

The background of the cover is a blurred photograph of an office environment. It shows several people in business attire, likely in a meeting or collaborative work setting. The image is overlaid with a blue tint and a grid pattern, suggesting a modern, structured workplace.

EMPLOYEE AND LABOR RELATIONS  
STUDENT WORKBOOK

SHRM<sup>®</sup>

SOCIETY FOR HUMAN  
RESOURCE MANAGEMENT

Creating Synergy in a  
Four-Generation Workplace

*By Rita Rizzo, MSc, CMC*

## PROJECT TEAM

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# Case Study Series on Creating Synergy in a Four-Generation Workplace

## INTRODUCTION

This case study is based on generational differences that occurred in a metropolitan children's museum. Employees from four generations (Traditionalists, Baby Boomers, Gen-Xers, and Millennials) experienced communication challenges, differing value systems, disparate approaches to museum work, and interpersonal conflict while using a team approach to introduce the community's children to the arts.

To enable participation in this case study, divide the class into four small groups, each group representing a different generational perspective. The groups will negotiate to come to consensus on issues related to planning and scheduling work activities to optimize productivity; communicating effectively across generations; and utilizing the strengths, experiences and potential of each worker to enhance customer service. Student assignments will be labeled as Generational Assignments and are inserted throughout the case study.

## TARGET AUDIENCE

Undergraduate students

## TIME NEEDED TO COMPLETE CASE STUDY

Three modules of 45-50 minutes.

## LEARNING MATERIALS REQUIRED

Student Workbook and instructor's guide.

## LEARNING OBJECTIVES

By the conclusion of the case, students will:

- Explore the preferred communication methods and styles to use to be effectively heard and understood in each of the four generations.

- Describe the primary work ethic characteristics of each of the generations represented in today’s workplace.
- Anticipate and proactively respond to generational differences that affect workplace performance and productivity.
- Understand the inter-relationship between internal customer service across generations and how to use this understanding to meet organizational goals.
- Focus on goals and behavior rather than personality in conflict situations.
- Collaborate with others to create and sustain a work environment that capitalizes and celebrates generational diversity in a manner which results in service excellence to the organization’s internal and external customers.
- Discuss the evolution of America’s generations over the 20th century and be aware of the historical events that affected each generation.

For optimum effectiveness, each generation to be discussed should be represented in the classroom to contribute their views to the case study. It would be appropriate to ask students to invite their grandparents, great grandparents, children, parents, and/or friends to attend class to ensure that members of each generation are present.

Alternatively, the instructor can invite guests to attend who would assist in leading each of the small group discussions. A Traditionalist CEO, a Baby Boomer manager, a Gen-X supervisor, and a Millennial technician would bring a good representative sampling of real-world experiences to the room.

There are eight members of the Green Globe Team featured in this case. The following table is provided to familiarize learners with the main characters.

### The Green Globe Team

NAME	AGE	GENERATION
Kate	82	Traditionalist
Hans	35	Gen-X
Anna	48	Baby Boomer
Robert	19	Millennial
Sam	54	Baby Boomer
Raja	27	Millennial
Jan	65	Traditionalist
Ian	40	Gen-X

In this case, participants must assume the role of a person from one of the four generations present in today’s workforce. The case is set in a fictional museum, the Children’s Museum, and is loosely based on situations experienced at an actual metropolitan museum. The case is carefully structured to avoid creating defensive responses from participants, although there is always a risk of heated discussions when any sort of diversity and inclusion issues are discussed.

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# Module 1: The Children's Museum— A Place of Tradition

Established in 1902 and located in a major metropolitan area, the Children's Museum is a place where children from preschool to high school can engage in educational experiences through exhibits, interactive programs and the museum's impressive collection. The museum encourages children to develop an understanding of and respect for themselves, others and the world around them by exploring cultures, the arts, science and the environment. Currently, the museum is undergoing an expansion that will nearly double the exhibit space and make it a "green" museum. The new museum wing will be built with environmentally friendly construction materials and will be used, in part, to house a unique "green globe" exhibit that promotes conservation and innovation in ecological preservation.

The museum employs an international staff and there is significant emphasis on inclusion in the organizational culture. Recently, however, a new diversity issue has come to the forefront, and both management and staff feel tested in dealing with the emerging challenge with the same level of integrity, fairness and equity that are time-honored at the museum. For the first time since its inception, the museum has become a four-generation workplace. Ranging in age from 18 to 82, all employees are becoming cognizant of the differing needs, skills, beliefs, values, perspectives and paradigms of each generation. Simmering under the organization's radar for more than a decade, recognition of these differences became unavoidable when meetings started taking place to plan the exhibits and programs for the Green Globe space of the new wing.

