Intergenerational Fluency 101: A toolkit for leading across generations

Table of contents

01

Foreword

By Edith Cooper and Jordan Taylor, co-founders of Medley

It will come as no surprise that as a mother-daughter founding team, the concept of building and empowering a multigenerational workforce is one we feel particularly close to.

Our perspectives as intergenerational leaders have been shaped by our respective personal and professional journeys: Edith has spent the past four decades advising Fortune 100 companies and building environments where people can perform to their full potential, including as leader of the human capital management division of Goldman Sachs. Jordan, who draws from her experience navigating her own pivotal career and life decisions, has witnessed the value of small groups and peer accountability in helping people achieve their goals. While we each have different leadership styles, our combined approaches have helped us build an even stronger foundation for our company, Medley, where we provide group coaching for emerging leaders.

Amid changing expectations for workplaces and the people that lead them, qualities such as adaptability, self-awareness, empathy, and communication have never been more critical. And yet too often, employers fail to dedicate time and resources to developing these skills, to their own detriment.

The organizations most ready for the future are the ones that commit to creating impactful growth and learning opportunities for the next generation rising within their ranks. In our work, we see firsthand how transformational that commitment can be—and how vital it is for workers of all ages to know how to support, connect with, and learn from one another.

While the current economic moment is undoubtedly a challenging one, we view this an opportunity to double down on crafting a new playbook for leadership development. We need to set the bar for what it means to be a leader—and what it means to build a more nimble, inclusive, and collaborative culture within organizations—even higher.

This playbook was written with that call to action in mind. We hope you find that this is a valuable resource as you lead your multigenerational workforce, and that it sparks conversation in your organization and your broader orbit about what it means to empower leaders of all ages.

About Jordan Taylor and Edith Cooper

Jordan Taylor is the co-founder and CEO of Medley, a leadership development platform that democratizes access to expert coaching and provides a strong peer community and resources to help emerging leaders grow both personally and professionally. Medley, which Jordan launched in 2020 with her mother, Edith Cooper, provides a unique space for emerging leaders to harness the power of human connection to fuel their own growth journey and to grow their impact.

Edith Cooper co-founded Medley with her daughter, Jordan Taylor, to bring her decades of experience creating environments where people can perform to their potential to a broader audience. As the former global head of human capital management at Goldman Sachs, where she was the first female Black partner, Edith brings unparalleled expertise in leadership development to the Medley team and community. She currently serves on the boards of Amazon and PepsiCo, among others.

02 Introduction

With <u>five generations</u> now working side by side for the first time, and a rising number of Millennial and Gen Z managers, diversity of age is the norm in many teams and organizations. But as emerging leaders continue to challenge old ways of working and organizations become ever more future-focused, it's not enough for employers to focus their efforts on supporting multigenerational workforces.
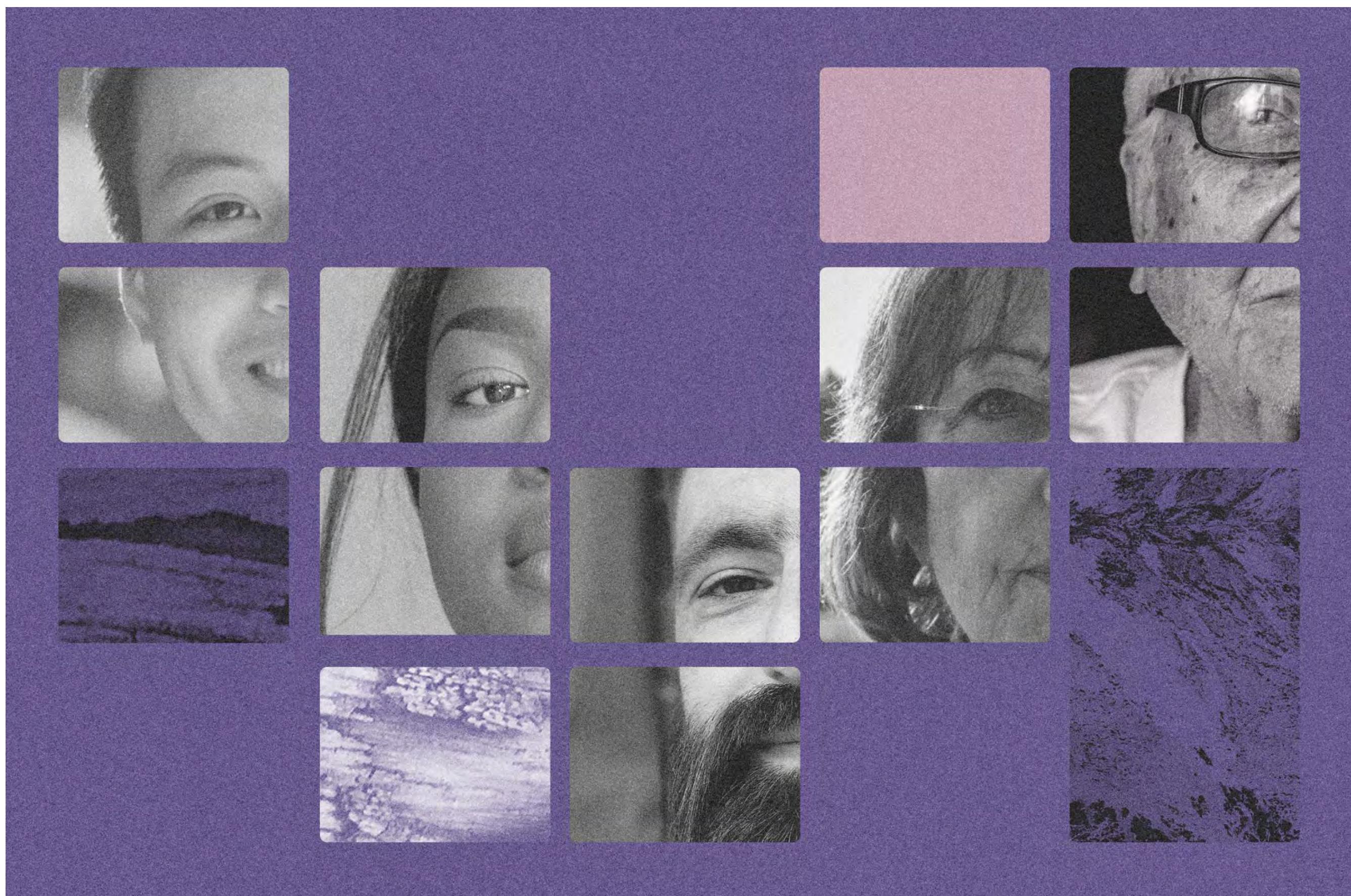
Instead, the key to improving collaboration, promoting mutual understanding, and helping workers thrive at every stage is to focus on building intergenerational cultures. That task requires moving beyond demographic facts and instead focusing on the relationships, power dynamics, and individual needs and desires that comprise a workforce.

And as workplaces tackle issues like remote and hybrid setups, caregiver support, the ongoing effects of the Covid pandemic, and employee engagement amid an economic downturn, demographic trends in the country at large are affecting the way each generation is able to show up at work.

