

Generational Differences in the Workplace: The Perspectives of Three Generations on
Career Mobility

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Career Mobility

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Abstract

Generational Differences in the Workplace: The Perspectives of Three Generations on Career Mobility

Have you ever had someone stereotype or prejudge you because of your age? Have any of these stereotypes held you back in your career? These experiences are not uncommon and there are numerous publications that promote stereotypes and ascribe certain characteristics to different generations. These labels and stereotypes are often found in the workplace and may impact how an individual navigates his or her career. To address these questions, this dissertation examined generational differences in the workplace using the perspectives of three generations of employees on succession planning and career mobility. The goal of this study was two-fold, a) to provide data driven research that moves beyond descriptive, broad or anecdotal research published in magazines and popular books; and b) to understand and describe the perspectives of Generation Y, Generation X and Baby Boomers on succession planning (career mobility), using a Basic Interpretive Design methodology.

This study was conducted through the lens of the lens of social identity theory and talent management principles in order to address generational differences and succession planning and was based on an understanding of organizations as multi-national companies with many businesses and site locations. The findings support human resource practitioners and organizational leaders plan succession and further develop employees by understanding the revelations and expectations of each generation.

The format of this dissertation is as follows: Chapter 1 outlines the structure of the study and provides key foundational background to situate this research study. Chapter 2 provides a more detailed review of the literature, including peer-reviewed research publications on generational concepts and theory, talent management and succession planning. Chapter 3 details the methodology, which includes the means and approach through which data was collected in this study. Lastly, Chapters 4 and 5 present the findings of the study in addition to applications of the research and recommendations for leaders and HR practitioners.

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CHAPTER 1: INTRODUCTION

Organizations in the United States (U.S.) are experiencing a shortage of leadership talent (Chugh & Bhatnager, 2006). This shortage represents a rising crisis related to organizations being able to attract, develop and retain talent long enough for the employees to be considered for a leadership succession plan (Blackman & Kennedy, 2008). As a result, employees are not typically engaged in succession planning. Chugh and Bhatnagar (2006) argue that the presence of four generations in the American workplace, which include the Mature (born between 1925 and 1946), the Baby Boomers (born between 1946 and 1960), Generation X (born between 1961 and 1975), and Generation Y (born between 1976 and 1990), further complicates talent management priorities and practices. It brings diversity of values and attitudes with respect to life experiences (Chugh & Bhatnager, 2006). Since generations are also referred to as cohorts (groups of people who came of age at roughly the same time), they are influenced by the significant events happening during their key coming-of-age years, such as economic changes, wars, political ideologies, technological innovations, and social upheavals (Chugh & Bhatnager, 2006). Consequently, different age cohorts have different attitudes and perceptions towards work and approach their individual careers with distinct mindsets (Schewe & Hiam, 2002). For example, Generation X is described as lacking loyalty to their employers (Bower, 2009); hence, their career choices are based upon immediate and short-term goals (Strauss & Howe, 1991).

In the workplace, Baby Boomers see Generation X as best suited for short-term tasks and needing constant reassurance from leadership from above (Strauss & Howe, 1991). On the other hand, the Baby Boomers are more likely to be loyal and remain with their employer until retirement (Bower, 2009). Second, as Baby Boomers prepare to retire,

they may be concerned about keeping their jobs until retirement and avoid being laid off due to poor performance. As a result, they may withhold knowledge and not prepare the next generation of leadership to succeed them in leadership positions (Cappelli, 2008).

The above arguments provide a background for two areas addressed in the present study:

a) generational concepts and theories and

b) talent management (with a focus upon succession planning and career mobility). These areas are important for understanding generational differences in an organizational environment or setting, particularly ones that currently face talent shortages. With respect to succession planning in private-sector organizations (to evaluate how HR managers can successfully support leaders and provide practice recommendations), needs to focus on discovering the best ways to retain talent and plan for leadership in the future (Kim, 2008). Though transition of leadership may be assumed to occur by some sort of natural order, some scholars (in the generational theory community) expect Baby boomers to retain leadership roles well beyond their retirement age and stay in the workforce and well after Generation X members are ready for the challenges of leadership (Kim, 2008). This scenario is anticipated partly because baby boomers dominate in terms of sheer numbers; they are a much larger cohort than Generation X and they claim seniority based on time and experience. Therefore, facilitating the leadership shift to Generation X will need to be undertaken strategically and intentionally within organizations (Pendergast, 2009), because individual baby boomer managers may not take the needed steps.

Generational Concepts and Theories

Kertzer (1983) argues that because of the different usages of the term "generation," there is some confusion with what a generation signifies. Other researchers have used the term to describe a cohort with a slightly different definition: "the succession of people moving through the age strata, the younger replacing the older as all age together" (Kertzer, 1987, p.126). Researchers also describe generational cohorts as people born in the same general time span who share key life experiences (Zemke et al., 2000). Generations are viewed as a life stage or a particular period of time in a person's life and/or as a historical period (Kertzer, 1987).

The concept of generation was primarily based on the notion that people born at about the same time grow up sharing an historical period that shapes their views (Kertzer, 1983). Arguing that generation is an important concept in our history, Mannheim (1970), whose writing has heavily influenced sociological works on generation, adopted the genealogical meaning of "generation" with the cohort sense of the term. Other scholars, such as Bengtson, Burgess and Parrott (1997) and Tindale and Marshall (1980) employed the age-stratification to define generations. Kertzer (1983) argued that "a generation is a sociological reality, consisting of a cohort, significant proportions of whose members have experienced profound historical life events" (p. 133), such as the Gulf War for Generation X or 9/11 for Generation Y.

For the purpose of this research, the term "generation" refers to the succession of people moving through an age strata, where the younger generation replaces the older generation, as described by Kertzer (1983). As mentioned previously, currently there are four generations in the American workplace (Straus & Howe, 1991). There are many characteristics that have been used to describe these four generations. Magnuson and

Alexander (2008) argue that these generations are distinguishable by workplace attitudes. For example, the Mature Generation (individuals born from about 1925 to 1946) who experienced World War II, the Korean War, the Vietnam War, and the Cold War, generally value dedication/sacrifice, hard work, conformity, law and order, respect for authority, and patience. Baby Boomers (individuals born from about 1946 to 1960), who experienced the Vietnam War, assassinations of John F. Kennedy, and Martin Luther King Jr., the Women's and Civil Rights Movements) are characterized as optimistic, seeking personal growth, competitive, and career-focused. The Baby Boomers (individuals born between 1946 and 1960) represent close to 77 million people, and their members occupy the top positions in most public and private sector organizations (Karp & Sirias, 2001).

Generation X (individuals born from about 1961 to 1975) experienced important events such as the Challenger Disaster, the end of the Cold War, the presidency of Reagan and higher divorce rates. According to Karp & Sirias (2001), Generation X has cultural markers such as MTV (Music Television) and tend to have delayed marriage and children, are technologically literate, and value diversity and work/life balance. Generation X is regarded as a pessimistic and depressed generation (Pendergast, 2009). Generation Y, who were raised in an era of rapid globalization are also tech-savvy and are confident, well educated, diverse, and achievement-oriented. Despite variation in the values described by authors, present research does not seek to prove or disprove any attributes, stereotypes or generalizations associated with the generations understanding, describing and recognizing differences across the generations related to the workplace (Strauss & Howe, 1991).

Generational Theory

The literature reviewed above describes generations as having distinct attitudinal differences. The concept of generational differences was one that was first introduced by William Strauss and Neil Howe (1991) in their book, *Generations: The History of America's Future, 1584 to 2069*. Strauss and Howe (1993) argue that generational theory seeks to understand and characterize cohorts of people based on their birth generation (or decade in which they were born). Similarly, Pendergast (2007) describes generational theory as the concept of generational location, generation as actuality and generation units:

Generational location is a category based on the chronological age of a cohort. Generational actuality moves from the passive designation to consider the way a generation responds to social changes and how these responses from the persona of the generation (p.2).

Pendergast (2007) indicates that there are typically years between generation units. The author introduced the idea of generational location, generational actuality and generation units to describe each generation in more detail and the impact that generation had on American culture. This research focuses on the concept of generations using generational theory as a foundation, so that the historical context may be presented along with current, more popular research and publications on generations. Including historical context and supporting research facilitates the process of creating themes and understanding patterns found in the data collected during the participants interviews.

Talent Management

Rani and Joshi (2010) describe talent management as a process that emerged in the 1990s and which continues to be adopted by more companies as they come to realize that

employee talents and skills drive business success. According to Ford, Harding, and Stoyanova (2010), talent management refers to ensuring that employees are identified or recruited, developed and retained in such a way that their outstanding contribution potential can be fully achieved for organizational success. In a study conducted by Deloitte (2006), the researchers found that the goal of talent management is to devise strategies for replenishing and growing the workforce in order to compete for the recruitment and retention of talented employees. The focus on talent management in the present study will examine if it is important to recognize generational perspectives when understanding the transfer of positions from generation to the next.

Chugh and Bhatnager (2006) identify various aspects of talent management to include as recruiting, selection, on-boarding, mentoring, performance management, career development, leadership development, succession planning (or replacement planning), career planning, recognition and rewards. Further, they state that talent management has moved away from being an administrative process (solely associated with replacement planning) to a continuous organizational practice that drives organizational outcomes. Therefore, solid talent management practices may be more suitable in engaging younger generations in the process of succession planning and perhaps entice them into staying with an organization long enough to be promoted to higher-level positions.

There may be corporations that have practiced replacement planning as a strategy for talent management in place of succession planning. Several authors argue that effective talent management is critical to the success of organizations (Arsenault, 2004; Bova & Kroth, 2001).

The present study illuminates the difference between replacement planning and succession planning. The purpose of clarifying the difference between replacement planning and talent management strategy is to describe the older practice of placing new leaders in positions, as compared to the more recent practice of strategically planning for new leaders to succeed the previous leaders. This strategy may lead to developing more effective career patterns for the younger generation, as opposed to simply placing younger employees in vacant positions that may not suit them. The findings in this study revealed thoughts and experiences that support an organization's effort towards career development and effective career patterns for younger employees.

Succession planning is a critical component of talent management; therefore, it is a core focus of this study. Further, exploring talent management within the context of this study leads to a greater understanding of succession planning and its importance in talent retention. Joshi, Dencker, Franz and Martocchio (2010) state chronological interdependencies between generations provide a vital foundation for the transmission of important knowledge bases (e.g., skills, information, ideas, values and experience in organizations, and resources) across generations in organizations. Their argument supports the importance of succession planning between generations and transferring knowledge to assist new leaders with their transition to their new role, thus providing a good foundation for the present study.

Global Talent Management

As businesses continue to grow and become multi-national the importance of global talent management is becoming more necessary (Kim & McLean, 2012). According to Scullion, Collings and Caligiuri (2010), global talent management includes the same activities that regular talent management does without taking any cultural

differences into account. Employees who stay in their country, yet work with individuals from other countries may need cross-cultural training upon moving into a global role (Scullion, Collings, & Caligiuri, 2010). Major challenges with global talent management include decentralized strategies, ethnocentric views and fear of losing one's position upon repatriation (Scullion, Collings, & Caligiuri, 2010).

General Challenges with Talent Management and Succession Planning

In the process of planning for resources, Human Resource (HR) practitioners may encounter several talent management issues. Venkat (2008) developed the theory w Triangle in order to capture some of the uncertainties that relate to talent management. The w triangle includes three “uncertainties” including (1) the *What* uncertainty- when the business goals are slightly set and there are vague suggestions, (2) the *Who* uncertainty- when an organization is not quite clear about employees potential, and (3) the *When* uncertainty- which occurs when a company knows employee strengths but is uncertain about management expectations with regards to the timing of moving employees around.

HR practitioners are usually responsible for educating business leaders on the state of succession planning and the potential gaps in future leadership. Cappelli (2008) argues that executives everywhere, acknowledge that finding, retaining and growing talent, counts among their toughest business challenges. With the baby boomer generation planning for retirement, the younger generations are preparing to fill positions long held by a cohort of individuals who have stayed with their employer for many years. This longevity may particularly be the case with high-level or senior positions. Hacker (2001) states the ability to attract and retain the best people for the job is a very complicated but constitutes an urgent issue in the war for talent. Thus it's important to

gain and sustain competitive advantage by finding, hiring and retaining the right talent by employing appropriate structures, systems, processes and practices (Kim, 2008).

Frantz, Maltz and Peppers (1998) argue that succession planning introduces systematic assessment of aspiring employees and career development, incorporating at the most sophisticated end, job profiles that identify critical skills, and competencies for effective performance in specific jobs. Further, they purport that Americans, struggling to secure jobs with the continuation of downsizing practices and organizations, are beginning to look closer at talent management and succession planning. Organizations are also concerned with succession planning particularly for leadership positions, because of the contemporary competitive organizational environment/atmosphere, where leadership is considered a critical success factor. Thus, having a clear succession plan and succession planning application may enhance an organization's success.

Kim (2008) argues many factors can impede succession planning, such as poorly planned staff cutbacks, an aging work force, and competition from other organizations. Kim (2008) adds that it is imperative to balance organizational needs and individual qualifications in the process of recruitment and selection. In other words, it is critical to find the right fit for the job (i.e., replacement planning), as opposed to just filling job vacancies. Bersin (2009) states that replacement planning focuses on selecting the right person for the right job. Typically, tables used to track replacement candidates are created yearly and include brief histories of replacement candidates and recent performance evaluations. According to Bersin & Associates (2009), this type of staffing strategy is aimed at ensuring orderly succession, but does not include any focus on professional or career development.

Krantz, Maltz and Peppers (1998) argue that succession planning is best suited to settings with structured career ladders, stable work forces and unchanging corporate goals and consists of identifying one or two next-echelon back-ups for each critical position. Again, the purpose of clarifying the difference between replacement planning and talent management strategy is to describe the older practice of simply changing new leaders as compared to the more recent practice of strategically planning for new leaders to succeed their predecessors (i.e. talent management strategy). In the short term, Generation X professionals need to be retained and moved into leadership positions, and Generation Y professionals need to be attracted and retained. Pendergast (2009) suggests that in order to improve the attraction and retention of employees, the nature of the leadership needs to be increasingly consultative, participative, and ideally move toward a coaching style, which is relationship-based rather than positional (and in accordance with succession planning). The succession of generations tends to go hand in hand with succession of leaders.

Krantz, Maltz and Peppers (1998) explain that a critical factor in organizational performance leadership is of central concern to assuring the long-term viability of modern companies. In addition, they state that, with increasingly turbulent (organizational) operating and market environment, changes in societal and consumer expectations and employment contracts and reliance on new forms of internal processes and controls, corporations are focusing more intensely on talent management than ever. With leadership being an important focus, recruiting, retaining and promoting employees deciding who should be on a succession plan may be a challenge in an organization if the turnover is high among the younger workers.

Talent management is a challenge, although it is the best approach to securing organizational leadership success (Krantz, Maltz & Pepper, 1998). Organizations face

serious talent management challenges with recruiting especially if the organizational environment tends to be passive, time-consuming and complicated by “red tape” (Persson et al., 2004). The environment (described by Wriston, 1980) does not lend itself to the consultative nature of leadership that is necessary to retain younger generations (Pendergast, 2009). However, this type of organizational environment may not attract younger workers, because of the rigid structure, strict policies and the limiting career mobility (Chamberlain, 2008).

Gaps in the Research

A review of the literature indicates that there is a dearth of scholarly research on generations as well as succession planning. Ford, Harding, and Stoyanova (2010) maintain that extant research is narrowed to self-reported descriptions of talent management/career progression systems without any evaluation of how they work in practice. In addition, there are gaps in the research on how generational and talent management theory link to the practical application of generational differences and talent management. The present research provides a qualitative perspective to the experiences of three generations to provide actual thoughts and experiences of employees related to talent management and the implications of these findings on succession planning. The study focuses upon three generations (although there are four generations in the workplace), because even though the Mature generation is still present in the workplace, many members of the Mature Generation have retired.

Codrington (2008) states that generational theory accurately predicts that each new generation entering a specific life-stage will redefine that life-stage and change it either subtly or dramatically. Generational theory is a sociological theory (Codrington, 2008). The present study therefore includes research from a sociological perspective on

differences in the ways that each generation approaches various life-stages. As such, the perspective aligns with social identity theory. Baby Boomers are starting to reach retirement age and may not leave the workplace based on traditional timelines.

