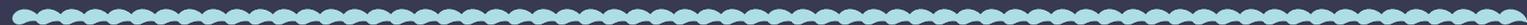




TECHNOLOGY



FEEDBACK



WORK-LIFE

BEYOND GENERATIONAL DIFFERENCES

Bridging Gender and Generational Diversity at Work



About Catalyst

Founded in 1962, Catalyst is the leading nonprofit membership organization working globally with businesses and the professions to build inclusive workplaces and expand opportunities for women and business. With offices in the United States, Canada, and Europe, and the support of more than 400 member organizations, Catalyst is the premier resource for research, information, and trusted advice about women at work. Catalyst annually honors exemplary organizational initiatives that promote women's advancement with the Catalyst Award.

BEYOND GENERATIONAL DIFFERENCES:

Bridging Gender and Generational Diversity at Work

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Catalyst Publication Code D100
ISBN # 0-89584-310-2

INTRODUCTION

Catalyst recognizes that using generational diversity to foster greater gender equity and workplace inclusion is essential to ensuring future business success. Managing a generationally diverse workforce provides opportunities for positive change and innovation.¹ Buy-in from employees and executives across all age cohorts (generations) requires that companies capitalize on the interacting business dynamics of today's workforce—globalization of businesses, benefits of technological advances, ever-changing demands for work-life flexibility—while also preparing for the workforce of the future.²

Organizations that appreciate the realities of generational diversity are becoming more flexible about their talent management and business development strategies and recognize the unique values, expectations, and skills that each generation brings to the table. For example, given that younger generations have grown up with rapid changes in technology and increased awareness about diversity and global realities, many of the practices and programs that companies have developed to tackle gender inequities, address talent management challenges, and foster greater workplace inclusion may not be relevant for younger cohorts of employees.

When companies maximize talent across generations they inevitably increase opportunities for women and men of all ages.³ Moving beyond a “difference” perspective to identify opportunity for innovation provides organizations with a competitive advantage for the future while also meeting their diversity and inclusion (D&I) targets.

WHY SHOULD COMPANIES CARE ABOUT GENERATIONAL DIVERSITY?

Thanks to demographic shifts, new technologies, and an increased focus on team-based approaches in many workplaces, different generations⁴/age cohorts are now working together more than ever before.⁵ Not only do these demographic trends increase organizational awareness about employees' age diversity, they also increase awareness about clients and customers and the

changing attitudes in larger social contexts.⁶ Hence, senior leaders and human resource professionals are trying to better understand the broad range of attitudes and behaviors within their organization and tackle concerns about the challenges of integrating a multigenerational workforce.⁷

Despite the widespread interest in this topic, however, where several organizations have started to *think* about this issue, only a few have fully developed the tools and resources to address it. Existing work programs and practices that focus on multiple age cohorts and generations, for example, are often implemented less systematically and consistently than other initiatives (e.g., diversity programs) and may overlook the impact of managing multiple dimensions of diversity, including gender.

ABOUT THIS REPORT

This knowledge product provides companies with the tools to integrate gender and generational diversity efforts as well as information to interpret existing workforce trends. Readers can choose to focus on specific themes and/or initiatives that are described throughout this report.

Based on Catalyst research and decades of experience advising multinational companies, this report contributes to the dialogue on multi-generational initiatives by:

1. Highlighting what leading-edge companies are doing to leverage generational diversity,
2. Informing organizations about how to incorporate gender and generational diversity as vital components of their existing initiatives, and
3. Providing tools and practices for readers earlier on in their journey as they start conceptualizing new initiatives.

This report may be particularly beneficial to senior leaders, human resource departments, and D&I professionals seeking to address generational diversity across different groups and to those aiming to attract, develop, and retain talent of all ages.

PROMOTING GENDER DIVERSITY BY CAPITALIZING ON GENERATIONAL DIVERSITY

Generational diversity has become an essential element of many diversity strategies.⁸ Companies are now managing a broader range of employees' work needs and experiences as well as career development choices. For example, while younger generations are climbing the corporate ladder and entering the workforce expecting fast-paced, highly inclusive workplaces that offer customizable careers, retirement-eligible employees are delaying their retirement plans.⁹ By the same token, professional development resources that were once relegated to entry-level and new employees have become a necessity for workers at all levels (e.g., career development; technology). This broadening of employees' needs coupled with the increased responsiveness on the part of many organizations, benefits gender diversity by helping change the norms and expectations about the way we work, increasing awareness about workplace trends in different cultural and national contexts, and promoting more inclusive organizational cultures.¹⁰

The ways in which generational diversity plays out in the workplace go well beyond chronological age and generational cohort. Since chronological age and generational identities intersect with other dimensions of diversity—including gender, ethnicity, and nationality—shaping the dialogue about individuals' work experiences requires special attention to personal, cultural, organizational, and global factors that different groups of employees encounter at work. For example, on average, women baby-boomers' resources for retirement significantly lag those available to their men counterparts¹¹. Also, as gender bias in the workplace becomes more subtle,¹² survey data suggest that young professionals are more likely than older generations to take gender equality for granted and believe that gender parity has mostly been achieved. Moreover, younger generations are especially likely to view workplace diversity positively and as a "fact of life."¹³

GLOBAL CONTEXT

Age-related workplace trends have global significance and local implications. In countries outside of the United States, however, age terminology (e.g., such as "older" and/or "younger" age group) often replace the U.S.-based generational labels.¹⁴ Also, depending on different demographic trends around the globe, the specific workplace issues associated with age diversity might vary from one context to the other. On the one hand, in many regions of Europe, low birth rates and the aging of the workforce are compelling companies to focus their efforts on finding new ways to engage their increasing population of older workers and seek out more diverse job candidates.¹⁵ Whereas the European workforce is aging, in other countries and regions such as China and India, younger generations outnumber their older colleagues in the workplace. China's younger generation (born from 1980 to 1990), for example, represents approximately 240 million people, almost 50 percent of China's workforce. This is the age group that has grown up with increased access to the Internet, mobile phones, and other high-tech resources, and hence, with the potential to create a very different workforce than their predecessors.¹⁶ In India, the last 15 years have contributed to the development of a larger middle-class and increased demand for consumer goods, which provides younger generations with new and broad economic opportunities and perspectives.¹⁷ While this summary only highlights a few trends outside of the United States, it showcases the importance of acknowledging cultural and global variation of managing generational diversity.

When it comes to managing workplace diversity, age per se is not one-dimensional. What we define as "age" can be influenced by individuals' current life stage, other life events and experiences, as well as individuals' familiarity with a particular organization or field of work.¹⁸ Two employees of the same chronological age but with completely different life circumstances and years of work experience in their job position, for example, will have different workplace motivations and needs.

