Succession Planning and Generational Stereotypes: Should HR Consider Age-Based Values and Attitudes a Relevant Factor or a Passing Fad?

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Authors’ note:
The views and opinions expressed in this article are solely those of the authors and in no way purport to represent an opinion, policy or position of the Washburn University School of Business, U.S. government, or Federal Labor Relations Authority.

Today’s workforce includes at least four generations that span more than 60 years. HR’s ability to work with management to cultivate a preferred organizational culture through succession planning initiatives, including recruitment, training and development, and retention programs is increasingly important to organizational success. This article explores issues relating to a generational perspective of age-based values, attitudes and norms within a multigenerational workforce and potential implications for HR in shaping organizational culture through the succession planning process.

"Managers, unlike parents, must work with used, not new human beings—human beings whom others have gotten to first."1

Through succession planning, an organization identifies and develops strategies aimed at reducing or eliminating existing or anticipated human capital gaps. Ideally, this process addresses performance, skills and/or leadership gaps expected to occur when key workers leave the organization. Succession plans may include strategies that address recruitment, training and development, performance management and retention.2 Succession plans may also include strategies that target knowledge transfer between and among workers and the organization, particularly for mission critical functions.3
In order to best structure a succession plan that addresses organizational needs, HR should have knowledge of the demographic profile of the existing internal talent pool from which successors may be developed (e.g., average worker age, education-level, gender, salary level and tenure in each department or functional area). Equally important, HR should have knowledge of the demographic profile and trends within the external talent pool from which the organization may recruit. With respect to age-based demographics, the subject of the multigenerational workplace has garnered widespread discussion during the past several years, especially in the popular media. Whether, and to what extent HR should address generational demographics, trends and stereotypes as part of the succession planning process is not widely agreed. Proponents assert that generational values and attitudes and resulting stereotypes contribute to the workplace norms and culture that HR must understand and address during the succession planning process. Others contend that issues attributed to the presence of multiple generations in the workplace are overstated and not supported by empirical research.

The multiple generations represented within today’s workforce necessitate HR's having a basic awareness and understanding of age-based values and work attitudes. Such awareness will improve HR's ability to anticipate and account for generational stereotypes when working with management to establish and implement succession planning initiatives geared towards cultivating and sustaining a preferred organizational culture.

I. The Multigenerational Workplace

During the past decade, numerous articles have been published that warn of an imminent human capital crisis initiated by the potential retirement of millions of experienced workers at or near the same time. The U.S. Government Accountability Office has reported “the loss of experienced workers could have adverse effects on productivity and economic growth.” To date, the human capital crisis has not materialized as projected, at least in terms of large numbers of retirements. Rather, studies have confirmed that a majority of those eligible to retire actually plan to continue working, primarily for financial reasons.

The decision of many older workers to delay retirement, whether for financial or other reasons, has significantly affected the demographics of the current American workforce. More than 60 years separate the oldest active workers and those who are just entering the workforce. The extent to which any particular segment of the present-day workforce employs workers representing the entire span of 60 years is unknown. What is known, however, is that workers of differing ages are active and are competing for roles, rewards and purpose as each seek to realize specific career or personal goals.

For example, a number of workers who would typically be considered to be near the later stages of their worklives are continuing to seek upward mobility opportunities and new assignments instead of slowing down. Growing numbers of mid-career workers are expressing interest in stepping back from their current scope of responsibility, be it line work, administration, management or leadership, in order to
slow the pace of their worklife and spend more time on nonwork activities. At the same time, younger workers increasingly are expecting fast-track progression into management and leadership roles. The new boss is often younger than the workers she or he manages.¹¹

Four Generations in the Workforce

Within today’s workforce, society recognizes at least four distinct groups based on age. These groups, or generations,¹² including their birth-year period, age range, and their relative size in the workforce, are depicted in table 1

<table>
<thead>
<tr>
<th>Generation/Work Group</th>
<th>Birth-Year Period</th>
<th>Age Range</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veteran/Traditionalist</td>
<td>1929-45</td>
<td>63-86</td>
<td>63 million</td>
</tr>
<tr>
<td>Baby Boomer</td>
<td>1946-64</td>
<td>44-62</td>
<td>78 million</td>
</tr>
<tr>
<td>Generation X</td>
<td>1965-79</td>
<td>28-43</td>
<td>48 million</td>
</tr>
<tr>
<td>Generation Y</td>
<td>1980-99</td>
<td>27 and under</td>
<td>80 million</td>
</tr>
</tbody>
</table>