Codrington (2008) also purports that Baby Boomers seem to be "retiring," but returning to their old companies as highly paid, part-time "consultants." There are also gaps in the research pertaining to the effects on Generation Y of Baby Boomers re-entering the workplace. Lastly, there is a gap in the research in understanding generational theory in relation to succession planning and the views of the generations currently in the workplace. Understanding and describing the responses to questions regarding career mobility may help to close this gap.

Rani and Joshi (2012) explain that talent management is still thought of as a relatively newer concept in human resource practice. Therefore, there is limited research on the topic.

According to Guest (2009), some writers refer to talent management as a fad—as the latest management buzzword—and dismiss its concepts. Other scholars such as Ford, Harding, and Stoyanova (2010), reject Guest's (2009) claim and state that talent management is an idea that has been around for a long time; it has simply been relabeled, integrating old and new ideas. To support their assertion, Ford, Harding, and Stoyanova (2010) add that there is a vast outpouring of Web- and paper-based discussions on the topic by management consultants, but as of yet, scholarly studies are few. Although there is extensive peer reviewed research on succession planning, there is a gap in the literature that would impact findings on whether or not the organization being studied has clear talent management practices. For the purpose of this study, talent management

is treated as a significant human resource practice that must be strategically planned and implemented.

Succession planning, which is a component of talent management, is considered an important part of business strategy (Crumpacker & Crumpacker, 2007). However, a review of the literature (discussed at length in Chapter 2) indicates that there is limited scholarly research on generational perspectives and succession planning. The present research addresses this gap using a qualitative research methodology. Adopting a qualitative research approach and using interviews to gather data supports the goal of describing and understanding the perspectives of the three generations on career mobility as well as the understanding the relationship between generational theory and succession planning.

Theoretical Framework

The theoretical framework for this research is informed by generational theory and social identity theory. Generational theory is used to capture data on the experiences of three generations. As mentioned previously, generational theory seeks to understand and characterize cohorts of people according to their birth generation. Generations are defined not by a formal process, but rather by demographers, the press and media, popular culture, market researchers and by members of the generation themselves (Straus & Howe, 1997). Social identity theory (SIT) aligns well with Generational Theory. Burke (2000) defines SIT as a person's knowledge that he or she belongs to a social category or group. Similarly, Trepte (2006) asserts that SIT focuses on that part of the self-concept that is defined by our belonging to a social group, and generation represents a group. According to Ash and Mael (1989), a set of factors traditionally associated with group formation (e.g., interpersonal interaction, similarity, liking,

proximity, shared goals or threat, common history) may affect the extent to which individuals identify with a group, although SIT suggests that they are not necessary for identification to occur. These two theories are therefore linked by the effort to group individuals into social categories based on their findings.

Burke (2000) defines SIT as a person's knowledge that he or she belongs to a social category or group. Paralleling Burke's (2000) definition of SIT, Tajfel and Turner (1985) found that people tend to classify themselves and others into various social categories, such as organizational membership, religious affiliation, gender, and age cohort. Social identification is the perception of oneness with or belongingness, where, people perceive themselves as actual or symbolic members of the group (Tajfel & Turner, 1985). SIT literature suggests several factors that are related to organizations, which most likely increase the tendency to identify with groups. Blake, Ashforth, and Mael (1989), state that social identification in organizations impacts the socialization values and beliefs of the organization and has an indirect effect on organizational identification. The effect of the values and beliefs of the different generational cohorts may have an impact each cohort's perspective on succession planning.

SIT provides a lens for understanding thoughts and experiences of the three generations examined in the study. SIT is incorporated into the study because its parameters allow a researcher to embrace concepts and sub-theories that focus on social-cognitive, motivational, social-interactive and macro-social facets of group life (Hogg, 2006). Thus SIT facilitates understanding in the area of generational theory and perspectives related to the social environment being studied as well as perspectives in talent management.

Cappelli (2008) says that the talent management strategy common among older companies relied on complex models of forecasting and replacement planning from the 1950s legacy systems, an era when business was highly predictable. In talent management, according to Cappelli (2008), the focus is getting the right people, with the right skills, into the right managerial/executive positions. Talent management brings the strategic planning process down to the individual level. The present research was conducted at the individual level. This study is informed by talent management theory that provides context for succession planning and career mobility.

SIT shows how generational distinctions (with regard to in-group/out-group) may be even more profound or pronounced. To further this point, Ashforth and Mael (1989), assert that identifying SIT may be intensified in complex organizational structures. This increased intensity may lead to a higher potential for in-group out-group behavior and group identification. The three theories selected to inform this study and the examination of talent management perspectives and practices are essential to understanding the participants' responses as well as providing linkages for future researchers who attempt to link the topics discussed herein.

Problem Statement

The problem that this research specifically addressed is the lack of preparation on the part of organizations in preparing for Generation X and Generation Y to take over leadership from the Baby Boomers. The use of "generation" to describe an age-based cohort is widespread (Kertzer, 1983). Researchers have identified multiple workplace-related differences across the generations, some of which were examined in this study. For example, Baby Boomers may not question the status quo or authority and this may cause confusion for Generation X, whose members have been taught to speak up. Karp,

Fuller and Sirias (2002) highlight a discrepancy between what Baby Boomers see as slacker behavior and what Generation X employees see as legitimate choices in how they spend their time. Tulgan (2004) indicated that by 2006, for every two senior workers exiting the workforce, one new worker would enter. The Baby Boomer generation is now the aging workforce with 10,000 of its members turning 55 every day. Soon, the two youngest cohorts (Generations X and Y) will dominate the prime-age workforce. Lastly, Smola and Sutton's (2002) study results suggest that generational work values and attitudes differ across generations.

According to Hornstein and De Guerre (2006), the roots of workers' distress are the traditional, top-down organizational structures continue to dominate workplaces. However, significant change may be coming sooner than we think: the successors to Generation X, known as Generation Y show signs of being the first demographic group to expect and demand more participative democratic structures. The average company spends a significant amount of dollars paying consultants to support their succession planning efforts. According to Wolfe (1996), internal succession planning saves the cost and time of external personnel searches. It improves employee morale, lessens the effects of reengineering and downsizing and most importantly, promotes a diverse talent pool within an organization.

Purpose of the Study

The purpose of this study is to describe the perspectives of three generations on succession planning and to answer research questions surrounding the differences and similarities between generational views on the topic. There have been other studies conducted on generational differences in the workplace; however, there are few examinations of generational differences as they relate to succession planning in a

corporate environment. According to Strauss and Howe (1991), Baby Boomers want to be able to get respect due and keep a job until retirement; whereas, Generation X and Y may believe that experience should outweigh considerations important to the Baby Boomers. These different views may pose an issue to talent management (succession planning) practitioners, because younger generations may not want to wait ten years to be promoted, according to HR.com and Creelman Research (2011).

The differences and similarities of each generation's perspective was examined to further inform and provide understanding around the responses that participants of each generation provide during interviews. Differences that are not understood may lead to animosity and stress in the workplace. The presence of strong, negative emotions in the workplace has a very serious impact on employee productivity and performance. The differences between each generational cohort's communication and learning styles, aspirations, work ethics, work-related values and lifestyle preferences often result in conflicts and tensions that work against organizational best interests (Niemic, 2000; Zemke et al., 2000). This study uncovers thoughts and views of participants across and possibly between the generations.

This basic interpretive qualitative study research focused on the perspectives of Generation Y, Generation X, and Baby Boomers in the areas of succession planning (a component of talent management). Participants were asked questions regarding career mobility and their views of their generation as well as their perspectives on other generational cohorts. These questions revealed the reality of their perspectives as well as compared and contrasted their perspectives with the other two generations. According to research conducted by HR.com and Creelman Research (2011), high performers under the age of 35, who have not been promoted in the last three years, are at risk for turnover,

which may pose a threat to succession planning practitioners. The literature review includes multiple industries. Although there is a remnant of employees who fall into the “Mature Generation” category, this group was omitted from this study because their small remaining numbers cannot provide a balanced representation of this group.

This research explored the experience of three generations working in a global organization that is facing succession-planning challenges. There were 12 employees who participated with ages ranging from 22-65. A basic interpretive qualitative study was conducted using a format of semi-structured interview questions. In order to allow for discussion with participants and adhere to the methodological premise of semi-structured interviews, this study utilized a limited amount of questions, and these questions were asked of participants during two separate interviews. In Chapters 1 and 2, a detailed description of each generation that is represented in the workplace today is presented.

Conceptual Framework

The research on generations focuses on capturing the perspectives of three generations on the topic of succession planning and generational differences in the workplace. According to Straus and Howe (1997), generational theory seeks to understand and characterize cohorts of people according to their birth generation. Generations are defined not by formal process, but rather by demographers, the press and media, popular culture, market researchers, and by members of the generation themselves. This research aids in understanding the differences and similarities across three different generations. The study may increase knowledge about how three generations’ perspectives and understand succession planning. Figure 1: The conceptual framework for this study depicts the relationship between the research questions in this

study and the concept of generational perspective. Generational identity (which will be described in detail in Chapter 2) is used in the theoretical framework to understand generational perspectives.

Succession planning (a component of talent management) is also explored deeper in Chapter 2. Each generation’s perspective on succession planning (career mobility) and the influence of the organizational context were the focus of the interview questions.

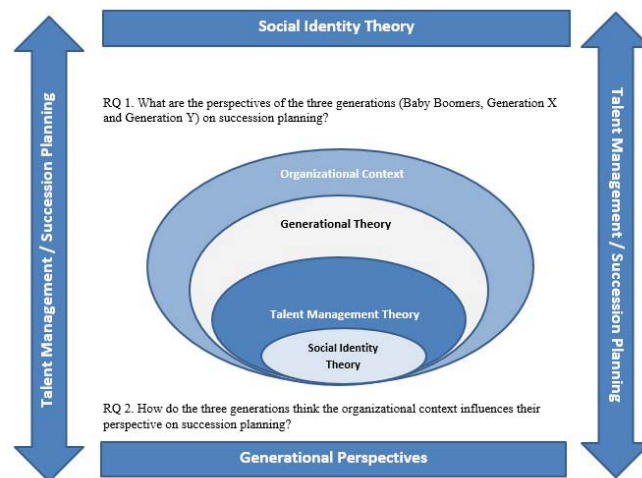


Figure 1: *The conceptual framework.*

Research Questions

In this research study it is possible that the participants may not all have the same perception of whether or not these behaviors contribute to an ideal organization (working) environment. Stets and Burke (2000) contend that, “social identity is a person's knowledge that he or she belongs to a social category or group” (p.32). According to Stets and Burke (2000), a social group is defined by people who have similar things in common. For the purpose of this research, the definition of social identity theory is derived from Burke (2000), which is a person's knowledge that he or she belongs to a social category or group. Chapter 2 includes literature on how an

individual's social group may influence their perspective in general and more specifically in the area of succession planning.

The research questions that guide this study are:

1. What are the perspectives of the three generations (Baby Boomers, Generation X, and Generation Y) on succession planning (career mobility)?
2. How do the three generations think the organizational context influences their perspective on succession planning?

Table 1 shows a comparison of the terms used to describe a person's understanding of an experience. The term "meaning" would be more appropriate to describe succession planning or organization context. The term "interpretation" would be more appropriate to describe the significance of the organizational context and succession planning. Lastly, the term "worldview" would be more appropriate for a phenomenological study, for example if the research question was "how do employees at company X make meaning of their succession planning experience." Since the present study is exploring how employees relate to their organizational context and succession planning the term perspective is optimal.

Table 1: Description of Perspective for present research.

	Perspective	Meaning	Interpretation	Worldview
Description	A perspective in is comprised of shared vocabularies, methods, theories, values and accepted logic.	Through qualitative methods, research participants or contexts speak for themselves. People construct or reveal the meaning structures that implicitly guide their understandings or actions within the particular settings or phenomenon of interest. These meanings are reflected in the researchers' findings that are thought to be inductively derived from the data. This viewpoint characterizes a constructivist	Interpretation is the process by which meaning is attached to data.	According to the a constructivist paradigm, worldview is shaped by the use and users of the term A basic set of beliefs that guide action
Source	Boland and Tenkasi (1995)	Guba & Lincoln, 1998	Miller & Brewer (2003)	Schwandt (1994)

Significance (Relevance) of the Study

Understanding the differences and similarities across three different generations may facilitate efforts to “pass the baton” of leadership as the baby boomer generation moves into retirement. Tulgan (2004) projects that Generation X and Y workers will revolutionize the workplace and liberate it from the traditional career path, old-fashioned supervisory tactics, outdated norms, and ineffective work patterns. According to Chugh and Bhatnager (2006), though the challenge of obtaining the best talent in organizations may be hampered by economic concerns and changing corporate landscapes. The battle to attract, develop, motivate, and retain talent is going to intensify in the coming years

(Chugh & Bhatnager, 2006). By increasing our understanding of generational views on talent management and being aware of potential weaknesses it is possible to make succession planning more effective (Wriston,1980).

Implications of the Study

Theoretical Implications

Knowing the views and perceptions of adults in each generation may save HR practitioners time in selecting the right talent for the right positions and help organizations focus as they struggle to develop solid, long-term succession plans. In a study by Fegley (2006) for the Society for Human Resource Management, 58% of respondents indicated that their organization had a formal or informal succession planning system in place, and an additional 26% reported intentions to develop one. Only 16% had no succession system or intention to create one.

The data collected in my study may help organizations understand the attitudes, perceptions and experiences of successors and prepare for their needs. In addition, the need to study talent management systems is in demand not only by academic researchers but by practitioners as well (Chugh & Bhatnager, 2006). To further address the need to understand talent management in relation to generations, Ford, Harding, and Stoyanova (2010, p. 15) argue: “there is evidence that the approaches to talent management are evolving and inclusive approaches may therefore dominate in the second decade of the 21st century, just as exclusive approaches did in the first decade.” The theoretical implications of these findings may help future researchers when studying the problem of generations and succession planning in the future, with regards to SIT.

Practical Implications

In order to understand the practical implications of talent management and succession planning between generations in an organization, it is also important to review other factors that may impact the alignment between the two. As Krantz, Matlz, and Peppers (1998) suggest,

Succession planning and management systems provide companies with methods for developing certain aspects of the leadership it requires to remain competitive and for managing risk. Companies take these factors into account when considering their approach to Succession Planning and Management (p. 6).

There are implications to gaps in leadership transition that will impact succession planning and the future of the organizations success. The outcomes of looking narrowly at in- groups (relating to SIT and generational cohorts) and the potential leadership pool selection in a complex organization has important implications for this study.

Succession planning is also defined as “any ‘systematic effort’ to ensure the continued effective performance of an organization, division, department, or workgroup by making provisions for the development and replacement of key people over time” (Frantz, Maltz & Peppers, p. 36). This research explores succession planning and management practices that have become more prevalent in the modern corporation.

Synopsis of Research Methodology

A qualitative research methodology (Basic Interpretive Design) was used to conduct the present study. According to Merriam (2002), “basic interpretive studies may be conducted through interviews, observation or through document analysis” (p. 6).

Data was collected through two semi-structured interviews and document analysis.

Because the research questions are based on the individual level of study, observations of the participants in their environments were not employed. A set of questions directly asked to the participant aided in understanding employees' perspectives. The research questions were shown to participants prior to the interview.

The researcher decided to use a Basic Interpretive Design. Initially, a Case Study design was going to be applied, however, the researcher was not interested in how the organization practices succession planning throughout its system. Then a phenomenological study was a potential option, however, the researcher was not interested in how participants make meaning of career mobility and succession planning, simply their generational view of it. For this reason, a Basic Interpretive Design, with interviews, was the best choice for the researcher.

There were 12 participants, 11 were interviewed (four from Gen BB and Gen X; three from Gen Y) interviewed from various professional and personal backgrounds. According to Merriam (2009) the number of participants needed for a basic interpretive study may sometimes be ambiguous. Merriam (2009) also suggests that the purposive sampling of the number of units included may be adjusted during the course of an investigation if saturation is reached.

The differing backgrounds, genders and ages allowed the exploration of divergent and similar sense-making processes among study participants, contributing towards theory construction during data analysis. The interviewer scheduled meetings for a mutually agreed time. The first interview was scheduled for 30 minutes and each second interview were scheduled for 90 minutes. According to Seidman (2006), 90 minutes warrants enough time for participants to recall an experience "put it in the context of their lives and reflect on its meaning" (p. 20). For the purpose of this research a

modified version of Seidman's (2006) approach was employed. The modification involved the use of two interviews as opposed to three separate interviews. Part two and three of Sideman's (2006) interview process was combined.