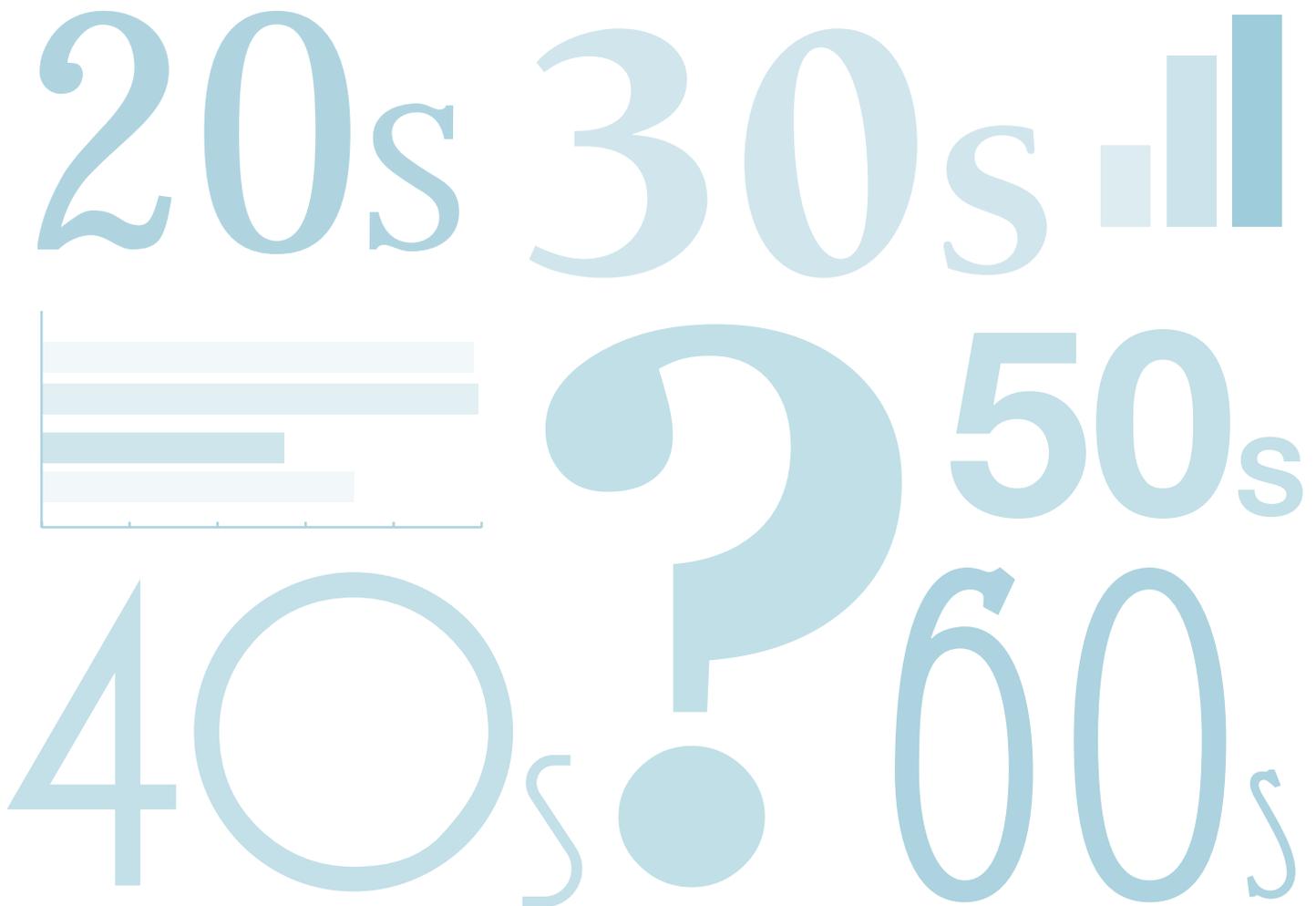
FIRST STEPS: WHERE TO BEGIN?

Effective implementations of customized approaches to generation and gender diversity should start by examining the specific needs of the organization. We recommend the following steps:

- Poll your workforce *or* use existing demographic data to summarize:
 - Age and/or generational demographics
 - Life-stage demographics ¹⁹
 - Seniority and tenure within the industry and company (e.g., employees who “grew up” in the company)
 - Current job level
- Survey employees (or samples of employees) about issues that might vary with age,

generational, and/or life-stage to get a sense if existing policies address some or many of these concerns. For example, what are employees’ concerns when it comes to managing work and personal life? Later in this report, we identify a number of trends that emerged as relevant in managing generational diversity in the workplace. These trends can serve as guidelines to focus on specific organizational issues and survey questions.

- Refer back to knowledge, strategies, and practices outlined later in this report to determine next steps for the organization once you’ve identified the most significant trends and characteristics.



UNDERSTANDING THE LANDSCAPE: WHAT ARE COMPANIES DOING TO ADDRESS GENERATIONAL DIVERSITY?

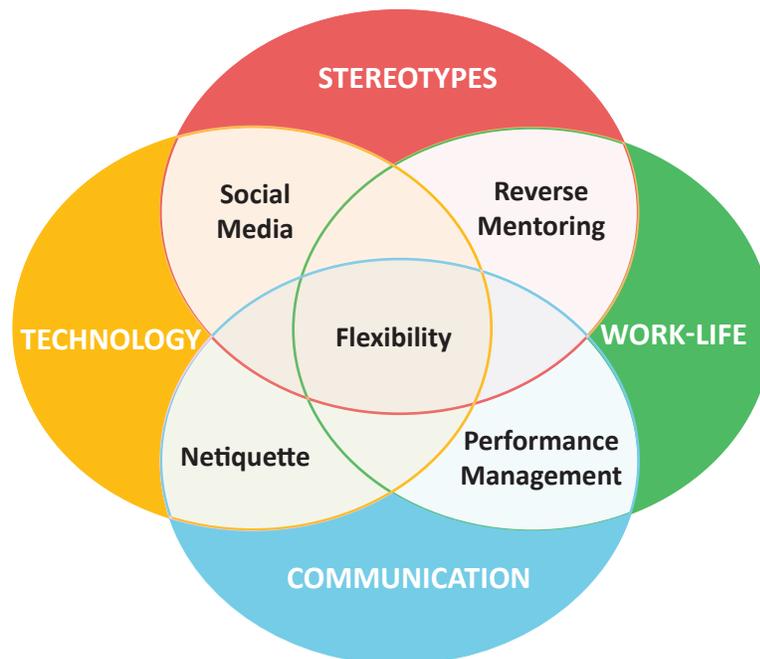
For this report, Catalyst interviewed representatives from 25 leading-edge companies²⁰ about the ways in which their organizations tackle generational diversity and position it within the larger D&I context. Participants discussed the tensions between perceptions and realities of a generationally diverse workplace and how their companies chose to address them.²¹ Flexibility, technology, work-life effectiveness, and communication emerged as both opportunities and challenges to creating inclusive, productive, and effective work environments.²² Most of the practices highlighted in this report address at least one of these aspects.