There are two major factors that characterize a generation: birth rate, and events of the times. With respect to birth rate, a generation begins when the birth rate increases and continues while the birth rate either grows or remains steady. A generation ends when the birth rate declines.¹⁵ With respect to the times, Karl Manheim defined a generation as a group of individuals who share a similar world view, resulting from exposure to common social and historical events occurring within the same times throughout their formative years.¹⁶ Generational boundaries occur when social and historical events change such that the formative years of those born after such change(s) result in different experiences or learning.¹⁷ Not every member of a generation has necessarily personally experienced each of that generation’s defining events.¹⁸ However, all members of a particular generation are typically recognized as having a shared awareness of or an appreciation for the events common to that generation.¹⁹ In the words of an ancient proverb, “Men resemble the times more than they resemble their fathers.”²⁰

Generational Values and Attitudes

Upon entering the workforce full time, an individual has already been exposed to innumerable influences through his/her formative years, involving learning experiences from family, friends, academic and perhaps religious institutions.²¹ During these formative years, individuals are also exposed to and generally influenced by significant social events and changes, usually through popular media (e.g., current events, books, newspapers, television, music and the Internet). Additionally, many will sample or experiment with the workforce through a part-time job, internship, or volunteer activity.²² Collectively, these influences and experiences contribute to each
individual's own set of core beliefs and to his/her expectations of others. Such beliefs are values representing adherence to “specific mode[s] of conduct or [an] end-state of existence [as being] personally or socially preferable” to the opposite conduct or end-state of existence.

Psychologists and organizational behaviorists have studied values and value systems for more than 40 years. Ten predominant categories of values and their defining characteristics, as revised by Shalom H. Schwartz, are frequently cited: Universalism (tolerance, social justice, equality); Benevolence (loyalty, honesty, forgiving, responsible); Conformity (obedient, polite, self-disciplined, respectful of elders); Tradition (respectful, traditional, adhering to custom, accepting of one's position in life, humble); Security (social order, family security, duty, national security); Power (authority, wealth, social power); Achievement (influential, capable, ambitious); Hedonism (pleasure, enjoyment of life); Stimulation (daring, variety, seeking an exciting life); and Self-Direction (independence, choose own goals, creativity, freedom).

Importantly, values are not just specific to an individual. Rather, values are common to groups of people who were exposed to similar social forces during their formative years. With respect to prioritizing values and value systems, researchers agree that people tend to order or rank their personal values to reconcile various conflicts among actions that involve more than one value. Thus, although two or more generations may share similar values as described by Schwartz, one generation’s rank-ordering of values may differ significantly from that of another generation.

Closely related to values are attitudes. Whereas values represent the criteria for evaluating or judging actions and objects, attitudes are considered the barometer of one's emotions (i.e., how one feels about something). An individual's attitudes are formed by personal development and interactions with others. Unlike values, attitudes are generally more subject to change over one's lifetime, influenced by such factors as age, education and life experience.

Generational-Based Values and Attitudes in the Workplace

According to proponents of a generational perspective of workplace dynamics, workers and employers increasingly accept the notion that employees bring their personal values, attitudes and lifestyle preferences with them to work. Observable characteristics for each generation of workers are widely reported, including characteristics relating to ethics, work-life balance, authority and leadership and technology. Summaries of some key value and attitude characteristics for each generation follow.

Veteran/Traditionalist

Commonly known as the “Greatest Generation,” veteran/traditionalist workers came of age during or on the heels of the Great Depression and two world wars. Their socialization was rooted in value systems built upon structured, formal roles (e.g., men worked, women married and remained home to raise children), patriotism, duty, self-sacrifice, top-down management and clear lines of
Traditionalists are considered loyal to their employer, consistent performers and fiscally conservative. Traditionalists are also considered to have a strong work ethic, to value and seek respect and inclusion and to have a desire to leave a meaningful legacy. Higher education was a dream come true. Technology is recent and represents change, both in their personal lives and their work, that requires training and adjustment. Traditionalists are often considered the embodiment of institutional knowledge, given their long-term tenure with their employer.

**Baby Boomers**

Until recently, baby boomers have been considered the largest (in number of births) generation, and have spanned birth time-period. For many years, the baby boomer group has been widely recognized as a major driver of the economy. Baby Boomers' impact as consumers, which began prior to their entrance into the workforce, is expected to affect the economy years after they leave, influencing consumer goods, health care, education and recreation. The baby boomer generation includes those who came of age during the 1960s and 1970s era of civil rights, the women's movement, and the Vietnam War. This generation's younger members include those who came of age during Watergate, the oil embargo and the high inflation of the 1980s.