For example, older workers have retired at <u>higher rates</u> in recent years (even accounting for the recent uptick in "un-retirement"), in large part due to concerns about health and Covid. Meanwhile, the youngest employees are reporting the highest rates of burnout of any group and are leading the call for greater work-life balance, remote and flexible work policies, and investments in diversity, equity, and inclusion, according to <u>Gallup</u>. As Millennials and Gen Z employees increasingly take on leadership roles—one 2020 Zapier <u>poll</u> of these groups found that half now have direct reports—these beliefs hold an increasing amount of sway over workplace policies. And in the middle, many Gen X workers are juggling caregiving responsibilities amid a care infrastructure <u>crisis</u>, as over <u>half</u> of workers in their 40s are in the "sandwich generation," caring for both children and aging parents.

At the same time, these generational labels don't tell the whole story, cautions Michael North, an assistant professor of management at NYU's Stern School of Business who studies age and the workplace. Focus too much on an individual worker's birthdate and you risk getting bogged down in stereotypes, assumptions, and over-simplifications. "We should really be focusing on workers' GATE," advises North, "which is an acronym that stands for generation, age, tenure, and experience."

For a workplace that is more responsive to every aspect of a worker's GATE, leaders must build feedback loops that are sensitive to age, life stage, and career stage, and promote policies that address workers' unique needs.

That means supporting emerging leaders and managers of all ages to support multigenerational teams, designing learning and development programs that recognize that we all have something to learn and something to teach, building benefits packages that reflect individual values and needs, and creating dynamic cultures that encourage mutual understanding and respect.

"

"We should really be focusing on workers' GATE, which is an acronym that stands for generation, age, tenure, and experience."

MICHAEL NORTH
Assistant professor of management at NYU's Stern School of Business

Throughout this playbook, you'll find anecdotes, data, and tactical advice that will help you accomplish each of these tasks, based on conversations with researchers and practitioners, as well as original research from Charter. We hope it will help leaders equip their multigenerational workforces to build and sustain intergenerational cultures.

03

Supporting leaders

In order to build and lead effective multigenerational teams, today's leaders need intergenerational fluency, the ability to communicate effectively across generations. Supporting leaders means equipping them with the basic skills that support intergenerational fluency: empathy, flexibility, an inclusive leadership style, and a beginner's mindset.

Art: Charter / Photo: iStock fizkes

Empathy:

Using open questions and active listening to understand, trust, and support team members of all backgrounds.

> FURTHER READING:
>
> Charter's book briefing on *True North - Emerging Leader Edition* by Bill George and Zach Clayton.

Flexibility:

Embracing autonomy in individual working arrangements, including location, schedule, and/or working style.

> FURTHER READING:
>
> "What is flexible work?" from Slack's Future Forum.

Inclusive leadership:

Shaping team culture to cultivate psychological safety and ensure all team members' voices are heard.

> FURTHER READING:
>
> "A toolkit for implementing psychological safety" from Charter Pro.

Beginner's mindset:

The ability to approach situations as a beginner would, regardless of experience. This helps leaders become open to learning from colleagues of all kinds, as well as more effectively teach more junior colleagues.

> FURTHER READING:
>
> "Don't Be Blinded by Your Own Expertise" from Harvard Business Review.

Each leader will exhibit these skills and attributes in a unique way, depending on their team's needs and their own leadership style. Below are three narratives from managers who have used these skills to effectively lead teams, along with specific learnings and practices related to their experience.

Ask, don't assume.

Brenda Zullo, director of development at Tory Burch, Gen X:

> *I work with anyone from designers to production and planning people, which is a huge spectrum of personalities. A lot of my job is to get people on board with a shared project, so I consider it my job to understand where people are coming from. From my first talk with reports as their manager, I introduce myself and the management style that I bring to the table. I make it a collaborative conversation to understand their strengths as well as their needs.*
>
> *For example, I had one direct report who was a single mother. Even when I was hiring her, she was very clear about needing to work from home two days a week. We talked about how she was going to put her child into local child care and what that would mean in terms of daycare pickup. I told her, 'As long as you're getting your work done, as long as you ask for help when you need, and as long as we're talking about this and keeping the communication flowing, of course, you should absolutely feel empowered to drop everything and go if your child needs you.'*

TAKEAWAYS:

- ☑ **Lead with clarity.** Employees should know what success looks like, expectations and evaluation metrics, and resources available to support them.

- ☑ **Stay curious.** Employees may have different obligations and responsibilities outside of their job at different life stages, but managers can't support employees without asking what they need—and understanding that those needs may change over time, sometimes abruptly.

- ☑ **Ask before assuming.** Don't draw conclusions about an employee's ambitions or learning goals based on their life stage or career stage. Instead, have regular development conversations to align on individual goals and available learning opportunities.

Expertise comes from everywhere.

Caitlin Kawaguchi, COO at Parkes Philosophy and junior board member for First Tech Fund, Millennial:

> *When you're a younger leader, it can feel intimidating to be leading groups of folks who are much older than you, but remember that you are there for a reason. Your age or generation does not mean you are bringing less to the table. The same goes for collaborating with folks who are older than you. It's all about focusing on the reason why you are both there and what expertise each team member is bringing to the table.*
>
> *Remember, expertise comes from everywhere, so make sure that the way you're structuring input in conversations includes everyone intentionally. You have to work to make sure feedback is heard, especially in areas where [people] might feel like they have less expertise. That's come up for me a number of times with older colleagues and technology. We're talking about shifting a platform and they say, 'Well, I'm not even on the current platform, so I don't have anything to share.' But actually, that's the expertise. When you're thinking about an external audience, that point of view is super important. We want to know why they might not have liked the first platform and what feels uncomfortable in the second one, as well as the best way to make it accessible and exciting. Remind folks that their expertise is not just subject matter, but also their lived experience.*

TAKEAWAYS:

- ☑ **Do a knowledge audit for each project.** Before beginning a new initiative, work to identify the skills and expertise necessary to succeed, and map each of these factors to a person on the team. Think beyond education, tenure, and previous projects and consider how lived experiences have built authority.

- ☑ **Invite participation.** Mastering facilitation tactics can encourage greater participation and feedback, build psychological safety, and boost feelings of inclusion. At the 2021 Charter Workplace Summit, Paypal CHRO Kausik Rajgopal underlined shared one tactic for jump-starting conversational turn-taking in meetings, inspired by a rule from the Supreme Court: "Nobody speaks twice until everybody speaks once."

"

Remind folks that their expertise is not just subject matter, but also their lived experience."

CAITLIN KAWAGUCHI
COO at Parkes Philosophy

Make upward feedback easy.

