

A blurred photograph of an office interior with large windows. In the foreground, the lower legs and feet of several people are visible, suggesting a meeting or collaborative work environment. The overall color palette is a cool, muted blue.

EMPLOYEE AND LABOR RELATIONS
INSTRUCTOR'S MANUAL

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SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

Creating Synergy in a
Four-Generation Workplace

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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.

FACILITATION OVERVIEW

This case study requires students to assume the role of a person from one of the four generations present in today's workforce. The case study is set in a fictional museum, the Children's Museum, and is loosely based on situations experienced at an actual museum. The case is structured to avoid creating defensive responses from students who participate in the case, although there is always a risk of inflaming opinions when any sort of diversity and inclusion issues are discussed.

As the course instructor, you will facilitate the case study according to the following directions.

- The suggested answer to a question posed in a *Generational Assignment* often appears on the page following the assignment, so students should be instructed not to look ahead in their workbooks. Alternatively, the pages can be distributed individually.
- Each *Generational Assignment* requires either small group or full class discussions in response to the question(s) posed in the assignment. All small group discussions should be debriefed to obtain full group learning.
- To process small group assignments, ask each group to volunteer their answer(s), and then ask whether other groups came up with a different response. Entertain all unique responses and encourage further discussion where there is disagreement. Allow approximately 10-15 minutes of processing time for each assignment.

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

Alternatively, the instructor can invite guests to attend who would help lead 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 study. 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

FACILITATING EACH GENERATIONAL ASSIGNMENT

Below are sample responses and processing suggestions (written in italics) to cover for each of the five Generational Assignments that appear in the case study.

GENERATIONAL ASSIGNMENT 1: GENERATIONAL DIFFERENCES

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

Do you believe the description given for the generation your group represents is accurate? Please state the evidence that supports your answer.

The purpose of this exercise is to get students to think about generational diversity and encourage them to consider why differences might exist. There is no right or wrong answer to this question, but it should inspire personal involvement in exploring the topic.

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

Again, this answer is based on opinion and is intended to provoke discussion and help the groups settle in to the generational perspective assigned to their group. Any evidence provided will be primarily based on personal observation and experience. Encourage students to challenge one another's "evidence" to surface the point that generational

differences are but one influence on individual perspectives and behaviors. Additional questions to stimulate discussion include:

- Do all people see life from the perspective of the generation they were born into, or are there other factors that shape life perspectives?
- Are personal values, perspectives and behaviors influenced more by generational cohort (peers) or by parents, extended family members and teachers who hail from different generations?
- How do world events, technology and trends shape generational perspectives?
- Is the “generation gap” something that has always influenced work relationships, or is this the first time in history that four generations are present in the workplace? Does this amplify the effect of generational differences at work?

GENERATIONAL ASSIGNMENT 2: MIND THE GAP

Please return to your generationally specific small groups. Each group will answer the following questions.

Do you believe that the survey results were accurate? Why or why not?

Students may notice that the survey summarized in the article was conducted only with HR professionals. Would the results have been different if conducted with line workers or managers? Do students believe that HR strategies such as team building, a variety of communication strategies and training will create cross-generational synergy at work? How might a variety of generational perspectives improve the quality of work produced?

If you were a member of the Green Globe Team, how would you structure the team’s communications to ensure that project deadlines are met and the communication methods used will utilize the strengths and preferences of each team member?

Page 9 in the Student Workbook shows how the Green Globe Team decided to structure their communications to capitalize on generational diversity and expedite their work. The structure the team produced is one example of how teams might communicate in a manner that utilizes the skills and preferences of each generation. Any structure that students develop that uses a mix of face-to-face and electronic communication would be an acceptable response to this question.

GENERATIONAL ASSIGNMENT 3: THE EVOLUTION OF GENERATIONS

Please return to your generationally specific small groups and look at the information on the two charts that details the characteristics of 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 technological, societal and business influences 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 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.

The suggested responses to this exercise appear on pages 14 and 15 of the Student Workbook and are also shown below for your convenience.

Traditionalists

	Technological	Societal	Business
Perspectives	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.
Values	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.
Paradigms	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
Perspectives	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.
Values	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.
Work Paradigms	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
Perspectives	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.
Values	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.
Work Paradigms	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
Perspectives	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.
Values	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.
Work Paradigms	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.

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 regard as potential worker satisfaction points in the following areas.

Length of work shift and days worked per week:

Flex-time 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:

Suggested responses to this assignment are found beginning on page 23 of the Student Workbook and are shown below. Please advise students not to look ahead at the answers while responding to the assignment.

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 (Millennials) and Traditionalists.
2. Flex-time 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 emails would 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.

GENERATIONAL ASSIGNMENT 5: SUCCESSION PLANNING

Please return to your small group 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:*

There are no correct responses for this assignment. The purpose of the exercise is to encourage students to think about how members of each generation can benefit from a comprehensive approach to succession planning. Generally, Traditionalists and Boomers will benefit by leaving a legacy and serving as mentors before retiring from the organization. This provides a sense of closure and ensures that the experience and knowledge gained during their career is passed on to others and remains with the organization.

Gen-Xers and Millennials will benefit from the wisdom imparted by departing workers and will be better prepared to assume leadership positions in the organization in the future. Individualized grooming of tomorrow's leaders not only propels younger generations on their career path, but also provides continuity in the organization.

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