Baby boomer members' socialization did not follow traditional roles that distinguished their parents' generation. Rather, baby boomers grew up in relative prosperity, optimism and safety—and were often the center of their parents' attention. They came of age during a social era that was very different from their parents' generation. This included increased incidence of divorce and increased numbers of mothers pursuing individual careers or working outside the home. At work, baby boomers are generally described as highly competitive micromanagers who disdain laziness and have a "do-whatever-it-takes" attitude toward personal and professional growth. They seek consensus and are adept at networking. Higher education is a given, with approximately one in four attaining a bachelor's degree or higher. Technology was introduced and has developed during their lifetime.

**Generation X**

Members of Generation X represent the smallest (in number of births) generation. Significant social and historical events that marked their coming of age included Three Mile Island, the Iranian hostage crisis and Iran-Contra. With both parents in the workforce, the family unit was smaller than experienced by previous generations. Mothers of Generation X children often delayed childbirth to pursue a career, resulting in a generation of latchkey kids, who learned independence and self-reliance early. Compared with their parents, as a group, members of Generation X are considered poor at networking. They are described as generally skeptical of authority, most likely due to the economic downturns that occurred as many of them were seeking their first jobs that
required them to compete with older and experienced baby boomers who had been downsized from their own jobs.\textsuperscript{50} For members of Generation X, education is considered necessary.\textsuperscript{51} Technology is something they grew up with and expect.\textsuperscript{52}

**Generation Y**

The most recent and potentially largest generation to enter the workforce is Generation Y, also referred to as Generation Next, Millennials, and Generation Net.\textsuperscript{53} The socialization of members of Generation Y reflects parental nurturing, protection and praise above and beyond each of the previous generations'.\textsuperscript{54} Generation Y members possess high levels of confidence and optimism, coupled with expectations for immediate feedback and almost continuous recognition.\textsuperscript{55} They maintain very close relationships with their parents, family and friends and are in constant communication with them, even bringing their parents along on job interviews.\textsuperscript{56} Some attribute their preference for working in groups\textsuperscript{57} to growing up in an era of highly publicized school shootings (e.g., Columbine High School) and the September 11 terrorist attacks.\textsuperscript{58}

Arguably, the most significant characteristic of Generation Y employees is that they do not consider computers or other electronics to be "technology." Their world has always included computers, cell phones, instant messaging, the Internet, etc.\textsuperscript{59} Because of their comfort with technology, multitasking for members of Generation Y (e.g., talking on the cell phone while typing on the computer and listening to music through an i-Pod) is considered a norm.\textsuperscript{60} Higher education is viewed as expensive. Generation Y employees typically enter the workplace well educated in terms of quality and quantity of schooling but have substandard communication and problem-solving skills.\textsuperscript{61}