Angela Romano, chief people officer of Sealed, Gen X:

> *My team often will have people come to us with a challenge they're having with their manager. Instead of intervening directly, we'll talk them through how to approach the conversation. Sure, I can go have any conversation that you want me to. But you're going to grow far more from it if you do it, so I'd much rather help you guide the conversation.*
>
> *For the first few times an employee has a major issue with a manager, that kind of one-on-one support is great, but there are also ways to encourage upward feedback on a more regular basis, like setting aside regular opportunities to give feedback during one-on-ones. I also think everybody should have a skip-level on a regular basis, and part of that conversation is asking how things are going with the report's manager. And then the skip-level manager can have a conversation with the report about how they can support them in addressing any issues.*

TAKEAWAYS:

☑ **Feedback is the antidote to conflict.** "I have literally never met a single working professional who doesn't have some sort of story about some sort of generational conflict or disagreement," says NYU's North. "If you really want to ease the tension, give your junior folks the opportunity to offer feedback."

☑ **Giving feedback is a skill, so teach it like one.** Giving upward feedback—especially younger employees giving feedback to older, more senior managers—can be difficult because of the power imbalance. Help employees develop the skill by practicing, scaffolding, and supporting feedback conversations.

☑ **Create opportunities for upward feedback.** Normalize and encourage upward feedback by creating opportunities for employees. Consider:
- Folding feedback points into standard one-on-one agendas.
- Scheduling regular skip-level meetings.
- Including upward feedback in the performance-review process.

"

Everybody should have a skip-level on a regular basis, and part of that conversation is asking how things are going with the report's manager."

ANGELA ROMANO
Chief people officer of Sealed

04

Continuous learning

One of the greatest benefits of building a truly intergenerational culture is that it creates greater opportunities for employees to learn from one another. "In the workplace, everything has customarily been top-down," says writer Bruce Feiler, author of the newsletter The Nonlinear Life, the TED course How to Master Life Transitions, and the new book *The Search: Finding Meaningful Work in a Post-Career World.* But over the past several decades, Feiler says, that concept has been ceding ground. Increasingly, "the idea is that wisdom can come from all different directions," he explains.
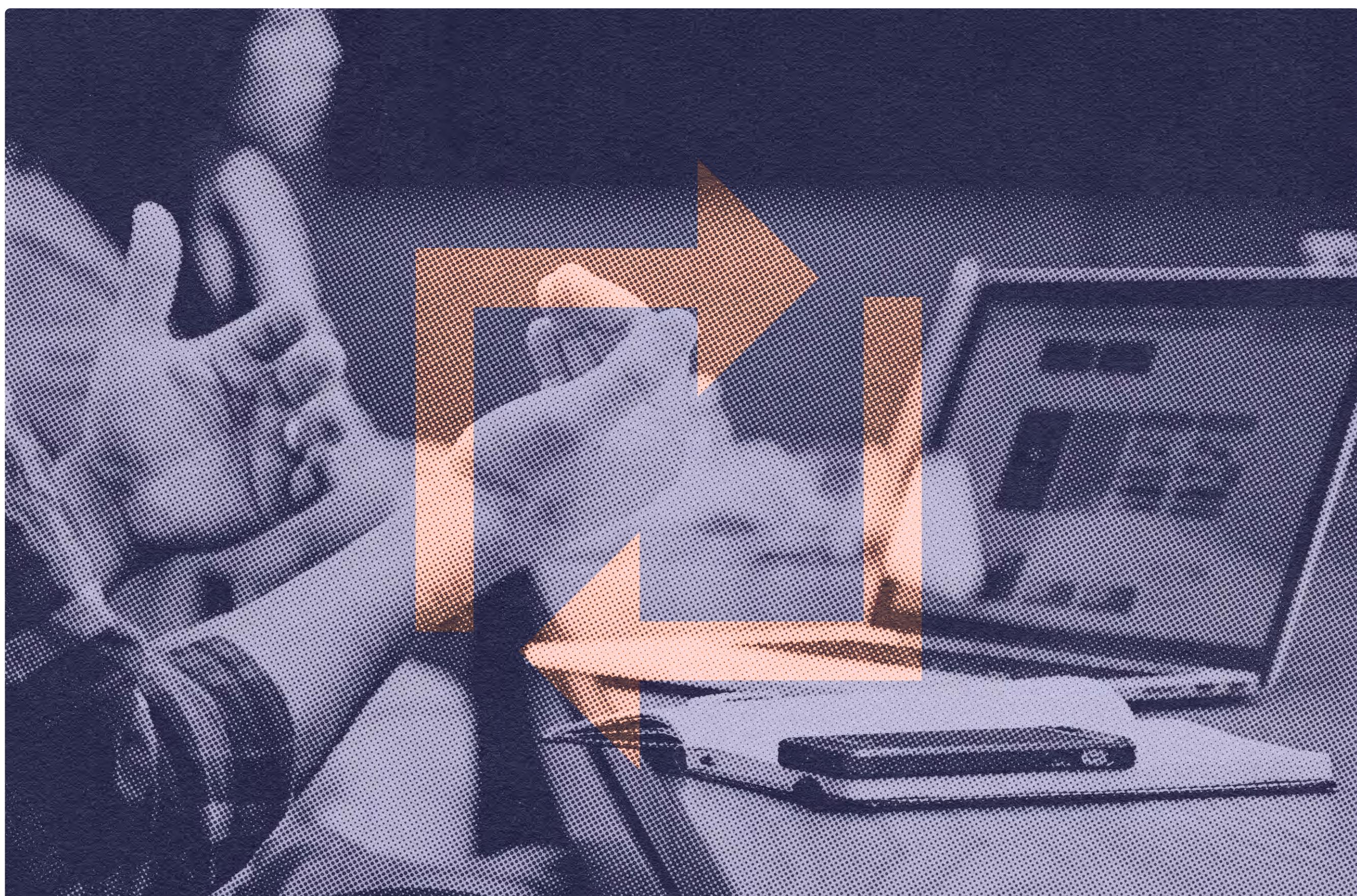
Companies can encourage this exchange of wisdom across generational lines through well-designed mentorship programs that combine traditional mentoring—with a senior person and a junior person as mentor and mentee, respectively—with alternative forms of mentoring and peer learning.

The benefits of mentorship

While the benefits of mentoring for mentees may seem obvious—encouragement and support, advice that boosts career progression and skills development, connections to new opportunities, and increased engagement and retention, among others—mentorship may benefit mentors just as much.

"There's research to suggest that the real benefits are accrued by the person who's mentoring," says Jean Rhodes, director of the Center for Evidence-Based Mentoring at the University of Massachusetts, Boston. "It gives them a better sense of commitment to the workplace. It's very gratifying. It takes them out of their own little narcissistic world and gets them thinking about bigger things."

Setting mentors and mentees up for success

According to Wendy Murphy, associate dean of undergraduate academic programs and a professor of management at Babson College, successful mentoring programs have three key features in common:

- **A director or coordinator.** This person can serve as "a trusted third party that's helping facilitate the relationship, making sure that people have the resources that they need, and a trusted advisor should things go awry or challenges arise," says Murphy.
- **Opportunities for participant input.** Giving mentors and mentees some say in the matching process—for example, through an in-person networking night with a post-event survey, or a digital system where mentors and mentees rank their choices based on resumes and bios—"helps participants feel invested in the relationship," explains Murphy.
- **An orientation.** Kicking off the relationship with a training session for both mentors and mentees "enables people to all get on the same page so that the mentees and the mentors all understand the expectations," Murphy says. It's an opportunity for both parties to align on the duration of the relationship, how frequently they will meet, the content of those meetings, and the pair's shared goals.