The interviews were held at various locations within the organization, selecting conference rooms closest to the participant. Seidman (2006) also states that when conducting multiple interviews with a participant it is best to space the interviews at least two-three weeks apart (p. 25). The interviewer recorded interviews using a digital recording device and also made notes during the interviews. Digitally recorded data was transcribed using transcription software and manually checked for errors. Silence and non-verbal responses were noted in the transcription process.

Population and Study Site

The population for this study is Company X, a multi-national company employing approximately 88,200 people worldwide. The Company X site was selected because its established global talent management department and practices and range of generations across its employee base informs the study's research questions regarding generational perspectives (Company X, 2012) on succession planning. For this study, secondary data was sourced from a collection of Talent Management and succession planning forms (internal documents), located in the organizations employee tracking system, People Soft. According to a Human Resource Business Partner at Company X, however, there are three forms within the People Soft system that are specifically associated with the Talent Management and succession planning process.

Documents retrieved from the Talent Management department describing the internal talent management review process and supporting documentation was reviewed as secondary data. Company X has locations in six countries and four businesses in the

United States. The sample of participants was selected from the mid-Atlantic region of the United States as opposed to selecting participant's corporate-wide to maintain feasibility. Study participants ranged in age from 22-65 years of age. No specific race, gender, or cultural background was required to participate in the study. According to Macky, Gardner, and Forsyth (2008), Baby Boomers made up about two-thirds of workforce 2009, the percentage may have changed; therefore, collaborating with leadership within the Human Resource department was necessary to select participants for the study. Zemke (2000) utilizes different age categories to define generations than those commonly used by demographers (i.e., Strauss & Howe, 1991). However, Zemke's definition of generational age cohorts is most commonly cited in recent studies. The goal of selecting participants was to get an equal amount of interviewees from each generation and to ensure representation from each generation.

Sample

There were 12 participants (four from the Baby Boomer Generation, four participants from Generation X and Generation Y). Since this study involved delving deeply into the perspectives of the participants, the technique of purposeful sampling was employed to gather rich-thick descriptions from participants; therefore, there is no need for a large sample. The process of conducting a Basic Interpretive study for the present research includes an in-depth study of in a large organization and questions about or details of succession planning within the organization. The study also included data collection (through interviews) in order to ascertain the perspectives of the participants on succession planning (career mobility).

The research site coordinator advised that participants were purposefully selected by the Human Resource Business Partner, to preserve limited access to information.

Names were purposively selected, then down-selected from the pool of each generational group. This knowledge did not bias the data collection because the issue of succession planning has been determined and identified by the site coordinator. However, the researcher sought data on the perspectives of participants regarding the issue of succession, not the cause of the issue itself. Participants were selected based on age. Although the present study has a concentration in succession planning and talent management (and participants were asked indirect questions regarding these topics), the employees' level within the organization was a factor in participant selection.

The focus of the study regarding participant's perspectives on succession planning and talent management is rooted in generational differences and people who are identified as "talent," as opposed to job level within the organization. There are many possible implications for practice, including that HR professionals and senior leaders may gain a clearer understanding of what employees think about succession planning practices at their place of work, about what employees think of the probability of a leadership position at their workplace based on their age and cohort group.

Data Collection and Analysis

There were two face-to-face interviews (Seidman, 2006) conducted with each participant. Interviews were audio taped with the permission of the participants. Questions were designed to gauge interviewee perspectives on generational differences and career mobility. Responses were recorded and coded. There was a microphone connected to a laptop as well as the use of a Live Scribe pen to record and capture interview notes. The software used to capture the audio through the laptop was Audacity. Both organizations and individual participants were assigned pseudonyms to protect

their identity. The site coordinator scheduled interviews between the researcher and participants at mutually agreed-upon times.

As patterns began to emerge, the data was coded to ensure clarity of connections, and coherence (if applicable) between code categories. Several questions were considered at the beginning of data analysis to assist in the initial search for appropriate codes. As additional patterns began to emerge, questions were altered according to the degree of their continued appropriateness. Transcription and coding were used to further analyze participant responses. The NVIVO application was used for data analysis.

Limitations of the Study

The multiple meanings and usages of the term “generations” was attacked by Ryder (1965). He notes that there exists an unambiguous term, “cohort,” to refer to the succession of individuals who pass through a social system, and there is a similarly clear term, “life stage,” to refer to a particular segment of the life course. Followers of Mannheim (1957) and Ortega Gasset (1933) could claim that a new "generation" might appear as frequently as every year, depending on the rapidity of change new cohort's face as they come of age in their society (Rintala, 1968). The term is still considered ambiguous and these charges may have implications within this study. Other limitations in this study include:

- Participants who are labeled as “cuspers” (or on the fringe of the generational divide) may share the views of 1-2 generations.
- Baby Boomers are typically in the higher-level positions in the organization, with the next two generations reporting to them, which may lead to the younger generations being hesitant about fully expressing their views out of fear of retribution.

- Adamski (1980) found that Polish workers compared the values of the younger "generation" with those of the older "generation," distinguishing these simply by age. In finding that there were "significant differences between the generations," the author offered no means of knowing whether to attribute these differences to life-course effects onto permanent cohort characteristics. This ambiguity appears in this study.
- Although Company X is a multi-national company, cultural differences were not explored since the study took place in one country.
- The individual's social identity may be derived not only from the organization, but also from his or her work group, department, union, lunch group, age cohort, fast-track group, and so on (Ashforth & Mael, 1989).

A major problem with generations, as described by Elder and Vinovskis (1978), is the following:

When a population divide occurs on genealogical principles into various generations, there is substantial overlapping in age across various generations. It is impossible to characterize the generations in terms of their common characteristics that are similar to other generations (p. 130).

Furthermore, Kertzer (1983) writes that in sociological studies involving age, the distinction between age, cohort, and period effects is now well known and guides the methodology of most research. We cannot attribute differences between people of different ages to their life-course position without determining whether these differences stem instead from cohort characteristics. The documentation in this section needs consideration when reviewing literature on and researching the topic of generations and can limit the study with more ambiguity.

Delimitations of the Study

This study did not address the gender or cultural background of participants. Additionally, this study does not intend to explore the Mature Generation at the risk of not having enough participants to be representative. Present research did not include an in-depth look at the costs of talent management and succession planning. According to Chugh and Bhatnager (2006), “every organization does not get into a formal talent management largely because of the costs involved. The cost of replacing an employee is approximately 30% of his annual salary” (p. 233). With regard to topic of diversity:

There is uncertainty about how to link talent management to strategy, and concern about how equal opportunities and diversity policies are damaged by talent management program. The competitive nature of exclusive talent management strategies may not be conducive to more egalitarian organizational cultures (Ford, Harding & Stoyanova, 2010, p. 14).

Therefore, diversity was not considered a key topic for the present study, but briefly mentioned in Chapter 2.

Research Assumptions

There are a few assumptions to support the present research. The first is that the employees at the research site would provide participants who are in one of the three generational categories (Baby Boomer, Gen X, and Gen Y). The second assumption is that participants were honest and forthcoming with their perspectives on the topic of succession planning and generational differences. The third assumption is that the involved parties (leadership, HR, and participants) are informed and understand the purpose and objective of the research.

Overview of the Study

Although the topic of generations has been written about in magazines, internet and in books, there is still room for significant research regarding how to leverage the differences and similarities across and between generations in the realm of succession planning. Hansen and Leuty (2011), state that while there is progress on investigating the influence of generation and age on values, several shortcomings exist with this body of research. One issue is that existing studies that account for age, all used student or young adult samples, whose lack of work experience may reduce their practical application to adult work values. Studies of social change, value transmission, social mobility, and the cultural and social integration all intersect with generational relations. What is crucial to the future of such study is for generational processes to be firmly placed in specific historical contexts—i.e., that they be analyzed in conjunction with the concepts of cohort, age, and historical period. Examining generation in conjunction with age and organizations opens up research that may obscure age, cohort, and generation. The issues likely to be of greatest interest will depend on the theoretical orientation of the researcher. From a socio-biological viewpoint, generational relations are central to society.

Definition of Key Terms

The following operational definitions are presented to provide a clear understanding of how they are used within the context of this study:

Age-based Identity: Membership in an age group that shares collective memories during formative years of life (Joshi, Dencker, Franz, & Martocchio, 2010).

Baby Boomers: Individuals born between 1943 and 1960. Demographers generally label Baby Boomers as those born from 1946 to 1964 (Zemke et al., 2000).

Career Mobility: “Individuals' optimal career paths may involve intra-firm mobility as well as inter-firm mobility. Intra-firm career mobility ("promotion") is subject to the employer's decision, whereas inter-firm mobility and its optimal timing are determined by the individuals who choose the optimal quitting time so as to maximize their expected lifetime earnings. Intra-firm career mobility is uncertain” (Sicherman & Galor 1990, p. 171).

Career Security: Employees build a portfolio of skills and experiences that guarantees a job no matter what is occurring in the current job market (Lancaster & Stillman, 2002).

Cohort-based Identity: Membership in a group that has experienced organizational entry within the same time interval (Joshi, Dencker, Franz, & Martocchio, 2010).

Cohort effect: When responses to the same phenomenon are similar within generations, but different between generations (Manheim, 1970).

External Factors: Generational perspectives that are influenced by factors outside of the company and individual control.

External Influences: Influences outside of organizational control.

Generational Characteristics: Values, attitudes, behaviors, and preferences of a generation (Kupperschmidt, 2000).

Generational Cohort: People born in the same general time span who share key life experiences (Zemke et al., 2000).

Generation: A sociological reality, consisting of a cohort, significant proportions of whose members have experienced profound historical events (Kertzer, 1983).

Generational Location: Social consciousness and perspective of youth reaching maturity in a particular time and place (Manheim, 1970).

Generational Perspective: Knowledge recognition and shared appreciation of the generation's ideas (Kupperschmidt, 2000).

Generational Unit: Differing forms of response to the particular historical situation, thus stratifying by a number of "generational units" (or "social generations") (Manheim, 1970).

Generation Xer's: Individuals born between 1961 and 1975, (Zemke et al., 2000)

Generation Yer's/Millennial: Individuals born between 1976 and 2000 (Zemke et al., 2000).

In-Group/out-group: In-group members often come to share pejorative perceptions of the out- group and experience the real or imagined slights against other members as their own (Ashforth & Mael, 1989).

Job Security: Remaining with a company for a long time and becoming invested (Lancaster & Stillman, 2002).

Organizational Climate: The dimensions of a work environment (leadership, behaviors, etc.).

Organizational Structure: How a business organizes itself with regards to leadership, departments, teams, etc.

Perspectives – way of looking at or thinking about something (Merriam, 2013).

Personal Plans and Experiences: How participants view their experiences within the organization with regards to career mobility and as well as professional planning.

Replacement Planning: “A form of succession planning best suited to settings with structured career ladders, stable work forces and unchanging corporate goals; consists of identifying one or two next-echelon back-ups for each critical position” (Ashforth & Mael, 1989, p. 36-38).

Social Identity Theory (SIT): Burke (2000) defines Social identity Theory (SIT) as a person's knowledge that he or she belongs to a social category or group.

Succession Planning: According to Frantz, Maltz and Peppers (1998), succession planning introduces systematic assessment of aspiring employees and career development, incorporating--at the most sophisticated end--job profiles that identify critical skills and competencies for effective performance in specific jobs.

CHAPTER 2: LITERATURE REVIEW

Introduction

There are many readings on the topic of generations in magazine publications and popular books. This relative abundance on the topic in popular literature is not matched however in scholarly research. The present literature review explores an important and under-recognized area of research that addresses generational differences and Talent Management (more specifically, succession planning). Rather than addressing the problem of communication between younger or older workers directly, the research suggests that we need to develop a mind-set shift from labeling and stereotyping generational cohorts, to understanding the generational outlook, in preparation of the transition of power from and leadership. Findings may support efforts of talent management, organizational development, as well as human resource development practitioners in planning leadership succession plan by understanding the leadership expectations of each generation.

There are still many gaps in academic research and seminal writing in the area of generational studies. The purpose of this Basic Interpretive Study is to explore the thoughts and perspectives of Generation Y, Generation X and Baby Boomers in the area of succession planning. Regardless of what happens with the U.S. economy, fewer workers will be available in the Generation X population to move into the management ranks. In addition, a large number Baby Boomers will become eligible to retire in the next few years, leaving a leadership gap in the upper echelons of organizations (Lancaster & Stillman, 2002). This research explores the experience of three generations working in an organization that is facing succession-planning challenges. Generally, the study examines the lived experience of 12 employees, ranging from ages 22 to age 65.

Topic Descriptions

A thorough review of the literature using relevant search terms (e.g., Generational Differences, Workplace, generational theory, Mature Generation, Baby Boomer, Generation X, Millennial, Generation Y, Succession Planning and Talent Management and Organizational Structure, etc.) is included in this study. The search was conducted in no particular order; rather, allowing a discovery process to occur through reading books and peer reviewed articles.

Included in the literature review were multiple disciplines such as generational studies, organizational development, organizational culture, psychology, business, management, cultural anthropology, sociology, social psychology and leadership. Literature from these disciplines was accessed through multiple databases including Proquest, EBSCOhost, Google Scholar, Emerald, SAGE Publications, ERIC, Dissertations, online articles and related books. Additional references were found by examining the references cited in the articles. Qualitative and quantitative research studies are included in this review because the study needs to contain data on all three generations as well as talent management and succession planning studies.

In addition, an extensive search of peer-reviewed journals, articles and books related to the constructs and publications are included because there is minimal peer-reviewed research on generational studies. According to Lancaster and Stillman (2002), generations carry their personalities with them through their lives. In fact, when hard times hit, generations are likely to entrench themselves even more deeply into the attitudes and behaviors associated with their generation. The organization studies in this literature focus on critiques from the sociological and managerial perspectives. However,

much discussion and promotion of recent decades have resulted in a closer study of modern organizational talent management (Casey, 2004).

Studies on Generations

It has become increasingly difficult to ignore the issue of a growing number of ‘retirees’ in the workforce today. Although the present economy may force many older workers to remain employed, the age group of soon-to-be-retirees is the largest age group in the collective workforce. Studies on generations are important because the transfer of information and work practices may take place organically, after proper training and/or planning (with the support and guidance of organizational and learning development practitioners), or not at all. In some organizations, this transfer may be more structured, ensuring the security of the more senior leader until his or her departure, or again, it may not take place at all.

My deep interest in the topic of the experiences of multi-generation workforces stems from personal experience of needing information transferred to me as a manager, as well as my experience as an organizational development practitioner conducting succession planning activities. This research attempted to provide a deeper understanding of the perspectives of three generations on succession planning. According to Straus and Howe (1997), generational theory seeks to understand and characterize cohorts of people according to their birth generation. Generations, the authors say, are defined not by a formal process, but rather by demographers, the press and media, popular culture, market researchers, and by members of the generation themselves.

The Origins of Generations

The concept of generations is an American idea (Pendergast & McGregor, 2006). The idea of generational differences was first introduced by William Strauss and Neil Howe (1993) in their book, *Generations: The History of America's Future, 1584 to 2069*. Pendergast (2007) describes generational theory as the concept of:

Generational location is a passive category based on the chronological span of time for the birth years of a cohort of individuals. Generational actuality moves from the passive location designation to consider the way a generation responds to social changes (p. 2).

Generation units are the subgroups within the generation time span. According to this study, there is typically a 20- to 22-year generation span.

Social Identity Theory Informs Generational Theory

Stets and Burke (2000) contend that, “social identity is a person's knowledge that he or she belongs to a social category or group” (p. 32). According to Stet & Burke (2000), members of a social group hold a common social identification, or view themselves as members of the same social category. Through a social comparison process, they determine persons who are similar to the self. In early research on this theory, social identity included the emotional, evaluative, and other psychological correlates of in-group classification.

By contrast, Pendergast (2007) determined that generations are defined not by formal processes, but rather by demographers, the press and media, popular culture, market researchers, and by members of the generations themselves. Joshi, Dencker, Franz and Martocchio (2010) suggest that a generational cohort is a way to categorize the traits, inclinations, psychology and social relationships of each generational group.