**Charting Generation Gaps Based on Worker Values and Attitudes**

Dominant values and work attitudes that differ for each of the four generations currently recognized in today's workforce may be categorized as in Table 2.
<table>
<thead>
<tr>
<th>Dominant Values</th>
<th>Baby Boomer</th>
<th>Generation X</th>
<th>Generation Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veteran/Traditionalist</td>
<td>- Benevolence</td>
<td>- Tolerance</td>
<td>- Stimulation</td>
</tr>
<tr>
<td>- Loyalty</td>
<td>- Power/authority</td>
<td>- Self-direction</td>
<td></td>
</tr>
<tr>
<td>- Conformity</td>
<td>- Achievement</td>
<td>- Achievement</td>
<td></td>
</tr>
<tr>
<td>- Custom</td>
<td>- Stimulation</td>
<td>- Hedonism</td>
<td></td>
</tr>
<tr>
<td>Stereotypes</td>
<td>- Old-fashioned/rigid</td>
<td>- Workaholic</td>
<td>- Cynical</td>
</tr>
<tr>
<td>- Autocratic</td>
<td>- Political</td>
<td>- Lazy</td>
<td></td>
</tr>
<tr>
<td>- Do not want to learn new ways of working</td>
<td>- Self-Centered</td>
<td>- Selfish</td>
<td></td>
</tr>
<tr>
<td>Work Ethic</td>
<td>- Disciplined</td>
<td>- Efficient</td>
<td>- Task-oriented</td>
</tr>
<tr>
<td>- Duty before play</td>
<td>- Logical</td>
<td>- Self-reliant</td>
<td></td>
</tr>
<tr>
<td>- Adhere to the rules</td>
<td>- Do what it takes</td>
<td>- Independent</td>
<td></td>
</tr>
<tr>
<td>Communication</td>
<td>- Formal</td>
<td>- Face time</td>
<td>Direct—“Tell me how I am doing”</td>
</tr>
<tr>
<td>- Written</td>
<td>- One-on-One</td>
<td>- As needed</td>
<td></td>
</tr>
<tr>
<td>- Chain-of-Command</td>
<td>- In-person</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feedback</td>
<td>- Avoid conflict</td>
<td>- “Show me the money”</td>
<td>Direct—“Tell me how I am doing”</td>
</tr>
<tr>
<td>- No news is good news</td>
<td>- Promotion/Title</td>
<td>- Instantaneous</td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td>- Command and control</td>
<td>- Collaborative</td>
<td>Entrepreneurial</td>
</tr>
<tr>
<td>- Take charge</td>
<td>- Team player</td>
<td>- Participative</td>
<td></td>
</tr>
<tr>
<td>- Authoritative</td>
<td></td>
<td>- Wants to know why</td>
<td></td>
</tr>
<tr>
<td>Authority</td>
<td>- Follow authority figure</td>
<td>- Question authority</td>
<td>- Lines are blurred</td>
</tr>
<tr>
<td>- Hierarchical</td>
<td></td>
<td>- Skeptical of authority</td>
<td></td>
</tr>
<tr>
<td>- Chain-of-command</td>
<td></td>
<td>- Why must I follow?</td>
<td></td>
</tr>
<tr>
<td>Family and Work</td>
<td>- Family and work are always separate</td>
<td>- Work takes priority over all else</td>
<td>Work-Life balance</td>
</tr>
<tr>
<td>Rewards</td>
<td>- Appreciate recognition for a job well done</td>
<td>- Appreciate promotion, title, money</td>
<td>Work-Life balance</td>
</tr>
<tr>
<td></td>
<td>- Opportunity to mentor</td>
<td>- Opportunity to build consensus</td>
<td>If must choose, will select family and friends</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Appreciate the opportunity to provide input</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>- Technical wiz</td>
</tr>
</tbody>
</table>
A reference chart, such as Table 2, is not literally applicable to each and every individual member of a particular generation. However, preparation of such a chart reflecting the demographics within one's existing workplace can assist HR in gaining awareness of the various values and work attitudes that members of different generations may have. Such information illustrates that the rank order of values and attitudes held by one generation of workers is not necessarily the same for workers of another generation. A chart of such information may provide HR insights regarding how stereotyping of workers, whether intentional or unintentional, may surface within the workplace, rooted in either age-based attributes or the expressed or perceived work attitudes and preferences of various workers.

Beyond gaining a general awareness and appreciation for the generation "gaps" between different groups of workers that arise because of the different sets and orderings of dominant values and work attitudes, understanding generational values and attitudes within the workplace can be strategically useful for HR in other ways. For instance, such information can provide HR and managers a reference for approaching general day-to-day workplace issues in which differing worker's values and attitudes may be implicated in minor workplace disputes. Such information may also assist in dispelling common misperceptions about workers representing each generation.

Understanding worker values and attitudes in terms of generational tendencies can provide a means by which HR could focus on promoting, rewarding and sustaining preferred work behaviors, whether for a particular work group, functional unit or entire organization. Thus, a workplace characteristics reference chart may improve HR's understanding of the existing mix of work attitudes within an organization when planning strategies to achieve a desired mix of work attitudes. Accepting the premise that generational differences may affect workplace dynamics can enhance the succession planning process by providing HR insights into characteristics of both the existing internal and external workforce talent pools. HR may further enhance these insights by understanding the relationship between the work-related values and attitudes of workers and the organization's resulting norms and culture.

### Generational Norms and Culture

Upon entering an established social setting such as a workplace, one encounters particular organizational norms that either reinforce or challenge his or her attitudes and, to some extent, values. Norms are the "acceptable standards of behavior within a group that are shared by the group's members." Norms, which may be either informal or formal, provide important clues as to how a particular workplace functions. Formal norms often exist as written policies and procedures. Informal norms, established by the workgroup itself, impact activities such as employee production, social interactions among workers and the public, appearance and demeanor.

