV culture; tolerant of alternative life styles; involved in green causes and social activism; loathe dress codes.

Resolving Intergenerational Conflicts

Here are five tips for dealing with intergenerational friction:

1. Look at the generational factor. There is almost always a generational component to conflict: Recognizing this offers new ways to resolve it. For example, Traditionals and Baby Boomers don't like to be micromanaged, while Gen Y employees and Linksters crave specific, detailed instructions about how to do things and are used to hovering

authorities. Baby Boomers value teamwork, cooperation and buy-in, while Gen X individuals prefer to make unilateral decisions and move on—preferably solo.

2. Air different generations' perceptions. When employees of two or more generations are involved in a workplace conflict, invite them to share their perceptions. For instance, a Traditional employee may find a Gen Y worker's lack of formality and manners offensive, while a Gen Y staffer may feel "dissed" when an older employee fails to respect his or her opinions and input.

3. Find a generationally appropriate fix. Work with the set of workplace attitudes and expectations that come from everyone's generational experience. For instance, if you have a knowledgeable Boomer who is frustrated by a Gen Y employee's lack of experience and sense of entitlement, turn the Boomer into a mentor. Or if you have a Gen X individual who is slacking off, give him or her a super-challenging assignment linked to a tangible reward.

4. Find commonality. Shared and complementary characteristics can be exploited when dealing with intergenerational conflict. For instance, Traditionals and Gen Y employees both tend to value security and stability. Traditionals and Boomers tend to resist change—but crave training and development. Gen X and Gen Y employees place a high value on workplace flexibility and work-life balance. Boomers and Linksters are most comfortable with diversity and alternative life styles. Gen Y employees and Linksters are technologically adept and committed to socially responsible policies.

5. Learn from each other. Traditionals and Boomers have a wealth of knowledge that younger workers need. Gen X employees are known for their fairness and mediation abilities. Gen Y workers are technology wizards. And Linksters hold clues to future workplace, marketing and business trends.

Organizations that make an effort to reconcile the differences and emphasize the similarities among the various generations will be rewarded with intergenerational harmony and increased productivity. ▶

Larry and Meagan Johnson, a father-daughter team, are partners in the Johnson Training Group. They are experts on managing multigenerational workplaces, and are co-authors of Generations, Inc.: From Boomers to Linksters—Managing the Friction Between Generations at Work.



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Strategies for Managing Talent in a Multigenerational Workforce

Jim Jenkins

A core challenge companies are facing today involves attracting and retaining a skilled workforce as the labor market continues to tighten, technology continues to evolve, and fewer foreign students immigrate to America searching for opportunities.

Because the business world has gone global by nature, HR practitioners are now more likely to recruit, hire, and retain employees who no longer fit the traditional employee model. The idea of what is considered *talent* is constantly evolving as we reach out to citizens around the globe looking for suitable employment. Thanks to recent corporate scandals, such as those at Enron and Tyco, potential candidates also want more than just a paycheck; they want to know the causes your organization supports and the level of accountability that exists from the top level of leadership on down to the front-line management.

This situation is exacerbated as companies find themselves managing four generations of U.S. workers:

- Silents (born between 1925 and 1945)
- Baby boomers (born between 1946 and 1964)
- Generation-Xers (born between 1965 and 1980)
- Millennials (born after 1980)

Companies will need to attract, motivate, and retain the best talent and embrace radical

changes in recruiting, providing benefits, and creating a corporate culture that actively demonstrates respect and inclusion for workers from all four generations. Each generation has its own characteristics, values, and attitudes toward work based on events that shaped their lives.

SILENTS

Given that they came of age during a time of great patriotism and economic expansion, Silents are considered among the most loyal workers, are highly dedicated employees, and the most risk-averse. Their values were shaped by the Great Depression, World War II, and the postwar boom years, creating a conformist society that retains a high respect for its institutions and authority. Silents possess a strong commitment to teamwork and collaboration, having high regard for developing interpersonal communications skills.

BABY BOOMERS

Baby boomers are the first generation to actively declare a higher priority for work over personal life and generally distrust authority and large systems; their values are shaped primarily by a rise in civil rights activism, Vietnam, and inflation. Characterized as more optimistic and open to change than the prior generation, Baby boomers are responsible for

the "me generation" culture and the pursuit of their own gratification, which often shows up as a sense of entitlement in today's workforce.

Because the fall of the dot-com marketplace eroded their retirement savings, many of the baby boomers now find themselves having to work longer. A recent AARP survey of 2,001 people born in this era revealed that 63 percent of them plan to work at least part time in retirement, while 5 percent said they never plan to retire, some because they like working, others because they need the money to replace lost retirement savings.

GENERATION X

Generation X is often considered a slacker generation; Gen-Xers vocally question authority figures and are responsible for creating the

Millennials, also referred to as Generation Y, are the first global-centric generation, having come of age during the rapid growth of the Internet and an increase in global terrorism.

work/life balance concept. Born in a time of declining population growth, this generation of workers possesses high technical skills and more independence than the prior generations.

Because Gen-Xers place a lower priority on work than on family, many company leaders from the Baby-boomer generation assume these workers are not as dedicated; however, Gen-Xers are willing to develop their skill sets and take on challenges and are perceived as very adaptive to job instability in the post-downsizing environment.

MILLENNIALS

Millennials, also referred to as Generation Y, are the first global-centric generation, having

come of age during the rapid growth of the Internet and an increase in global terrorism. They are among the most resilient in navigating change while deepening their appreciation for diversity and inclusion.

Having seen significant gains in technology and an increase in educational programming during the 1990s, the millennials are also the most educated generation of workers today. Additionally, they represent the most team-centric generation since the Silents as they have grown up at a time during which parents programmed much of their children's lives with sports, music, and recreational activities to keep them occupied while their boomer parents focused on work.

A major influence from boomer parents is their willingness to work hard and set goals to achieve the lifestyle they want and share many of the common values of patriotism and family from the Silent era. At times, they appear more demanding than previous generations.

STRATEGIES FOR HR PRACTITIONERS

As these four generations continue to interact, companies can no longer assume that high pay, basic medical benefits, and a 401(k) will secure the top talent. As more Silents retire, Baby boomers seek postretirement careers, Gen-Xers demand challenging but balanced work assignments, and millennials expect high perks in exchange for loyalty and technological savvy, HR practitioners must find creative ways to recruit and retain talent.

Reinforce Your Company's Mission Through Messaging and Roles

Though these multigenerational workers all have varied needs and desires, the one constant among them is that each needs to

understand what your company stands for and why your company is in business. Being clear about your company's mission is a vital step toward rallying everyone to work together. As HR practitioners, you play a key role in communicating the importance of the work your company does and that collaboration and teamwork are key to both the organization and every individual's success. Work with your leadership at every level to get this message out loud and clear.