Their article “Unpacking the Generational Identities in Organizations,” describes an organization where senior management believed that a generational divide was creating a lack of trust between two employee groups (the Baby Boomers, who were the more senior group, and Generation Y, a group of recent graduates) leading to high turnover rates for the recent graduate new hires. The authors suggest in organizations today, generational phenomena may manifest in many ways have various consequences, therefore making it difficult to define a generation at times (Joshi, Dencker, Franz, & Martocchio, 2010).

Sullivan, Forret, Carraher, and Mainiero (2009) argue that although there are multitudes of articles covering the topic of generational differences and the impact of those differences in the workplace, there is still a gap in the area of peer-reviewed research on the topic. This dearth of research is one reason why Joshi, Dencker, Franz and Martocchio (2010) took a unique approach in their study. The researchers used many concepts of generational cohorts and aligned them with Social Identity theory. After using this approach Joshi, Dencker, Franz, and Martocchio (2010) produced the term generational identity, which relates to a person’s self-awareness that they belong to a group.

Joshi, Dencker, Franz, and Martocchio (2010) state that social identity theory posits that cohort-based identities emphasize a collective identity because they are associated with a shared set of organizational experiences and outcomes and because membership in a cohort-based group is stable and immutable in any given organizational setting. They also provide a framework for understanding generational identities in organizations. Within this framework, they list two assumptions to explain generational identities. The first assumption is that multiple generational identities coexist in

organizations. The second assumption is that multiple generations coexist in organizations. These two assumptions are important in setting the context for the rest of the study. Further, Joshi, Dencker, Franz, and Martocchio (p. 393-394, 2010) propose that each generational identity is associated with a preceding and succeeding generation that is chronologically linked. Individuals entering an organization during the same time interval undergo similar training and socialization experiences and enter into similar employment contracts.

These concepts are important because examining the differences across generations may provide insights into talent management and developing succession plans and leadership transition practices between generations. Completing this research achieved the difficult task of making the search for and retaining talent and the retaining of talent a simpler process, by understanding the organization's leadership. The data revealed in this study may help HRD practitioners develop and/or purchase programs to improve communication and work relations across the generations. Just like no two people are exactly alike, there are no two generations exactly alike which makes it difficult to determine what talent management practices are the best fit overall.

General Research on Generations and Cohorts

Research has shown that in families (and other groups), each generation may possess unique values, beliefs and attitudes (Glass, Bendston, & Dunham, 1986). The authors examine socialization theory and developmental aging of three generations. The authors also argue that attitude similarity between generations is the consequence of beliefs surrounding socialization, status inheritance and influence. The present research pursues answers to the following question: What are the views of Baby Boomers, Generation X, and Generation Y on succession planning (career mobility). According to

Codrington (2004), a "generation" tends to be about 20 years in length, representing roughly the time from the birth of a cohort (or group) of people to the time they come of age and start having their own children. He/she also adds typically, generations are bounded by significant events in the country or region being considered. These findings support the use of social identity theory as part of the theoretical construct.

Description of Generations

In most cases, our parents experienced a much different workplace than we encounter today, due to the vast changes in how we do business (i.e., the use of technology, women in the workplace, or a shift in the way goods are manufactured). What may be important to the current generation, may not be important to the previous generation, or the following generation. Although each one can influence the other, there have been numerous studies focused on the differences between generations.

It is generally believed that currently there are four generations in the workplace, including the Mature generation (born between 1909 and 1945), the Baby Boomer generation (born between 1946 and 1960), Generation X (born between 1961 and 1976), and Generation Y (born between 1977 and 1998). For the purpose of this study, the focus will be on only three of the four generations, the Baby Boomers, Generation X, and Generation Y. The older members of the Baby Boom generation are transitioning out of the workplace; Gen X is between Gen Y and the Baby boomers and may still be developing leadership skills.

Knowing generational information is extremely valuable, as it can help explain the baffling and confusing differences between our unspoken assumptions and our attitudes and actions (Zemke, Raines, & Filipczak, 1999). Joshi, Dencker, Franz, and Martocchio (2010) agree that determining cohort-based identities will emphasize a

collective identity, so it is possible that a set of organizational experiences and outcomes, and possibly training preferences may be similar. Lancaster and Stillman (2002) reported that the largest generation in the United States at the same time is Generation Y topped out at 80 million people. The same report listed Generation X as having 46 million and Baby Boomers at 75 million.

Duty and sacrifice are typical behaviors associated with the mature generation. The formative events associated with the mature generation are the Great Depression, Pearl Harbor, World War II, and Hiroshima. The second oldest generation, the Baby Boomers, are considered the “me” generation. This generation experienced formative events such as the civil rights movement, the Martin Luther King, Jr., and John F. Kennedy assassinations, as well as the Vietnam and Cold Wars. Generation X is labeled as being skeptical and self-sufficient. Formative events that have shaped this generation are the Watergate scandal, the fall of the Berlin Wall, the computer boom, and the Reagan presidency. The youngest generation (referred to as Generation Y) is recognized in the Reynolds and Smith (2008) study as being coddled and idealistic. Formative Generation Y events include the 9/11 attacks and the internet boom. Furthermore, Parry and Urwin (2010) also state that the “concept of generations has a strong basis in sociological theory.” Parry and Urwin (2010) also present research that examines the generalizations and comparisons of each generation through the lens of sociological theory.

Baby Boomer Generation

In an article published in Cepero and Williams (2009) titled *The Multigenerational Workforce: Opportunity for Competitive Success*, they argue:

The oldest generation, Traditionalists grew up following the worldwide economic depression, with World War II as the major event in their childhood. They view work as a privilege and have a strong work ethic grounded in discipline, stability and experience (p. 1).

The perspectives of the traditionalist may have had an effect on the Baby Boomers and how they view work ethic in regards to working long hours. Cepero and Williams (2009) also add:

The Baby Boom generation, was the largest generation born U.S. and has had a significant impact on societies worldwide. Defining events of this generation include the space race, and women's liberation. Baby Boomers tend to be idealistic, driven and optimistic (p. 1).

It is possible that the way Baby Boomers view Generation X (slackers, etc.) traditionalist may have had similar dislikes regarding the Baby Boomer generation.

Research conducted on generation typically includes such broad descriptions of each generation. Current research on generations that is based on popular notions of generations that empirically, is not valid, and that reinforce simplistic if not stereotypic views of generations (e.g., "Millennials are entitled," "Baby Boomers are politically liberal") represents an organizational misstep in this regard. Although there is a rich tradition of scholarship on the concept of generations, it includes debates and disagreements with respect to what a generation is and how it should be defined (Joshi et al., 2010).

Generation X

The Baby Boomers and Generation X may behave differently at work. One example of a generational difference is that Baby Boomers may not question status quo

or authority, and this may cause confusion for members of Generation X, who were taught to speak up. Karp, Fuller and Sirias (2002) state that what Baby Boomers see as slacker behavior, the Generation X employees sees as legitimate choices about how they spend their time. According to Lancaster and Stillman (2002), Generation X is the most misunderstood generation in the workforce today, but is an influential population that has worked to carve out its own identity separate from that of the Baby Boomers and Traditionalists. Lancaster and Stillman (2002) provide a very detailed description of Generation X, stating:

While traditionalists are typically characterized as being extremely *loyal* and Baby Boomers *optimistic*, Generation X is characterized by *skepticism*. They grew up seeing every major American institution questioned, so X'ers put faith in themselves and have less faith in institutions (p. 1).

Lancaster and Stillman (2002) summarize their background on Generation X by adding that this is an extremely resourceful and independent generation that counts on its peers and itself to get things done and does not hold out too many false hopes that any person or institution is going to swoop down and save it from reality.

Generation Y (Millennials)

Generation Y has many names such as Echo Boom, Baby Busters or Generation Next. According to Lancaster and Stillman (2002), who characterize Generation Y as smart, practical and techno-savvy, prospective employers who must figure out how to attract this group into the workforce label them as the millennial generation. Before entering into the workplace, Generation Y witnessed personal threats in school such as the Columbine massacre and 9/11, as well as readily available illegal drugs and

increased gang activity. Lancaster and Stillman (2002) also purport that with the advent of advanced technology and media blurring the lines between fantasy and reality, the people influencing Generation Y often seem larger than life. Generation Y have also been influenced by Baby Boomer parents who have given them the confidence to be optimistic about their ability to makes things happen; Generation X'ers gave Gen Y enough skepticism to be cautious (Lancaster & Stillman, 2002).

Comparisons across the Generations

In this review of literature, a few articles focused on the preferences and work styles of each Generation in the workplace. Parks (2007) states that “Boomers tend to leave unsatisfying jobs and relationships, seek personal gratification through goal attainment and they often sacrifice their own personal lives for work, and started the ‘workaholic’ trend” (p.3). To further illustrate generational differences, Kunreuther (2003) states that Generation X is more comfortable than Baby Boomers working across race, gender, and sexual orientation. Karp, Fuller and Sirias (2002) state that Baby Boomers tend to have adopted the mindset toward work modeled by their parents, who are in the mature generation. In addition, the Baby Boomers parents warned against the perils of job-hopping and taught them to be loyal to their employer. However, ‘Gen X’ witnessed their parents being laid off even when having this loyalty (Karp, Fuller and Sirias p. 10). Karp, Fuller and Sirias (2002) also suggest that seeing parents experience continuously laid off contributed to a mentality of Generation X and may often result in a high employee turnover for this group. This is a trend that may frustrate Baby Boomers.

The large number of Baby Boomers (born between 1946 and 1964) resulted in more competition for limited job openings, thus making a competitive workplace the norm. However, Karp, Fuller and Sirias (2002) state that, “Generation X is viewed as a

disengaged, disloyal, generation of slackers. Generation X tends to be more distrustful of organizations and the people who manage them due to the fact that they grew up in an era of downsizing and restructuring.” This distrust may lead many individuals within Gen X to believe that job security is a myth, and their best chance of survival is to keep moving from company to company until they find the best fit for their lifestyle. This thought process around job loyalty is in direct opposition to that of their predecessors.

According to Lancaster and Stillman (2002), from the public to private sector, from large multi-national corporations to small businesses, the American workplace is being disrupted by generational “collisions.” These “collisions” (or differences) include reduced profitability, loss of employees, higher payroll costs, derailed careers and wasted human potential (Lancaster & Stillman, 2002). Kunreuther (2003) states that there tends to be a difference in how older generations support the work of younger generations (p.454). Kunreuther (2003) also states that “in organizations founded and/or run by Baby Boomers, it seems the younger people are barely acknowledged, much less addressed successfully” (p. 454), indicating poor communication between the generations. In the same research it was discovered that Baby boomers want to supervise or micromanage Gen X and expect them to ‘pay their dues’ before giving them real authority. In contrast, Parry and Urwin (2010) caution that significant research is required to disentangle cohort and generational effects from those caused by age or period. The suggestion that different groups of employees have different values and preferences based on factors such as age and gender for example, remains a useful idea for managers. However, a convincing case for consideration of generation as an additional distinguishing factor that influences values and preferences, has yet to be made (Dede, 2004).

Kolb and Putman (1992) indicate that while vast amounts of research have been conducted on conflict in the workplace, most research focuses mainly on the formal, public, and rational aspects of conflict and not on the interpersonal or intergroup conflicts that most often occur in work settings. Almost all studies of interpersonal or intergroup conflict are detached from their organizational context, and very little research has been conducted on the topic. Additionally, Melton (2003) states “we know very little about the vast majority of interpersonal and intergroup conflict that occurs in work settings” (p.138).

In social-psychological studies, the term "generation" has been studied for many years. In a study of "generational differences" in work orientations, Taveggia and Ross (1978) contrasted factory workers whom they divided into four age groups (defined in relation to a 1974 survey): under 26 years old; 26-35 years; 36-45 years; and over 45 years. Taveggia & Ross (1978) found the notion of "generation gaps" inapplicable, because there was relatively little difference in work orientation among the age groups. The authors found that differences would have been hard to attribute to cohorts, as opposed to life-course factors such as going to college or starting a family.

Similarities Across Generations

Understanding generational differences and their implications in the workplace is critical to decrease potential conflicts due to such differences as well as to manage and develop different generations effectively (Park, 2010). It may also be beneficial for organizations to understand similarities across generations. With "generation" used in so many different, analytically incompatible senses, what is being denoted is sometimes unclear, as when Bengtson and Troll (1978) cite "societal generational processes" in discussing the thesis that parent-child similarities may be the result of common environments rather than within-family socialization.

Similarities across generations may lead to a deeper understanding of the areas of work that are simply unrelated to generational perceptions. Generations are defined as generation cohorts, the groups of people who came of age at roughly the same time and who are influenced by the significant events happening during their coming-of-age years such as economic changes, war, political ideologies, technological innovations and social upheavals (Park, 2010). There are still gaps in the literature concerning whether or not generations experience similar evolutions.

One area of generational studies that relates to similarities across generations is “age- strata.” One subset of this body of research, generational conflict literature, while making reference to parent-child relations, also addresses these relationships as a function of conflict related to age strata (Kertzer, 1983). The focus is placed on “age-strata” to see how intergenerational transmission processes change over time. It is necessary to specify limited historical periods in which the transmission took place. For example, lumping together men aged 20-64, thereby aggregating people who entered the labor force in widely differing historical periods (Erikson et al., 1979), makes it impossible to inquire into the changing historical context of mobility processes. It is important, then, to pay careful attention to age groupings, relating specific historical periods to specific patterns of intergenerational transmission. In this way, historical changes in the mobility experience of successive cohorts can be determined and their causes assessed (Featherman & Hauser, 1978).

Lipset and Ladd (1971) compared college cohorts of the 1930s with those of the late 1960s to determine if there were cohort differences. In this study they referred to these cohorts as "generations" of college students. Bengtson (1976) attempted to marry the “Mannheimian” notion of generation units as agents of social change with the

developing field of age stratification. At times, the sociology of age has been identified with generational analysis (Bengtson & Cutler, 1976).

Cohorts

According to Butterfield (1972), when responses to the same phenomenon are similar within generations, but different between generations, it is called a "cohort effect." A comparable problem is found among historians who write of "generations" in terms of particular cohorts and at the same time refer to particular historical periods as "generations" (Butterfield 1972). Referring to a variety of diverse processes, from kinship descent, to cohort, to life stage, to period, will discourage the kind of analysis that is so necessary to research on age (Kertzer, 1983). Rosow's (1978) otherwise perceptive discussion of how best to define cohorts is partially marred by this problem. He writes that "cohort effects are a central concern in the analysis of generations. By cohort effects, I mean the typical response patterns of members of various cohorts to the same thing. The term "generation" may cover a wide range of cohorts. However, though it is the great historical event that defines such "generations," they are often linked in practice to the cohorts of youths and young adults thought to be particularly influenced by such events (Kertzer, 1983).

Social Identity Theory

Origin of Social Identity Theory

Manheim (1970) purports that each generation has a unique sociological paradigm. One generation having its unique sociological paradigm may make it especially difficult for that generation with a different paradigm to transfer knowledge to another generation, especially, when the new generation may have a different own vision of organizational goals. Consequently, they may not be interested in continuing the objectives and

leadership practices of the previous generation. The concept of generations is important to sociological research, but progress can only be made if an acceptable or standardized definition of generation is employed (Kertzer, 1983).

According to Hogg (2006), social identity theory is a social psychological analysis of the role of self-conception in group membership, group processes, and intergroup relations.

According to Straus and Howe (1997) generational theory seeks to understand and characterize cohorts of people according to their birth generation, and generations are defined not by formal processes, but rather by demographers, the press and media, popular culture, market researchers, and by members of the generation themselves. These two theories are linked by the researcher's effort to group individuals into categories.

Social identity theory (SIT) embraces interrelated concepts and sub-theories that focus on social-cognitive, motivational, social-interactive and macro-social facets of group life. Similarly, Trepte (2006) asserts that SIT focuses on that one part of the self-concept that is defined by our belonging to a social group. According to Ash and Mael (1989), a set of factors traditionally associated with group formation (interpersonal interaction, similarity, liking, proximity, shared goals or threats, common history, etc.) may affect the extent to which individuals identify with a group, although SIT suggests that they are not necessary for identification to occur. Burke (2000) defines SIT as a person's knowledge that he or she belongs to a social category or group.