"

In the workplace, everything has customarily been top-down. [Now] the idea is that wisdom can come from all different directions."

BRUCE FEILER
Author

Worksheet: Setting expectations for mentor-mentee relationships

Provide mentors and mentees with this worksheet to help them align during their first meeting.

1. **What are our goals for this relationship, both individual goals and shared goals?**

2. **What do we care most about in this relationship?**

3. **What are our ground rules?**

   a. **How often will we meet? Where? When? How (digital/in person/hybrid)?**

   b. **Will we communicate between meetings? If so, how (email, LinkedIn, text, etc)?**

   c. **How will we give and receive feedback in this relationship?**

How to support mentors

Make sure to set aside time to prepare mentors specifically for taking on a mentee. Charter's mentorship survey found that mentors of very successful mentees—defined as those who accomplished at least 81% of their goals—were more likely to work at organizations that offer mentorship training.

Tailor these trainings to the needs of your organization's pool of mentors. If you have many first-time mentors, for example, your program coordinator may want to focus on more basic skills like active listening and goal-setting frameworks.

If your mentoring program includes many senior employees, prepare mentors for a fruitful relationship by helping them get into the right learning mindset. "It's very ingrained in people to look upward in their social hierarchy for learning," explains Ting Zhang, an assistant professor of organizational behavior at Harvard Business School who studies learning and feedback. "But being oriented to learn downwards from you —that is, from people who are more junior to you—is really valuable, because you're now going into that relationship as a learning opportunity rather than an obligation."

ACTIVITY:

> Help mentors adopt a downward learning orientation by asking them to remember a time when they learned something from a mentee or more junior colleague, and encourage them to share reflections on the experience.

A beginner's mindset, which similarly helps mentors stay open to learning, also helps them empathize with mentees (who may truly be beginners) and give advice that is more useful to people earlier in their careers. For example, Zhang notes that a beginner's mindset "could help make the advice you give more concrete, because beginners think much more concretely than those who are experts."

ACTIVITY:

> Activate a beginner's mindset by asking mentors to revisit a piece of writing or a work product that they created early in their career. Have them reflect on their mindset at the time, their challenges from that time period, and any lessons they learned through the process.

Non-traditional forms of mentoring

Aside from traditional mentor-mentee relationships, alternate forms of mentoring like reverse mentoring, peer mentoring, and mentoring circles can also be useful to employees at all career stages.

Reverse mentoring flips the typical mentor-mentee relationship by placing a more senior mentee with a more junior mentor. In addition to helping the more junior person develop mentoring skills, this kind of mentoring relationship can upskill and reskill more tenured employees.

"

Being oriented to learn from people who are more junior to you is really valuable, because you're now going into that relationship as a learning opportunity rather than an obligation."

TING ZHANG
Assistant professor of organizational behavior at Harvard Business School

Murphy offers a few examples of the knowledge more junior mentors can bring to the table:

- Direct experience with the client or customer base.
- Updated technical or academic knowledge of the field from being in an educational setting more recently. "These fields move so fast that it's impossible once you've been out for 20 or 30 years to have kept up on the literature," she adds.
- Social-media trends and emerging platforms.
- A frontline perspective on the workplace. As Murphy notes, it can be "really hard to get an honest perspective once you get several levels up in the organization."

Peer mentoring programs pair coworkers at similar levels and experience. Some peer mentoring programs offer "step-ahead" mentors, who are the next level above the mentee and can give tactical advice about immediate steps to advance in the near future. Others pair coworkers at the exact same level, either in the same department or across different functions.

"Peer mentoring is one of the most underutilized resources," says Murphy. Employees often favor mentoring relationships with more senior colleagues, but peers can actually be more useful for certain asks. "What you need senior mentors for are bigger strategic and cultural questions about the organization, how things get done, and what you need to develop. Whereas your peers, you can use for much more tactical questions," like reviewing your LinkedIn profile or an important email.

Offer tools to mentors outside of these training sessions, like question banks, worksheets, and reminders to check in and meet with mentees. Also encourage and create an infrastructure for mentors to meet with fellow mentors as a way to share challenges and learn from each other.

FLASH CASE STUDIES:

Peer mentoring can help companies achieve any number of learning goals:
- Sodexo sees peer mentoring as a diversity, equity, and inclusion initiative to connect employees belonging to similar affinity groups, so it runs peer mentoring through employee resource groups (ERGs).
- EY uses peer mentoring as a buddy system to welcome new employees to the company during their onboarding process.
- Code for America sees peer coaching as a way to support managers in a remote setting, and sets manager pairs up with digital tools including coaching prompts and action items.

"

It can be really hard to get an honest perspective once you get several levels up in the organization."

WENDY MURPHY
Professor of management at Babson College

Mentoring circles are larger groups that go beyond the typical two-person setup. This arrangement "takes the weight out of that one-on-one relationship and distributes it across many people, so that if you don't perfectly identify with your one mentor, there's someone else in the circle that you could really identify with and have that chemistry with," explains Murphy.

The composition of the mentoring circle can depend on the needs of the employee base, and the structure can be combined with the principles of traditional mentoring, reverse mentoring, or peer mentoring. A CEO, for example, might look for a peer mentoring circle made up of other CEOs, while a junior employee might benefit from a mentoring circle comprising a "step-ahead" mentor and a more senior mentor to get two sets of perspectives.

Murphy recommends that individuals build these kinds of developmental networks or "personal boards of advisors" even outside of formal mentoring programs. "I highly recommend that every person at every career stage has a handful of people that they're talking to about their career," she says.

05

Inclusive benefits

A company's culture is often described in terms of benefits and perks. While that definition falls short of what <u>culture actually is</u>—the values, priorities, and behaviors that guide how decisions are made and work is done—the values you use to shape your benefits offerings are indicative of culture. And in this regard, making your culture an intergenerational one depends largely on one thing: flexibility.

That flexibility can manifest in multiple ways, including how you structure your offerings. Tami Simon, senior vice president at the benefits-consulting firm Segal Benz, notes that cafeteria-style benefits plans, in which employees can allocate pre-tax dollars toward selections made from a menu of benefit options, are seeing a resurgence in popularity as employers move further away from a one-size-fits-all mindset. "[They're] thinking about how to bring back a certain element of personalization so that each person can essentially customize their benefits to meet whatever their needs happen to be," she says.

And while the generational makeup of your workforce should shape your benefits strategy, this data set should also be considered through a lens of flexibility. It's true that an employee base that's mostly Gen Z will likely need different things than one that's mostly Baby Boomers. Workers in the former category may value student-loan repayment benefits more highly, for example, while those in the latter may place a higher premium on retirement benefits. At the same time, "every single workforce is different," Simon says. "What might be right for a Millennial in one workforce might not be right for a Millennial in another."

In that spirit, this chapter will focus not on what to offer, but on how to make that determination in a way that prioritizes balance, choice, and clear communication.

"

"Every single workforce is different. What might be right for a Millennial in one workforce might not be right for a Millennial in another."