One way to do this is to have every division, team, or project create its own mission statement. Of course, it goes without saying that these statements must be aligned with the overarching company mission statement. Any perceived contradiction between mission statements will create confusion among employees. Make it clear that every group, team, and project works toward a common mission and that every role in your company must ultimately be tied back toward fulfilling that mission. This is extremely important now that we have more workers who are concerned with making more than just a paycheck; regardless of what generation people are from, every employee needs to understand your business purpose and how you go about fulfilling that goal.

Leverage and Track Employee Strengths

Most companies hire a person for a particular function and then neglect the remainder of their capabilities, which can result in increased turnover when people are denied challenges that utilize their many talents and strengths. Knowing that both Generation X and Y are going to remain on payrolls well into the next 30 to 50 years, companies need to possess full knowledge of the many competencies employees offer and find ways to leverage them in future assignments. Create a systematic

approach for detailing what everyone has to offer so you can harness these skills as you evolve what you bring to market.

Knowing that younger workers want more challenges is a crucial step toward long-term retention. If you're unwilling to identify what people have to offer and marry that with their career goals, you could easily find yourself in a constant search for talent. And knowing that within the next ten years there could very well be some kind of worker shortage, this could leave your company vulnerable to future markets.

Reenergize Your Compensation and Benefits

Companies must approach compensation, benefits, and incentives to satisfy the needs

As HR practitioners, you play a key role in communicating the importance of the work your company does and that collaboration and teamwork are key to both the organization and every individual's success.

of each generation's unique perspectives, attitudes, and values about work.

Be flexible regarding benefits. For instance, as more people retire later in life, many will want more time off as opposed to increased compensation. Younger people may want more flexibility in their careers and assignments that foster new skill sets they can apply later in their careers. For older workers, consider giving them research assignments and offer paid sabbaticals where they can engage in learning programs of interest to them.

Don't assume that everyone loves your current health plan or your total benefits package or that they have such high value for employees that nothing more needs to be offered to employees to keep them motivated, loyal, and high-performing. Many companies

now offer onsite health facilities and nutritionists as part of their benefits packages, as well as flexible hours, alternate work schedules, and telecommuting.

Giving full medical benefits to older workers who decide to work part time, experts say, can be an effective way to hang on to skilled employees and can be cheaper than bringing in new workers who must be trained. According to surveys by Watson Wyatt and others, many older workers, particularly those who opt for part-time work, look for companies that provide "bridge" medical coverage until Medicare kicks in.

A great way to get people to work together across the generations is to provide them with an opportunity to educate each other about each generation's own history, characteristics, milestone events, culture, language, and norms.

Generation X is the first generation to prepare for retirement without Social Security. They realize they can't depend on the old pension system, so expect them to look for companies that offer 401(k) plans that provide matching dollar amounts to employee contributions.

Expand Your Communications Strategies

Most companies rely too heavily on one strategy for corporate communication. By making the same message available in multiple formats (thus increasing the number of times you communicate a message), you'll find the way to reach these audiences and have them assimilate the new information.

When communicating major policies or issues, consider making use of multiple modes of communication to effectively reach your

employees. Silents and baby boomers may appreciate being told verbally about changes in policy or procedures, whereas Gen-Xers and millennials may prefer the use of e-mail, instant messages, or corporate broadcasts.

Conduct Generational Information Awareness/Sharing Sessions

A great way to get people to work together across the generations is to provide them with an opportunity to educate each other about each generation's own history, characteristics, milestone events, culture, language, and norms. Rather than talking at your people, have representatives from each age-based generation put together programming to educate people and facilitate dialogue.

Make Mentoring a Constant

As your more established and experienced workers head toward retirement, develop strategies to ensure knowledge transfer and capturing your organizational memory.

The more structure you can lend to your mentoring program to create knowledge transfer, the better. First, determine younger employees' goals and developmental needs, and then pair them with older, more experienced employees to create cross-organizational dialogue among generations.

Consider various mentoring models, which can include one-on-one mentoring sessions, group mentoring programs, senior leadership discussion panels, and a "speed-mentoring" program where employees sit across from company experts to ask questions. Other companies now bring in their more experienced and senior staff into the on-boarding process for new and younger employees and have them enter into coaching relationships

that begin with the initial hiring period and can last up to the first full year of employment. This is a great strategy to retain more experienced workers by giving them a fresh assignment beyond their normal responsibilities while also contributing to the retention of younger employees by giving them more direct attention and professional development opportunities earlier in their career.

No matter what you choose, mentoring can become part of the employment life cycle to ensure that a company's history and knowledge continues from one generation to the next.

Actively Engage in Succession Planning

With a large population of employees becoming retirement-eligible in the next five to seven years, companies cannot afford to put off succession planning. To allow the most experienced and senior talent to depart without formally developing processes to facilitate knowledge transfer puts many organizations at risk with a slightly reduced workforce.

HR practitioners need to ensure their companies engage in a process where experienced workers review the current procedures, policies, guidelines, and customer data and determine which are still valid and which need updating. Don't assume that your experience, knowledge, and wisdom are being handed down by natural transition; make sure you develop a program that captures the knowledge gained from your most experienced and tenured staff.

Another element of succession planning also involves actively embracing new technologies and enhances processes for managing how the work actually gets done. Hosting events such as an Innovation Summit to actively acclimate people to the evolving

work conditions is a proactive measure toward keeping people meaningfully engaged in their work. To deny the rapid rate of the evolving global marketplace is to actively prepare for extinction. Whether you conduct these events quarterly or biannually, it's important to make use of such events to showcase the creativity and talent for managing change inside the organization.

Create a Diverse Training Operation

Companies that offer little in the way of training will surely struggle to retain their top talent because many generational workers

HR practitioners need to ensure their companies engage in a process where experienced workers review the current procedures, policies, guidelines, and customer data and determine which are still valid and which need updating.

now realize the value of having a cadre of transportable skills and talents.

Older workers may not fear technology as many report; they just gravitate toward technology from a different vantage point and often require more patience as they begin to adapt. And although younger workers are more adaptive, they may lack the depth of understanding and sense of history older workers often bring to the table, requiring organizations to create training centers that accommodate people with varying skill sets and approaches to learning.

One way to ensure successful knowledge transfer is to recruit some of your more tenured employees to bring their expertise into your training organization and pair them up with staff who are more technically inclined. Additionally, develop a process that goes

beyond the classroom or online experience where employees receive additional coaching and support beyond the initial training. This means of follow-up ensures a successful knowledge transfer and creates continuing dialogue among the generations at work.

A final element for your training outfit requires you to remember that retention starts with the on-boarding process. Remember that career planning is something everyone wants to know about once they cross the threshold onto your payrolls and that every orientation program needs to address the goals and aspirations of your workforce from day one.

Remember that career planning is something everyone wants to know about once they cross the threshold onto your payrolls and that every orientation program needs to address the goals and aspirations of your workforce from day one.