## GOING GREEN TURNS FACES RED

The museum's president, Maya Zam, unveiled the initial plans for the new wing to the museum's staff with the enthusiasm characteristic of the children that the expansion would serve. "The new wing will be home to nine permanent exhibits and two special exhibits," she explained as she projected the architect's three-dimensional designs onto the big screen behind her. At the end of the virtual tour through the 11 exhibit spaces, Ms. Zam invited comments and questions from the museum's staff.

"It is really big, huge in fact, when you consider that we are nearly doubling our floor space with this expansion," volunteered a tour guide from the middle of the room. The speaker, a woman named Kate, was the museum's most tenured employee. At 82, Kate remained alert and focused although her gait had not kept up with the quickness of her wit. "And where are the seating areas for each exhibit space?"

"Seating?" asked Hans, a 35-year-old curator. "Why would each space need seating? The children need to be active while they are here. It's great exercise for them. I like

the wide-open spaces we will have in the new wing. Children can move quickly from one activity to another without impediment.”

“And what are their parents, grandparents and great grandparents who bring them to the museum supposed to do when they get tired?” Kate asked. “You have a point,” Maya responded. “We need to assure that everyone who comes to the museum has their basic wants and needs met while they are here. I am going to assign a team to each of the exhibit areas to critique the plans for each space and offer suggestions for any modifications to the current plans to make them more generation-friendly.”

“Should we consider the needs of both our internal and external customers, museum visitors and the staff of each area when considering customer wants and needs?” queried Anna, a 48-year-old production assistant. “Please do,” Maya answered. “Are interns welcome to participate on the project teams?” asked Robert, a 19-year-old student. “Of course,” replied Maya. “We should have representation from each generation to create an environment that is conducive to people of all ages.”

## THE GREEN GLOBE PROJECT TEAM

A week later, the project team for the Green Globe exhibit area met for the first time. Kate, Anna, Hans and Robert were pleased to find themselves participating. Four more members rounded out the project team of eight. Sam, age 54, Raja, age 27, Jan, age 65, and Ian, age 40, settled in for what was sure to be a spirited debate.

“Age is just a number,” said Ian. “I am not sure why a generational focus is necessary to plan the Green Globe exhibit. People of all ages need to participate in saving our planet.” “You say that now,” Jan chimed in, “but you may see it differently when you get to be my age. I think that each generation has a slightly different role and responsibility in restoring and maintaining the ecosystems that support life on Earth.”

“I brought my laptop so we can do a little research on the generations,” said Raja. “Instead of voicing our personal views, why don’t we start by finding out how the four generations represented on this team differ?” With that, Raja hooked her laptop up to the conference room’s projection system and began a search for the needed information. “Here’s a good place to start,” Raja said as she clicked on the *Generations Toolkit* found on the SHRM website.<sup>1</sup> A brief synopsis of the generations was provided:

### **Traditionalists (also known as the Silent Generation, Veterans, Matures)**

**born before 1945:** This generation’s members prize loyalty and prefer a top-down approach to management. They view information as something that should be provided on a need-to-know basis.

**Baby Boomers (born 1946-1964):** This generation’s members are characterized by their optimism and idealism. They achieved success by challenging authority and creating open lines of communication.

**Generation X (born 1965-1980):** This group tends to be more skeptical than members of other generations. Many were latchkey kids or the products of broken homes and grew up in a time of political and corporate scandals. As a result, they often distrust institutions and prize individualism.

**Millennials (also known as Generation Y, Echo Boomers, Net Gen, Nexters, Generation Why) born 1980-1994:** Even as this generation enters the workforce, their personalities are already emerging. For starters, these young workers recognize that not only will they change employers throughout their career, they will change the type of work they do.

“It looks like some generations go by a lot of different names,” Sam commented.

“Yes, and there is some difference of opinion among experts as to the exact date ranges that compose a generation,” replied Jan.

“I hate to ask a dumb question,” Anna chimed in, “but exactly how do you define what constitutes a generation?”

Raja located an online dictionary<sup>2</sup> and read the definition aloud. “A body of living beings constituting a single step in the line of descent from an ancestor; a group of individuals born and living contemporaneously; a group of individuals having contemporaneously a status (as that of students in a school) which each one holds only for a limited period.”

“So as SHRM refers to generations in its descriptions, a generation is a cohort of people born into and shaped by a particular span of time who are influenced by the events, trends, and developments occurring in their formative years,” summarized Ian.