The intensity and consistency of organizational norms establish the culture of the organization (i.e., how things are done here). As a result, in shaping an organization's culture, informal norms can affect the workplace as much as, if not more so, than formal norms.
II. Implications of Generational Demographics on Succession Planning

Through the succession planning process, HR can influence organizational culture in various ways. For instance, HR may impact the existing culture by creating or revising policies to meet the needs of the existing organization and, as possible, reflect the preferences of employees. Or HR may provide training and developmental opportunities to enable employees within the organization’s internal talent pool to augment competencies necessary for future progression. Because the internal talent pool is rarely sufficient to satisfy long-term organizational needs, HR frequently will consider actions directed at an external talent pool. In so doing, HR can impact organizational culture through the recruitment and selection of new employees, either to fill existing gaps within the workplace or to initiate change to the existing norms and culture of the workplace.

Recruiting from an external talent pool does not necessarily mean recruiting only from the Generation X and Generation Y applicant pools. For example, in a fast-growth workplace in which the internal talent pool is composed of predominately Generation Y workers, there may be a need for formality and structure as the organization itself matures. In such a case, HR may target recruitment efforts to attract people with skills possessed primarily by traditionalists or baby boomers who could introduce needed stability to existing norms. Whether focusing on the internal talent pool or on an external talent pool, however, HR must consider the extent to which each action can and will impact workplace norms, in order to create and/or sustain workplace behavior(s) aimed at accomplishing the organization’s mission.

Regardless of the succession planning activities HR undertakes, it is a virtual guarantee that the workplace will include two or more generations at any given time. This, in turn, means that with each training, developmental or recruitment action, existing workplace norms may experience pressure to either hold constant or to adapt and change. If the existing workplace culture is consistent with and supports the achievement of organizational goals, HR should work closely with management to sustain that culture by engaging in actions that will result in holding the workplace norms constant. Otherwise, HR may influence or initiate strategic changes geared towards changing and aligning workplace norms to be consistent with the desired workplace culture. The process of influencing or initiating such a change can occur through action directed at formal norms, informal norms, or both. Success, however, arguably lies in HR’s understanding of the generational demographics involved.

Changing Formal (Policy) Norms

Revising formal (policy) norms within the workplace is fairly straightforward. HR may partner with management to draft specific procedures and policies governing workplace behavior. Such formal rules may apply across the board, regardless of one’s age, position, generational attitudes or work preferences. One example is the organizational anti-harassment policy. In coordination with management and the EEO department, HR supports a workplace culture free of harassment through the creation
and distribution of a formal policy statement and complaint process that applies equally to all workers within the organization. All workers are expected to adhere to the formal policy and to adjust their behavior accordingly. In this regard, individual worker attitudes and values are aligned to organizational requirements through externally initiated formal norms.

HR may also partner with management to draft specific procedures and policies that reflect demographic trends and generational preferences. For instance, based on work attitudes and preferences, as illustrated in Table 2, General Workplace Values and Attitudes chart, both Generation X and Generation Y workers expect to have flexibility and balance between their work and personal lives. These expectations are supported by various studies and by the experiences of hiring managers. Thus, as part of the succession planning process, in order to recruit and retain Generation X and Y workers, HR may seek to address this generational characteristic by drafting and implementing a policy that includes options for telecommuting, job sharing or flexible scheduling. Such a formal policy, however, regardless of the extent to which it may reflect generational preferences and trends, does not necessarily guarantee either acceptance or the desired change in the workplace culture if HR has neglected to consider and plan for contingencies relating to such a policy’s impact on the current informal norms.

Changing Informal (Behavioral) Norms

Changing informal (behavioral) norms that have been established by existing workgroups and influenced by the generational characteristics of those groups, is arguably more challenging than simply revising formal norms. As noted previously, creating a policy, such as a telecommuting or flexible schedule policy, will serve little purpose, in and of itself, if the existing work culture does not support such change. For example, traditionalist and baby boomer workers and managers were rewarded by adhering to a value of separating work and family or simply prioritizing work above their personal life. Thus, both groups may find the introduction of a flexible schedule policy discordant with their work values. If so, they may subsequently consider such a policy to be a slight against them and to the requirements that they, themselves, had to meet in order to progress within the organization.