Train Yourself and Your Managers to Develop Strong Interpersonal Skills

Executives and managers should develop interpersonal skills to foster relationships with employees. A leader's primary responsibility is ensuring that everyone in the organization understands that "working together" is not negotiable, while at the same time creating a respectful, open, and inclusive environment where workers of all ages and cultural backgrounds can openly share who they are without fear of being judged or changed. The tendency is to assume that in order for others to be successful, they have to think or behave like us. As we are now more global than ever before, current leaders must rethink their views and remain open to new ways of doing business, as some of the old models for success no longer apply.

Leaders must remain open to new ideas and encourage innovation from everyone and provide constant feedback to shape and guide the company's strategic vision. Leaders should avoid projecting their own expectations about work and remain open to different perspectives based on generational attitudes.

With the variety of multigenerational employees in today's workplace, companies can no longer abide by traditional rules of leadership and management. Companies can achieve real strategic advantage by embracing the diversity among generations to create a flexible work environment that keeps people productive regardless of age.

Promote Diversity and Inclusion

No matter how you view it, diversity has become a true business imperative. As we are more global than ever before, companies need to proactively address how to maintain their existing markets while entering new ones with a highly inclusive and respectful corporate culture.

Younger workers in particular are more cause-oriented than ever before, and so your corporate culture must be reflected in your advertising, your Web presence, and in how you make a difference beyond making a mere profit. We know that increased cultural diversity brings the potential for greater creativity, better decision making, and more efficient ways of doing business. However, to manifest that kind of agility, you must have an environment that values the differences and celebrates them in a powerful way.

Companies that take on diversity to merely give it lip service among their leadership ranks ultimately get found out when workers realize that there truly is no sense of respect or honoring of the many skills they bring to the

organization. Even your more tenured employees will see through a thinly veiled attempt to simply try and manipulate metrics rather than develop a dynamic culture that willingly fosters respect.

Ask What It Takes to Retain Talent

Many companies today are applying multiple strategies to retain the top talent. They change their pay structures, improve coverage programs in their benefits, offer more flexible work schedules, and allocate increased funds for training, but some still find that their talented people are leaving their payroll. They spend a lot of time and effort combing through research studies, analyzing research studies, and relying on consultants to create solid retention strategies and find that nothing truly works.

Instead of looking to outside sources and other companies' data to develop retention strategies, use the simple and most effective approach to find out what it will take to keep your most talented people in your organization: ask! Finding out what attracts and keeps talented employees in your company is a simple process—it involves asking direct questions and documenting the answers each person provides—on an individual level. Companies can ask four simple questions to ascertain what's needed to retain the top talent:

1. What is it that attracted you to want to work for our company?
2. What do you need or want to continue your career with our organization?
3. What things can our company stop doing to retain more employees?
4. What things can our company start doing to retain more employees?

Many assume that people want more challenging work assignments. That's not always the case, and other factors may be present. For example, providing challenging work assignments to a struggling single parent can result in excessive stress and conflict as the parent has less time to spend with his or her child. A cash-bonus program to increase sales results can cause people to become more aggressive in meeting goals, resulting in physical exhaustion, lack of attention to details, and both unhappy employees and dissatisfied customers.

The bottom line to retaining the top talent is to have an ongoing dialogue with employees at all times and ask the right questions to get good responses. Whether it's by electronic surveys, focus groups, or one-on-one interviews,

The bottom line to retaining the top talent is to have an ongoing dialogue with employees at all times and ask the right questions to get good responses.

the only way to know what employees want is to ask them directly. It's also important to not do this anonymously. While a person's immediate supervisor may not ask the above questions directly, managers need to know what their employees want, so make sure they receive this feedback and can work their staff to develop career-development plans to satisfy some of the major needs and wants of their staff.

By asking people these direct questions and educating them more in how you develop your corporate culture, you'll be building loyalty.

Stay Current on Generational Issues

Ultimately, HR practitioners need to stay current on generational issues and trends. Many

organizations are finding that managing a multigenerational workforce has replaced many of the traditional discussions regarding gender simply because the idea of four generations on one payroll is a relatively new phenomenon. In fact, the number of books on the subject has tripled in the last year, and there are more and more academic studies being done to examine the impact of the combined mix of the generations at work.

And don't forget there's also a new generation that's now in elementary and junior high schools today, developing its own values and needs and perceptions about the world and work. If you haven't talked to a child lately, now's the time to engage in a meaningful

dialogue with today's youth as they will one day enter the global business arena, and your company will certainly want to leverage their talents and skills.

Although we can't predict the future of how these multigenerational employees will work together, what we can do is learn to create meaningful dialogue and recognize that these differences do exist. Our organizations must adapt to working with them and be highly flexible in how we approach the work we do. HR is truly where much of this dialogue can start, and by constantly promoting, celebrating, and dialoguing around the generational mix, you can do much to secure a viable future for the companies you support.

Jim Jenkins is founder and president of Creative Visions Consulting, a consulting firm that supports CEOs, midlevel managers, and front-line supervisors—leaders at all levels of an organization—in developing their leadership potential. He is an author, speaker, and coach and has worked with such organizations as Booz Allen Hamilton, AT&T, and Wells Fargo. For more information, visit www.cvc-inc.com.

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Audit departments can leverage the varied talents of different age segments in today's workplace, while avoiding the potential for interpersonal clash.