## **GENERATIONAL ASSIGNMENT 1: GENERATIONAL DIFFERENCES**

Please form four small groups representative of the four generations: Traditionalists, Baby Boomers, Gen-X, and Millennials. Include students and guests of each generation in the group into which they self-identify. Once your group is organized, please answer the following questions.

- Do you believe the descriptions given for your generation is accurate? Please state the evidence that supports your answer.

- Do you believe the descriptions given of the remaining three generations are accurate? Please state the evidence that supports your answer.

## WE MEET AGAIN

Two days later, the team met again to continue their work. “I was thinking that maybe we could get more done if we stopped meeting and communicated by e-mail,” said Hans.

“Whatever happened to the ‘high tech, high touch’ work environment where we integrate technology with face-to-face interaction?” Jan wondered.

“It’s just that we aren’t very organized,” Hans responded. “Our team recommendations are due in two weeks, and so far we haven’t even looked at the exhibit design.”

“I think we have to become a generationally responsive team before we can create a more generationally friendly space,” said Anna. “Once we understand each other better, we can use the shared knowledge to create a more inclusive exhibit.”

“Maybe this will help,” Raja offered. “Last night I was doing some additional research on generational differences, and I found that SHRM conducted a study on how to remove generational barriers to productivity at work.”

### **Bridging the Generation Gap at Work<sup>3</sup>**

*August 30, 2004*

ALEXANDRIA, VA—A new survey finds that 40 percent of human resource (HR) professionals have observed conflict among employees as a result of generational differences. In organizations with 500 or more employees, 58 percent of HR professionals reported conflict between younger and older workers, largely due to differing perceptions of work ethic and work/life balance.

“Organizations recognize that the expertise and unique perspectives of a diverse work force can contribute to the success of a company,” said Society for Human Resource Management (SHRM) President and CEO Susan Meisinger. “HR professionals can help managers and employees use communication and training to remove generational barriers to enhance the effectiveness and productivity of their diverse work force and improve the overall success of the organization.”

SHRM’s “2004 Generational Differences Survey” asked HR professionals about employees from different generations working together, the quality of their work, types of conflicts, retention factors, and strengths and weaknesses of each generation. The survey identified four generations: veterans, those born before 1945; baby-boomers, born from 1945 to 1964; Generation X (Gen-Xers), born from 1965 to 1980; and Nexters (also known as Millennials, or Generation Y), born after 1980.

Overall, HR professionals are generally positive about relationships among the generations, with half saying they work effectively together and 27 percent saying the quality of work frequently improves with a variety of generational perspectives. However, 28 percent of HR professionals said conflict among generations had increased over the last five years and 33 percent expect it to increase over the next five.

Nearly a quarter of HR professionals say differences over acceptable work hours are the primary sources of conflict, which reflects different perceptions of work ethic and benefits like telecommuting and flextime. Frequently, these complaints came from older workers about younger employees' willingness to work longer hours. Past SHRM research finds that work/life balance is among the most important job-satisfaction factors for younger employees and is typically not as important among older workers.

HR professionals use many methods for managing a diverse work force, according to the survey. A vast majority said communicating company information in multiple ways, including e-mail, one-on-one discussions and meetings is extremely effective. In addition, HR professionals said that training managers to address generational differences, offering team-building activities and developing mentoring programs to encourage workers of different generations to work together also are effective in managing an intergenerational work force.

Forty-two percent of HR professionals said their organization had lost Gen-Xers and Nexter employees who believed they could not advance in their careers because veterans and baby-boomers held top positions. HR professionals reported implementing succession-planning programs, offering training or increasing compensation in order to retain younger workers.

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“There is a lot of good information here,” said Anna. “Maybe we should come up with a communication plan for our team that incorporates some of the suggestions in the survey.”

“Done,” said Ian. “Let’s put a cross-generational team together and come up with a communication structure that respects our diverse needs and gets this project underway.”



## Module 2: Generations Evolve

The following Monday, the Green Globe Team met for three hours to continue their work to create a generationally friendly exhibit area.

“Based on our discussion of the generation gap at last week’s meeting, Kate, Sam, Raja, and I came up with a communication plan for our team,” Ian reported.