At best, members of traditionalist or baby boomer generations may view such a policy simply as coddling new workers. In reality, though, if HR knows that the trend among many baby boomers reflects that they are increasingly juggling care of elderly parents with care for their own children, in addition to their work, HR may anticipate that baby boomer attitudes may have changed over time and they may actually embrace the opportunity for flexibility. However, as baby boomers may not yet have the competencies or skills necessary to implement and manage such a policy, their initial reluctance may not be with the policy, but rather how to support and implement it without appearing incompetent. By recognizing this, HR would be prepared to follow through by including with the new policy targeted training to address the baby boomers’ potential anxieties and to enhance their management competencies in supervising Generation X and Y employees.
Therefore, to influence existing workplace norms successfully, HR must first recognize the existing norms, as well as the values and attitudes underlying those norms. Otherwise, HR may run the risk of being viewed by existing workers as being not only disrespectful of the current workplace culture, but also disrespectful of the workers who identify with the existing norms and culture. The impact of ignoring existing workplace norms could range from minor disengagement among selected workers to widespread discord that negatively affects workers morale and productivity.

Recognition of existing workplace norms must be followed by communication and training focusing on the desired behavioral change. As noted in the example just discussed, the desired behavior HR seeks to elicit from traditionalist and/or baby boomer employees is support of flexible work alternatives, such as telecommuting, job-sharing, or flexible scheduling. One mechanism for gaining such support, while addressing the concerns of those whose value systems are challenged by the change, would be to train managers/supervisors on a performance management focus that measures not whether the employee is present at work each day, but whether project deadlines are being met and/or whether work products are being delivered in a timely manner. Such flexibility, of course, depends on the type of duties being performed.

Such workplace transitions require making concerted changes in perspectives and attitudes among all workers. Understanding generational values and attitudes is, therefore, important if HR is to work successfully with managers to address the needs of younger workers while not alienating older workers. For instance, a mentoring program can be an important part of a succession planning program. Younger workers, notably members of Generation Y, benefit by having their needs met in that they have the opportunity to receive the feedback they expect and crave, to engage in meaningful communication and to have an avenue for providing their own input into improving or contributing to their work environment. As mentors, more mature workers benefit from organizational recognition of their value to the workplace, by having the opportunity to engage in knowledge transfer and by having the opportunity to learn themselves from the perspectives and knowledge (particularly technical knowledge) of the younger workers whom they mentor. Interestingly, commentators have reported that a similar result is seen when younger workers mentor older workers, particularly in relation to technology. Either way illustrates how HR can initiate change to an organization's informal norms and, thus, to the organizational culture.

Succession planning in a multigenerational workplace requires actively listening to and among all workers to ensure that workers are not viewing one another, especially those of other generations, through a narrow, generational frame of reference. Perhaps more so than any other factor, the communication style of Generation Y employees epitomizes the generational differences within the workplace and provides a prime example of the generation gap in the workplace. Consider the following e-mail:

Dude, SWDYT ... AWGHTGTHA?
J/C LMK ASAP TOM
L8R
It does not matter to whom this e-mail is directed. Depending on one's generation, such an e-mail could evoke a similar shorthand response, utter confusion and frustration, mere annoyance, or even dismissal of the communication through the stroke of the delete key. For the traditionalist and the baby boomer, this type of e-mail is generally discordant with their respective workplace attitudes that communications should be formal and written or face-to-face. Conversely, Generation X and Y employees and supervisors are likely to be more accepting, both of the mode of communication and the style, due to their own personal comfort levels with technology and a preference for direct, informal and instantaneous communication.

To reconcile the differences among the generations, HR may provide either a quick, technical fix to this issue or approach it as an adaptive, organization-wide learning opportunity. For a technical fix, HR would simply work with the appropriate organizational entities to create or revise formal policy to prescribe procedures for initiating and formatting communications. Although such action would certainly address the issue and satisfy traditionalist or baby boomer employees who prefer structure and formality, Generation X and Y employees would probably feel alienated, both as a result of not being included in the change process and possibly for not having their preference(s) incorporated into a formal norm. Such a slight may even cause Generation Y employees to seek other employment with an organization that is more accepting of their preferred mode of communication.

Alternatively, HR could address this issue as an adaptive learning opportunity. In so doing, HR would initially coordinate with senior management or senior leaders to clarify instances in which formal, written communications are mandatory. This would be followed by coordination with workers regarding instances in which e-mail or instant messaging would be acceptable. It is at this point that HR can provide awareness training by encouraging workers to consider the perceptions of those who will be receiving the communications, particularly those of different generations.