Through qualitative analyses of interview data, four intersecting trends emerged as particularly relevant for managing different generations in the workplace. While the trends overlap and do not represent completely discrete categories, identifying specific themes helps frame recommendations as well as develop policies, programs, and practices:

- Trend 1:** Addressing stereotypes
- Trend 2:** Maximizing communication and feedback
- Trend 3:** Leveraging technology at work
- Trend 4:** Managing work-life and career flexibility

As noted in Figure 1, these four trends and the approaches intersect in a number of ways, making each individual trend relevant when it comes to generational and gender D&I and managing all employee talent. The intersections of gender and generation are especially salient when it comes to work-life effectiveness and stereotypes in the workplace. As you read through the report, think about ways these different factors overlap in your organization.

FIGURE 1
WORKPLACE TRENDS: WORKING IN GENERATIONALLY DIVERSE WORKPLACES.²³



To help customize talent management approaches and practices that address generational diversity, we have developed a Four-S framework (Senior Leaders, Supervisors, Systems, and Strategies). This strategic framework is based on interview data and prior Catalyst research on gender equity, workplace inclusion, and talent management.

- **Senior Leaders:** Recognize that senior leaders set the tone for diversity dynamics in their organization and act as role models. Senior leaders' buy in is critical to success when implementing practices and programs to ensure success.²⁴
- **Supervisors:** Help supervisors get employees of all generations engaged in developing more inclusive and productive workplaces and fostering greater inclusion. To do this, supervisors need to be engaged in D&I efforts and processes so that the links between everyday tasks and behaviors and larger organizational goals are emphasized and prioritized appropriately.
- **Systems:** Maximize systems-based programs, policies, and practices, and encourage organizations to focus on generating and sharing knowledge, raising awareness, and developing skills that foster D&I to enhance cross-generational efforts.
- **Strategies:** Provide strategic recommendations and practices for capitalizing on generational trends to help your company better serve employees, clients, and customers.

Applied within the Four-S framework—and taking into account generational, organizational, and cultural contexts—the four trends serve as general guidelines for companies to consider when developing effective talent management programs. Based on Catalyst's review of more than 50 company practices, Tables 1 through 4 also highlight how Four-S recommendations translate into company practices and strategies.

TREND 1: ADDRESSING STEREOTYPES

One challenge facing companies that are developing age-diversity programs is stereotypes and generalized perceptions of different generational cohorts.²⁵ It can be difficult to sort through stereotypical perceptions, myths, and realities (in terms of workplace needs and experiences) of each group. Although it is important to acknowledge generational differences and identify general trends,

the assumption that all members of a particular age group share the same characteristics and attitudes can be misleading and reinforce negative stereotypes (e.g., *all* Gen Y employees are impatient and disloyal to their company; *all* Baby Boomers are hierarchical and resistant to change). Notably, negative perceptions can impact the workplace as well as leaders' performance and effectiveness.²⁶

On average, employees of different generational cohorts share similar work attitudes and work goals and needs. For example, research suggests that employees of different age groups agree about the value of workplace flexibility, fairness, and opportunities to do rewarding work.²⁷ Furthermore, variation *within groups* (i.e., within each generational cohort) can be as great as that between cohorts, especially considering intersections of ethnicity, gender, and sexual orientation, as well as differences in industries and workplaces.²⁸ For example, Catalyst research has shown that stereotypes still influence women and men managers' perceptions of women and women of color as well as some organizational processes.²⁹ It is feasible that stereotypes associated with different groups may "compound" to create separate outcomes and barriers for women and men of different generations. A "Generation Y" woman, for instance, may face stereotypes as a woman (e.g., "too nice" or "too harsh") *and* as a member of Gen Y (e.g., "inexperienced" or "too demanding"). Being aware of these intersections is essential to fully understanding employees' experiences.

What can companies do to address the variety of needs that come with a diverse workforce without relying on and reinforcing stereotypes? One way to address generalizations about particular groups is to challenge the assumptions behind them. For example, organizations can cater to the similarities and shared values *among* generations, such as flexibility and fairness in the workplace³⁰ as well as provide the tools for employees to learn about stereotyping.³¹ In addition, organizations will need to review prior policies, practices, and programs to determine what modifications need to be made to account for having more diverse age cohorts working together. Clear organizational support of D&I efforts and goals can also challenge negative perceptions.³²

Table 1 provides specific examples of practices and additional recommendations to address polarized perceptions and stereotypes about different groups in the workplace.

TABLE 1
ADDRESSING STEREOTYPES AND NEGATIVE PERCEPTIONS

	WHAT TO DO
Senior Leaders and Supervisors	<ul style="list-style-type: none"> • Provide opportunities for cross-generational dialogue and interaction, and highlight the benefits to all employees and to the organization of working in diverse teams. • Communicate the unwritten rules about how work gets done and other important workplace norms so that expectations are clear to everyone. For example, clear and explicit communication about career opportunities can help prevent incorrect assumptions about career paths, who is advancing, and why.³³
Systems and Strategies	<ul style="list-style-type: none"> • Survey employees on a regular basis (e.g., annually or biannually to get their perspectives regarding issues such as career development, work-life effectiveness, and communication. This will allow you to monitor any change and development in employees’ work needs and values. • Develop programs on generational diversity that are tailored to your employees’ needs, demographics, and your organizational context. • Provide employees with the tools and resources to manage stereotypical perceptions in the workplace and to build specific competencies, such as stereotype avoidance skills.³⁴ For example, implement training that focuses specifically on generational and gender diversity. • Train employees to become “awareness advocates,” and empower them to tackle stereotypes in specific, critical contexts such as during performance reviews or promotion discussions.³⁵ • Integrate a system of checks and balances in the organization’s human resources processes (e.g., hiring, performance evaluation) to include a variety of perspectives and prevent stereotypical perceptions.³⁶ • Leverage technology and communication to disconfirm stereotypes; for example, showcase successful women and men role models, highlighting a diversity of career paths, personal interests, age, levels, and work-life stages.
Specific Organizational Strategies	<p>Training and Education on stereotyping in the workplace:</p> <p>Programs and Activities that support cross-generational dialogue such as:</p> <ul style="list-style-type: none"> • Mixed-level networking opportunities; • Cross-level and reverse mentoring; and • Information technology that allows different employee groups to interact through, among others, virtual networks, blogs, and intranet applications. <p>Programs and Activities that challenge assumptions behind stereotypical perceptions such as:</p> <ul style="list-style-type: none"> • Discussions and trainings that highlight similarities rather than differences in goals and values among different age groups. For example, acknowledge common interests. • Newsletters, blogs, or other internal communications that challenge stereotypical perceptions by featuring profiles of successful women and men role models at different career stages.

