EXPLORING CONTEMPORARY MANAGEMENT CHALLENGES: Preparing for the Departure of Boomers

UCSD EPSE and LAMP Student Research Assignment 2014; Combined 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

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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