PAUL MCDONALD
EXECUTIVE DIRECTOR
ROBERT HALF MANAGEMENT RESOURCES

ILLUSTRATION BY
GARY HOVLAND

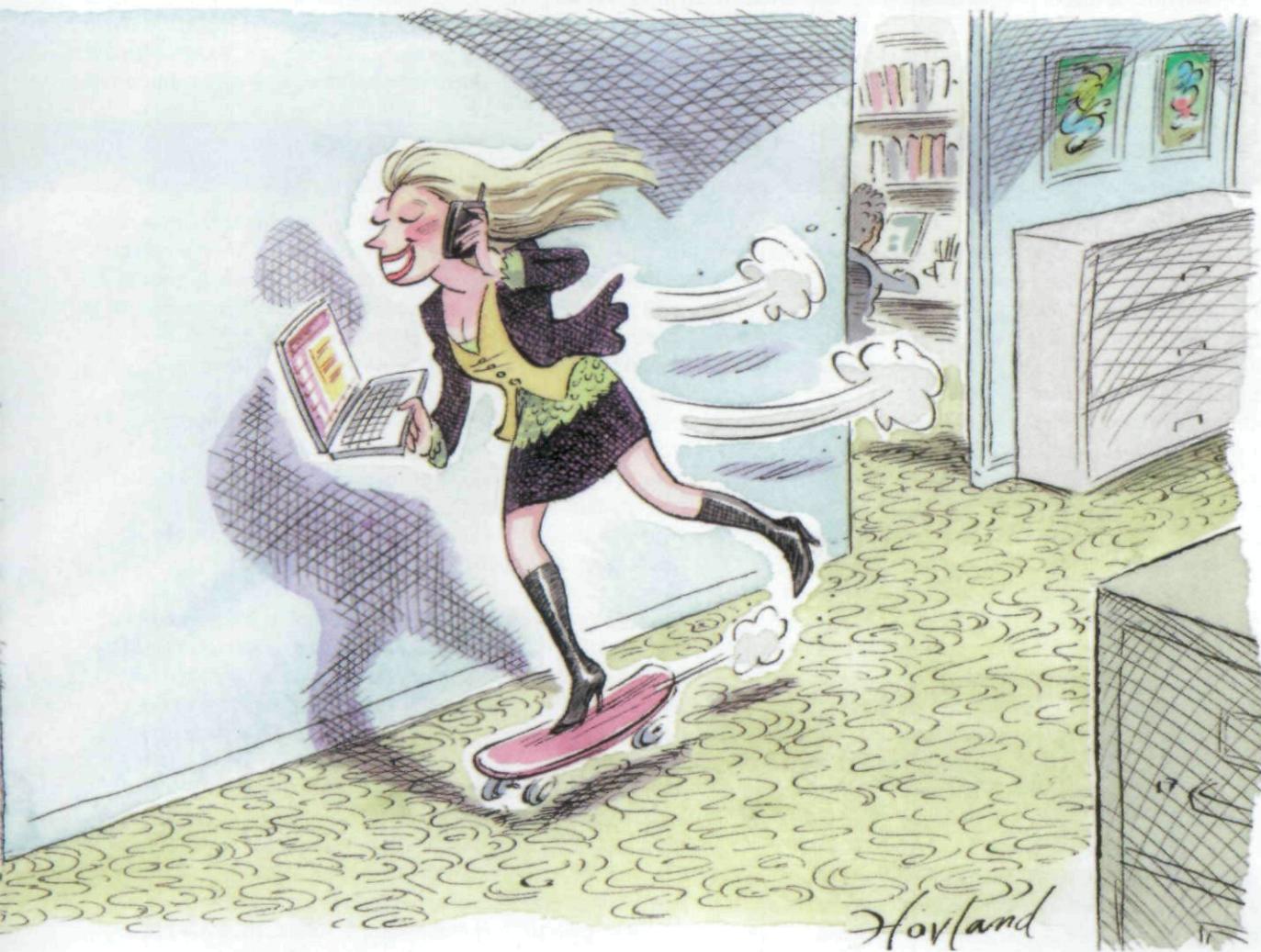
The Multi



TODAY'S WORKPLACES HAVE BECOME GENERATIONAL MELTING POTS. Trends such as delayed retirements, second careers, and increased longevity mean that the age spectrum of workers is wider now than ever before.

The generational ground-shifting occurring in workplaces around the world has not bypassed internal audit departments. In the course of a typical day or week, internal auditors are likely to interact with a diverse array of professionals

generational Workforce



from as many as four generations. And whether auditors find themselves at the oldest or youngest end of the age spectrum — or somewhere in the middle — they're likely to encounter some generational potholes in their interactions with colleagues.

Demographic experts generally point to four generations that are active in the global workforce: traditionalists, baby boomers, Generation X, and Generation Y — the newest addition on the corporate ladder. The differences among these groups go well beyond birth periods. Experts maintain that each generational cohort has been shaped by unique historical, social, and cultural events; as a result, each has distinct preferences, work styles, and professional goals. In addition, there are indications that workers from each generation respond to different sets of motivators and rewards and seek to derive varying experiences and benefits from their jobs.

Although this generational brew makes for a lively and diverse mix of perspectives and personalities, it can also create friction in the workplace as members of different groups seek to carry out a common

By encouraging intergenerational understanding and cooperation, internal audit groups can improve their ability to thrive while taking advantage of the distinct talents and strengths of every team member.

mission while embracing often conflicting values, work styles, priorities, and viewpoints. Working with people who seem to approach their professional obligations differently can initially seem problematic, and even unsettling or irritating. But when audit practitioners resolve to make these workplace relationships more than merely superficial, transactional ones, there are profound opportunities for learning and growth on both a personal and professional level. For its part, management also should recognize that changing workplace demographics can affect productivity and morale in either

a positive or negative way. By encouraging intergenerational understanding and cooperation, organizations as a whole and internal audit groups, in particular, can improve their ability to thrive while taking advantage of the distinct talents and strengths of every team member.

A GENERATIONAL PRIMER

Generational profiles provide broad outlines that can be useful in trying to understand what motivates members of various groups. While it helps to be aware of generational attributes, auditors should keep in mind that even when supported

Understanding Gen Y

As the oldest baby boomers ease out of the workforce in the years ahead, members of Generation Y — also known as the Millennial Generation — will become an increasingly large and vital segment of the corporate world. They constitute the labor pool from which companies will draw most of their employees in the coming years. As a result, much attention has been given to attracting and retaining workers of this generation, who frequently have been characterized — whether fairly or unfairly — as “high maintenance.”

Although some say Gen Yers frequently have been maligned in the media and by older colleagues, they also have their share of often-prominent supporters. For instance, writing in their *BusinessWeek* column of Sept. 27, 2007 (“Generation Y’s Bad Rap”), much-admired former executive Jack Welch and his wife and co-columnist, Suzy Welch, defended Gen Y, saying: “Overwhelmingly, we’ve found Gen Yers to be hardworking, entrepreneurial, startlingly authentic, refreshingly candid, and wonderfully upbeat.”

To learn more about why Gen Y elicits such strong and often varied views, Robert Half International, in conjunction with Yahoo! HotJobs, surveyed more than 1,000 of the most senior members of Gen Y — those between 21 and 28 years of age — to study their professional priorities. Several tips derived from the survey, *What Millennial Workers Want: How to Attract and Retain Gen Y Employees*, may be helpful to employers and managers.

Offer Attentive Management Contrary to what some may think, Millennials are not an aloof generation. They’re sociable and eager to engage with those around them, especially their managers. Raised on instant communication, video games, and frequent parental input, Gen Yers are accustomed to direct, ongoing supervision and guidance from authority figures. They seek a similar relationship with their bosses, looking to them for almost constant feedback.

For audit departments, this means that the CAE or an auditor’s direct supervisor should not reserve feedback for an annual or twice yearly performance evaluation. Instead, they should offer Gen Y employees a steady stream of communication about performance.

Show Them the Money Although Millennials have a variety of job-related expectations, salary ranked as the top consideration in deciding whether to accept an offer. Because Millennials are accustomed to instant results, managers may have greater success making them an attractive offer up front, rather than offering a lower salary with the possibility of a raise or bonus down the line. In fact, this may be a necessary step for any audit department intent on attracting the most talented professionals in a difficult hiring environment.