- For the Traditionalists on our team, we will meet face-to-face twice a week for an hour each time. Since our time is short, we will have a time-lined agenda and remain on task.
- For the Baby Boomers, we will participate in a daily online chat at 9:00 each morning to answer questions and exchange ideas.
- For the Gen-Xers, we will e-mail reminders of meetings and make all individual assignments by e-mail. Remember to use bullet points instead of paragraphs whenever possible and change the subject line on each e-mail to make it easier to find them after they have been filed.
- For the Gen-Y’s, we will send copies of the design plans for our exhibit space to everyone. Each team member will modify the designs individually and then post their modifications on the server for review. You should notify the other team members by e-mail when your design is posted.

The group agreed to the plan and spent the remainder of the session getting to know each other and the generations better.

“As we consider the floor plan of our exhibit space, we should also plan the activities, displays and programs that need to fit into the space. We will need lots of activity space where children and their families can conduct green experiments,” suggested Sam.

“But we also need a fair number of educational exhibits, since they will include basic information about global warming and ecosystems,” said Hans.

“I think we should install interactive computer stations throughout the space so that children can gain information about each exhibit interactively,” said Robert.

“All children do these days is push buttons!” Kate exclaimed. “We need to give them a chance to dig in and get their hands dirty!”

“This is why we need to do our work individually,” said Raja. “Let’s use the rest of our time becoming familiar with the trends and developments of each generation and then combine perspectives, just like we did to create our communication protocols, to design the space.”

“You’ve been researching again, haven’t you?” asked Jan.

“Yep,” replied Raja, “and this time I found some charts that detail the evolution of American generations<sup>4</sup>.”

### The Evolution of American Generations<sup>4</sup>

Adapted from SMART Consulting

Generation	G.I.	Silent	Baby Boomer	Generation X	Generation Y
Birth Years	1902-1924	1925-1945	1946-1964	1965-1980	1981-1994
Coming of Age Years	1927-1942	1947-1967	1968-1986	1987-2002	2001-2016
<b>TECHNOLOGICAL INFLUENCES</b>	<b>Birth Years</b>	<b>Birth Years</b>	<b>Birth Years</b>	<b>Birth Years</b>	<b>Birth Years</b>
Equipment	Machine	Assembly Line	Assembly Line	Computer	Personal Computer
Communication	Telephone	Radio	Radio	Television	Internet
Scientific Moment			Atomic Bomb	First Man on Moon	Cloning
Educational Source	Elders	School	School/College	Sesame Street	Cable TV
Educational Attainment	12th Grade	H.S. Diploma	Post H.S.	College	?
Energy	Electricity	Fossil Fuel	Fossil Fuel	Nuclear	Nuclear
Transportation	Boat	Automobile	Automobile	Airplane	Jet
<b>SOCIETAL INFLUENCES</b>	<b>Coming of Age Years</b>	<b>Coming of Age Years</b>	<b>Coming of Age Years</b>	<b>Coming of Age Years</b>	<b>Birth Years</b>
War	WWII	WWII	Vietnam	Desert Storm	Distant Country
Youth Movement	End of Child Labor		Kent State University	Tiananmen Square, Beijing	Suicide & Child Killings
World Event	Lindbergh Flight	Pearl Harbor	Assassinations; Jack Kennedy, Martin Luther King, Jr., Bobby Kennedy	Release of Nelson Mandela	End of Apartheid; 9/11
Political Climate	Prohibition	Big Government	Big Government	Conservative	End of Busing and Welfare Reform
Immigration	White European	White European	White European	Diverse	Restrictions
Political Change Catalyst	War	War	Protests/Strikes	Whistle Blowers	Media
Reference Point	Family	Patriarch	Parents/Peers	Peer	Gang
Favorite TV Show	N/A	Father Knows Best	Star Trek; MASH	Seinfeld	The Simpsons; The Cosby Show
Parenting Style	Protective	Spoilers	External Child Care	Give to Grandparents	Co-Parent w/ Partner
Peer Personality		Seen But Not Heard	Seen and Heard	Do, Say Now, Think Later	Say/Play It Loud!
Nutshell Phrase	All Dressed Up and No Place....	Bring the Boys Home!	Make Love Not War	Duh! Just Do It!	It's a Gift!
Musical Genre	Classical	Bebop/Jazz	Rock 'n Roll, R&B	Rap, Heavy Metal	Rap, Hip Hop
Social Conscience	Holocaust	Women's Suffrage	Civil Rights, Women's Lib	Live Aid	