TAMI SIMON
senior vice president at Segal Benz

Collecting your data

As with engagement surveys, benefits-focused employee surveys should be a tool to identify workforce-level trends, rather than to get an individual-level understanding. With that in mind, the below questions can help you to assess what's working in your benefits strategy and what changes would help it better serve your employees.

TEMPLATE: SURVEY QUESTIONS FOR BENEFITS FEEDBACK

Overall, how satisfied are you with the currently available benefits?

○ Very dissatisfied	○ Somewhat dissatisfied	○ Neutral	○ Somewhat satisfied	○ Very satisfied

↳ Optional: Explain your answer.

Who are you responsible for as a primary and backup caregiver?

Child(ren)/minor(s):

○ Primary	○ Backup	○ N/A

Adult(s):

○ Primary	○ Backup	○ N/A

Elderly individual(s):

○ Primary	○ Backup	○ N/A

Other (explain below):

○ Primary	○ Backup	○ N/A

↳ Explain your answer.

What ideas do you have for support you would like to see?

[Note: This wording can be left intentionally vague to solicit answers about both specific benefits and broader change.]

It's important to note, though, that while surveys can be a valuable way to understand what your employees need from their benefits, relying on surveys alone won't give you the full picture of employee needs. For one thing, they are "a snapshot in time," Simon says, rather than a way to capture longer-running sentiment. "Everybody has a different mood every day, and it could be that someone really needs something one particular day and a month later they don't need it at all," she notes. For another, surveys only capture the needs of the employees who fill them out—and workers who feel disengaged or mistrustful of their organization are less likely to participate, only further compounding the problem.

To gain a richer, more holistic understanding, make surveys one component of a multi-pronged approach that gathers both quantitative and qualitative information. Other components include analyzing data on usage rate for individual benefits, holding sounding-board sessions with employee resource groups (ERGs), and training managers to have more focused conversations with their reports about what they'd like to see.

Note: While focus groups may be more efficient, one-on-one conversations often yield more valuable information—someone who wants to ask about fertility benefits, for example, may not feel comfortable doing so in front of a collection of their colleagues. Even these manager discussions should be fully optional and presented as such. "Oftentimes, not all of your employees will be willing to step forward, but there will be handfuls of more vocal folks that may be willing to talk about their story," Julia Cohen Sebastien, CEO and co-founder of the employer-based caregiver-support platform Grayce, told Charter in an interview earlier this year. It's then up to leaders to give employees the opportunity to "speak up for what they want through formal and informal mechanisms for trying to gather that input."

SCRIPT:

One framework for managers to use in these discussions, borrowed from Stanford's d.school, is:

> "I like, I wish, I wonder":
>
> What's working? What's missing? What would you want the organization to try?

Communicating your benefits

Somewhere between <u>one-third</u> and <u>half</u> of employees don't understand their benefits, depending on the survey. No matter the exact figure, this much is clear: Closing the understanding gap in an inclusive way means providing multiple pathways for people to learn what's available to them, without privileging one group's learning preferences over another's. It also means presenting the information by need, rather than by demographic.

CHECKLIST: GENERATIONALLY INCLUSIVE BENEFITS EDUCATION

Here are four steps to ensure that workers of all ages and stages have equal access to their benefits information:

☑ **Organize your benefits by life event.** On your employee intranet, benefits microsite, or whatever platform you use, make it easier for employees at all life stages to find the information most relevant to their own circumstances. Information should be "event-driven, as opposed to just, 'Here are your medical benefits, here are your retirement benefits,'" Simon says. An employee whose child is nearing high-school graduation, for example, may use that event as an access point for information on financial-wellness programs, tuition support, and college-admissions assistance.

☑ **Provide decision-making support.** An employee's benefits needs will change in abrupt fits and starts throughout their career, and most won't pay attention to a benefit before the moment they need it. As Simon puts it: "I'm not going to read stuff about menopause until I've got a question about menopause." To help people understand their own evolving needs, she notes, many organizations are creating decision-tree-type tools that help guide employees through benefits selection by "ask[ing] you what your particular priorities are, what your particular goals are."

☑ **Include a variety of formats.** Varying levels of digital fluency and comfort shouldn't be a barrier to understanding benefits. "One person may want to print something out, read it on paper, take notes," Simon says. Make sure employees have the option to receive their benefits information on or offscreen, even if that means making a printable PDF for download.

☑ **Message reminders on different platforms.** One 2022 <u>study</u> found that incentives, such as offering matching to encourage

401(k) contributions, are often not enough on their own to increase employee participation in a desired behavior—but making those incentives conspicuous through frequent reminders can move the needle. As with the point above, employees have varying preferences—often, but not always, influenced by age—in how they consume information: Some may be more comfortable receiving these reminders via email, while others may be better reached via text or even social-media posts from your employer account. To make sure you're reaching all effectively, avoid limiting yourself to one medium. (Though as study co-author Hayley Blunden, an assistant professor of management at American University's Kogod School of Business, noted in a recent interview with Charter, it's best to focus on a small number of high-priority initiatives at a time: "You don't want to get into a place where you're overwhelming people with making every single thing conspicuous all the time.")

SPOTLIGHT: CAREGIVER BENEFITS

There's a reason the survey language above called out caregiving specifically. Around three-quarters of employees are caregivers in some form, according to a 2019 report from Harvard Business School—a category that includes those caring for children and those caring for parents, as well as siblings, other relatives, partners, and friends.

As Charter columnist S. Mitra Kalita wrote last year: "If everybody is now a caregiver, how can employers help, well, everybody?"

In figuring out how to prioritize the many benefits that can help caregivers—child-care and elder-care support, flexibility, paid family and medical leave, financial-planning support, and legal support, to name a few—it helps to work backwards, Sebastien counsels. "The question is, what is the result that you want? What's the business problem you're trying to solve?" she says. "That might be how you keep people at work, or giving people more knowledge and support, giving them more time back. But also, what's the emotional state that you want to invoke in the employee? How do I show people that in their hardest moments in their life, we're there for them? An employee may not really remember whether they got one week off or whether they were given an extra 2% match in their 401k, but if they literally were in a job where their mother almost died, their spouse was going through intensive chemo, or their child was struggling with enormous issues in getting the right treatment for neurodiversity, they'll remember who was the employer and who was the manager that helped to make it possible to manage that."

"

The question is, what is the result that you want? What's the business problem you're trying to solve?... But also, what's the emotional state that you want to invoke in the employee?"

JULIA COHEN SEBASTIEN
CEO of the caregiver-support platform Grayce

06

Culture considerations

Building an intergenerational culture means, well, tending to your culture—the values, policies, behaviors, and norms that shape how work gets done. Here are three areas to focus on: communication; diversity, equity, and inclusion; and employee connection, with action items on the organizational level and on the individual level.

Communication

There's no shortage of stories in the modern workplace about generational misunderstandings and miscommunication: over emoji usage, slang terms, punctuation, message timing, modes of communication . Minimizing those misunderstandings means setting clear norms and expectations at every level—as an organization, as a team, and as individuals—so that workers of all ages and stages can come to a shared agreement of how to talk to one another.