EXISTING DIVERSITY & INCLUSION PRACTICES AND APPROACHES

[In comparing how our gender diversity strategy is similar to our generational strategy] first, we had to break stereotypes that women aren't interested in technologyWith regard to Baby Boomers, the myths and stereotypes that they aren't interested in technology because they are technologically less savvy, or they are only going to be buying them for their grandkids [had to be broken]. They are interested in these products partly for that reason, but they are also the end-user of the product themselves.

— **Consumer/Retail**

CREDIT SUISSE—REVERSE MENTORING: ENGAGING GENERATIONAL DIFFERENCE

Credit Suisse's *Reverse Mentoring: Engaging Generational Difference*, launched in 2009, pairs more senior leaders with junior employees to cultivate opportunities to educate senior employees about diversity, provide visibility to more junior employees, and improve cross-generational and cross-level communication. Mentees are members of the Americas Diversity Operating Committee (ADOpCo) at Credit Suisse, which comprises business heads *at least* four levels above their mentors. Mentors are young high-potential leaders in the organization. Currently being piloted in the Americas with mentors and mentees within the same business unit, the program will eventually extend participation to other global regions.

Credit Suisse recognizes that having an age-diverse workforce broadens the dialogue about diversity by virtue of the fact that employees from different generations bring different perspectives to bear. To fully leverage the benefits of multiple perspectives in today's workplace, it is essential to promote communication and educate employees about generational differences. Through regular, one-on-one meetings that can include work (e.g., specific projects) or leisure activities (e.g., coffee, museums), the program seeks to:

- Develop trust among people at different levels within the organization by establishing personal connections and allowing for frank discussions of workplace issues, including diversity issues.
- Facilitate behavioral change by bridging the gap between different employees' values and perspectives, by creating common understandings, and by promoting collaboration.
- Share knowledge among employees in diverse functions and levels by providing senior leaders with the opportunity to learn about the experiences of more junior colleagues.

Senior leaders focus on how these high-potential young people think and process information. Working with current business challenges, mentees ask mentors how they would go about solving problems. For instance, one mentoring pair attended a firm-sponsored training session on understanding generational differences and then compared their individual reactions to the session. Another mentee invited his mentor and a small group of his mentor's friends for a discussion over lunch to gain insight into that younger generation.

Ben Muda, a one-time Credit Suisse employee and current MBA student at Harvard Business School, recalls his experience in the reverse mentoring program as a positive one. "I think that this was perhaps the highlight of my time at Credit Suisse. The fact that the ADOpCo decided to implement this reverse mentoring program is a strong testament to [Credit Suisse's] desire to retain the best and the brightest and to ensure that any disconnect with the younger, future leadership is eliminated."

TREND 2: MAXIMIZING COMMUNICATION AND FEEDBACK

While communication challenges are not uncommon at work, misunderstandings can become especially salient when individuals have different communication styles and expectations about workplace interactions. In terms of cross-generational communication, the most frequently cited issues include: knowledge transfer; giving and receiving feedback; and the ability to express different career, work, and life priorities.³⁷ For example, younger generations are often described as expecting more immediate and frequent feedback and preferring technology (e.g., email or instant messaging) as a major means of communication at work. While this perception might be true for younger generations entering the workforce, changes in expectations are also linked to changes in work culture and technology, and employees might appreciate different communication styles regardless of age.

Research suggests that there are indeed some variations among age cohorts in terms of their *preferences* for using technology to communicate in the workplace (see Trend 3) and that, in general, younger workers are more likely to socialize with colleagues via technology and keep their workplace interactions more informal.³⁸ Studies have also found that, when it comes to workplace communication, younger generations are especially keen on transparency and expect their leaders to “walk the talk.”³⁹

Regardless of individual preferences for different types of communication and levels of formality, effective communication and feedback are essential to managing gender and generational diversity and to creating inclusive workplaces for all. Furthermore, prior Catalyst research has consistently demonstrated that knowledge sharing and access to informal networks have important implications for gender diversity. Consistent communication across departments, job levels, and generations helps organizations become more transparent and fair in communicating those “unwritten rules” and “cascading biases,” which are especially helpful or harmful to the advancement of women and employees of color.⁴⁰

TABLE 2
IMPROVING COMMUNICATION, TRANSPARENCY, AND KNOWLEDGE SHARING

	WHAT TO DO
Senior Leaders and Supervisors	<ul style="list-style-type: none"> • Utilize both traditional (face-to-face, town halls, newsletters) and virtual (email, conference calls, intranet) means of communication. Providing a variety of means to interact with colleagues not only improves cross-generational communication, but also addresses the needs of remote and part-time employees. • Provide more communication opportunities, such as informal employee events, mentoring, and networking programs, for employees who might not have access to the influential informal networks. • Create opportunities for reverse or reciprocal mentorship among employees at different levels and/or career- and life-stages. This will also educate employees about working with different communication styles. • Encourage openness and find ways to decrease ambiguity in workplace communication, especially when it comes to “unwritten rules” about how the work gets done. • Support the sharing of expertise, recognition, and appreciation. • Show how you are “walking the talk” when it comes to generational diversity through knowledge sharing activities and by serving as a role model of important behaviors. • Promote and manage multigenerational learning and development.
Systems and Strategies	<ul style="list-style-type: none"> • Develop a comprehensive communication guide for employees of all backgrounds, including strategies for dealing with cross-level communication and the unwritten rules in the organization. For example, it can be helpful to set up meetings to discuss work styles and expectations when an employee is joining a new team or manager. • Create more flexible and interactive performance management systems and support initiatives that allow for a variety of communications styles and preferences. • Promote knowledge sharing that acknowledges differential access to influential networks and information about advancement opportunities. • Use communication technology (e.g., blogs, intranet) as tools to communicate across boundaries and give employees a voice.
Specific Organizational Strategies	<p>Programs and Activities that encourage open communication among members of different generations as well as across organizational levels, including:</p> <ul style="list-style-type: none"> • Opportunities for cross-level and reverse mentoring; • Information technology such as social media, virtual networks, and blogs to maximize information sharing, interactions, and transparency; • Tools such as 360 feedback, cross-level and peer feedback departmental retreats, and trainings on engaging in difficult conversations to promote formal and informal feedback and communication. <p>Programs and Activities that encourage transparency and open communication about the “unwritten rules.” Examples include:</p> <ul style="list-style-type: none"> • Handbooks and trainings on the unwritten rules in the organization on what behaviors are helpful to succeed. • Information about behaviors that help promote inclusive work cultures.

EXISTING DIVERSITY & INCLUSION PRACTICES AND APPROACHES

We address generational differences from a substantive work standpoint by laying out clear expectations from the firm and [from the] associates.... By doing this, once we get people in, we can show them what we expect from the get-go.