Ashforth and Mael (1989) assert that in-group members often come to share pejorative perceptions of the out-group and experience the real or imagined slights against other members as their own. The same research found that within social groups,

the in-group members validate each other's relative superiority. Similarly, a field experiment by Mummendey and Schreiber (1984) involving political parties found that in-group favoritism was strong on dimensions regarded as important to the in-group, but that out-group favoritism existed on dimensions regarded as un-important to the in-group, but important to the out-group.

SIT shows how generational distinctions (with regard to in-group/out-group) may be even more profound or pronounced, thus “the consequences of identification uncovered by SIT, may well be intensified in organizations. In complex organizations the categorization of individuals, group distinctiveness, out-group and group formation, suggests that group identification are likely to be prevalent” (Ashforth & Mael 1989, p.26). These authors argued that:

- (a) social identification is a perception of oneness with a group of persons;
- (b) social identification stems from the categorization of individuals, the distinctiveness and prestige of the group, the salience of out-groups, and the factors that traditionally are associated with group formation; and
- (c) social identification leads to activities that are congruent with the identity, support for institutions that embody the identity, stereotypical perceptions of self and others, and outcomes that traditionally are associated with group formation, and it reinforces the antecedents of identification (p. 20).

This perspective is applied to organizational socialization, role conflict, and intergroup relations (Ashforth & Mael, 1989).

Tajfel and Turner (1985) offer a social-psychological perspective on SIT. This perspective is applied to three domains of organizational behavior: socialization, role conflict, and inter- group relations. From the SIT perspective, a person may develop a

sense self. In organizations, the prevalence of social categories suggests that social identities are likely to represent a significant component of individuals' organizationally situated self-definitions, and indeed, studies have documented this idea. This perspective on social identification in organizations suggests an implication that the effect of organizational socialization, on the internalization of organizational values and beliefs, is comprised in part of an indirect effect via identification; that is, socialization effects identification, which in turn effects internalization.

Talent Management and Succession Planning

A simple organization chart or a career assessment tool cannot describe all the possible directions a career may take. Lancaster and Stillman (2002) suggest too many employers and employees ignore generational differences because they assume that since we all experience the same life stages we are all bound to see career development the same way based on our stage in life. Lancaster and Stillman (2002) also explain that with competitive pressures, tight labor markets and economic upheavals companies are becoming more creative in how they plan and manage employees' career paths. Lancaster and Stillman (2002) state that while many traditionalists were part of paternalistic organizations that took care of employees. Generation X, who were raised in an environment in which the employer/employee contract was written in invisible ink, have taken career independence to a whole new level and seem the least dependent on the company to provide them with a career path.

Global Talent Management (GTM)

According to Beechler and Woodward (2009), as the global economy expanded dramatically between 2002 through 2007, business leaders and human resource managers worried about the intensifying international competition for talent. Tarique and Schuler

(2010) assert that, “even though there is currently a global economic slowdown, there are major structural conditions in place to ensure that competition for talent worldwide will continue to be a significant challenge” (p. 2). Companies that have a global structure may also face issues with succession planning. GTM challenges are left unmet, impacting near and long term global business strategies.

Talent Management

In order to attract and retain the best employees, companies should strive to become the model employer of choice. If an organization is far behind the market of talent management it will fail to attract the right employees to continue success or create new success. Becoming the model employer of choice does not lie in strong recruitment practice alone, although, clearly, this is vital (Kim, 2008).

According to Kim (2008), talent is essential to competitiveness in the new economy. The talent management process is not just about buying but developing talent. The making versus buying cycle is driven by the larger product, economic and available labor cycles. By using innovation and execution, talent management should be a source of competitive advantage. In that regard, Kim (2008) emphasizes four principles for ensuring that each organization has the skills it needs: “(1) balance developing talent in-house with buying it on the open market; (2) improve the accuracy of the organization’s talent-need forecasts; (3) maximize returns on talent investments; and (4) replicate external job market dynamics by creating an in-house market that links available talent to jobs” (p. 649).

According to Bersin and Associates (2009), making plans for choosing future leadership is vital to the health of an organization. Current leaders cannot remain in their roles forever. A succession plan will make the transition smooth and less stressful. A

succession plan will help explain who has the decision-making responsibility to appoint new leaders. Each step in the process should be explained thoroughly and clearly to prevent confusion.

Succession Planning

Terms such as “executive succession”, “passing the baton” and “CEO transition” are familiar to many as a result of increased focus on succession planning during the 1990s. According to Kesner and Sebra (1994), “without a sense of where succession research began, it is difficult to understand the strengths and weaknesses of its evolution” (p.400). There has been debate on the concept of succession. While there is some debate as to the origins of succession as a research topic, few question the significant role played by Oscar Grusky throughout the 1960s. Consequently, early observations by Grusky (1960) that the field lacked systematic investigation was a first step in setting the succession literature on a more scientifically rigorous course of study” (Kesner & Sebra, 1994, p.133).

According to a report by Bersin and Associates (2009), there may be four to five levels of succession planning maturity. Organizations that are at level zero in terms of succession planning do not have a succession management process at all, which includes 21% of all companies. Organizations rated at a level one tend to focus more on senior executives positions and create a list of high potential employees to replace outgoing leaders. This is called replacement planning. According to Bersin and Associates (2009) 15% of organizations are at a level one. Organizations that practice what is referred to as traditional succession planning would rate at a level two on the succession planning maturity model, where 52% of companies appear. When at level two, talent reviews

(which include development plans) are conducted in addition to targeting replacements for senior level positions.

Level three succession planning is called Integrated Succession Management. At this level organizations conduct an assessment of all positions at all levels and develop a strategy that integrates talent management processes. Bersin and Associates' (2009) research shows that only 12% of organizations have achieved a maturity level of three. The final level of succession planning maturity an organization can reach is four, which according to Bersin and Associates' (2009), has not been reached. At a level four companies completely understand and utilize the full potential of their employees and succession planning decisions are made based on what is best for the business (p, 2).



Source: Bersin & Associates, 2009.

Figure 2. Bersin & Associates Success Management Maturity Model

Issues with Succession Planning

In 2002, American Association of Retired People (AARP) predicted that over the following decade, the workforce within the United States experienced a major demographic shift. According to the AARP (2002) study, the proportion of employees ages 55 and older increased from 12.9% to 16.9%. This makes succession planning a vital part of organizational and talent development practices for most organizations. In

2003 Shore Cleveland and Golberg predicted that in the next 15 to 20 years, employers will hire one out of every four workers older than the age of 55. This is in contrast to the one out of every five workers hired who were older than age 55 (Shore, Cleveland, & Goldberg, 2003). This prediction suggests that societal and financial pressures will be stronger, making it harder for older workers to stay gainfully employed beyond the current average age of 63.

Effective Succession Planning

The information age transition to a knowledge and imagination age brings new challenges to workplace learning requirements (Pautler, 1998). Succession planning saves the cost and time of external personnel searches. It improves employee morale and lessens the effects of reengineering and downsizing. Most importantly, it creates a diverse talent pool within your organization along with benchmarking procedures for ensuring the ongoing success of your plan.

Succession Planning and Generational Issues

Workers are expected to be multi-skilled, such as having experience, knowing technology, and having the teamwork expertise to maintain productivity and efficiency (Merriam & Caffarella, 1999). A growing number of older workers are choosing to remain in gainful employment for a variety of reasons, such as psychological, social, financial, and professional benefits (Collins, 2003). This phenomenon will require new learning by older workers and a restructuring of the workplace. This restructuring of the workplace provides a demand for new learning by older workers, younger workers, the organization, and management teams.

Lancaster and Stillman (2002) report that the generations view career planning differently:

- Baby Boomers think one needs to build a stable career;
- Generation X thinks one needs to build a portable career;
- Generation Y thinks one needs to build a “parallel career” by learning several jobs simultaneously, which is also cost-effective to employers.

According to Kim (2008), ensuring a good fit between a candidate and a job is a key element in the hiring process. Accordingly, what must first be asked is exactly what one’s organization is looking for, then what the job requirement is, then the individual job qualifications have to be searched (Davis et al., 2007). There has to be a balance, too, between a job reward system and individual (or extrinsic vs. intrinsic) motivation. So it is necessary to fit the right person to the right position, at the right time (Kim, 2008).

Impact of Organizational Setting and Culture on Talent Management and Succession Planning

According to Child (1972) larger organizations tend to be more hierarchical. Larger organizations are more specialized, have more rules, more documentation, more extended hierarchies and a greater decentralization of decision making. Workers who receive little feedback suffer anxiety, which, together with low job satisfaction, can lead to their seeking to change jobs. The turnover rate is also likely to increase when employees' values and goals, and their strategies for attaining those goals, do not fit with those of the organization. Those employees who choose not to leave the organization experience diminishing job satisfaction because their work is no longer providing the emotional benefits they desire. When workers are given control of their careers, their intrinsic motivation and their commitment to the organization are high; this is true regardless of the worker's age, education, tenure or position.

To analyze the relative strengths and weaknesses of hierarchies, professionals should focus on three functions; selection, motivation, and organization. According to Wriston (1980) selection involves determining the organization's success in hiring and promoting staff with the most appropriate knowledge, skills, and attitudes. There are two basic questions posed by selection: (1) Does the organization know what specific abilities will contribute optimally to its success and (2) Is the organization able to successfully identify and secure those abilities through its hiring and promotional practices (Wriston, 1980).

Top management or executives should have some HR expertise on their staff (Lawler, 2008). According to Kim (2008), people should have stimulating work and responsibilities. At the same time, they should have some recognition and reward system, as well as leadership development opportunities. People's demands and preferences are changing, and organizations must prepare new means to retain key talent. Many executives now ask for periodic measurement of employees' performance. Before performance can be measured however, the best people have to be selected and be offered opportunities for professional development, and better organizational environments should be created in order to achieve continuous high performance. Job markets for talent have become more competitive than ever before so that it is not easy attracting the right person, for the right job, at the right time. Nelson (2004) states that it is important to gain and sustain a competitive advantage by finding, hiring, and retaining the right talent with the right structures, systems, processes and practices in place.

Conclusion

In summary, there are many ways that different generations may be compared and contrasted. This literature review sought to review these approaches and differences in

generation in relation to theory and practice. Regardless of how generations may be viewed, the interdependencies between individuals based on linear chronological age representing multiple generations are the foundation for the transferring of skills, knowledge, ideas, values, and experience in organizations. The present literature review also reveals that the effect of generational differences on organizational outcomes has received relatively little attention among researchers.

CHAPTER 3: METHODOLOGY

Introduction and Overview of the Methodology

The purpose of this study was to explore the perspectives of three generations on succession planning and to answer research questions surrounding the generational views related to career mobility. This chapter describes the qualitative research design for the present study. As part of the methodology, this chapter includes a description of the participants, how participants were selected, the researcher's role, and ethical issues. An explanation is provided on the data collection tools, how the data was collected and analyzed and threats to the data quality. By employing qualitative modes of enquiry, I attempted to provide answers to the following research questions:

1. What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning?
2. How do the three generations think the organizational context influences their perspective on succession planning?

Rationale for Qualitative Research Design

A qualitative research design was selected to study aforementioned questions. According to Merriam (2002) qualitative researchers are interested in understanding interpretations at a particular time and in a particular context (p. 4). Purely quantitative methods were unlikely to elicit the information necessary to address the proposed research questions. In qualitative research, the participants' are able to provide information about themselves and their setting (Bloomberg & Volpe, 2008). Beer (1988) states that qualitative research is well-suited to asking broader questions of social science, unlike traditional science which attempts to answer questions precisely. Qualitative

research is based on a well-defined methodology and can provide the means to scientifically answer these broader questions that provide new insight (Beer, 1988).

According to Bloomberg and Volpe (2008), qualitative research is grounded in an essentially constructivist philosophical position. The intent of the present qualitative research is to examine the social situation of multiple generations, by allowing the researcher to enter the environment and a deeper understanding of the employee's interactions and views on succession planning. They further argue that qualitative methodology focuses on discovery and description with objectives that allow the researcher to extract and interpret the meaning of the participant's experience. Learning how individuals experience and interact with each other in their setting is always considered and interpreted with qualitative research, and qualitative researchers are interested in understanding individual's interpretations of their experiences (Merriam, 2002, p. 4). Although qualitative research has at times been viewed as somehow inferior to quantitative research (Yin, 1994), it has strong methodological integrity when approached with rigorous attention.

Rationale for a Basic Interpretive Methodology

Qualitative theorists have differing ideas on the main types of sound qualitative methodologists. Patton (1990) states that there are a total of ten distinct qualitative methodologies, while Tesch (1990) accounts for a total of 45 qualitative design methodologies. Other perspectives include Creswell's (1998), who purports there are only five different qualitative methodologies. Two converging perspectives are those of Denzin and Lincoln (2011) and Merriam (2002) who share the belief that there are a total of eight qualitative methodological designs; however, those eight designs are not

identical. Merriam's (2002) eight studies include: (1) Case Study, (2) Ethnography, (3) Narrative analysis, (4) Phenomenology, (5) Grounded Theory, (6) Critical, (7) Postmodern-post structural, (8) and Basic Interpretive.

A Basic Interpretive Design (BID) has the following characteristics:

- Similar to phenomenology - the researcher is attempting to understand phenomena through the meaning participants assign to them (Rowling, 2005).
- The basic interpretative study focuses on the individual's situational influences and whether or not their opinion would differ in a different circumstance (Marshall, 1996).
- Methods and approaches emerge and are to be adjusted during the study (Koro-Ljungberg & Douglas, 2008).

According to Merriam (2009), the basic qualitative study is the most common form of qualitative study in the field of education. According to Patton (1990), the purpose of "basic research is knowledge for the sake of knowledge...and the basic researchers purpose is to understand and explain" (p.152). As such, the findings of this study are "a mix of description and analysis" (Merriam, 1998, p. 11), describing the participants' perspectives. The researcher serves as the filter for the meaning, using inductive strategies with a descriptive outcome (Marshall, 1996). There are many criticisms of a Basic Interpretive Design. One criticism is that it is too simplistic. Another criticism is that it is too similar to phenomenological approach (Creswell, 2004). In a basic interpretive study researchers strive to understand the meaning people have constructed their world and how they make sense of their experience (Sandberg, 2005).

According to Merriam (2002), a differentiator between a phenomenological study and a Basic Interpretive Design is that a phenomenological study seeks to describe and understand a single shared experience of one group.

Basic interpretive studies usually include roughly 9-12 individual interviews that are 60-90 minutes in length (Merriam, 2002). Seidman (2006) recommends three interviews per participant with a suggested length of ninety minutes. The first interview uncovers the life history of the participant, the second interview focuses on eliciting the details of the lived experiences where participants are asked what they do or did, to tell about relationships, and to reconstruct their day(s). The third delves into the meaning the participant attaches to the experiences. During this discussion, the intellectual and emotional connections are noted. A modified version of this interview process was used where the first two interviews are appropriate; however, since this is not a phenomenological study the third interview was unnecessary. A modified version of Seidman's (2006) interview structure was applied as an adjustment for a basic interpretive design.

Maxwell (2005), states that, "qualitative researchers typically study a relatively small number of individuals rather than collecting data from large samples, thus are able to understand how events actions and meanings are shaped" (p.22.). Merriam (2009) purports that the number of participants needed for an interpretive study may sometimes be ambiguous; therefore, researchers need to understand when saturation has been reached, meaning the responses coalesce around a group of ideas and themes, with no new added information.

The researcher was the sole individual who performed data collection and analysis for this study. The results of the research are descriptive (Merriam, 1995). The coding process involved combing the data for themes, ideas and categories and then marking and labeling data so that it could be easily found and used in other parts of the research. As Merriam (1995) points out, basic interpretive designs include open coding (to compare and categorize data), axial coding where the researcher connects categories after open coding and constant comparison (the process of selecting the core category, relating it to other categories and confirming the overlaps).

The methodology selected for the present research study is from the epistemological perspective of social constructivism. According to Crotty (1998) our knowledge of the social world and all meaningful reality is contingent upon human practices, being constructed in and out of interaction between human beings and their world, and developed and transmitted within an essentially social context (p.42). An interpretivists approach is used to understand each individual participant's perspective (Chism, Douglas, & Hilson, 2008). A selected literature review preceded data collection, and although this review informs the study, the literature is not data to be collected.