As an organization:

- **Clarify the purpose of your communication channels.** For example, you might differentiate between Slack for internal conversations and email for external messaging, with texting used only in case of an off-hours emergency. Absent any guidance, workers may over-rely on whichever mode of communication feels most intuitive, setting up divides that often fall along generational lines—younger workers, for example, may not default to email in the same way as their older peers, setting up a scenario in which messages are missed or their urgency is misinterpreted. Codifying which mode of communication to use when (and with whom, and for what) keeps everyone's expectations aligned about how they should receive and send various categories of information.

- **Establish an emoji glossary.** It may seem silly or inconsequential, but those tiny images have an outsized power to change the way a message is received—and, by extension, the way its sender is perceived. (One recent Washington Post underline noted that even the plain smiley-face emoji can spark drastically different interpretations, with one Gen Z employee describing it as "dead behind the eyes," while older workers may not intuit the meaning of, say, the nail-polish emoji.) As part of your communication norms, have a place where you define what various emoji mean in the context of your organization, as well as expectations for use—a thumbs-up or check mark to indicate that a message has been read, for instance.

As a team:

Draft team-level agreements. These documents allow the employees who work most closely together to codify their working expectations and norms, such as core working hours, when individual people will be unreachable, and expectations around the timing of replies. Workers with different life stages and different caregiving obligations may vary in their preferences for time-based flexibility or the boundaries they draw between time on and offline; capturing everyone's needs and desires in one place allows people to both make them visible and come up with solutions when they conflict.

RESEARCH SPOTLIGHT:

A pair of studies in the Journal of the Academy of Management identified one of the communication practices of effective remote teams: "burstiness," or short periods of focused work and synchronous messaging.

In a 2022 interview with Charter, Anita Williams Woolley, a co-author on those studies and an associate professor of organizational behavior and theory at Carnegie Mellon's Tepper School of Business, suggested that teams incorporate burstiness into their team agreements: "I don't know that it would be beneficial for an organization to decide site-wide that this is our burstiness period," said Woolley, whose research focuses on collective intelligence and online collaboration. "It's more meaningful on a work-unit level, the people who are really intensively needing to touch base on multiple things. Let those people drive that decision."

As individuals:
- **Write and share user manuals.** This is an individual employee's personal guide for their colleagues, covering such topics as how they prefer to receive feedback and conflict-resolution styles.

TEMPLATE: USER MANUAL

About me

Name

Where I am

Role

What I work on

Ask me about

Contact Information

When I'm online

[   ]

Slack or email?

| ◯ Slack | ◯ Email |

Video or phone call?

| ◯ Video | ◯ Phone |

In case of emergency

How should colleagues contact you when an urgent issue comes up?

What else to know about getting in contact with me

Do you have any hours where you're not at the computer or have notifications muted? Do you have a preference for after-hours communications?

Working with me

How I like to work with colleagues

How do you like to brainstorm? How often do you like to check in and touch base? How do you like to give and receive feedback?

How I prefer to resolve conflict

| ◯ Slack | ◯ Email |

My strengths / skills I can share with colleagues

[   ]

My work-related pet peeves or strong dislikes

[   ]

Personal

Send me recommendations for

What have you been looking for? Books, podcasts, hiking trails, vacation destinations, new hobbies, TV shows, music?

Fun facts

Diversity, equity, and inclusion

Age "is the only universal social category," North says. "I'm a millennial. I'm never going to be a Boomer, but I know one day I'm going to be older. Therefore, you would think I would want to seek that kind of perspective. On the flip side, every single older person literally knows exactly what it's like to be younger."

Despite this universality, age bias remains prevalent in both directions, even among those who prioritize workplace equality. A 2021 paper out of Stanford found that advocating against gender and racial bias is often correlated with a greater likelihood of "'succession'-based ageism, which prescribes that older adults step aside to free up coveted opportunities." And a study North co-authored the same year highlighted the effects of "youngism," noting that younger adults are judged more harshly by their older peers.

Eliminating age-related bias in the workplace starts with legitimizing it by making it an explicit part of your diversity, equity, and inclusion efforts— something that relatively few employers currently do. In a 2020 AARP survey of around 5,600 global employers, just over half said they did not include age in their DEI policy. (Other, slightly older data paint a worse picture: In PricewaterhouseCoopers' 2015 annual CEO survey, just 8% of executives said their DEI strategies addressed age.) Here are a few ways to signal to employees that your DEI strategy includes age—and for your organization to hold itself accountable:

- Make it a component of your anti-bias trainings and other DEI-focused learning opportunities.
- Call it out in your DEI mission statement and other internal messaging.
- Keep it as a consideration when auditing your hiring pipelines.
- Incorporate it into voluntary demographic surveys, and make it a factor in analyzing equity in compensation, mobility, and turnover.

"

Age is the only universal social category. I'm a millennial. I'm never going to be a Boomer, but I know one day I'm going to be older. On the flip side, every single older person literally knows exactly what it's like to be younger."

MICHAEL NORTH
Assistant professor of management at NYU's Stern School of Business

ACTIVITY: DEI MISSION STATEMENT

Randal Pinkett, author of the book _Data-Driven DEI_ and founder of the DEI consultancy BCT partners, recommends that individual employees and organizations alike develop DEI mission statements to make their DEI commitments more actionable.

Your statement should answer the question: "What do I believe is my calling, my mission, my purpose in a more diverse, inclusive, and equitable world?" Pinkett told Charter in an interview earlier this year. For example, "Is it to create a culture where people feel included? Is my DEI mission to be an example of an ally for women to break down the barriers that prevent them from having equal opportunity?" Having your north star written down can help you to make intentional and impactful decisions around how you incorporate DEI values into your work each day.

Pinkett recommends breaking down your statement into three components:

Mission:
What is your purpose?

Vision:
What's the future you want to create?

Values:
How do you create it?

Connection

While North's GATE framework found that the T, tenure, is the strongest fault line in terms of how employees organize themselves socially, that self-sorting can be complicated by what he calls a "growing chasm" between older and younger workers' lived experiences, driven largely by a swelling generational wealth gap, age-based political divides, and each group's respective career challenges.

"There's a lack of stability that makes it really daunting to be young in today's society and to try to make your way," North says. At the same time, "if you're an older worker, if you get laid off, it's really, really stressful, and a real concern as to whether you're going to be able to find another job, because the pace of change is so vast."

This chasm is not impossible to bridge, provided workplaces make intentional efforts to do so. London Business School management professor Lynda Gratton puts it simply: "The best way of creating intergenerational empathy is encouraging friendships." Ideally, explains Gratton, author of *Redesigning Work* and founder of the consultancy HSM Advisory, that encouragement happens along two dimensions:

- **Time.** "Part of the reason people don't make friends is that they don't have any time," she says. "So you think about how to acknowledge that this is important and give people time." For in-person workers, this might take the form of a policy allowing employees to expense a monthly coffee chat; for remote workers, it could mean scheduling regular virtual team-bonding sessions that involve 1:1 breakout groups.
- **Space.** Whether physically or virtually, "actually put people together," Gratton says, and in situations that encourage them to say, "'What do you and I have in common? We're at a different age, but I bet you we've got something in common we could talk about,' to show people that age is not a definer of a person." Once you've helped people carve out the time to connect, equip them with prompts and/or goals for their conversation (for example, tasking a Millennial/Boomer pair with planning the next meeting icebreaker), to ensure the time together feels purposeful and not aimless.