—*Professional Services/Law*

INTEL CORPORATION—INTERCULTURAL AWARENESS AND TRAINING: PART OF LIFE AT INTEL

As a company with employees all over the world, Intel has taken a comprehensive approach to cultural integration and awareness training. The company offers specific programs on intercultural training and also weaves lessons on cultural awareness into its general training and learning curriculum.

Intercultural content is featured in Intel's business-skills courses on topics such as decision-making, communication, and team building. Intel also customizes training products for local use in specific countries and cultures. A "Constructive Confrontation" course, for example, was adapted to meet the unique needs of Asian cultures. Similarly, Intel's "Into Intel" program for new employees includes required classes such as "Performing to Intel Values," which helps employees and managers examine the tension between Intel values and their own cultural values.

Intel's commitment to diversity and message of global inclusion permeates all facets of its employee training programs. Intel recognizes that workforce diversity is critical to the company's continued success and that to work and communicate effectively, employees need tools and resources to help them quickly understand various cultures and form relationships with colleagues and partners around the world. Because of its intercultural awareness training, Intel's employees are well-prepared to meet the needs of the global marketplace.

KPMG LLP—ACHIEVING RESULTS THROUGH MENTORING

In 2004, KPMG set out to expand their existing mentoring program focused primarily on assisting employees with the transition to partnership to all KPMG employees regardless of functional area, level, or partner-track status.

- Mentoring is strongly and actively supported, communicated, and encouraged by leadership. Although the firm does not formally require participation, mentoring is viewed as an important professional development activity.
- Both mentees and mentors are expected to contribute to the relationship in meaningful ways, with the mentor providing guidance and advice, and the mentee contributing his or her own knowledge and expertise.
- The process for pairing would-be mentees and mentors is fluid and self-directed. Leadership personnel believe that the most important component in mentoring relationships is chemistry; thus, rather than institute a formalized matching system, KPMG encourages mentees to identify coworkers who they know personally to be mentors.

The program provides participants with trainings, tools, and resources to facilitate relationships. Employees are strongly encouraged to participate from the beginning of their careers at KPMG.

Mentor-mentee pairs are expected to formulate and monitor goals for the relationship. Setting goals helps better define the relationship and ensure expectations are met for both parties. The mentoring program is also entrenched in KPMG's performance management system. There is a general expectation that employees will become mentors as they advance within the firm, and partner-track employees are expected to specify mentoring as one of their formal career goals. Also, KPMG formally recognizes mentors with the National Mentoring Award. Created in 2006, the award is an annual firm-wide effort to acknowledge the positive impact mentoring has on career development.

SAP AG—net45plus

In response to the aging workforce in many European regions and to better prepare for upcoming national regulations that extend the age of retirement, the net45plus employee network at the German headquarters of SAP AG was designed primarily to engage older employees by providing support and resources to help them navigate their careers and plan their retirement.

With more than 300 employee members, net45plus assists SAP in facilitating knowledge transfer between retired and current employees by focusing on personnel development, health services, training, career development, and retirement planning. Aging affects everyone, and awareness at a younger age of how these issues affect one later in life results in better planning on the employee's part. Recognizing this, network membership is open to all employees regardless of age.

Based on internal dialogue about how to best support older employees, who often face vastly different life challenges than their younger counterparts, and to encourage cross-generational communication, SAP developed the following components:

- **net45plus Web site and newsletters:** These communication vehicles allow sharing of important retirement information and answer outstanding questions on topics such as health, health insurance, elder care, and leisure-time activities. The newsletter includes information collected from various organizations, such as Germany's Retirement Department and Office of Unemployment, as well as other government organizations. net45plus makes it easy for employees to find and interpret laws and the implementation of those laws by posting them on its Web site and sending out a regular net45plus newsletter.
- **Roundtable Discussions:** Held monthly, net45plus invites experts to speak on various topics, including income tax preparation, pension planning, or health security. Roundtables typically comprise a total of 12 retired, semi-retired, and/or current employees, and the discussions prepare employees for changes that may take place as they reach retirement or semi-retirement.
- **Informal Meetings:** To increase employee engagement and enhance the transfer of knowledge, net45plus encourages colleagues to meet socially, typically in a restaurant or casual environment, to share stories and life experiences. Employees build relationships and support each other by discussing problems, finding solutions, and providing advice.

TREND 3: LEVERAGING TECHNOLOGY

In today’s workplace, technology is central to many work roles and essential to conducting global business. The level of familiarity and the ways in which employees from different generations use technology in their daily work activities, however, may vary.⁴¹ Research shows that in North America, Gen X and Y workers are more likely to say they are comfortable using technology than Baby Boomers.⁴² Having grown up in a world where cell phones and computers are the norm, younger generations are therefore especially likely to choose these technologies as their main form of communication both at work and in their personal lives. That is not to suggest that members of other generations are not equally comfortable and interested in using technology to maximize their work.

Regardless of individual preferences for interacting with colleagues virtually or in person (phone, face-to-face), new technologies represent powerful tools to promote transparency, encourage a variety of working styles, and create a more inclusive workforce. For example, technology can help facilitate cross-generational mentoring, knowledge sharing, social networking, and professional development for employees both within and across different locations. Providing guidelines to use these technologies can also help address some resistance to utilizing new tools in employees’ day-to-day work. Resistance to change frequently stems from a lack of clarity on exactly how or when it is appropriate to use a new behavior, so taking steps to remove ambiguity facilitates change and can improve acceptance and effectiveness.⁴³

TABLE 3
MAXIMIZING TECHNOLOGY AS A DIVERSITY TOOL

	WHAT TO DO
Senior Leaders and Supervisors	<ul style="list-style-type: none"> • Leverage different media, such as social networks, intranet, and newsletters to support mentoring, networking, and knowledge sharing across generations, nationalities, and other dimensions of diversity. • Actively promote the use of technology within your team as a way to increase productivity, effectiveness, and innovation. • Create generationally and gender diverse teams for cross-mentoring and knowledge sharing opportunities about how technology is used.
Systems and Strategies	<ul style="list-style-type: none"> • Develop clear policies or guidelines and train all employees on the use of new technologies at work regarding their appropriate use, as well as on other strategies to maximize these tools to work effectively across teams and locations. • Highlight the benefits of using technology as a way to “work smarter,” and maximize different types of working.
Specific Organizational Strategies	<p>Programs and Activities that help examine, employ, promote, and decrease confusion with new communication technologies and social media at work, including:</p> <ul style="list-style-type: none"> • Structures and policies (e.g., handbooks and trainings on “netiquette”) for using technology at work (whether in an office or when working remotely) that provide clear guidelines about appropriate utilization. Make sure to update the guidelines on a regular basis, provide training and time to practice, as <i>technologies and utilization change quickly</i>. • Knowledge sharing activities focusing on technology use among employees of different generations using different media, such as social networks, intranets, and newsletters. <p>Programs and Activities that utilize technology to promote organizational citizenship and knowledge sharing activities across employees at different levels as well as among alumni and other employees who might be interested in coming back via:</p> <ul style="list-style-type: none"> • Alumni touch points, return to work programs • Social media, alumni websites • Alumni events

EXISTING DIVERSITY & INCLUSION PRACTICES AND APPROACHES

Technology has had a tremendous impact as people are freer to do work from home or their kids' soccer game, but it means you're more reachable, and you have to be accessible. I'm not convinced that this is a generational issue or [an issue for] people's careers evolving, but we hear partners say more about their personal lives or [that] free time is more important to them. I don't know if it's a shift in priority from when they were in their 20s, but I don't think you can underestimate them [when it comes to how they want to use technology and where they want to do work].