Researcher's Subjectivity

According to Creswell (1998), the researcher is a part of the data collecting process. For this study, the researcher focused on the meaning that the participants gave to the questions and was intentional about not adding personal interpretations. Creswell (1998) also states researchers are critical to the analysis process because we may incorporate our own bias. Peshkin (1998) states that "rather than trying to eliminate the researcher bias or subjectivity, it is important to identify them and monitor how it may

share their interpretation of the data” (p.18). As a female growing up in the United States and living in a suburban area of New York City, I was exposed to many different cultures. As a result, I witnessed many conflicts and disputes as a result of cultural differences and misunderstandings.

As the child of two foreign parents I was told that as long as you have an education in United States you will go very far in life. I was taught to value education, respect people with seniority and authority and to work hard to succeed no matter the circumstance. This has shaped how I view conflicts in general. At work, I always look to help and support people who are considered the underdogs. During the succession planning process it is important to have an advocate speak on your behalf with regards to your readiness to move up in position. I have seen individuals considered “underdogs” get passed over for promotions over and over again. I have sometimes felt like an “underdog” being sandwiched between two generations, Baby Boomers who have more experience and Generation Y’s who have more time and energy. I have also learned that in the workplace it is sometimes difficult to tell who the “true underdog” is, and the succession planning process can be very subjective. I look forward to the day when I am encouraging people to stand up for themselves on a greater scale, not just in conflict, but in the belief that they are capable and worthy of respect.

As the researcher, I monitored any thoughts and feelings regarding situations or participants labeled as “underdog.” Since I work at Company X, I was mindful of any potential bias towards the organizational practices. I enjoy working at Company X and I understand the structure of the company. I also have experience with succession planning, from my work at a different organization. I believe that succession planning

when done correctly is an effective way to sustain the leadership of an organization. Another way that I decreased subjectivity was to select participants that I do not know. The knowledge I have of the organization and succession planning helped strengthen the study context.

Employing member checks during the interview process also decreased bias since I am an employee at Company X. In this study member checking was conducted during the interview process and at the conclusion of the study, which increased the credibility the study. According to Creswell (2009), the interviewer built a rapport with each interviewee in order to obtain honest and open responses. During the interview, the researcher restated or summarized information and then discussed answers with the participant to determine accuracy. This allowed participants to critically analyze the findings and comment on them. The participants either affirmed that the summaries reflect their views, feelings, and experiences, or stated responses do not reflect these experiences. If the participants affirm the accuracy and completeness, then the study is said to have credibility (Creswell, 2009). The overall goal of this process is to provide findings that are authentic, original and reliable.

Research Questions

The research questions guiding this study are derived from study purpose. The research questions are the following:

1. What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning?
2. How do the three generations think the organizational context influences their perspective on succession planning?

Population and Sample

Population

The population for this study came from Company X, a multi-national company employing around 88,200 people worldwide. Company X was selected because its established global talent management department and practices and range of generations across its employee base informs the study's research questions regarding career mobility and generational perspectives. This is a benefit to the present research since it is important to select participants from the three generations focused upon in this study (Baby Boomer, Generation X and Generation Y). Company X has locations in six countries and four businesses in the United States. In order to collect information-rich data the sample of participants were selected from the headquarters regions of the United States, where succession planning is heavily practiced and global talent management is conducted on a small scale (according to the talent management staff).

Study participants ranged in age from 22-65. No specific race, gender or cultural background was required to participate in the study. Mackey (2005), predicted that by 2009 Baby Boomers would make up about two-thirds of the U.S. workforce, and therefore collaborating with leadership within the Human Resource department, to ensure a balance of generations was necessary to select a balance of participants from each generation for the study. Zemke (2000) uses different age categories to define generations than those commonly used by demographers (i.e., Strauss & Howe, 1991). However, Zemke's definition of generational age cohorts is most commonly cited in recent studies.

Sample

For this study, a purposeful sample (Patton, 1990) was used. There were 11 participants selected, comprised of three employees from the Baby Boomer generation and four from Gen X and Gen Y. The sites Human Resource Business Partners (HRBP's) sent the initial email notification to potential participants. The participants were chosen based on age; tenure, gender and job level were not factors in participant selection.

Criteria for Selecting Participants

Participants were selected for this qualitative research study because they fit the criteria of being within an age group of one of the three identified generations. A sample of men and women were selected by age as a member of one of the three following generations: Baby Boomer (Individuals born between 1943 and 1960), Generation X'er (Individuals born between 1961 and 1975), or a Generation Y (Individuals born between 1976 and 2000). Participants were selected from a pool of employees in a purposive manner ensuring an equal representation of males and females as much as possible. Outside of the age criteria, special populations or demographics were not sought for this study. Length of time with the organization, race or level within the organization was not a criterion for selection. In addition, the research design does not call for any vulnerable groups to be targeted specifically. No other specific criteria for exclusion or inclusion exist. Using a purposive selection process eliminates bias from the talent managers.

The participants were selected by age by the human resource business partner's (HRBP) within the organization. The HRBP's sent a list of names of participants to me,

then sent notices to the participants and their managers notifying them of their participation in the study. The HRBPS and managers were asked not to share information regarding the study or employees involvement in the study. The researcher then set up 30-minute overview calls to explain the study and began building a relationship and comfort level with potential participants.

Data Collection Methods Overview

The data for this research was collected via semi-structured interviews. According to Merriam (2002) one of the most important aspects of a Basic Interpretive Design is an interview. Semi-structured interviews can take on many forms. The form of interview used for this study was predetermined, open-ended and focused (Chism, Douglas, & Hilson, 2008). An open-ended interview is conducted in manner in which the researcher asks key respondents for facts surrounding a matter as well as their opinions (Yin, 1994). In a focused interview, the respondent is interviewed for the short period of time (from 60 to 90 minutes). The open-ended, focused form of interviewing was selected for this study to determine if the respondents have different or similar responses to the same set of questions regarding their environment and their self-identified generation.

There were 12 participants selected and 11 were interviewed. Each participant was interviewed twice. Seidman (2006) suggests conducting at least three interviews for a phenomenological study. A Basic Interpretive design is very similar to a phenomenological design; however, the format of conducting two interviews was employed for the study. The interviews were audio-taped with the participants' permission. The questions inquired about participants' perspectives regarding

generational differences in the workplace and what it means to be in their generation and work. Their responses were recorded and coded. Both a microphone connected to a laptop, and Audacity software were used to capture the audio. A separate recording device was used to capture the audio in case the microphone or Audacity failed during the interview. The interviews took place at various locations within the selected organization.

The interviewer recorded interviews using a digital recording device and took notes during the interviews. Digitally recorded data was transcribed using transcription software and manually checked for errors. Silence and non-verbal responses were noted in the transcription process. Participants were given pseudonyms to protect their identity. The site coordinator scheduled interviews with participants. The NVIVO application was used for coding and analyzing data. The researcher provided participants with blank documents including the Talent Profile, Succession Plan Form and Succession Planning Development Form. The researcher also requested that participants keep the documents confidential. However the researcher reviewed the documents to gain a better understanding of the organization's succession planning process, so that the researcher can better understand the context in which participants are experiencing succession planning.

Interview Questions

The research included the method of two semi-structured interviews to build rapport and collect data for the research questions. The employees of this organization have various professional levels, ages (as well as professional and personal backgrounds). These employees live in the United States work in a professional

atmosphere. The differing backgrounds of the employees allows for a deeper exploration of conflicting and comparable sense-making processes among study participants, contributing toward validity during data analysis. The similarities among the employees (e.g., they are all professionals and U.S. residents, Company X, 2012) brings focus to the data. Conducting qualitative research interviews aided in obtaining descriptions of the experience of each participant.

The researcher utilized interviews as the primary method of data collection in this research study, because of their potential to elicit rich-thick descriptions. Further, interviews give the researcher an opportunity to clarify statements and probe for additional information (Creswell, 1998). Denzin and Lincoln (2011) state that a major benefit of collecting data through individual, in-depth interviews is that they offer the potential to capture a person's perspective of an event or experience. The interview is a fundamental tool in qualitative research (Merriam, 1998). Since this study was conducted from the social constructivist epistemology, interviews are the most appropriate when the researcher is interested in the participants perspectives (Chism, Douglas, & Hilson, 2008). Interviews also involved some level of observation. Therefore, observations, were captured such as discomfort, excitement, etc.

Schwandt (2000) states that although interviews have certain strengths, they also have various limitations. He identifies three limitations of interviews. First, not all people are equally cooperative, articulate, and perceptive. Second, interviews require researcher skill. Third, interviews are not neutral tools of data gathering; they are the result of the interaction between the interviewer and the interviewee and the context in which they occur (Schwandt, 2000). Merriam (2002) reasons that interviews are guided by a list of

questions (or issues) to be explored and neither the exact wording nor order of the questions may be determined ahead of time. For this study, the interview questions were provided for the reader and used during the interview.

Interview Protocol

A study protocol provides a systematic process in the interview (Yin, 1994). According to Guba and Lincoln (1985), the subjectivity of the researcher can be reduced through interviews. Guba and Lincoln (1985) also maintain that the integrity of the interview process includes asking sound questions, in addition to recording, transcribing, and interpreting data is vital. Sandberg (2005) states, “interviews may be conducted in the form of a dialogue because generating verbal descriptions of a lived experience a one-sided activity. When the researcher merely poses questions, and the subject simply answers, the study is unlikely to achieve high communicative validity” (p.54). This according to Sandberg (2005), represents a strong rationale to dialogue with study participants.

Interview Questions (Set One)

The first interview focused on rapport building and to gain an understanding of the participants daily work life. The questions were used to gain familiarity with the participant.

Interview Question 1 – How are you?

Interview Question 2 – How long have you been with the company?

Interview Question 3 – What type of position do you hold? (Individual contributor, manager or senior leader)

Interview Question 4 -What is a typical day like for you?

Interview Question 5- What is your age or age range?

Interview Question 6 – Which generation do you identify with, Generation Y, Generation X or the Baby Boomer generation?

Interview 6a - Follow up: Why do you identify with that generation?

Interview Question 7 – To your knowledge, are you on anyone’s succession plan?

Interview Question 7a – Have you ever been a part of anyone’s succession plan?

Interview Question 8 – In your tenure with the organization have you been promoted or have you changed jobs?

1. What was the process? (How did this transition come about?)
2. What is your perspective of this process?

Interview Question 9 – What is it like working in your current environment?

Interview Question 10 – How do you think individuals in your generation perceive individuals in other generations?

Table 2

Research Question and Interview Question Matrix (set one)

Research Question and Interview Question Matrix				
	Interview Questions (set one)	Research Question 1: What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning?	Research Question 2: How do the three generations think the organizational context influences their perspective on succession planning?	Rapport Building
Q1	How are you?			X
Q2	How long have you been with the			X

Q3	What type of position do you hold? (individual contributor, manager, senior leader)			X
Q4	What is a typical day like for you?			X
Q5	What is your age or age range?	X		X
Q6 a	Which generation do you identify with? (Baby Boomer, Generation X, Generation Y)	X		X
Q6 b	Why do you identify with that generation?	X		X
Q7 a	To your knowledge are you currently on anyone's succession plan?		X	X
Q7 b	Have you ever been on anyone's succession plan?		X	
Q8	In your tenure with the organization have you been promoted or changed jobs?		X	
Q9	What is it like working in your current environment?			X
Q10	How do you think individuals in your generation perceive individuals in other generations?	X		X

Interview Questions (Set Two)

In this study, each participant was interviewed (sending the questions ahead of time), and the interviews will include the following questions (in dialogue format). The second interview will consist of in-depth questions about your views on the different generations and career mobility (succession planning). The second may take up to 60 minutes.

2nd Interview Question 1- What advantages do you think your generation has had with regards to navigating your career?

2nd Interview Question 1a (follow-up) – what are some disadvantages?

2nd Interview Question 2a- What it is like working with people in other generational groups (identify the other generations)?

2nd Questions 2b- Can you think of and describe situations where working with other generations has been particularly challenging for you?

2nd Question 2c- Can you think of and describe situations where working with other generations has been particularly rewarding for you?

2nd Interview Question 3a - What is your understanding of how employees move from a position A to a higher position B at your organization?

2nd Question 3b- Can you please think of and describe a situation where you (or a colleague of yours in the same generation?) tried to seek a higher position or a position with more responsibility. What happened? How did the organization support (or not support) this desire?

2nd Interview Question 4 - What are your current career ambitions? How are you planning to fulfil these ambitions?

2nd Interview Question 5a - Where do you see yourself within 5-10 years within the organization?

2nd Question 5b- What do you think you need to do to get to the position you are aiming at? How is your organization likely to support (or not support) you in achieving your long term (or short term) career goal?

2nd Interview Question 6a – Overall, what is your long term view of your mobility and longevity in this organization?

2nd Question 6b- What do you think your organization needs to do to help you get there?

2nd Interview Question 7 – To your knowledge, what is your organization doing now with regards to career mobility of its employees?

2nd Interview Question 8 – How would you define succession planning?

In addition to the interview questions stated above. Follow-up questions were used to garner a more descriptive response such as:

“What do you mean by that?”

“Can you explain that further?”

“Can you give me another example?”

Table 3

Research Question and Interview Question Matrix (Set Two)

Research Question and Interview Question Matrix			
	Interview Questions (set two)	Research Question 1: What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning?	Research Question 2: How do the three generations think the organizational context influences their perspective on succession planning?
Set2Q1	What advantages do you think your generation has had with regards to navigating your careers?	X	X
Set2Q1a	What are some disadvantages?	X	X
Set2Q2a	What it is like working with people in other generational groups (identify the generations)?	X	
Set2Q2b	Can you think of and describe situations where working with other generations has been particularly challenging for you?	X	
Set2Q2c	Can you think of and describe situations where working with other generations has been particularly rewarding for you?	X	
Set2Q3a	What is your understanding of how employees move from a position A to a higher position B at your organization?		X
Set2Q3b	Can you please think of and describe a situation where you (or a colleague of yours in the same generation) tried to seek a higher position or a position with more responsibility. What happened? How did the	X	X

	organization support (or not support) this desire?		
Set2Q3c	Can you please think of and describe a situation where you (or a colleague of yours in a different generation) tried to seek a higher position or a position with more responsibility. What happened? How did the organization support (or not support) this desire?	X	X
Set2Q4	What are your current career ambitions? How are you planning to fulfil these ambitions?		X
Set2Q5a	Where do you see yourself within 5-10 years within the organization?		X
Set2Q5b	What do you think you need to do to get to the position you are aiming at? How is your organization likely to support (or not support) you in achieving your long term (or short term) career goal?		X
Set2Q6a	Overall, what is your long term view of your mobility and longevity in this organization?		X
Set2Q6b	What do you think your organization needs to do to help you get there?		X
Set2Q7	To your knowledge, what is your organization doing now with regards to career mobility of its employees?		X
Set2Q8	How would you define succession planning?		X

Secondary Sources

For this study, secondary data was collected from the collection of blank Talent Management and succession planning forms located in the People Soft system.

According to a Human Resource Business Partner at Company X, there are three forms within the People Soft system that are specifically associated with the Talent Management and succession planning process. These are standard talent management forms within people soft that have been slightly modified by Talent Managers within Company X.

Additional types of questions were utilized to garner more information when the initial response is somewhat unclear. According to Chism, Douglas & Hilson (2008), focusing questions, used as a follow-up to a broad question may be asked for more specific responses when a participant has difficulty providing a response. According to Kvale (1996) interpreting questions, that require participants to interpret his or her answers, is an effective way to encourage the participant to further explain their response if necessary. The secondary documentation did not include identifiable information and was collected to enhance the study by providing additional context for the study and written documentation that would help understand the succession planning process.

Blank Internal Documents

1. Talent Profile: This form is similar to a basic job application. It includes current and historical work experiences and is to be completed by the employee.
2. Succession Plan form: This form is to be completed by managers regarding who is on their succession plan. The form does not limit the amount of employees that may be listed on the plan. It requires that the manager lists if the employee will be ready to assume the indicated leadership now (as in “ready now”), in two to five years or in five plus years.
3. Succession Planning and Development form: This form includes an employee’s

performance review, development needs, leadership programs an employee has attended and a list of current succession plans on which they are listed. This form is to be completed by a Talent Manager after meeting with the employee and their manager separately.