Emphasize Career Development Millennials want to make a contribution to their employers; in return, they want help

by extensive surveys and research, these traits are, at best, generalizations. Professionals should avoid jumping to conclusions solely on the basis of someone's generational identity. Numerous factors in addition to birth era also shape how others think and behave, such as race, gender, ethnicity, geographical considerations, and socioeconomic background.

With this caveat in mind, demographers generally attribute specific traits to the generational groups currently active in the workforce:

- **Traditionalists.** Born before 1946, members of this generation typically value loyalty, discipline, respect for authority, and a traditional approach toward work. They believe in paying their dues and are accustomed to a seniority-based system and a command-and-control approach to management.
- **Baby Boomers.** Born between 1946 and 1964, these individuals belong to a generation that comprises about 40 percent of the U.S. workforce. Boomers have long been a dominant presence — not only in the labor force, but in society overall. Generally

ambitious, career-oriented, and accustomed to intense competition for jobs, boomers range in age from 44 to 62, with many at the peak of their careers. Boomers are likely to be found in senior-level leadership positions, such as chief audit executive (CAE). They desire to remain connected to the workforce and make intellectual contributions as they near retirement age.

- **Generation X.** Composed of individuals born roughly between 1965 and 1979, members of this generation generally place a premium on work-life balance, growth opportunities, and good relationships with supervisors and colleagues. Gen Xers are between the ages of 29 and 43. They generally seek autonomy, versatility, and self-direction in their careers. They tend to distrust corporations and other institutions, having watched their parents experience downsizing and job insecurity and having endured similar career experiences themselves. These professionals may be more likely than others to leave the workforce or change careers — often pursuing entrepreneurial ventures —

if they feel their current jobs lack meaning or purpose or fail to offer them the flexibility they need to reconcile competing personal and professional priorities.

- **Generation Y.** Numbering nearly 80 million in the United States, Generation Y — also known as the Millennial Generation — is broadly defined as those born between 1979 and 1999. The youngest members are still in elementary school, while the oldest are in their late 20s. The much-studied, much-discussed Millennials typically value autonomy and reinforcement in their jobs, as well as workplaces that are fun, informal, and promote collegial relationships. Because this generation grew up using personal computers, cell phones, and other electronic devices, its members tend to be highly proficient with technology. At best, Gen Y members have been depicted as eager and tech-savvy, requiring that work be both enjoyable and challenging. At worst, they have been characterized as an over-stimulated, high-maintenance generation hooked on instant gratification. This

achieving their career goals. Internal audit departments can enhance their appeal to these workers by showcasing perks such as in-house training and mentoring programs, rotational opportunities, reimbursement for tuition and professional fees, and paid time off for professional development activities, including pursuing certifications.

Offer Challenging, Diverse Assignments Gen Yers crave challenge and change. After all, they have been exposed to numerous enrichment activities and hobbies from the time they were babies. They also grew up with a high level of stimulation — TV, video games, the Internet, and myriad extracurricular activities — and will disengage quickly if they're not challenged.

Gen Y professionals may be more likely to thrive if they're given opportunities to stretch their skills and develop multiple competencies. For example, they're likely to prefer a series of short-term roles on several different audit projects, as opposed to being immersed in one engagement for an extended period. They also might be attracted to employers that offer rotational programs or allow auditors to work with clients in various industries and business units.

Focus on the Work Environment Survey respondents ranked working with a boss they can respect and learn

from as the most important aspect of the work environment. Rounding out the top three responses were "working with people I enjoy" and "having work/life balance." And while Gen Yers have a reputation for being tethered to technology, they place a surprisingly high value on personal interactions with co-workers.

The takeaway for managers: Make sure the workplace is structured to encourage plenty of the "face time" that Gen Y professionals enjoy. This could mean arranging work groups in open, connected seating areas that facilitate easy communication or creating more opportunities for employees to socialize during and after work. Pleasant break rooms or cafeterias, monthly staff lunches, and opportunities to gather away from the office can go a long way toward keeping this group engaged and productive.

Promote Balance Employers will encourage longer tenures and greater loyalty if they offer perks and programs that support Gen Y's desire for balance. Nearly three-quarters of those surveyed said they are concerned about their ability to balance a career with personal obligations. To improve retention of younger workers, companies may need to rethink traditional career paths and timetables for advancement and offer options such as job sharing, telecommuting, compressed workweeks, or flexible schedules as appropriate.

group also has been accused of having a sense of entitlement and unreasonable expectations about work. Like Gen Xers, Gen Y professionals are more likely to put family and personal pursuits before career and desire flexible schedules that will help them achieve the balance they seek.

As these demographic sketches suggest, some significant "cultural" differences exist among generations, and it's easy to see how conflict might arise between a traditionalist supervisor accustomed to a conventional 50-plus-hour workweek and a Gen Y internal auditor wanting to work fewer hours in the office in favor of more time spent telecommuting. The Gen Y professional might prefer to fill out the workweek by logging late-night hours from home or multitasking on the weekends by building an Excel table while watching a golf tournament on television.

While companies have become more cognizant of the need to better understand and address potential generational clashes — often at the policy level by implementing telecommuting or flexible schedules, for instance — audit professionals can also take steps to minimize generational differences.

GETTING TO KNOW YOU

Internal auditors can foster better and more generationally diverse relationships in the workplace by avoiding the natural tendency to cluster with co-workers based solely on age. Although it may seem like work to develop a comfortable relationship with individuals who are dissimilar from themselves, employees who do so will likely find the experience personally enriching and career-enhancing.

Rather than simply offering co-workers of different generational groups a cordial greeting when passing them in the hallway, approach them one-on-one and seek to discover what can be learned from each person. If Gen Y workers hear, for instance, that a traditionalist team member has a reputation for compiling impressively concise audit reports or delivering audit findings with confidence, they should ask for the individual's advice in these areas. They might even request to shadow a more experienced colleague on an engagement or ask him or her to walk them through a report. Not only do younger internal auditors stand to accelerate the learning curve by tapping into the expertise of seasoned

team members, but this strategy can be an effective way for Millennials, in particular, to defuse any generational tensions that may exist between them and older workers and replace these tensions with constructive relationships.

Internal auditors might also look for opportunities to participate on project teams that bring colleagues from different generational groups together. For

instance, by joining a group that is tasked with recommending a new software package for the department, professionals can learn more about one another's individual strengths while getting to know each other better on a personal level.

RESPECT FOR OTHERS

Professionals of every generation want to know that colleagues respect their

Rules of the Road for Gen Y

Just as Generation Y has certain expectations of companies and managers, the corporate world also has some for this newest generation of workers. The following guidelines may be useful to young professionals trying to find their footing in today's workforce.

Listen First Even if a younger worker thinks he or she has the perfect solution to an office conundrum, it's best to hear colleagues out and gather all the facts before speaking up. While auditors shouldn't shy away from making contributions, no one wants to come across as the office know-it-all who has the answer to every problem even before a co-worker has finished explaining it.