—Professional Services/Law

PROCTER & GAMBLE—GLOBAL & ONLINE TALENT MANAGEMENT

At The Procter & Gamble Company (P&G), 95 percent of managers are hired directly from universities, and P&G offers them a life-long career in different industries and markets, all within the same company. Potential is identified early and at various levels, so that the company can strengthen itself from within. Because of P&G's global talent management approach, the company has highly qualified diverse leaders in all regions of the world.

People and positions are tracked in an on-line talent development system— sufficiently robust to accommodate all of the company's 127,000 employees. The system enables employees to play an active role in their career development and to help develop their direct reports. Employees at all levels— from clerical and entry-level associates to senior executives— have the opportunity to complete their “talent profiles,” which include their career history, specific experiences, long-term career interests, functional skills, language ability, and mobility preferences and constraints. Managers of others use the system to approve skills assessments, identify development opportunities, and set development goals. Human Resources (HR) managers use the system to capture employees' promotion readiness, potential, destination jobs, and next assignment(s).

P&G develops employees through disciplined and rigorous training and assignment planning towards the employee's “destination job.” Managers help determine what experiences employees need to gain in order to attain career goals and freely send valued employees to other P&G organizations and regions for that experience.

With the talent database, P&G can also track the development of particular groups, such as women or people of color, as well as the career trajectories of individual people. Newly promoted employees who are evaluated after a full year at the new level as performing “well or exceptionally” are considered successful; P&G estimates that the vast majority of promotions are successful.

TREND 4: MANAGING WORK/ CAREER AND LIFE FLEXIBILITY

Closely linked to prior trends are generational differences with respect to work styles, work-life needs, and career goals.⁴⁴ Some believe that Gen X and Gen Y women and men have been a catalyst in making work-life effectiveness an important business priority for organizations.⁴⁵ In fact, work-life effectiveness has been a salient topic for fostering greater gender equity for several decades. One possible generational difference— partly linked to life-stage— is the perception that younger employees’ needs for work-life effectiveness may have less to do with “family responsibilities” and more to do with personal goals and interests (e.g., social activities, volunteer opportunities, and educational pursuits). Thus, it is important to develop flexibility policies and practices while considering a broad range of “life” options among both women and men of different generations.

Research does show that, in fact, work-life effectiveness is important to employees *across* both generational and gender cohorts.⁴⁶ Also, having grown up in a fast-changing and unpredictable job market, the “newer” generations are especially likely to value work that gives them the opportunity to learn and focus on their overall professional development and less on their development within a specific company.⁴⁷ Within this context, old notions of retention, organizational commitment,

and what constitutes the “ideal employee” (e.g., spending her/his career in the same field of work or organization) are rapidly changing.⁴⁸

“Flexibility”— in terms of how, when, and where the work gets done and individuals’ unique career paths and life stages—is becoming increasingly important when attracting and retaining talent of all ages. Unless properly managed, differences in goals, attitudes, and expectations about work-life issues can lead to conflict and resentment.⁴⁹ For example, experienced employees might view younger employees’ request for flexibility at the beginning of their careers as lack of commitment to their job.⁵⁰ Or, employees at the beginning of their career might be skeptical of career-flexibility programs when those at the top all seem to follow one specific, more traditional path. Similarly, women— and mothers in particular—are still largely viewed as the main “target” of work-life and flexibility programs, and those who use these programs as less committed to their job.

Thus, activities and programs that help reconcile different work-life needs, not only allow for diversity of working styles but also promote both generational and gender inclusion.

TABLE 4
MANAGING FLEXIBILITY BEYOND WORK-LIFE DICHOTOMIES

	WHAT TO DO
Senior Leaders and Supervisors	<ul style="list-style-type: none"> • Communicate the business case for flexibility, encourage flexibility and agility in the way work gets done, and provide career flexibility options. • Celebrate the myriad employee life circumstances, highlighting life experiences as an important and valued diversity dimension. Featuring employee-approved profiles of women and men at different levels and career stages on the intranet, for example, can provide relevant role models for others. • Encourage managers and senior leaders to act as role models when it comes to using flexible work options. • Provide career development and learning opportunities to employees at different levels/ages. Providing employees with a variety of skills, experiences, and responsibilities can positively affect their work experience within the organization.
Systems and Strategies	<ul style="list-style-type: none"> • When developing work-life programs, survey and consider the needs of employees in different life- and career-stages to address differing needs and make sure that everyone is fully engaged. • Make sure flexibility and other work-life programs and policies are truly supported with action and well-communicated throughout the company. • Find new ways to benefit from existing diversity programs with a generationally inclusive lens. For example, consider refining on- and off-ramping programs and changing career path options and professional development opportunities to address the needs of all talent.
Specific Organizational Strategies	<p><i>Programs and Activities</i> that make work-life effectiveness a business priority and that highlight strategies to “work smart,” including:</p> <ul style="list-style-type: none"> • Access to meaningful role models (e.g., showcase employee profiles on the intranet, including senior leaders) • Strong, well-communicated business case for flex policies, including flexible work arrangements and career path flexibility and develop career advancement models that include flexible options. • Clear and consistent conversations about work-life effectiveness. For example, include it in competency, discuss openly at staff meetings, provide role models who are in senior roles and/or are successful at using flexible work arrangements. • Information about the unwritten rules regarding work and career path flexibility.

EXISTING DIVERSITY & INCLUSION PRACTICES AND APPROACHES

When it comes to work-life balance, "life" means many different things to each generation... whether it means picking up a toddler from daycare, [managing] a misbehaving teenager, or [having] a date on Thursday night. I've found that middle-generations can be demanding on the newest generations [holding the attitude that], "I figured it out myself, earned my stripes. Why can't you?"