Data Analysis and Synthesis

The process of data analysis is both inductive and deductive (Bloomberg & Volpe, 2008). According to Merriam (2002) data analysis and data collection happens concurrently and begins with the first interview, observation and document encountered during the study. Merriam (2002) also adds “simultaneous data collection and analysis allows the researcher to make adjustments along the way and to test concepts and themes against subsequent data” (p. 14). The coding process divides the data into different categories; the researcher can then synthesize the interview responses then integrates them into an explanation. In Chapter 4, a written narrative is presented on the collective interviews after the data has been coded and emerging themes have been identified. Chapter 4 also explains how descriptive codes, which summarize the primary topic of a response, were used to categorize information (Saldana, 2008). These narratives provide clarity in cross-checking the data and serve as a secondary analysis. Since coding is a cyclical act, where the data needs to be reviewed in multiple cycles to capture the essence of the response, the approach is to come up with themes, either by their similarities or differences collectively provide an accurate description and scope of the responses expressed by participants. Some categories may require further refinement therefore sub-categories may evolve. Themes emerged as a result of the cyclical coding process.

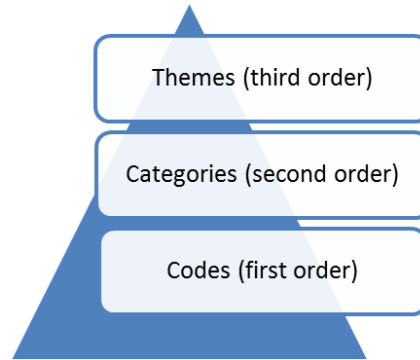


Figure 3. Coding Process

Methods of Verification

With regards to the methods of verification in a qualitative study the method of focus for this research was in the area trustworthiness. Bloomberg and Volpe (2008) and Guba and Lincoln (1985) use the terms *transferability*, *dependability*, *confirmability*, and *credibility* when describing trustworthiness. As mentioned in the methodology section, there are limitations with using the interview format. First, not all people are equally cooperative, articulate and perceptive. Second, interviews require researcher skill. Third, interviews are not neutral tools of data gathering; they are the result of the interaction between the researcher and the interviewee and the context in which they occur (Schwandt, 1997). Researchers learn a great deal about the accuracy, fairness and validity of their data analysis when participants are asked to react to what is described in the data analysis (Patton, 1999). The researcher addressed these limitations by asking building rapport with the participant during the first interview to increase confirmability and by asking consistent questions in the same order. In addition, participants were asked to verify their responses as valid and accurate.

Transferability

According to Lincoln and Guba (1985), external validity and transferability is defined as “the scope to which the research findings can be replicated behind the proximate research or generalizability” (p.290). Merriam (1995) adds the extent to which the findings of a study can be applied to other situations refers to the question of external validity (p.57). External validity were achieved through the description of the research site and documentation of the sites environment. Since the study includes sources that are particular to Company X, there is a potential limitation with the transferability of the study. To achieve transferability, member checks were conducted to help reduce incorrect data. Purposive sampling was applied during the participant selection process. Purposive sampling seeks participants that will support the research problem (Miles and Huberman, 1994). The site coordinator supported the initial selection of participants and the process of down-selecting participants by age.

Dependability and Consistency

Dependability and consistency may be achieved in the study by capturing the consistency of the responses to the interview questions. As Merriam (1995) suggests, in order to ensure reliability, dependability and consistency, the research must be replicable and produce similar findings. She (1998) also states “there is no benchmark by which one can take repeated measures to establish reliability in the traditional sense” (p. 170). Guba and Lincoln (1985) assert “consistency and dependability rather than reliability” (p. 288) is the most important aspect of achieving trustworthiness in a qualitative study. In an effort to increase dependability and consistency, participants were shown their interview transcriptions and asked if they wanted to add anything.

Credibility

Study credibility was achieved through pattern matching and categorizing findings. The descriptions collected during the study also added credibility to the research. In addition, the researcher used a statement of her experiences, assumptions, and biases. The secondary sources mentioned in the methodology section were developed for the purposes of managing talent and have been used successfully for five years at Company X in tracking succession plans in the PeopleSoft system.

According to Teijlingen and Hundley (2001) conducting a pilot will help strengthen the study. Through a pilot, researchers can conduct interviews with pilot participants, followed by feedback from the participant on potentially difficult questions or ambiguity. The pilot study conducted for this research gave the researcher to time the length of an interview and decide if it is too long or too short. For the present study three pilot interviews were conducted. One pilot for each generation. The results of the pilot study are not included in the final analysis.

Human Participants and Ethical Considerations

Protection of human subjects is an important issue in social science research (Bloomberg & Volpe, 2008). Researchers are morally responsible for conducting research in a manner that minimizes potential harm to participants in the study. To address any presenting ethical issues, the researcher took care to identify any potential harm to participants. According to Bloomberg and Volpe (2008) there may be ethical issues in any phase of the research process (i.e.; data collection, data analysis and interpretation and dissemination. For the most part, issues of ethics focus on establishing safeguards that protects the rights of participants and include informed consent,

protecting participants from harm, and ensuring confidentiality. This qualitative researcher, remained attentive throughout the study to the researcher–participant relationship, which is determined by roles, status, and cultural norms. She also considered the ethical issues that may arise during this qualitative research study by providing all information about the study to the research site and the participants.

Informed Consent

According to Bloomberg and Volpe (2008), informed consent is central to research ethics. For the present study, providing participants with an informed consent eased any discomfort or mistrust that their responses would not be confidential. In addition, participants were verbally reassured that the study is ethical, in that their responses remained anonymous through a coding process. A sample consent form is included in the appendix.

Summary

Chapter 3 described the methodology used to design this qualitative research, including a discussion of the qualitative paradigm and the rationale for the researcher’s choices. A description of the population and participants, the researcher’s role, the data collection tools, data collection plan, and data analysis plans was also included. The researcher discussed threats to data quality, validity, reliability and ethical considerations in reference to the current research study. In summary, this chapter provided a detailed description of this study’s research methodology. Qualitative Basic Interpretive Design methodology was employed to provide a deeper understanding of how generations view succession planning. The data collection method was recorded individual interviews. The data was reviewed against literature as well as emergent themes from the coded

participant responses. Credibility and dependability were accounted for through various strategies.

CHAPTER 4: FINDINGS AND ANALYSIS

This research uses a qualitative approach to describe the experiences of three generations regarding talent management within their organization and their perspectives of one's own and other generations. More specifically, the findings reveal employees' perceptions of succession planning and career mobility. Tulgan (2004) projected that Generation X and Y participants will revolutionize the workplace and liberate it from the traditional career path, old-fashioned supervisory tactics, outdated norms, and ineffective work patterns. Therefore, understanding generational perspectives and career mobility in relation to succession planning is more important than ever to HR practitioners.

The conceptual framework developed in Chapter 1 offered a research agenda to explore the perspectives of the three generations. This study focused on three generations (Generation Y, Generation X and the BB Generation). The design of the study addresses the following research questions:

1. What are the perspectives of the three generations (Gen BB, Generation X and Generation Y) on career mobility and succession planning?
2. How do the three generations think the organizational context influences perspectives on succession planning?

Gaps in the Literature

In this chapter the findings are presented in light of the conceptual framework, drawing a comparison between generational responses/highlighting new insights and suggesting connections among the generations. Distinctions in the perspectives of participants can be expected, which means the views of work from generations are ever changing. Yet, there is little in the scholarly literature about how different generations

view succession planning and career mobility. A review of the literature reveals a dearth of scholarly research on generations as well as on succession planning. Ford, Harding, and Stoyanova (2010) maintain that current research is limited to self-reported descriptions of talent management/career progression systems neglecting evaluation of how they work in practice. The present research provides a qualitative perspective on the experiences of three generations to provide actual thoughts and experiences of employees related to talent management and to suggest implications of these findings on succession planning.

Data Collection and Analysis Procedures

As mentioned in Chapter 3, a Basic Interpretive Study design was applied as a starting place to gain a more in-depth understanding about the views of each generation on succession planning. According to Seidman (2006), 90 minutes warrants enough time for participants to recall an experience “put it in the context of their lives and reflect on its meaning” (p. 20). For the purpose of this research a modified version of Seidman’s (2006) approach was employed by using two interviews as opposed to three interviews. The first interview was scheduled for 30 minutes, and the second interview was scheduled for 90 minutes. None of the second interviews took longer than 60 minutes; therefore, 90 minutes was more than sufficient.

The interviews were semi-structured with open-ended questions. Each respondent was asked a core set of questions; however, probing questions to stimulate further insights on certain issues were posed by the researcher. All interviews were digitally recorded then transcribed by the researcher. Participants were asked to provide answers to the interview questions relevant to their current age, job, and organization. The site

coordinator provided supporting documentation relevant to gaining an understanding of the succession planning process as it relates to the study.

Blank Talent Management documents were provided through the corporate PeopleSoft system and had no impact on participants' answers or the study as a whole. Each research question was answered using two sets of interview questions. There were 12 participants' total and 23 interviews. All but one participant, from Generation BB, was interviewed twice. There were four participants for both Generation Y and Generation X. There were three participants for the Gen BB. Saturation was reached by the third participant interview making a fourth participant interview unnecessary. The conceptual framework was developed from the literature to structure and guide the direction of this research, provide context for interpreting and explain the research findings and deepen understanding of the perspectives of three generations.

Description of Research Site and Secondary Data

The Company X site was selected because of its established global talent management department and practices and because of the range of generations across its employee base. According to a Human Resource Business Partner at Company X, there are three forms within the People Soft system that are specifically associated with the Talent Management and succession planning process. Data retrieved from the Talent Management department describing the internal talent management review process and supporting documentation was used as secondary data. Company X has locations in six countries and four businesses in the United States. The sample of participants was selected from the mid-Atlantic region of the United States as opposed to selecting participant's corporate-wide to maintain feasibility. Study participants range in age from

22-65 years. No specific race, gender or cultural background was required to participate in the study.

Demographic Data

Several closed ended questions were asked to capture demographic data; however, most questions in interview one and two were intended to be open ended. Separate from the findings, interview one contained foundational questions, such as job level and generational identification in order to build rapport with each participant. Job levels spanned generations with the exception of the senior leader. Participants were also asked his or her age or age range to verify which generation they belong in.

Table 4

Overview of participants' generation, age, gender and job level

Participant Overview				
Participant	Generation	Age	Gender	Job level
Dexter	GEN Y	29	Male	Individual Contributor
Simone	GEN Y	26	Female	Individual Contributor
Olivia	GEN Y	28	Female	Individual Contributor
James	GEN Y	31	Male	Individual Contributor
Ayanna	GEN X	38	Female	Individual Contributor
Raider	GEN X	42	Male	Manager
Mouse	GEN X	40	Male	Manager

Nicole	GEN X	41	Female	Manager
Warren	GEN BB	62	Male	Manager
Sally	GEN BB	53	Female	Senior Leader
Sam	GEN BB	48	Male	Manager

Participant Stories

The eleven participant profiles presented in the following section provide background information for each participant at Company X. The stories are not in any particular order; however, the stories are grouped from the younger to the older generation

Generation Y

Dexter. Dexter is a 29 year old and an individual contributor (no direct reports) with the title of “program manager.” He has been with the organization for four years. Dexter is currently on a succession plan to become a manager within his department and has been promoted once in his tenure with Company X. Dexter was very descriptive with regards to his explanation of succession planning. He spent two years in a leadership development program within the Human Resources department that enhanced his knowledge of succession planning. Overall he feels confident about his future at Company X.

Simone. Simone is a 26 year old individual contributor who is also a program manager. She has been with the organization for six years. Simone is not on a succession plan; however, she would like to be. She has been promoted once in her tenure. Simone

expressed a lot of frustration during the first and second interview with regards to her ability to move up and around the organization. She is very eager to look for new experiences within the company.

Olivia. Olivia is a 28 year old individual contributor (no direct reports) who works within the Human Resource department as an analyst. Olivia is not current on a succession plan: however, she has been promoted once in her tenure of four years. She has also been a participant in one of the organizations leadership programs. Olivia sees herself with a company for many years to come but assures that length of time is dependent on getting another promotion.

James. James is a 31 year old and an individual contributor (no direct reports) with the title of “senior engineer.” He has been with the organization for eight years. James is not on a succession plan. He has been promoted once in his tenure with Company X. James explained situations during his interviews that involved his manager not being the most supportive leader when it came to his career advancement. Overall he feels confident about his future and longevity at Company X.

Generation X

Ayanna. Ayanna is a 38 year old and an individual contributor (no direct reports). She has been with the company for two and a half years. Ayanna’s role with the company involves running the senior leadership development programs. Ayanna is not on a succession plan. She has been promoted once in her tenure with Company X. Ayanna feels that the organization supports her goals. She holds a PhD in her profession and has received rewards for her work within the company. Overall she feels confident

about his future and longevity at Company X. However, her length of stay with the company will be determined by her ability to secure a leadership position.

Raider. Raider is a 42 year old manager at Company X. Raider works closely with the organizations external clients and has two direct reports. He has worked for Company X for six years and has been promoted three times during his tenure. He is ex-military and he really enjoys working for Company X because of the structure. He is not on a succession plan as he states, “to my knowledge.” Raider works with top executives at Company X and plans on staying with the organization until retirement. He feels being that being in Gen X has more advantages than disadvantages mainly being “next in line” for senior leader positions.

Mike. Mike is a 40 year old manager at Company X with a small team of five people. He is an engineer and has been with the company for five years. Mike is currently on a succession plan for his manager. During his tenure he has been promoted once and is looking forward to the next step in his career as a director. However, he is unsure of the amount of time it will take to move into a senior leader position and did not feel that the organization as a whole supports him. He expressed concern for the lack of additional opportunities within the organization and is open to leaving if the next role is not presented within five years.

Nicole. Nicole is a 41 year old manager at Company X with over 30 direct reports. She has been with the company for 18 years. Nicole’s department handles government contracting. She is currently on a three succession plans for various managers within her department. During her tenure she has been promoted five times and is leaving the organization due to lack of support. Although Nicole is on three

succession plans, she has no idea how long it will take to secure the senior director position she is looking to have. Nicole handed in her resignation two weeks after the interview.

Generation BB (Baby Boomers)

Warren. Warren is a 62 year old manager within the engineering department. Although he is a manager he did not have any direct reports. Warren has worked for Company X for 17 years. He is not on a succession plan nor has he ever been promoted. Warren has rotated from department to department his entire career and seems to have enjoyed the change of pace and place each time. Warren only engaged in one interview since saturation was reached. He was fine with simply being able to participate and mentioned he plans to retire very soon.

Sally. Sally is a 53 year old senior leader for Company X and has been with the organization for five years. She had four direct reports. Sally is not on a succession plan, but she would like to be. Since Sally began her tenure with Company X she has been promoted once. Sally shared really enjoys working for the organization and plans to stay until retirement. She is currently working on a program that will help employees who are transitioning into retirement.

Sam. Sam is a 48 year old manager within Company X with two direct reports. Sam has never been promoted, nor is he on a succession plan. Sam has been with the organization for five and a half years and is very frustrated with not being on a succession plan. Sam mentioned that he was in the military. Sam also has a lot of compassion for Gen Y and does his best to mentor his younger colleagues.

Initial Data Analysis

The researcher analyzed the transcript from each interview. The following guidelines for thematic analysis (Miles, Huberman, & Saldana, 2013) were followed: (1) familiarize yourself with your data, (2) generate initial codes, (3) read through each transcript to get immersed in the data, (4) review themes, (5) defining and name themes, and (6) produce the report. The interview transcripts were initially analyzed to search for specific pieces of data that could be coded and placed into categories and, finally, into themes.

To provide a comprehensive look at the findings, the transcripts and codes were analyzed and categorized into themes. The following charts depict the demographic layout of the participants as well as the responses and themes of the study. The data, tables and charts included in the "Major Themes and Findings" section, which provides rich context on the view and perspectives of the three generations, presents a more concrete picture of career mobility at Company X. The data includes the responses from each participant. The tables in this chapter provide snapshot and deeper understanding of how the codes, categories and themes relate.