Feiler also suggests bringing in younger workers to lead the charge, on the grounds that they're often more comfortable with the idea of sharing about their lives outside of work. "If you talk to somebody 50-plus, they grew up in an era of business where bringing your personal self to work was not something you did," he says, meaning they may not be as naturally fluent in merging those two worlds. For the younger employee, spearheading this effort can also be an opportunity to build influence and develop leadership skills as they become a culture carrier for the organization.

Recent research supports the idea that younger workers may be well-primed to support workplace-connection initiatives: Edelman's 2022 special report on trust found that while employees trust their colleagues the most to tell the truth about what's happening in their organization— more than their manager or their CEO—trust lowers among each successive generation. Empower workers to use that trust to jumpstart connection, and give them the tools to create connection points throughout the organization, between different cohorts of workers.

"

Part of the reason people don't make friends is that they don't have any time. Think about how to acknowledge that this is important and give people time."

LYNDA GRATTON
Management professor at London Business School

ACTIVITY: POINTS OF COMMONALITY

This is an exercise that can be done in person or via virtual breakout groups, as a short icebreaker or as part of a longer team-building session:

> In round one, split employees into groups of two and give them one minute to find one thing they have in common outside of work. At the end of the minute, each pair shares their fact with the larger group. The next round is three people, two minutes, and three things, and so on for as long as you'd like to continue. Instead of using a randomizer to split people into groups, curate them deliberately, with an eye toward mixing together employees of different ages and life stages.

RESEARCH SPOTLIGHT

A 2021 review of the academic literature on intergenerational workplace friendships identified four research-backed categories in which employers can support those relationships, along with actions within each category that predict strong relationships across age groups:

- Organizational climate and human resources-practices: Encourage employees to buy into a collective organizational identity via a clearly defined culture, including policies, norms, and rewards.
- Leadership: Emphasize a transformational leadership style and prioritize workers believing that the workplace is run fairly, both in terms of decision-making and in terms of employee treatment.
- Workspace design: Create opportunities for interaction, without demanding it as the only option (e.g. through crowded spaces or fully open plans without more private respites). Encourage employees to personalize their work stations in ways that convey who they are outside of work.
- Communication media: Be mindful of the mix of communication platforms your organization uses, taking care to not create an imbalance in which one age group's preferences are significantly elevated over another's.

As is typically the case with friendships more broadly, the review paper also noted that intergenerational friendships at work, which merge "collegial relationship and friendship," are necessarily different from those outside the workplace—a finding worth keeping in mind when determining how to measure success. The goal isn't to create lifelong best friendships; instead, it's to create relationships built on collaboration and trust, ones that allow employees to bring fuller versions of themselves to work and that bring happiness and meaning to people's working lives.

CULTURE CASE STUDY: THE ROLE OF THE OFFICE

It's worth reiterating here what employers have already realized: There's no way to make everyone completely happy when it comes to office policies, a fact that's as true across generations as it is within generations—including among younger workers who may have never experienced a fully in-person world. Consider these two data points from WFH Research:

- Workers in their 20s are the least likely to want <u>fully remote work</u>, at 24%, compared to 29% of those in their 30s, 33% of those in their 40s, and 41% of those aged 50-64.
- Workers in their 20s are also the likeliest to say they would quit or look for another job if required to work <u>in an office full-time</u>, at 54%, compared to 42%, 38%, and 35% for their older peers.

So how should employers set up their own working arrangements in a way that, as Simon from Segal Benz puts it, "balance[s] the needs of an entire ecosystem... when different people need different things at different times?" By crafting a flexible policy grounded on the three tenets covered earlier in this chapter: inclusion, communication, and connection.

Inclusion. "Everybody in a multigenerational workforce has a different relationship with home and a different set of burdens at home," Feiler points out. "You have to find avenues to discuss this and understand that it means different things for different workers"—potentially even at different times. A middle-aged parent, for example, may value both the ability to work from home to be there for school pickup and the ability to go to an office for deep focus when needed. An employee fresh out of college may be hungry for facetime with their first-ever colleagues. An older worker caring for an aging relative may find it easier to juggle their obligations if they can forgo a commute.

Building an inclusive policy, then, means creating that policy collaboratively rather than unilaterally, giving employees an opportunity to share their unique needs and preferences—on the team level if that's how your arrangements are decided, or via company-wide feedback channels if your organization is implementing one practice across teams and functions.

Communication and connection. Be clear about the intentions undergirding your office policy. Paul Bennett, co-chair and chief creative officer of design firm IDEO, has described a philosophy of focusing on what he calls "carrot moments"—the instances when workers would benefit from and enjoy sharing the same physical space. "It's got to be 'carrot,' not 'stick,'" he <u>told Charter</u> earlier this year. "You've got to make people want to come in" by building a compelling case for the value of the time spent together.

"

Everybody in a multigenerational workforce has a different relationship with home and a different set of burdens at home. You have to find avenues to discuss this."

BRUCE FEILER
Author

The same is true for communicating the value of experiences that don't take place in an office. For younger employees in particular, mentorship and a sense of community, or lack thereof, are top-of-mind concerns regarding remote work. In hybrid and remote setups, make up for perceived lack by not only being deliberate about creating social and learning opportunities, but messaging how those opportunities can be meaningful even when not fully face-to-face.

One example: Charter's mentorship research, mentioned in the earlier chapter on continuous learning, found that with the right supports, mentorship can be equally effective in helping mentees reach their goals regardless of the setting. When establishing mentorship programs where the bulk of the mentoring happens outside the office, prime mentors and mentees for success by making it clear how they'll be supported and explaining the factors that can make their relationship a fruitful one.

A few other things to consider in crafting your working-arrangement policy to meet the needs of workers across ages and stages:

Tip: If you offer a work-from-home stipend to remote employees, allow them to use it for more than home-office setups. Generally speaking, "younger people have small[er] apartments," Gratton points out, and some may prefer to put those funds toward a coworking space or membership at a third space outside their home.

Tip: Make clear that employees are supported in making choices with health and safety in mind—a medically vulnerable older worker or a middle-aged worker with an unvaccinated baby at home, for example, may prefer working remotely during health events like this past winter's "tripledemic" of viral infections. "We have to take care of each other and recognize that our own risk tolerance may not be the same as our coworkers," Dr. Jennifer Nuzzo, director of the Pandemic Center at Brown School of Public Health, told Charter in an interview last fall.

Tip: A Gensler survey last year found that Gen Z, Millennial, and Gen X workers all preferred a "coffee shop" style office ambiance, while Baby Boomers preferred a more corporate feel. (The runners-up were "boutique hotel," defined as "hospitality-infused, amenity-rich spaces," for Gen Z and Millennials; corporate for Gen X; and coffee shop for Baby Boomers.) In addition to creating different zones for collaboration and focused work, design different parts of your space to evoke different moods or experiences.