— **Construction/Engineering**

SKADDEN—SIDEBAR PLUS

In response to the decreased demand for legal services in a challenging economic landscape, Skadden offered a supplement to its existing Sidebar program.⁵¹ Implemented in 2009, Sidebar Plus provided associates and counsel in good-standing the opportunity to pursue personal or professional interests for a one-year period before returning to the firm. The program was designed to jointly benefit participating attorneys and the firm as a whole by providing the greatest possible development opportunities to the greatest number of attorneys. Those participating in the program had the opportunity to expand their skills and experience in a manner of their own choosing, whether that was to pursue additional academic credentials, such as an MBA or LL.M., language study, or increase professional experiences to expand their skill set. By conserving resources, Skadden decreased the overall headcount of the firm, in turn decreasing its financial burden, which enabled Skadden to continue offering enriching developmental opportunities for those attorneys who remained at the firm.

Initially developed in the United States and then rolled out in Europe and Asia, the Sidebar Plus program enlisted help from its strong network of partners and Skadden Fellows⁵² to identify organizations such as academic institutions, foundations, governmental groups, and non-profit organizations that would welcome a Skadden attorney to work for them for one year. Nearly 500 different organizations expressed interest in Skadden's Sidebar Plus participants.

The financial incentives for participating in the program are robust:

- Participants receive one-third of their current annual salary in a single, up-front lump sum payment.
- Skadden reimburses outstanding law school student loans (if any) to a maximum of \$1,000 per month for the duration of the attorney's participation in the program.
- Skadden reimburses participants for health insurance premiums for the duration of the attorney's participation in the program.
- Fees for primary bar registration are also reimbursed.

Participants are expected to remain current in their continuing legal education (CLE) requirements and are encouraged to attend approved, firm-sponsored CLE programs and other firm-sponsored events to maintain a connection with the firm. Skadden also created a website for participants to communicate with the firm and each other during their time away.

CAPITAL ONE FINANCIAL CORPORATION—FLEXIBLE WORK SOLUTIONS

Capital One created its Flexible Work Solutions (FWS) initiative to enhance organizational performance and real-estate asset utilization while supporting better work-life integration for its thousands of associates. The FWS initiative, which began as a result of associate feedback, supports work when and where it is most effective by enabling mobility through technology and providing supportive and unique workplace atmospheres to reinforce that flexibility. Capital One empowered its associates to work on their own timetables and in the work setting that best suits their tasks – at home, in new and innovative office workplace settings, or even at the local coffee shop. As a result, the company has increased associate productivity and satisfaction by offering flexible work arrangements, lowered real estate costs by requiring less overall space, and even driven environmental benefits through reduced commuting. The company's FWS initiative encompasses the following elements:

- **Open office design and efficient space utilization:** Capital One successfully adopted an open-air design in its office buildings, meaning that the office spaces have more open, public collaborative workspaces, as well as project rooms for smaller team collaboration. Other features include low-walled cubicles, open galleys, and “quiet zones” for those who need uninterrupted silence for concentrated thinking. The design also resulted in intelligent real estate usage, reducing real-estate costs for the company.
- **Technology:** The FWS program enables mobility through technology, including laptops, BlackBerry devices, instant messaging, and a Voice-over-Internet phone system that allows users to activate their phone number at any workstation they choose. Technology provides the freedom for employees to work anywhere.
- **Manager training:** A course, developed by Capital One University, helps managers understand the most effective ways of managing a virtual and flexible workforce. Early on, the company's HR Diversity team met face-to-face to refine priorities together with managers and to role model work flexibility.
- **Metrics:** Capital One conducts a survey each year to ensure it is properly managing the cultural shift and making data-driven changes to the program as needed. Increased productivity, satisfaction, and employee engagement are all early indicators of the success of the program.

SUMMARY

Employees across generations, companies, industries, and geographies are concerned about a variety of workplace issues, albeit sometimes for different reasons. Hence, developing practices that support a broad range of interests and needs is essential to creating generational *and* gender inclusion. Existing initiatives that focus on age and generational diversity often do not explicitly integrate or acknowledge the intersections among other diversity dimensions such as gender, race/ethnicity.

In this report, Catalyst proposes an approach that acknowledges and integrates gender and inclusion into the dialogue about generational diversity in the workplace. We discuss how managing perceptions, communication, technology, and work-life effectiveness is critical to designing generation- and age-inclusive practices and showcase how generational trends intersect and have the potential to increase employee engagement and ensure business sustainability.

Catalyst argues that forward-thinking companies will benefit from designing and implementing programs that maximize return on investment through integrated diversity approaches. For example, a new communication technology can address and enhance work-life effectiveness for employees at different life- and career-stages while also promoting gender equality. A networking group designed to combat gender or generational stereotypes also addresses issues of communication and transparency and provides important information about career advancement.

The synergies among the different trends and approaches outlined in this report can foster more comprehensive and inclusive policies, practices, and programs—allowing companies to create more effective and inclusive work environments.

APPENDIX: DATA COLLECTION

OVERVIEW

The trends discussed in this report are based on in-depth analyses of three different sets of data:

1. Semi-structured interviews with representatives from 25 leading-edge companies;
2. An extensive review of more than 50 company practices and approaches that address some aspect of generational and age diversity; and
3. A comprehensive review of Catalyst research and external literature on generational workplace trends, gender diversity strategies and practices, and organizational effectiveness and inclusion.

Interview data were collected via conference calls and follow-up emails. Specifically the data were collected through semi-structured phone interviews with 25 companies, most of which had at least one policy, program, or practice focused on generational diversity. Participants—all leaders and managers in human resource and D&I roles—were asked about how their companies were tackling generational diversity and positioning it within the larger D&I context. Based on our review, we identified several practices for this report.

DATA ANALYSIS

Catalyst conducted thematic analyses of the qualitative data described above to better understand how leading-edge companies tackle generational diversity and how they position it within the larger D&I context. We aimed to advance the dialogue on how initiatives that address these diversity aspects were developed and whether gender diversity influenced different approaches to generational inclusion.