For the traditionalist and baby boomer employees, training would be directed at broadening their generational framework to recognize that Generation X and Generation Y employees are not necessarily being disrespectful, lazy or rude. Rather, the younger employees are simply reflecting the results of the technology they have always had. For Generation X and Generation Y employees, HR would invite them to broaden their generational framework to understand the traditionalists' and baby boomers' preference for structure and formality. HR would then release or coordinate the release of a message addressing organizational or business communications. Through this simple process, HR could initiate change to an existing norm by fostering inclusion of those who must internalize and take ownership in that new norm.

HR may apply these same techniques to other existing generational disconnects, including workplace and lifestyle scheduling issues and individual versus group performance issues. One should not presume such changes will be easy or welcome, however. Change that requires adaptive learning throughout the organization, such as change that implicates value systems, and the attitudes rooted in those value systems requires all involved to acknowledge and to accept that their preferred views or actions may need to be subordinated to the larger group's needs and preferences—in this case, the organization's.
For example, within a multigenerational workplace, traditionalist or baby boomer managers may lament the fact that Generation Y workers express little if any interest in loyalty to a single employer or a lifetime career with their current organization. Instead, Generation Y workers tend to view their “career” as a sampling of different jobs in which they have opportunities to learn new skills while providing services or expertise. With the prevalence of portable benefits, loyalty to a single employer simply is not a Generation Y value. In this instance, transitioning traditionalist or baby boomer managers to a new norm of accepting short-term workers requires adaptive learning.

Specifically, traditionalist workers, for whom the values of custom and security are deeply rooted and of high priority, must be willing to consider and accept the fact that for Generation Y workers, the values of self-direction and or stimulation outrank custom and security. Likewise, transitioning Generation X or Y employees to the norm that traditionalist and baby boomer employees value long-term tenure with their employer of choice also requires adaptive learning. By incorporating communication and awareness training into the succession planning process and its resulting programs, HR can help workers of all generations better understand that while basic values may be shared, the order of those values may differ among groups. It is at this point that workers will be called upon to reconcile potential conflicts among actions that involve more than one value.

III. Challenges to the Generational Perspective

The generational perspective of workplace dynamics is not universally accepted. A number of commentators disagree that this perspective should be given independent attention or resources. There are three primary challenges—the first two are related to the definition of generation, and the third relates to whether there is independent, empirical verification of a generation gap.

The Definition of Generation

Although four generations are widely recognized in today’s workforce, arguments exist for recognizing either more or fewer than four. There is no specific number of years that determines a generational birth period. For example, the baby boomer and Generation Y groups span nearly 20 years, while the traditionalist and Generation X groups span only about 15 years. The rationale presented for increasing the number of currently recognized generations is that those who are born on the “cusp” of a particular generation (i.e., born within a few years of the end of one generation or the beginning of another generation) should be placed into a separate “bridge” generation. Such a generational categorization would recognize those who identify equally with members of two generations.

Those born on the cusp of the baby boomer and Generation X time period (from 1960-1964) illustrate this argument. Although the Vietnam War and the Civil Rights Movement both occurred during the baby boomer times, the impact or significance of these events was not the same for those born at the beginning of the baby boomer
generation as it was for those born near the end of that generation. For individuals who were born during the early years of the baby boomer generation, these major historical events unfolded during their formative years. For those who were born at the end of the generation, however, these events were not necessarily associated with their formative development, although technically these events occurred during their generation. Rather, for those born near the end of the baby boomer generation, their coming-of-age was marked by economic events such as the high inflation of the 1980s and the oil embargo, as opposed to the social events their older baby boomer cohorts experienced.96

The rationale presented for reducing the current four generations is that the two most recent generations (i.e., Generation X and Generation Y) share enough similar values and attitudes that they should be consolidated into a single group—Generation XY.97 This argument reflects the realization that during the past 30 years technology has, perhaps, resulted in the need to redefine what a shared experience is, if not the need to redefine what a generation itself is. With the advent of the Internet, especially, common experiences and historical events are increasingly shared across generational birth periods.