Accept the "Pay Your Dues" Mentality The age-old philosophy of paying one's dues may eventually go the way of the dinosaur, but in most audit environments it still exists. No matter how impressive their educational background or internship experiences, auditors will be expected to gain certain experiences before receiving the most desirable assignments. This widely accepted practice doesn't mean managers should sentence new recruits to nothing but repetitive, mind-numbing work either, but fledgling auditors should accept the need to prove themselves and work their way up to projects of increasing complexity and importance.

Dress the Part Auditors should show appropriate deference when it comes to wardrobe choices and appearance. Although most managers understand the appeal of casual dress and may even have children who sport tattoos, this doesn't mean the boss will tolerate extreme choices in clothing and personal adornment.

Reserve Judgment On occasion, Gen Yers may find that older colleagues are not as knowledgeable in some areas as they are. For instance, they may not know how to test a particular IT control or create a macro in Excel. Their shortcomings in one area, however, do not mean they have nothing to teach. Gen Y employees should modestly offer their expertise and remain open to opportunities to glean knowledge from experienced colleagues in other areas.

Show Rather Than Tell It's fine to tout one's knowledge and skills during the interview, but doing so on the job will likely stir resentment from more experienced colleagues. Auditors should allow their work to speak for itself. In time, managers and co-workers will take note of an employee's thoroughly completed audit reports or proficiency with risk management software.

Help Them Manage You Although managers realize that employee preferences for supervision and feedback vary considerably, they can easily get caught up in their daily responsibilities and overlook individual needs. If auditors find their supervisor is not as attentive or responsive as they'd like, they should approach him or her to ask for additional guidance or performance critiques. Bosses generally strive to adjust their management style to employees, but they may need occasional prompting to deliver targeted and timely feedback.

knowledge and experience. It's common, though, for generational groups to feel pitted against one another. Often there are perceptions — whether valid or not — that one group devalues another's abilities, and this promotes generational ill will.

In the most harmonious workplaces, respectful attitudes flow up and down

Experienced professionals are likely to find that younger workers can help them gain a new perspective on their work and may have valuable skills to share with their mentors.

the generational spectrum. Professionals interact with an open mind and view any differences they encounter, not as obstacles, but as opportunities to broaden their perspectives.

While experienced members of the team should certainly be recognized for their hard-earned expertise, they also need to acknowledge that even the greenest staff-level auditors bring valuable skills and perspectives to the table. For instance, Gen Y professionals may have more up-to-date technology knowledge than colleagues who are 30 years older, or the younger worker may have greater enthusiasm for taking ownership of some aspect of an audit project, no matter how small the responsibility.

Seasoned auditors may need to take the initiative to break the generational ice with younger colleagues. A simple open-ended question about how a current engagement is going can pave the way for knowledge sharing and mutual assistance. Most importantly, perhaps, veteran practitioners can improve their ability to relate to Gen Y, in particular, by recalling their own mind-set in the early days of their career. Didn't they also believe that they had the necessary preparation and knowledge to make a difference right away? And didn't they also expect — or at least hope for — a certain amount of professional challenge and respect right from the start? Gen Y may not be that "different" after all.

MENTORING MATTERS

Mentoring is another tool that can be highly beneficial in breaking down generational barriers. Through mentoring, younger professionals gain the counsel of an experienced colleague who can share technical know-how and offer guidance on the subtleties of office protocol, preferred work methods, and interpersonal

mentor Gen Y professionals; or by informally — and diplomatically — dispensing advice and counsel to them, these relationships may develop naturally.

AIR DIFFERENCES

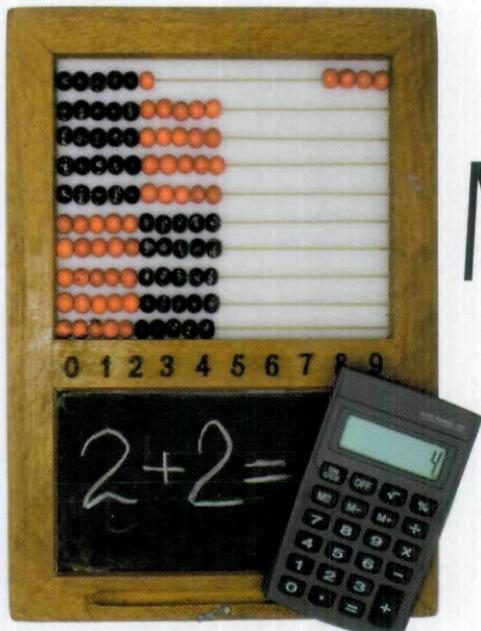
When generation-based differences in work style or attitude seem to be a persistent source of difficulty with colleagues, both parties should try talking it out rather than resigning themselves to conflict. Sometimes the solution is simple and relatively painless. For example, a boomer CAE may decide to implement more flexible work options in response to requests from Gen X and Gen Y auditors. In return, these staff members are likely to increase their productivity and do a better job of keeping team members informed of their progress on a project or engagement. Changing policies or benefits to make them more responsive to workers' needs should not be viewed as making concessions to any one employee group, but as a means to a mutually beneficial end. These actions can help companies and audit departments improve their ability to attract top candidates, increase retention, and boost productivity and morale among existing staff.

A COMMON FOCUS

Developing a greater awareness of the characteristics of a multigenerational workforce allows audit practitioners to take better advantage of the varied perspectives and talents of colleagues from each group. But even when audit departments are true generational melting pots — bringing together each of the various age segments — their common goals and shared mission as auditors should always remain the central focus in their interactions. By building on this connection and ensuring that team members understand their individual roles and responsibilities in carrying out the group's overall mission, auditors should come to realize that their professional commonalities are greater than their individual differences. And finding common ground is always the first step toward better understanding and more productive relationships.

To comment on this article, e-mail the author at paul.mcdonald@theiia.org.

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Training the Multigenerational Workforce

Judith M. Greig



uch has been written in this and other publications about the challenges of managing a workforce made up of Baby Boomers, Generation X, and Generation Y, each with its own life experiences, goals, and expectations. Similar challenges also face educators and corporate trainers as they design and deliver

Greig, a Baby Boomer and formerly executive editor of Defense AT&L, has a master's degree in English and a certificate in adult teaching from Cambridge University, U.K. She has taught at Wayne State University, Mich., and Northern Virginia Community College.



The answer to a robust blended learning program is not to match the delivery to the people or to match it to the content, but to match to both.



continuing education and professional training programs for the multigenerational classroom. In "The Boomer-Millennial Convergence: Designing Instruction for the Learners of Tomorrow" (a paper presented at the 2006 Interservice/Industry Training, Simulation, and Education Conference) Vertex Solutions, Inc.'s Janice Ware, chief learning strategist, and Rosemary Craft, senior instructional designer, write that "creating a learning environment that will meet the varied needs of all three generations will challenge the skill and talent of all members of the DoD and Federal learning community."