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- ² Ellen M. Galinski, "The Changing Landscape of Work," *Generations* (Spring 2007): p. 16-22. Emily V. Troiano, *Workplace Trends: Today's Decisions, Tomorrow's Successes* (Catalyst, 2008).
- ³ Much of the existing research on gender and generational differences focuses on how professional, political, and social barriers hinder women's ability to manage work and family/childcare. More recently, the focus has started to shift on broader talent management concerns. Susan A. McDaniel, "Born at the Right time? Gendered generations and webs of entitlements and responsibilities," *Canadian Journal of Sociology*, vol. 26 no. 2 (2001): p. 193-214. More recent approaches have extended the generational and gender discussion to include other groups and different stages in life, see for example Bond et al.; Family & Work Institute, *Generations & Gender in the Workplace*, American Business Collaboration, 2006; London Business School, *The Reflexive Generation: Young Professionals' Perspectives on Work, Career and Gender* (2009).
- ⁴ In general, both in the United States and globally, generations are defined and shaped by important events, social histories, cultural shifts, and socio-political trends that were happening while each age group was in its formative years. In the United States, these generations are referred to as Veterans (born between 1922 and 1944), Baby Boomers (born between 1945 and 1964), Generation X (born between 1965 and 1979), and Generation Y (born after 1980). Age ranges are not absolute cutoffs. Individuals born near the end of one generation and the start of another (or vice versa) may identify with aspects of both or multiple generations. Conference Board Canada.
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- ¹¹ Timmerman.
- ¹² See Catalyst research series on gender stereotypes for an extensive overview of how stereotypes play out in day-to-day work.
- ¹³ Conference Board Canada; London Business School.
- ¹⁴ In Europe, for example, discussions about age-related workplace policies and initiatives often refer to the concerns of specific age groups (e.g., older, retirement-age employees) rather than larger generational cohorts. See European Commission, *The Business Case for Diversity: Good Practices in the Workplace* (2005). European Commission and Economic Policy Committee, *The 2009 Ageing Report, Economic and Budgetary Projections for the EU-27 Member States (2008-2060)*, (2009), for examples of relevant demographic trends and initiatives.
- ¹⁵ The European commission projected the employment of women to rise from 58.4% in 2007 to 63.4% in 2020 and to 65.1% in 2060 and the employment rate for older workers from 44.9% in 2007 to 54.5% in 2020. European Commission and Economic Policy Committee, p. 25. Clearly, age and gender diversity are becoming increasingly relevant in many European countries.
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- ¹⁹ Research shows that employee priorities and values shift based on where they are in their "life course." Life stages can be defined based on an individual age, family and/or parental status, as well as on her/his occupational and organizational tenure. These characteristics can translate in different types of specific "life stages," and individual companies can operationalize what categories are more relevant within the work context. For example, social scientists Patricia Roehling, Mark Roehling and Phyllis Moen identify the following stages to incorporate age, family configuration, and career trajectories: "Non-parent stages" include young non-parents (approx ages 18–29), mid-age non-parents (ages 30–39), older non-parents (ages 40–50), and shifting gears (ages 50+), and "Parental stages:" parents of preschool aged children (youngest child is 0–5) and parents of school-aged children (youngest child is 6–17). Patricia V. Roehling, Mark V. Roehling, and Phyllis Moen, "The Relationship Between Work-Life Policies and Practices and Employee Loyalty: A Life Course Perspective," *Journal of Family and Economic Issues*, Vol. 22, N. 2 (Summer 2001): p. 141-170. Similarly, the Center for Employment and Family Careers Institute at Cornell proposed four key types: 1) Anticipatory Stage (women and men in their twenties who have no children) includes young professional who have not yet started but are looking forward to family and work careers; 2) Launching Stage. Includes women and men in their twenties and thirties who have young children or preschoolers at home. Launching both family and work careers. 3) Establishment Stage. Includes people in their forties and fifties who have children at home. Established families and careers. 4) Shifting Gears Stage. Includes people in the fifties and sixties who have no children at home. Looking toward retirement or second careers or a combination. Work-Family Research Network, "The Cornell Center For Employment And Family Careers Institute: Developing A Work/Family Methodology," *Work-*

- Family Research Newsletter* (Winter 1999). http://wfnetwork.bc.edu/The_Network_News/1-1/winter99/article_cefci.html
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- ²¹ These trends largely reflect some of the same themes that emerged in media as well as in other research literature on generational issues in the workplace, see for example Canadian Conference Board; Smith, *Decoding Generational Differences*, New York, NY: Deloitte LLP (2008).
- ²² Research by Ernst & Young revealed that generational cohorts have more in common than what most expect—for example, opportunities to learn and grow, flexibility, a culture of respect, and chances to play a leadership role in the firm were identified as the most important factors for all three generations. In December 2007, Ernst & Young (E&Y) distributed an online survey to 9,144 of their partners and employees in the U.S. and Canada. About 3,000 employees in each of three generational groups (Boomers born 1946 – 1964, Generation X 1965 – 1980, and Generation Y born after 1980) were invited to respond. Ernst & Young, *The Generation Gap: The Real Story at Ernst & Young*, EYGM Limited (July 2008).
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- ⁴³ Chip Heath and Dan Heath, *Switch: How to Change Things When Things are Hard*, New York: Broadway Books (2010).
- ⁴⁴ London School of Economics; Troiano.
- ⁴⁵ The idea that younger employees are especially likely to value flexible work arrangements came up repeatedly in the course of Catalyst's interviews with company representatives; see also London School of Economics; Smith; Troiano.
- ⁴⁶ Conference Board Canada.
- ⁴⁷ Conference Board Canada.
- ⁴⁸ In general, old notions of organizational commitment and loyalty are changing. Where in the past employees were likely to remain in the same organization and line of work for most of their career, professional trajectories have now become more fluid and unpredictable. Employees may move laterally, change careers, or move to a different organization several times throughout their lives. Salopek.
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- ⁵³ The Skadden Fellowship Foundation awards two-year fellowships which provide Fellows with the freedom to pursue public interest work.

ACKNOWLEDGMENTS

This report is the result of the teamwork and dedication of many Catalyst staff. Catalyst President & Chief Executive Officer Ilene H. Lang gave insight and support that were critical to the report's development. Nancy M. Carter, Ph.D., Vice President, Research, oversaw the report and provided considerable input and guidance that were instrumental in producing this product.

Laura Sabattini, Ph.D., Anika K. Warren, Ph.D., Sarah Dinolfo, and Emily Falk conceptualized the study and co-authored the report. Mekayla Castro provided significant contributions throughout the process.

We are grateful to Catalyst issue experts and team members for their insightful comments and suggestions: Michael J. Chamberlain; Jan Combopiano; Meryle Mahrer Kaplan, Ph.D.; Jennifer Kohler; Julie Nugent; Susan Nierenberg; Emma Sabin; Debbie Soon; and Cheryl Yanek. Special thanks go to those who shared their knowledge and

experience about generational diversity and their global perspective: Deborah Gillis, Emily Pomeroy, and Christine Silva, Catalyst Canada; and Eleanor Tabi Haller-Jorden and Candice Morgan, Catalyst Europe AG. We also extend our thanks to interview participants and the companies and individuals who provided practices for the report.

Nancy Hendryx, Associate Editor, edited the report. Sonia Nikolic, Graphic Designer, designed the report and illustrated the cover. Emily Pomeroy, Senior Associate, Catalyst Canada, fact-checked the report.

Finally, this project would not have been possible without the generous support of Mentor Circle Sponsor General Motors Company, Associate Circle Sponsor IBM Corporation, and ResearchPartners American Express Company, BMO Financial Group, Deloitte LLP, Ernst & Young LLP, Google, IBM Corporation, McDonald's Corporation, and UPS.

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