The Extent to Which Historical Events Shape a Generation

The second common challenge, which is related to the first, is that reliance on broad historical events as definitive in shaping life experiences during a group’s formative years fails to address whether and to what extent factors such as race, social status, ethnicity, religion, gender or even regional location impact and shape life experiences.98 For example, as previously discussed, many baby boomers came of age during the Vietnam War. However, if a particular boomer had family (father, brother, uncle) who was drafted or who served or died in the war, his or her perception of the times would differ from those of a baby boomer cohort who either did not have this experience or whose family member or friend may have avoided service (e.g., through education, travel to Canada). Similarly, those baby boomers who came of age in the Deep South during the Civil Rights Movement likely had a very different experience than those who came of age during the same period in the Pacific Northwest, where racial demographics were very different.99

Rather than defeating the generational perspective premise, however, one may consider these examples to be indicative of the fact that while members of a generation share similar experiences, one should not generalize that there is shared agreement on what those events represent or how they were interpreted by individuals. This is especially important for organizations with non-American workers. For instance, baby boomer workers from Germany, whose formative years were marked by recession due to defeat in World War II, would likely have experienced the times very differently than those born in America during the same period whose formative years were marked by progress, optimism and growth on the heels of success in World War II.100
Whether Empirical Data Support the Premise

A third challenge to the generational perspective is the assertion of a lack of empirical and/or peer-reviewed research supporting the existence of a generation gap among today’s workers. This challenge may result from the lack of research published specifically in human resources journals, since independent research on the topic of worker value systems and preferences has been conducted and published in psychology and industrial organization journals, for more than 40 years. With respect to the work environment, organizational behavior researchers have studied individual and group attitudes relating to job satisfaction, job involvement and organizational commitment.

For example, in 1976, Ronald Taylor and Mark Thompson analyzed differences in work values among workers 18-65 years of age. They found similarities between older and younger workers on dimensions of pride in work ecosystem distrust and distinctions between older and younger workers on dimensions of self-expression, extrinsic rewards and intrinsic rewards. Taylor and Thompson opined that age or tenure in the workforce may have caused divergence between younger and older workers but noted that to ascertain the nature and strength of such influences would require a longitudinal study. Interestingly, Taylor and Thompson found workers’ attitudes changed over time, with younger workers valuing self-expression to a greater degree than older workers. The value placed on self-expression declined progressively with age, as did the importance of money as a reward.

More recently, in 2001, Catherine Loughlin and Julian Barling found that the primary influences on work values, attitudes and behaviors among Generation Y workers were work experiences and family experiences. Such findings are consistent with the plethora of popular media commentaries on the topic. What remains to be studied, however, is, perhaps, the effect of the existence of technology as a given for Generation Y workers, who have never known a world without technology. Because technology was not a given for the other generations, the baseline for conducting research on work values and attitudes may need to be redefined. Notwithstanding, it is clear that as Generation Y gains a foothold in the workplace, organizations will need to change to accommodate their norms instead of expecting young workers to change to accommodate existing organizational norms. In this regard, sheer numbers and skills alone provide Generation Y employees leverage.

Conclusion

Strategic human resources management reflects “all those activities affecting the behavior of individuals in their efforts to formulate and implement the strategic needs of the business.” The impact of generational preference does exist in the workplace, whether it is rooted in empirical data or a product of the popular media. HR must acknowledge and address the issue as part of the succession planning process. By understanding the values and attitudes of workers and how they relate to organizational norms and culture, HR can improve its ability to add value strategically by sustaining the current organization or driving change to achieve a preferred organization.
Notes


8. AARP. (2003, Sept.). *Staying Ahead of the Curve 2003: The AARP Working in Retirement Study Executive Summary*. Washington, DC: AARP. Retrieved November 17, 2007, from http://assets.aarp.org/egcenter/econ/multiwork_2003_1.pdf (For instance, in a 2003 national survey of stockowners between 50 and 70 years old, 77 percent reported losing money in stocks during the preceding two years. Of those who had not yet retired, 21 percent reported they would postpone retirement due to their losses. Of those who had retired, another 21 percent reported that they planned to return to work to compensate for their stock market losses.)


19 Ibid.


22 Ibid.


Managing your multigenerational workforce: It takes time, talent, tact, and perseverance, but the end product can be a great place to work with a wonderful talent pool. 

Strategic Finance, 52(3).


Ibid.


Ibid.


Ibid.

Ibid.

Ibid.

Ibid.


Ibid.


Ibid.


Most Generation Y workers have not yet been in the workforce long enough to gain leadership experience in numbers that permit generalizations about their leadership characteristics.


67 Ibid.

68 Ibid.


70 Ibid.


75 Hansen, F. (2002). Truth and myths about work/life balance: Ideally, work/life balance programs support diversity and are effective recruitment and retention tools. Trouble is, many companies don’t deliver. Workforce, 81(13), 34.


84 Ibid.


87 “Dude, so what do you think? Are we going to have to go through this again? Let me know as soon as possible tomorrow. Later.”


99 Ibid.

100 Ibid.


104 Ibid.

105 Ibid.


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