Who Are These People?

A few caveats. First, Baby Boomers, Gen X, and Gen Y have been the subjects of many sociological studies, independently and in comparison with each other. Stereotypes are dangerous—we all know people who don't fit the traits, goals, and values of the generational group to which they belong. The descriptions I give below are attributable to no one expert's research findings but reflect recurring characteristics from many studies and articles. Second, authorities vary in both the date ranges they assign to the generations and in nomenclature: In some studies Gen Y and Millennial are simply different names for the same group; in others, the Millennials are considered a fourth generation. The term I have chosen for this article is Generation Y. And third, time is a continuum, so the generational boundaries are blurred. The late Boomers, for example, are less like the early Boomers and more like the early Gen Xers ... and so on.

Baby Boomers: It's Been a Hard Day's Night

The Boomers, born between 1946 and 1964, are the generation whose senior members are just now reaching retirement age. The approaching loss of their skills is a much-documented concern for the Department of Defense and for public and private sector employers in general. But as would-be retirees examine their 401(k) statements in the uncertain financial environment of 2009, many will undoubtedly feel they have no choice but to delay retirement; and some who have already retired may re-enter the workforce

and require catch-up training or even retraining for a different career. It's reasonable to suppose, then, that Boomers will be a presence in the workplace and the corporate training arena longer than previously anticipated.

Boomers are the children of hard-working parents—in the case of the early Boomers, parents who lived through one or two world wars and the Great Depression. This group is characterized on the one hand as a bunch of self-indulgent whiners, but on the other as hard workers, driven to succeed and willing to put in long hours, often to the detriment of family life.

Boomers lived the evolution of increasingly sophisticated workplace, home, and personal technology—some of them were responsible for creating it (think Bill Gates and Steve Jobs)—but they went to school in the "chalk and talk" educational era, when the instructor stood at the front of the classroom and lectured, illustrating points on the blackboard; students took notes and occasionally asked or answered questions. In the educational arena, the language lab was probably the only interactive learning technology to which many Boomers were exposed. The result is that however gadget-oriented some of them have become, given a choice, Boomers (especially older Boomers) are more likely to opt for an instructor-led classroom than, say, listening to a podcast of the same material.

Generation X: Like I Care?

Gen Xers, born between 1965 and 1980, are often described as the disaffected latch-key children of the workaholic Boomers. Many Xers grew up in two-career or single-parent families, and because they had to fend for themselves from a pretty early age, they tend to be self-reliant. Gen Xers saw—and themselves also paid—the price of their Boomer parents' 60-hour weeks; in contrast, they want a healthier balance between work and homelife. As for comfort with technology, they're the kids who programmed the VCR for their parents and grandparents.

Chalk and talk was certainly part of Gen X's educational experience, but so to an increasing extent were cooperative learning approaches in which students worked actively in groups. Computers in schools may have been a rarity for early Gen X, but by the time the last Xers were high school juniors and seniors in 1997, 70.4 percent of K-12 students were using computers at school, according to the U.S. Department of Education's National Center for Educational Statistics.

Generation Y: Look at Me! Look at Me!

Born between 1981 and 1989 (or 1999, depending on whose numbers you like), to late Boomers and early Xers, Gen Y are the workplace newbies. Sometimes unkindly dubbed "trophy kids," they grew up in an environment of constant attention, feedback, and encouragement. "Good job" rang in their ears as a constant refrain. Yers are used to being the center of at-

tention, entertained by adults, the TV, computer games, and their K-12 teachers. Ware and Craft write that Gen Y "does not make the same distinction between 'learning' and 'fun' that earlier generations made ... [and] will not be satisfied to sit in a classroom listening to lectures. For them, learning needs to be hands-on, interactive, collaborative and fun."

More than tech-savvy, plugged-in Yers are tech-dependent. They've never known a world without computers, cell phones, handheld video games, e-mail, and instant messaging. They are the ultimate multitaskers, sending text messages while they listen to music or podcasts they've downloaded to their MP3 players and check out their friends' Facebook pages or blogs.

Gen Yers value speed and practicality. Why waste time typing "How are you?" or "That was really funny," when you can get the message across with "r u ok" (punctuation optional) and "ROFL"? Yers are most likely of the three groups to not just embrace but to expect various distance-learning options. However, having been raised in the parental spotlight, they also need the kind of one-on-one attention that mentoring provides.

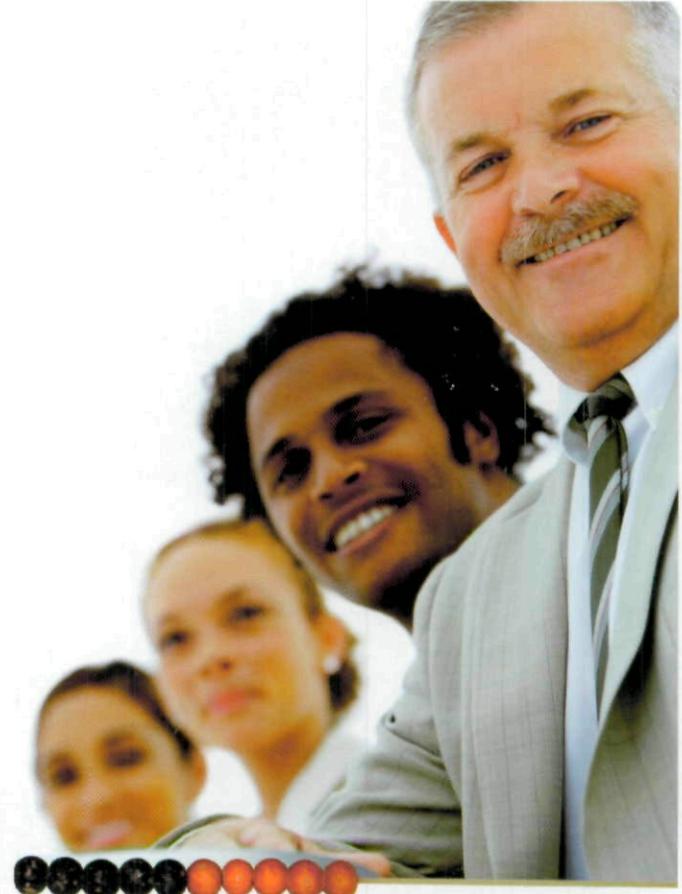
Blended Learning for the Blended Workforce

Is it as simple as classrooms for the Boomers and Web 2.0 glitz for Gen Y? Absolutely not. The need is for blended learning programs that provide a multimodal combination of classroom and online learning assets to "meet the varied needs of all three generations" (to quote Ware and Craft).