Generation	G.I.	Silent	Baby Boomer	Generation X	Generation Y
Birth Years	1902-1924	1925-1945	1946-1964	1965-1980	1981-1994
Coming of Age Years	1927-1942	1947-1967	1968-1986	1987-2002	2001-2016
<b>BUSINESS INFLUENCE</b>	<b>Coming of Age Years</b>	<b>Birth Years</b>			
Career Objective	Corporation	Gold Watch	Self-Employment	Executive Suite	"To Be a Star"
Economic Environment	New Deal	Depression	Boom	Recession and Recovery	Global
Customer Service Mindset	Internal-Union	External-Paying	Serve Yourself	Whack	Internal
Change Rate	Steady	Explosive	Explosive	Turbulent	Constant
Business Growth	Steady	Affluent	Explosive	Downsizing	Recovery
Competition	Companies	Companies	Co-Worker	Global	Global
Primary Worker	Defense	Blue Collar	White Collar	Entrepreneur	Service Provider
Industry Base	Defense	Manufacturing	Information	Service	Retail
Goal	Support Troops	Production	Wealth	Viability	Viability

### GENERATIONAL ASSIGNMENT 3: THE EVOLUTION OF GENERATIONS

Please return to your generationally specific small groups and review the information on the charts that pertains to the generation you represent. The Traditionalist group will consider two columns, the G.I. and Silent Generations, which together form the Traditionalist generation. Answer the following questions:

How do the technological, societal, and business influences listed affect the perspectives, values and work paradigms of the generation you represent? Record your answers below and be prepared to present your work to the entire class.

The members of the Green Globe Team conducted the same activity. Their responses appear on the next page, so please don't look ahead in the workbook until you are instructed to.

	Technological	Societal	Business
Perspectives			
Values			
Paradigms			

The Green Globe Team formulated the following responses to their analysis of the chart:

### Traditionalists

	Technological	Societal	Business
<b>Perspectives</b>	On-the-job training is valued; formal education not needed. Automation simplifies life, communication can occur quickly at a distance.	Patriotic, defensive posture; protect women and children; government protection for all.	Beat the competition; produce only the best; unions give the little guys clout.
<b>Values</b>	Earning mentality; budget, invention makes life better; controlled consumerism, respect authority.	Regulate morals and habits; patriotic; respect elders; fight for what is right; family with male head.	Customer is king; "poor but proud"; high productivity, efficiency.
<b>Paradigms</b>	Work hard, invent; job for life; sequential team work; boss/company is right; work to live.	Everyone should work; brawn counts as much as brain when earning a living; union protection needed.	Retirement is a reward; hard work leads to wealth; loyalty to employer.

### Baby Boomers

	Technological	Societal	Business
<b>Perspectives</b>	American might; sequential team work; college is needed for a good job.	Women and minorities need rights; children have rights; protest brings change.	Entrepreneurship; plenty for all—jobs, money, entertainment.
<b>Values</b>	Do your part; buy now, pay later; use your imagination; individuals are as important as the group; working hard and nonstop is good.	From responsibilities focus to rights focus; war is unfair; government isn't to be trusted; love valued over hate; make your voice heard; be involved.	Self-service; lifelong learner; competition within teams for top performance; information is power; instant gratification.
<b>Work Paradigms</b>	Blue collar makes as much money as college-educated; workers' rights need to be respected; live to work.	Women have the right to work; children can thrive in child care; strength in numbers.	Get a desk job; work smart and get rich; invest well; innovate to get ahead.

## Gen-X

	Technological	Societal	Business
<b>Perspectives</b>	Computer is king; college is a birthright; exploration is expansive.	Help the vulnerable; don't rock the boat; share power.	Anyone can succeed through perseverance; must survive uncertainty; think globally.
<b>Values</b>	Do it faster; mobility is desirable.	America protects all globally; care for the elderly; take risks; diversity is valued; speak out against injustice.	Keep it simple; recovery is strengthening; life is unpredictable; stay viable.
<b>Work Paradigms</b>	Technology skills are a must for all; organize and streamline operations; less is more; groups need to function as teams.	Coworkers are as important as bosses; save and conserve everything.	Work your way up the ladder; flatter organizations are better; kill bureaucracy.

## Millennials

	Technological	Societal	Business
<b>Perspectives</b>	The world is at your fingertips; fastest is best; people merge with machines.	Every person for themselves; friends replace families.	Individual excellence is rewarded; uncertainty is a constant; contribute globally.
<b>Values</b>	Information is valued; research brings answers; save the planet; be safe.	Life is fragile; elders share family responsibility; be heard and noticed; be healthy; realism.	Be on the fast track; worker satisfaction is king; consumerism drives the economy.
<b>Work Paradigms</b>	I can do it by myself; I need good technical resources; virtual teams.	No free lunch; telecommute; self-directed work.	Individual achievement; get it done; nothing is impossible; earn to spend.

