Motivating Multiple Generations
Motivating Multiple Generations
Baby Boomers

1943-1964
Generation X
1965-1980
Millennials
1981-2000
Generation Z
2001-2020
Motivating Multiple Generations

WHAT ARE THE VALUES OF DIFFERENT GENERATIONS

- **Traditionalists**: adherence to rules, discipline, family focus, hard work, and trust in the government
- **Generation X**: balance, diversity, lack of loyalty to an organization, and a global mindset
- **Baby Boomers**: anti-war, anti-government, equal rights, involvement and personal gratification
- **Millenials**: achievement, fun, civic duty, sociability and self confidence
Motivating Multiple Generations

Traditionalist
- Offer to facilitate wealth transfer conversations
- Show them their loyalty isn’t taken for granted
- Showcase your involvement in the community
- Prove you are the right advisor for their heirs
- Give them the gift of your time
- Position change as evolution vs. revolution

Baby Boomer
- Keep communication positive
- Skip traditional retirement language
- Recognize strong Boomer parent-Millennial child relationships
- Offer to facilitate difficult wealth-transfer conversations
- Keep them up-to-date on innovations
- Help Boomers prioritize their many responsibilities

Generation X
- Be a resource and an expert
- Anticipate skepticism
- Speak with 100% transparency
- Use unfiltered and direct communication
- Don’t get defensive
- Make every process efficient

Millennial
- Make finances an approachable topic
- Show them how they can make a difference
- Clearly communicate your accessibility
- Bring their voice to the table
- Offer education
- Embrace innovation

Generation Edge
- Start the conversation now
- Get in their friendzone
- Personalize your interactions with them
- Keep it visual
- Encourage engagement in content
- Suggest a game plan
### Motivating Multiple Generations

<table>
<thead>
<tr>
<th>Generational Perceptions of Mentoring</th>
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<tbody>
<tr>
<td><strong>Traditionalist</strong> (1922-1945)</td>
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<tr>
<td>Mentoring = An obligation</td>
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<tr>
<td><strong>Baby Boomer</strong> (1946-1964)</td>
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How to manage different generations in the workplace
One size doesn’t fit all when it comes to today’s workforce—five generations of workers means five approaches to work.¹ Learn how to adjust to a multigenerational workforce.

**Current U.S. workforce numbers²:**

- **2%** Traditionalists (1925–1945)
- **25%** Baby Boomers (1946–1964)
- **33%** Generation X (1965–1980)
- **5%** Generation Z (2001–2020)
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