The Defense Acquisition University got with the program early. DAU offers courses leading to acquisition career field certification and training to meet continuing education requirements, both of which are offered in a variety of modes: classroom; distance learning, where course material is offered in various online formats; and hybrid, which employs both online and classroom learning. DAU also provides informal learning assets for workforce members on the job—the DAU Acquisition Community Connection online communities of practice and the AT&L Knowledge Sharing System (AKSS).

"Courses are designed to accommodate the power of different learning preferences where and when we can," said Dr. Judith H. Bayliss, chief education advisor at DAU, in conversation with other DAU faculty members.

Bayliss is skeptical of the generational model. "I think it's easy to fall into broadly written and ineffective stereotypes," she said. "People have amazing similarities and amazing differences, and those things are frequently quite independent of age or generation. We have to try and meet everybody's needs. How certain people prefer to receive information may not necessarily be how certain others prefer to send it, so we may have some mismatches, but I think that has more to do with just being people than the decade of birth."



As instructional designers face the challenge of serving the sixty-somethings, the twenty-somethings, and everyone in between, they have a broader array of choices than ever before.



Dr. Owen Gadeken, DAU professor of acquisition management, agreed: "You can wrap yourself around a never-ending dilemma if you start dividing people up into all sorts of different classifications. I do think some knowledge of generational differences is useful, and over the course of an entire program, you strive for enough diversity that you hit as many of the hot buttons as you can."

Others—of whom Alvin Lee, DAU professor of acquisition management, is one—believe that the real key is to match the delivery medium to the content. Some material can be presented effectively online, other material relies on classroom interaction, and still other requires one-on-one



"We have to try and meet everybody's needs. How certain people prefer to receive information may not necessarily be how certain others prefer to send it, so we may have some mismatches."

Dr. Judith H. Bayliss, DAU chief education advisor

mentoring—and an individual's or a generation's learning preferences do not affect that.

"I think we—that is, training organizations—need to make a concerted effort to look at what actually works versus what feels good or is the current trend," he said.

The answer to a robust blended learning program is not to match the delivery to the people or to match it to the content, but to match to both.

Learning Online

Distance learning offers well-documented advantages: the ability to reach more people more cost-effectively and to provide location-independent, round-the-clock learning



opportunities. Forward-looking educational institutions are finding more and more innovative ways to exploit the capabilities technology offers and to extend their distance learning media.

Dr. Chris Hardy, director of the DAU eLearning and Technology Center, is excited at the possibilities offered by the rapidly evolving online learning world of virtual classrooms, mobile learning, and the range of Web 2.0 capabilities—many of which DAU is actively exploring and incorporating into curricula.

Hardy believes that there are some generationally related comfort level-issues with learning technology. The younger

workforce members, he said, "come connected." They already operate in the world of Twitter, Facebook, blogs, and wikis; and having been used to the rapid proliferation of social networking technology, they accept change almost without noticing it.

Many of the older workforce members need to be brought up to speed on Web 2.0 applications. The point isn't that they are technology-averse, but, as Bayliss pointed out, that Boomers—and to a lesser degree, Gen X—didn't have the opportunity to grow up in a culture with all of today's delivery modes. "We need to change the culture and make people want to become more proficient with the technology," Hardy said.

That culture change applies to those who teach as well as those who learn. "We are doing a lot of onsite technology training with our faculty right now," Hardy added. "DAU is moving towards integrating the formal learning of the certification courses and continuous learning courses with the informal learning of AKSS, the communities of practice, and Web 2.0 initiatives. So [when] a course manager develops a course, and he is responsible not only for the classroom and continuous learning module content, but also for all the content that resides in the knowledge-sharing space."

Learning in the Classroom

While it's important that trainers be conversant and, to some degree, competent with the technology available in order to support the integration of learning assets, good training programs recognize that they must leverage the strengths and comfort zones of trainers as well as learners, and for some, that comfort zone is the classroom. Gadeken is one of those people. "I grew up in the classroom, and that's where I am most comfortable and where DAU is going to get the best work out of me," he said.

Today's classroom training is no longer just chalk and talk (or as Gadeken put it, "sage on a stage"). In Gadeken's opinion, DAU has very successfully transitioned most of the classroom experience into facilitated team-learning opportunities that use innovative approaches. Gadeken himself successfully uses simulations, including Looking Glass, Inc.[®], a large-scale management simulation that DAU licenses from the Center for Creative Learning in Greensboro, N.C., for use as a capstone exercise in the 10-week PMT 401 Program Manager's Course. (Gadeken described the experience in "Through the Looking Glass," *Defense AT&L*, September-October 2004.)

Gadeken facilitated another creative exercise in experiential learning when he took students in the PMT 352B Program Management Office Course to Gettysburg to do a hands-on examination of two "projects": the Union (Army of the Potomac) project and the Confederate (Army of Northern Virginia) project ("Learning Program Management on the Battlefield at Gettysburg," *Defense AT&L*, January-February 2007).

While these and other learning exercises and games may have nothing directly to do with defense acquisition, they are carefully chosen to teach principles that apply in acquisition. There is a value to taking acquisition out of the picture. Gadeken explained that it's easier to get to the learning objectives when people aren't worried about getting the "right" answer and when they don't get sidetracked into discussions of how their own organizations do certain things.

The team approach in the classroom serves a number of important functions. Depending on the type and level of the course, it can bring Boomers, Gen X, and Gen Y together in an arena where, in order to be successful, they must work cooperatively and respect each other's differences. It can also, in some courses, provide opportunities for the more experienced to mentor the less experienced. "I think there's a tremendous social motivational need to do classroom training," Hardy said.

Learning: A Shared Responsibility

Bayliss, Hardy, Gadeken, and Lee all stressed that the responsibility for learning is not one-sided. Course designers should respect and accommodate, as far as is practical, various learning preferences; but learners need to be flexible too. Content has to be covered, and it may be that the best way to present a certain part of it is not a particular student's preferred way to learn. It's impossible to please everyone all the time. And—a reality of the training world—the best course design and all the learning options in the world won't reach a student who isn't motivated but is simply meeting a requirement.

"If I'm forced to take a course and I don't want to, I'm going to go through the material as quickly as I can, take the tests, and immediately flush the knowledge," Lee pointed out. "But if I'm interested in something, I don't care about the way the content is presented because it's important to me, so I will do anything I have to in order to master it."

Motivation is rarely under the control of any training program, and trainers need to accept the fact that they are just not going to reach some students, however they choose to present the material—and it's not their fault or the fault of the instructional design.

As instructional designers face the challenge of serving the sixty-somethings, the twenty-somethings, and everyone in between, they have a broader array of choices than ever before to best match content and delivery; to accommodate a variety of learning preferences, individual and generational; and to provide learning assets enjoyable enough to win over all but the most unmotivated of learners.

The author welcomes comments and questions and can be contacted at jmgreig@onlymyemail.com.

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