“Well, this sheds a lot of light on why we see this project from such varied perspectives,” said Anna. “I see a lot of overlap among the generations. I think we should capitalize on this common ground and utilize the differing experiences of our team members to examine every aspect of our current situation.” With that comment, the meeting ended, and the team members worked as a virtual team for the next two days to make modifications to the exhibit design.

At the team meeting three days later, each member came with notes on the design modifications they had composed and reviewed in the previous two-day period. Much to their delight, they quickly came to a consensus on Ian’s plan that proposed two experimental activity areas; two educational displays, each equipped with a computer bank to add interactivity to each exhibit; a video arcade area where children and adults could sit side by side and compete in planet-saving games; seating around the entire perimeter of the exhibit area; and ample open space in the

middle of the exhibit to accommodate large groups of school children working as a team to create green projects.

“We have almost a week left to address the needs of internal customers, those who will staff and manage the exhibit area,” said Robert. “When we meet again next Monday, we should bring any data we have gathered to help in this phase of the project. Why don’t we each put a list on the server summarizing the work preferences of each generation that will affect worker satisfaction?”

“I’m going to need some help on this assignment,” said Sam. “Can we work on this in pairs instead of individually?”

“Sure,” responded Robert. “Let’s develop four lists, each representative of a different generational perspective.” The group decided that the workplace satisfaction issues up for discussion would be work schedules, team structure, leadership style, bonus and reward strategies, motivational needs, and work/life balance considerations.

Raja, who had now become the group’s designated researcher, provided this fact sheet to each team to help jog their thinking about the work satisfaction factors of each generation.<sup>5</sup>

## GENERATIONAL DIFFERENCES MAKE ALL THE DIFFERENCE: TACTICS AND MESSAGES TO USE FOR DIFFERENT AGE GROUPS

### Traditionalists

Traditionalists are loyal workers who believe in sacrifice, hard work, duty before fun, and adherence to rules and regulations. They are a dwindling generation that is no longer well-represented in the workforce. For them, work is an obligation and many members of this generation remain in the workplace out of economic need.

Traditionalists appreciate strong leadership of the “control and command” variety, and tend to feel that “no news is good news” when it comes to performance feedback. Many in this age group appreciate the opportunity for part-time work, project work, or casual employment opportunities. They like the opportunity to return to work after prolonged leaves of absence, and wish for their experience and expertise to be respected.

**Recruiting tactics and messages:** Jobs that offer a stable income, healthcare benefits, and non-strenuous jobs and work schedules appeal to this group of employees. An aging-friendly workplace is important to Traditionalists with reasonable accommodations such as special lighting, foot stools, ergonomically-correct seating, magnified computer screens, wrist supports on mouse pads, and an easy-to-navigate workspace. They experience satisfaction from a job well done and appreciate a keen separation between work and home to protect their privacy and schedule.

### Baby Boomers

Boomers were born to post-WWII parents who raised them to believe that they could be and do anything. They are a huge generation, making up as much as 28 percent of the population and 40 percent of the workplace and were pushed by their World War II parents to achieve.

In the workplace, they seek status and will sacrifice family for advancement. They are focused on acquiring nice homes, cars and other material possessions as these are markers of success to them. They are hard workers, but their way to show how hard they are working is to put in lots of time at the workplace. This generation expects people to work at least from 8 to 5, and a really good worker will come early and leave late. There is less emphasis on what you do and more on how much time you are around.

They believe in career paths and many still have the notion that hard work and loyalty equals career success. They still do not understand job-hopping young people, and in the back of their minds believe that young people’s lack of concern over finding a company that offers a career path and some security will cause them problems.

**Recruiting tactics and messages:** Career advancement is of key importance, as are promotional opportunities and the chance to make a real difference. This is a generation of people that are desperate to do something meaningful before they retire. They want to be remembered and are enticed by opportunities to do something significant. Offer them security and career opportunities, upward mobility and status. Money is a minor enticement and they are not focused on doing their own thing as much as on gaining some sort of status. They are obedient, loyal, and easy to entice and retain with the traditional HR tools of promotion, salary and status. After all, this generation made those policies.

## Gen-X

Gen-X is a younger group and is dwarfed by the two huge generations before and after it. The core of this group is in their forties and is the thinnest generation in numbers that America has had in some time. It makes up only 16 percent of our population.

The members of this generation were raised in times of rapid social change. They lived in the era of Watergate and the time when the private lives of public officials became public. They are the kids whose mothers began working before the sophisticated child-care system we have today was in place.

