



## GENERATIONAL BLENDING IN THE WORKPLACE

Embracing Differences::Implementing Solutions

### AN ASSESSMENT CHECKLIST

For the first time in history, we have four generations in the workplace. Each group has a different set of values, motivational factors and communication styles.

It takes an internal commitment to bring about change within your firm or organization.

It is a choice.

Here is a checklist that can help you begin the assessment process. Once you determine where you are, you can determine where you need to start to bring about generational blending in your workplace.

#### **Leadership:**

Do you have the internal support to examine the future of your firm or organization and what it means to have four generations within your workforce? Do you have 1 to 2 two advocates that are willing to lead the generational blending effort?

Have you looked at your attrition costs related to generations moving on to find what they want?

Do you have a transfer knowledge program in place for the Traditionalists and Baby Boomers to share their experience as they depart the workforce?

Are you examining your existing and future clients and assessing who they are in the generational mix?  
Are you consciously addressing their needs, speaking their language and communicating appropriately?

Are you preparing your firm or organization to be poised for the future?

Do you have a vision or mission statement? Do you know who you want to be and where you are going?

**Culture:**

Do you know how to define your culture? Can you articulate your brand, your standards, and your work ethic?

Have you ever conducted a culture assessment in your firm?

Does your staff know what is expected of them if they work in your firm or organization?

Do you know what the morale is currently like within your firm?

Have you brought together representatives of each generation within your workplace to have open discussions and shared decision making?

**Human Resources:**

Have you fully identified your candidates for today's needs?

Do you have a current and well-thought out process for hiring (Example: homework assignment, group interviews, presentations, etc?)

Have you determined what you offer / are willing to offer in terms of flexible work arrangements / work/life balance and balanced hours?

Are you willing to offer alternate partner / professional tracks?

Do you have a comprehensive onboarding program?

Have you trained your HR staff to understand and manage generational differences?

What existing policies and procedures do you have in place to guide and govern issues that may arise related to generations?

Do you have a dress code in place that works for your firm or organization culture?

Do you have a pipeline / retention program in place to maintain your generational strengths?

**Awareness of generational issues:**

Have you identified and tracked generational issues that have arisen in your firm or organization?

Do you have solutions that you have implemented to manage those differences?

Do you allow stereotypes to be perpetuated?

Have you committed to blending generations by offering training such as?

One-on-one coaching

Training programs

Mentoring programs

Reverse mentoring

Technology mentoring

Time-management training

How to communicate properly (when to use technology, when to meet face-to-face, when to make a phone call, arrange a meeting, and how to communicate your message.)

Are you training all generations to take care of your clients consistently and responsively?

**Technology:**

Have you assessed and discussed your technology requirements with all generations?

Have you determined your social media platform?

Do you have a social media policy in place?

**Corporate Social Responsibility:**

Has your firm or organization made a commitment to giving back to the community?

Do you have multiple ways to give back that meet the sensibilities of various generations?

**Do you understand the value to Generational Blending in the Workplace?**

Is most of your time spent managing conflict?

Have you conducted any productivity studies to determine time lost to generational disconnect?

Have you invested in assessments such as 360 Degree Feedback to improve understanding and communication?

Do you have an 'Up or Out' approach, where those that don't play by existing rules need to find another place to work?

Have you conducted exit interviews to determine why your employees are leaving?

**ARE YOU READY TO BE PART OF THE GENBLEND™ MOVEMENT?**

**Initial consultation to assess your generational position:**

Status report.

Where you are.

What needs to be done.

Personalized approach.

**Stepping Stone Plan / Menu to move toward GenBlend™:**

Establishing commitment.

Establishing a multi-generational task-force.

Leadership training on generational blending.

Culture assessment.

Generational training – debunking myths.

Training on how to Respect. Learn. Blend.

Development of mentoring programs.

Training on how to coach one another.

One-on-one coaching.

On-going training. Accountability and Follow-Up.