

EXPLORING CONTEMPORARY MANAGEMENT CHALLENGES: Preparing for the Departure of Boomers

UCSD EPSE and LAMP Student
Research Assignment 2014;
Combined Findings

OUTLINE

- The Assignment
- Information Received
- Findings

THE ASSIGNMENT

- Understand the challenge
 - Determine what about Boomers' knowledge, experience, and behavior should be preserved, transferred and sustained
 - Determine what techniques should be employed to preserve, transfer and sustain these assets
 - Determine when and how these techniques should be employed, and who should take the lead
- Gather information (literature, survey, interviews)
- Look for common themes
- Document findings, present best practices, give personal analysis and recommendations

INFORMATION RECEIVED

- Six team reports
 - 65 researchers
 - 26 science and technology companies
 - 99 interviews
 - 1,277 survey respondents
 - 113 literature citations
- Swift and professional effort in completing the project and producing coherent and useful reports (six to eight weeks)

FINDINGS

■ What Should be Retained?

- Attitudes and values: work ethic, emotional maturity, loyalty and commitment
- Situational experience (incl. complex management situations)
- Contacts and corporate history
- Technical or procedural knowledge is less essential, but “foundational knowledge” is valuable: systems perspective, understanding of *underlying* technologies and legacy systems
- Breadth and depth of need and the degree of potential loss depends upon the type of industry/company
 - Consumer tech has younger, independent culture, less boomer dependence
 - Defense and manufacturing tech has a disciplined culture, more boomer dependence

■ What Techniques to Use?

- Mostly face-to-face, working together on projects, with purposeful conversations
- Formal training and knowledge bases are not well embraced
- GenX has more respect toward Boomers than does GenY

FINDINGS

■ Implementation?

- Who: no consensus, many choices -- senior management, human resources, all supervisors, all employees
- When: Be proactive, start early, be continuous
- How: depends a great deal on the culture and structure of the organization -- make smooth job transition part of the culture, structure and facilitate purposeful conversation

■ Combine short and long-term tactics

- Retain access to key experts until knowledge is sufficiently transferred
- Structure formal knowledge transfer program(s), identify, plan, and evaluate
- Also foster less formal exchanges at all levels

Findings

■ Insights

- Both departing Boomers and recipients of knowledge need encouragement, motivation, structure
- Alumni (e.g., retiree) programs and post-retirement employment options builds a sustainable knowledge pool
- Measure and evaluate every effort continuously
- Potential program elements:
 - job shadowing
 - lunchtime storytelling
 - resource pools and alumni association
 - inter-generational project teams
 - cross-training assignments