Divorce was high in this generation's formative years. According to the U.S. Public Health Service, the number of all children involved in divorce increased by 300 percent between 1940 to 1980. The skeptical, realistic, blunt cartoon character Bart Simpson perhaps best portrays their generation. They are skeptical of the integrity of almost all institutions and believe they have to fend for themselves. They believe their mission in life is to clean up everyone else's mess.

Xers are one of the most diverse generations in America's history. The 1990 census found that almost 35 percent of those in the 10-29 age group were nonwhite or Hispanic.

They expect to work very hard but also to be well-paid. They do not want to defer rewards and they much prefer cash and salary to options and the promise of future promotions. This is the only generation that focuses on work-life balance. No one else really cares about that, but this generation has made it a concern for most organizations.

**Recruiting tactics and messages:** This is the generation that is skeptical of offers of security or long-term commitment. Leaders are suspect and cynicism is common. They will leave you for a nickel, as the saying goes. Offer them money, stock options and the chance to do what they want to do. They are excited by the chance to earn based on what they do rather than on what a boss says they should earn. They are to-the-point and expect to be treated that way, too. Don't be too diplomatic or try to get them excited because of who they will be working for. They don't have heroes.

## Gen Y (Millennials)

Gen Y, the large (25 percent of the population), emerging generation of 20-somethings, is very different. Their parents are acutely aware of the problems that an unsupervised latch-key environment created and they have been increasingly protected and supervised. They were taught very early to conform and to be like others.

They are a generation symbolized by “baby on board” car stickers, safety seats, air bags, superb medical care, and orthodontics. They are more likely to believe that it is possible to have a perfect world than their incredulous Gen-X elders. They are diplomatic and are taught to work out a solution to issues peacefully, not with fighting as previous generations might have done. Parents intervene on their behalf frequently and they have not been expected to take care of themselves as the Gen-Xers were.

They are concerned with government and with making sacrifices for society and community. They look for a balance between material goods and spiritual happiness. Gone is the skeptical, self-centered nature of Gen-X and the protesting and idealism of the Baby Boomers.

This is a “go do it” generation of compromisers who believe in community and group. They look up to leaders and expect guidance and some protection from them. They see a boss as a mentor and coach. They expect to be paid for what they do, not how much time they spend doing it.

**Recruiting tactics and messages:** This is a generation that values balance and moderation. They want time to be with friends. They are conformists and team players, more than any other generation, and they will be very loyal if the organization provides them with a few things: flexible schedules, the opportunity to take long periods of time (without pay) to travel or do community service, and project- or group-focused work that has measurable outcomes. They respect leaders and want someone to look up to.

#### **GENERATIONAL ASSIGNMENT 4: CONSIDERING OURSELVES**

Please return to your generationally specific small groups. List what you predict the Green Globe Team members of the generation you represent will see as potential worker satisfaction points in the following areas.

- Length of work shift and days worked per week:

- Flextime options:

- Job-share options:

- Frequency and form of team meetings:

- Preferred leadership style of team leader:

- Meaningful rewards and bonus structure:

- Strategies used to motivate workers:

- Work/life balance considerations:

# Module 3: Creating Synergy in the Four-Generation Workplace

Based on the input of the team members from each generation, the Green Globe Team generated the following worker satisfaction recommendations:

1. Twelve-hour shifts will be offered for positions that Millennial workers tend to occupy, such as IT specialists, activities coordinators, production specialists and educational specialists, while part-time, job-share and casual employment will be offered to tour guides, activities assistants, clerical support staff, volunteer staff and interns. These jobs are done mostly by students (Gen-Y) and Traditionalists.
2. Flextime options will be offered to workers in all positions in increments as short as one hour to accommodate family schedules, doctor's visits, significant events and the occasional long lunch hour with friends. This strategy is friendly to all generations.
3. Staff meetings will occur once every two weeks instead of the current weekly meeting. Virtual meetings to be held by video-conference, chat room, bulletin boards, and e-mails will keep staff informed between meetings. Meeting length will not exceed one hour.
4. Both long- and short-term reward systems will be designed to create worker incentives that are meaningful across generational lines. End-of-project bonuses and annual recognition and reward events are two examples of items that can be used as perks. Daily informal recognition (nice job, I appreciate your help, thank you) is appreciated by all workers and will become a part of the Green Globe's culture to motivate performance and make each team member feel valued.
5. Workers who choose to work 12-hour shifts will be compensated as full-time employees with full benefits. Healthcare benefits will be extended to part-time workers at an affordable cost. Workers will not be disturbed at home during leave time by workplace concerns. Employees will be allowed to work from home to accomplish tasks that don't require their presence in the workplace. Reasonable age-friendly accommodations will be made for workspaces that house Traditionalist and Boomer staff members.