07

Conclusion: An approach to carry forward

It is not an overstatement of stakes to say that a healthy future for your organization depends on cultivating intergenerational fluency in the present. Now more than ever, this fluency is what lays the foundation for greater employee engagement, productivity, and wellbeing— and as younger workers ascend through the ranks, it's a critical tool for employers in making them into leaders ready to take on the most pressing challenges ahead.

Art: Charter / Photo: iStock Prostock-Studio + Jose Luis Montoya Retamosa
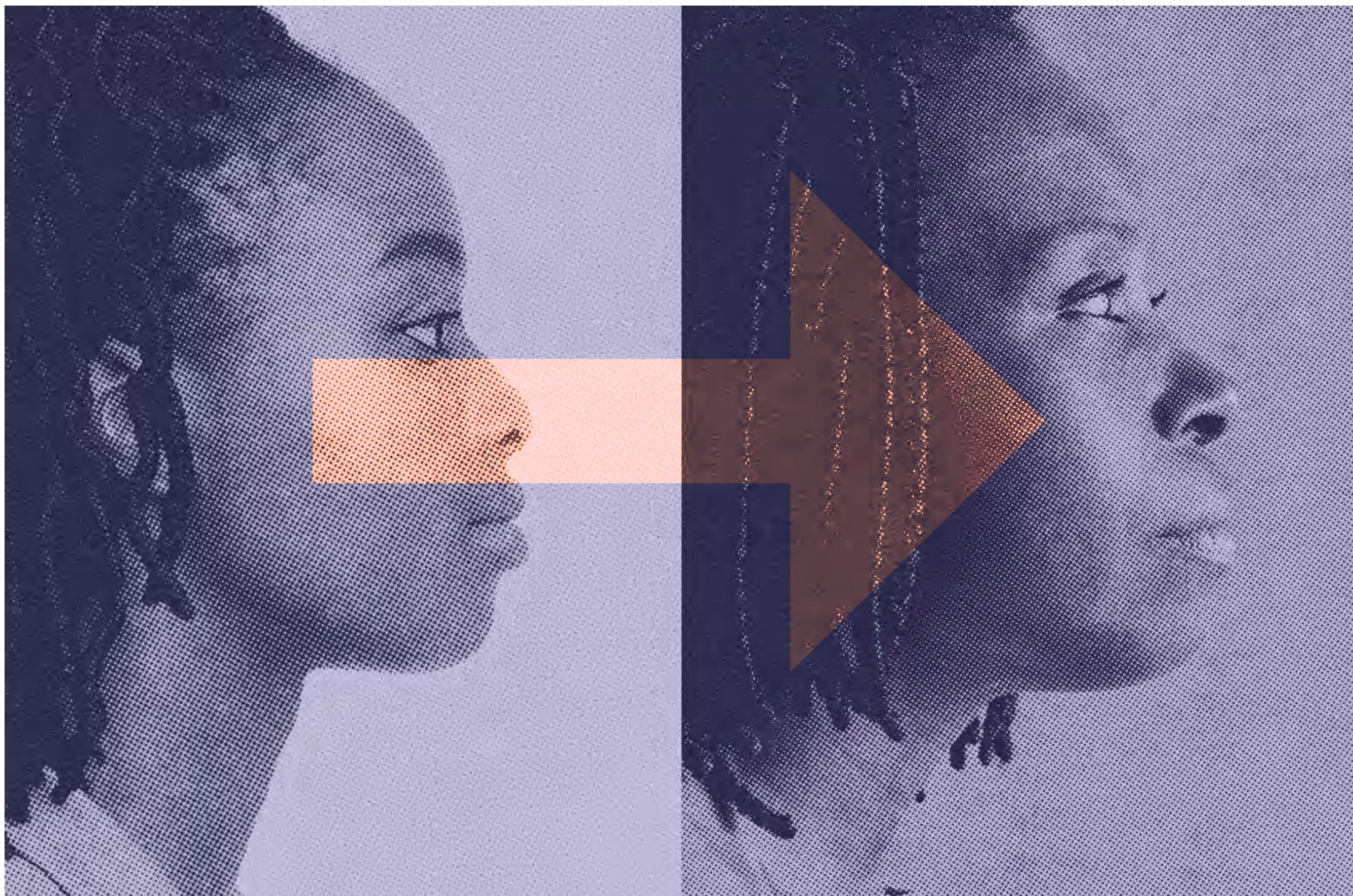
But one of the key truths of managing a multigenerational workplace is that the premise itself is built on a blunt instrument. As we've highlighted in this playbook, generations are incomplete labels encompassing a wide variety of needs. In terms of understanding your workforce, they're best used as a starting point, fleshed out with all other obligations and needs that make up each individual worker's full life.

In a broader sense, the same is true of the tactics and practices covered in these chapters. Each is a starting point, intended to be built upon and customized for your specific workplace, the people who populate and lead it, and the challenges they face.

With that in mind, if you can only take one thing from this playbook, make it this set of guiding principles:

- A beginner's mindset: The willingness to learn, to ask questions, to receive and respect information from every direction.
- A focus on flexibility: In work arrangements, in benefits, in schedules, and in overall orientation.

A truly intergenerational culture is one that relies upon these concepts, rather than generational categorizations, as its north star. An organization rooted in flexibility, powered by employees who approach their work with open-minded humility, can better adapt to employees' changing circumstances while consistently helping them to grow. And in doing so, it can build a workplace where workers of all ages and life stages can thrive —both independently and in collaboration with one another, now and in the future.

08

About

This playbook was brought to you by <u>Charter</u> and <u>Medley</u>.

Thanks for reading, and please feel free to get in touch with questions, reactions, and ideas for future playbooks at <u>newsroom@charterworks.com</u>.

About Charter

Our mission is to transform every workplace and catalyze a new era of dynamic organizations where all workers thrive. Charter does this by bridging research to practice—giving people the tactical playbook for what work can and should be.

Charter is a next-generation media and insights company. We publish a free email newsletter, original research, and articles about work on TIME.com. Charter Pro is a premium membership that supports owners of the people agenda in executing their highest-value initiatives, quickly. We also host events for workplace decision-makers and work with organizations directly.

About Medley

The demands on leaders have never been greater, particularly on those who are newer to managing and leading others. Macroeconomic uncertainty, hybrid in-person working environments, and high expectations for inclusivity and values-alignment present distinct challenges and opportunities for a new model of leadership.

In order to lead and manage effectively, people need to have dedicated space to build self-awareness, strengthen interpersonal skills, and expand their perspective – and Medley groups provide that space.

Medley partners with innovative organizations who recognize the need for more scalable and sustainable ways to improve retention, productivity, and belongingness among their emerging leaders. For large enterprises, we launch and scale our group coaching platform across populations internally, and for smaller organizations, we match participants across industries.

Our unique matching methodology, expert network of coaches, and personalized curriculum deliver a consistently impactful experience that sends a strong signal of investment in employees and feels distinctly different from alternatives.

If you're curious about how you can partner with Medley to support your emerging leaders, share more with us at www.withmedley.com/for-companies.