The Green Globe Team members agreed that the plan had a little something for everyone in it to cultivate cross-generational synergy and enhance worker satisfaction; but Ian, always the skeptic, brought the light mood of the team to a halt by commenting, “This is all well and good, but realistically, people tend to feel most motivated at work when they get along with each other. I think we should talk about the everyday generational collisions that occur here at the museum. If we ignore the conflict points, the generational gaps won’t shrink.”

“Give me an example of the conflict points you see,” Jan prompted.

“I will give you a number of them,” Ian responded.

- When a Gen-X or Millennial person is put in a position to manage a Boomer or Traditionalist, it almost never goes well. The younger manager is often patronized or ignored by the older worker. It’s like the tail tries to wag the dog.
- Newly hired Millennial employees want to take the fast track to the top of the organization because of their great technical skills, and don’t seem to understand the concept of seniority.
- Baby Boomers impose their “workaholic” ways on others and try to guilt trip you if you work only the hours that are required.
- Traditionalists are not flexible when it comes to bending the rules under special circumstances and will actually report rule infractions to management, even if they aren’t personally affected by them.
- Boomers say they want Gen-Xers to replace them when they retire, but they seem to be too busy to mentor the emerging leaders in the organization. Information is power here, and they seem to be hoarding it.
- Some feel that Gen-Xers are too blunt and task-focused to build effective working relationships.

“Now that you bring it to my attention, I guess I have seen all of those things occur. I think all of these concerns could be addressed by a coaching and mentoring program that would help those seeking promotion to polish their cross-generational skills,” responded Jan.

“Better yet,” remarked Anna, “what if we integrated a mentoring program as part of a larger succession planning initiative? Currently state employees participate in a succession plan with the following components.” She elaborated as follows.

## **PASSING THE TORCH FROM BABY BOOMERS TO GEN-XERS: SUCCESSION PLANNING**

These eight steps involved in succession planning will help prepare for the exodus of Baby Boomers from the workplace over the next decade. The key to a seamless transfer of power involves assembling the groups named below.<sup>6</sup>

- **Competencies:** This group develops management and leadership competencies along with guidelines on using them. Representatives from each management rank will comprise this group.
- **Knowledge management/transfer:** This group studies effective ways to manage knowledge and ways to capture knowledge possessed by departing highly skilled employees and sharing it with those who will take their place. This group will be comprised of administrators and departing managers.
- **Management mobility:** This group studies ways to increase the ability of managers to move within their agency and to other agencies. The purpose is to develop the state's managerial resources and match managerial skills and capabilities with agency needs.
- **Mentoring:** This group identifies the characteristics of good mentoring and develops a program that allows departing managers to mentor incoming managers. This group is comprised of administrators and departing managers.
- **Recruitment and selection:** This group focuses on innovative recruitment and selection strategies and techniques. This group is comprised of line workers, managers and administrators.
- **Employee retention:** This group looks at steps that can be taken to better communicate what the state has to offer, make employment with the state more appealing, and encourage our highly skilled employees to stay.
- **Retiree resources:** This group focuses on an array of realistic, practical ideas and options for hiring retirees. This group is comprised of departing managers, recent retirees and administrators.
- **Staff development:** This group looks for new ways to develop and train staff to prepare them to take on new jobs and responsibilities as they replace departing employees.

## **GENERATIONAL ASSIGNMENT 5: SUCCESSION PLANNING**

Please return to your small groups and discuss how each of the strategies listed in the succession planning process would benefit members of the generation you represent.

- Competencies:

- Knowledge management/transfer:

- Management mobility:

- Mentoring:

- Recruitment and selection:

- Employee retention:

- Retiree resources:

- Staff development:

## REPORTING THE GREEN GLOBE TEAM'S RESULTS

At the next meeting of the entire museum staff, each team was asked to report their recommendations for a more generationally friendly expansion design. Raja presented the Green Globe Team's work in a multimedia presentation, detailing each aspect of their plan.

"I am more than impressed!" exclaimed Ms. Zam as she inspected their results. "I am especially pleased to see that all of the Green Globe Team members contributed to the process, found ways to work together collaboratively, and feel satisfied with their outcome. Congratulations and thanks go out to this team for practicing what they are advocating!"

Thank you for participating in this case study. We wish you every success in implementing the knowledge about generational diversity you've gained.

# Recommended Reading List

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