Table 5

Category-Code Schemata

Category	Codes
Relationships at Company X	<ul style="list-style-type: none"> • Relationships • Manager/Director • Leadership/Organizational support • Director • Mentoring • Advocate • Collaboration • Grooming and employee • Loyalty • Roles • Stereotype • Age discrimination • Advantages/Disadvantages
External Influences	<ul style="list-style-type: none"> • Industry • Job Market
Organizational Climate	<ul style="list-style-type: none"> • Organizational context • Work atmosphere • Corporate culture • Hierarchy • Stressful • Lack of stability • Collaboration
Personal Plans and Experiences	<ul style="list-style-type: none"> • Computer • Technology • Performance • Job level • Age • Career Mobility • Retirement • Bachelors/Masters of Arts • Education • Tenure • Outlook on Career • Flexible work arrangements
Available Opportunities	<ul style="list-style-type: none"> • Career Mobility • Higher-level jobs • Job change • Job expansion • “Next in line” • Longevity • Job outlook • Rotational jobs • Pipeline • Promotions (formal and informal)
Organizational Structure	<ul style="list-style-type: none"> • Hierarchy • Succession planning • Corporate Politics • Career Mobility • High Potential Programs • Leadership programs • Flexible work arrangements

Table 6

Data Analysis Major Themes, Sub-Themes and Associated Categories

Theme	Sub-Themes	Associated Categories
Individual Factors	Sub-Theme 1: The views of the three generations on career mobility and succession planning are strongly impacted by their relationships and personal experience.	Relationships (at Company X)
	Sub-Theme 2: Perspectives of career mobility are influenced by personal experiences.	Personal Plans and Experiences
Organizational Factors	Sub-Theme 3: Views of career mobility programs are impacted by the organizational climate.	Organizational Climate
	Sub-Theme 4: Views of career mobility programs are impacted by the organizational structure.	Organizational Structure
External Factors	Sub-Theme 5: External factors and viewpoints of available opportunities creates a perspective of lack of stability	Available Opportunities External Influences

Major Themes and Findings

The purpose of this section is to present a more concrete picture of the findings of the generation’s views on career mobility, succession planning, along with the views of other generations. These themes reflect the key responses and situations described by the interviewees during two interviews. The themes are not presented in any ranked order. A few of the themes also include the advantages and disadvantages (mentioned by participants) regarding the specific topic or question presented. The following

paragraphs describe the synthesized findings of the study exhibited by participants of organization, Company X. Based on the stories shared by each participant interviewed for this study, three themes (and five sub-themes) emerged from the coding and categorization process. Since there are codes that overlap (meaning fit into more than one category), and some categories are associated with more than one theme, there is a category/code chart for each theme.

Theme 1: Individual Factors

Sub-theme 1: The views of the three generations on career mobility and succession planning are impacted by their relationships and Personal Experiences.

The finding that the views of three generations on career mobility and succession planning are impacted by relationships is supported by two categories Relationships at Company X and Personal Plans and Experience.

Table 7

Category and codes associated with Theme 1

Associated Categories	Associated Codes	
Relationships (at Company X)	<ul style="list-style-type: none"> • Relationships • Manager/Director • Collaboration • Leadership/Organizational support • Advocate 	<ul style="list-style-type: none"> • Grooming and employee • Generational Advantages/disadvantages • Age discrimination
Personal Plans and Experiences	<ul style="list-style-type: none"> • Technology • Performance • Resignation, retiring • Career Mobility 	<ul style="list-style-type: none"> • Education • Outlook on Career • Organizational Context Bachelors/Masters of Arts

Relationships as Company X

Relationships/Grooming/Collaboration. When participants discussed working, being prepared for career mobility or working on projects, comments on relationships, mentoring and collaborating with others came to the forefront. Three participants (one Gen X and two Gen Y), made it clear that an employee's connections to leaders will increase his or her chances of career advancement. Mike (Gen X) stated, "*...It's all about the relationships you make and who do people see you being aligned with. Those relationships whether right or wrong help prepare you in the company. It really is all about who you know.*" Simone from Gen Y responded with great frustration sharing, "*...It's so political and more about who you know and your network.*" The second Gen Y participant responded saying, "*...Certain people KNOW they have upward mobility*" (James).

The same three participants also shared that it is important to have a manager's support and to have the right person as an advocate. The two Gen Y participants, James and Simone (who expressed frustration throughout her 2nd interview) added, "*...If you don't have a very good relationship with your manager, it doesn't matter what good work you produce*" (Simone). Another Gen Y participant (James) stated, "*...I told my boss that I needed more responsibility, but she was not responsive.*" Then Mike (Gen X participant) also made a similar comment with some frustration, "*...It's all about the relationships you make and who do people see you being aligned with. Those relationships whether right or wrong help prepare you in the company. It really is all about who you know.*"

Collaboration. Cross-collaboration does not appear to be naturally occurring phenomena at Company X. A response from the Gen BB participant referenced Gen Y as the initiator of the collaboration stating, “...to be quite honest I got the idea of collaboration from a younger person” and “...when I work with Gen Y I get an invigorating collaborative feel...it’s not stagnant or in a box” (Warren). However, a Gen Y Participant disagreed with his or her generation’s desire for collaboration by stating, “...People in my generation are resistant to cross-collaboration stating things like that’s not in my job description and I have other things I need to focus on” (Simone). Gen X participants did not mention cross-collaboration; however, one Gen Y participant shared a story where she asked Gen X co-participant to collaborate with her on a project and the response was a reluctant “yes,” stating, “...we can start the project together, but then you can take it over” Nicole).

Advantages/Disadvantages. Gen X participants had interesting views of his or her work experiences. For example two Gen X participants thought of his or her generation from the perspective of being sandwiched between Gen Y and Gen BB. One Gen x participant shared, “...We are a mix between the Gen BBs and Gen Y, so we understand both generations and can relate to both” (Ayanna). Another Gen X’er stated, “...We have to be flexible and relate to both generations.” (Raider). Mike (Gen X) stated, “...it’s about the relationships and who you are aligned with that will determine with you will have an advantage or disadvantage.”

Age discrimination/Advocate/ Manager-Director/Grooming employee/Long-term Goals/ Leadership-Organizational Support. Gen X and Gen BB had mixed reactions to feeling supported by the organization; however, there was one response that

related to ageism. The participant tried to make a transition within the organization and shared the following experience where support was conditional or they were met with resistance, “...I was told that I had too much experience. So then I said, Okay, well what about the Delta Program? Well, you don't have enough experience. So you're kind of caught in this trap. Later an explanation was given that I was too old for the first program” (Nicole).

Another Gen X participant also did not feel supported by the organization but felt supported by leaders in her department sharing, “...I feel supported within my department - not the overall organization” (Ayanna). A second Gen X participant shared, “...Likely to support if we can stay employed. I work on contracts and I'm too expensive now. So they may not support me” (Nicole). Two Gen BB participants (Sally and Sam) noted obstacles to receiving support from the organization stating, “...Yes (feel supported), but there are always internal political hurdles to overcome” (Sally). Sam shared, “...Yes, the organization (along with my manager), is likely to help me achieve my goals. However, I have to acquire the skills and keep an eye out for opportunities” (Sam).

There were participants who mentioned that they felt supported because of their manager/director allowed them to participate in leadership programs and served as an advocate. A participant provided a perspective that he felt organizational support, because he was selected through a nomination process and because of funding for a corporate program stating, “...The organization is supportive, but only because I'm in a leadership program” (Olivia). Dexter (Gen Y) shared, “...I get support on paper through the leadership program, but not in their actions. It can be a challenging conversation. I'm never sure if it's sincere.”

Two participants said that they feel supported without any resistance sharing, “...*Yes, when you do a good job people notice, you can’t just show up every day*” (Raider) and “...*Yes, the organization supports me as well as my current manager*” (Dexter). The last two participants did not feel supported by the organization or a manager/director. Simone was frustrated because she really wanted to get onto a project that would help her get accepted to a leadership program. Mike definitely did not feel any support at all with each sharing, “...*No, I was told ‘you have other things you need to focus on’, then they chose another person for the project I wanted and it totally flopped*” (Simone).

During the participants interviews it was clearly evident that relationships were an important part of career mobility. What was also revealed is the impact of Personal Plans and Experiences as well as Relationships as Company X is that a participant mentioned: “...*When you do a good job people notice, you can’t just show up every day*” (Raider). Sam’s response was “...*the organization (along with my manager), is likely to help me achieve my goals. However, I have to acquire the skills and keep an eye out for opportunities.*”

Mentoring/Grooming Employee. Mentoring or grooming an employee were mentioned by all generations (in some capacity) as being important to career mobility. One Gen Y participant stated, “...*If you don’t have a very good relationship with your manager, it doesn’t matter what work you produce, if you don’t have a good working relationship or even sometimes that’s my only personal relationship*” (Olivia). Company X does not have a formal mentoring program. However, employees mentioned that in the absence of a structured mentoring program, employees will seek mentors in an informal

manner. There were two more Gen Y participants who referenced relationships as well stating, “...*I told my boss that I needed more responsibility, but she was not responsive. We don't have a great relationship*” (James). Simone (Gen Y) said, “...*It's so political and more about who you know and your network and certain people KNOW they have upward mobility.*”

All participants who have participated in an informal mentoring relationship noted the benefits of such partnerships. One Gen BB participant mentioned with pride, “...*I mentored a young lady 20 years younger, she was able to flourish and grow and that was rewarding to me*” (Sam). Unfortunately one Gen Y participant recognized the importance of a mentoring program and felt that it was important enough to have a more formal program adding, “...*The organization needs to make sure there are mentors available for everyone*” (Olivia). Also, two Gen X participants shared the following thoughts on mentoring; “...*One of my mentors told me about P.I.E. (Performance, Image and Exposure). Image plays a bigger part*” (Mike). Raider (Gen X) shared, “...*Having a mentor has helped me out in the past. It continues to help me.*” Although Company X does not have a formal mentoring program, there are numerous structured corporate leadership programs. Unfortunately, these programs are difficult to gain acceptance and require strong senior leadership support and nominations.

Stereotypes. Gen Y participant expressed a few frustrations regarding work and being in a generation. For example one participant shared, “...*The Gen BBs see us as being entitled which bothers me, because I don't think I am entitled. I've never had that perception of myself*” (Dexter). Another Gen Y participant said, “...*Gen X says 'that's not my job'...but Gen Y says... 'that's REALLY not my job.' Most Gen Y only wants to*

focus on their work. We are only collaborative when it benefits us” (Simone). A different aspect of the frustration was expressed by a third Gen Y participant who mentioned, “...*We (Gen Y) were told we don't have enough experience or that we've moved around too much and it creates a negative view of us*” (Olivia).

Gen X participants had very negative comments about Gen Y in general. Such as “...I worked with someone from Gen Y and I really had a problem with his *sense of entitlement*” (Ayanna). Mike expressed negativity about Gen Y but laughed a little during his comment saying, “...Gen Y and Gen X have had similar experiences, but the perception of Gen Y is that *they are not loyal*” and “...*They're spoiled* (Mike). The last two Gen X participants shared, *everyone can get a medal and everyone gets an award*” (Nicole), as well as, “...Gen Y is about *what's in it for me?*” (Raider).

Ayanna and Nicole (both Gen X) expressed additional less than favorable comments around working with Gen Y employees. Ayanna shared, “...*Generation Y wants everything to happen now*” and “...*They (Gen Y) need a lot of praise.*” Ayanna concluded with “...*It doesn't work that way and they need to be more patient.*” Nicole (Gen X) showed the most disdain for Gen Y stating, “...*They are just coddled*” and “...*I had to tell another Gen Y, 'I just told you on Tuesday you did a good job' and she said 'but its Friday.'*”

Nicole (Gen X) continued to give examples of her experience with interacting with Gen Y. Further into the interview she shared “...*A Gen Y employee wanted to wear jeans to an interview, which showed a lack of professionalism*” and “... *One (Gen Y) job applicant brought parents in to negotiate salary.*” Mike (Gen X) saw Gen Y behavior with regards to professionalism a little differently sharing, “...*They (Gen Y) are much*

less formal_so you have to 'flex' your approach when working with them” and Mike (Gen X) made a comment similar to Nicole’s stating “...*Everyone (in Gen Y) gets a trophy.*”

There were also a few stereotypical negative statements made regarding working with Gen BB. Those comments include James (Gen Y) who shared “...*I work with someone of an older generation (Gen BB) and I spend a lot of time having to persuade him. I have the skills to help him. It’s very challenging.*” Simone (Gen Y) was open about not getting along with her Gen BB counterparts stating “...They are ‘*un-cool*’ dinosaurs who leave *no space to brainstorm* or try new things. *You definitely cannot make mistakes.*” Olivia (Gen Y) saw Gen BB as being “*more focused on work than life itself*” sharing, “...*Gen BBs are more traditional 9-5 ’er’s and do not make time for anything outside of work*” (Olivia). According to Dexter (Gen Y), he does not like working with Gen BB because “...*They (Gen BBs) don’t like to try new things.*”

Gen X expressed interesting and comparative views of one’s own generation while explaining work experiences with Gen BB. Raider (Gen X) shared “...*We (Gen X) understand how the Gen BBs communicate and can make adjustments accordingly taking into account that Gen BBs may be a little bit inflexible.*” Nicole (Gen X) was little more critical about the behavior of Gen BB overall sharing “...*I’ve always looked at the BB Generation in comparison to our generation and said ‘what’s wrong with you?’ You know...free love, and all that. I think to myself, when are you going to grow up?*” Mike made reference to Gen X when asked about his views of Gen Y and Gen BB and shared, “...*Other generations see us as rude, arrogant and impersonal.*” Ayanna felt that Gen BB has an outdated work paradigm. She stated, “...*Gen BBs are not as open to flexible*

work arrangement as Generation X. They expect you to be in the office even when it isn't necessary."

Gen BB had mixed views about Gen Y. Two out of three Gen BB participants shared the same negative sentiments as Gen X. For example, one Gen BB participant (Sally) stated "...they (Gen Y) *want things to come quickly but they have to put in the appropriate amount of time.*" The second comment made by Sam (Gen BB) was, "...*they (generation Y) just have bad attitudes.*" However, the third Gen BB (Warren) participant made a more positive statement: "... *I look at Generation Y and I think 'that's (they're) our retirement checks, we better make sure they are successful'.*"

Advantages/Disadvantages. Generation X expressed positive and negative views of being between the Gen Y and Gen BB. An advantages of being in Gen X expressed was; "...*With the Gen BBs retiring there is going to be a lot of new opportunities coming up for us*" (Raider). Mike (Gen X) shared "...*I think our generation (Gen X) is able to understand both generations.*" Another Gen X participant (Ayanna) shared "...*We are still young enough to 'get' social media like twitter and Facebook,*" as an advantage. Gen Y did not expressed strong views of Gen X. Two Gen Y participants made comments such as; "...*I hear a lot of 'that's not my job (from Gen X), but we can work on it together.*" Most of Gen Y's comments were focused on Gen BB. Mike (Gen X) felt like Gen Y may sometimes be at a disadvantage in the workplace because "...*They (Gen Y) get lumped together with us (Gen X) a lot.*" Each employee in each generation is bringing a unique perspective based on work life experiences; there are concrete similarities and differences that are very clear. Theme 1 (Individual Factors) reveals how participants in each generation views the other generations and the stereotypes, age discrimination, as

well as advantages and disadvantages that sometimes arise with three generations working together. Another aspect of generational perspectives on the individual level is the participants' views of their career plans and experiences.

Personal Plans and Experiences

Sub-Theme 2: Perspectives of career mobility are influenced by personal experiences and career plans.

Technology. The participants' views on technology in relation to the generations arose as the coding took place. Company X is a highly technological organization; yet, certain groups expressed frustration with bearing the responsibility of being technologically savvy. While Gen Y described positive experiences, Gen BB expressed feelings of being at a disadvantage. Gen Y participants felt overused in assisting Gen BB with technology. James stated, "...*Some folks in the older generation (Gen BB) want to learn new things and some just say 'well we've always done it this way'*" and "...*I saw an opportunity to move away from MS Excel and no one wanted to make the change to a more updated mode of tracking. It was frustrating.*"

Gen Y participants consistently stated that understanding and using technology was an advantage for their generation. James later stated "...*We had the internet in college. You know, I was, like, kind of an early adopter of this whole big boom of having instant information at your hands. And so it's just kind of ingrained with how I work...*" and how we (Gen Y) work. He clearly saw this as an advantage. Another Gen Y participant added, "...*Definitely technology* (referring to advantages for Gen Y)" (Dexter). Simone (Gen Y) shared the downside to using technology too heavily, saying; "...*We are so connected that we forget the benefit of traditional networking and cold calling. It's*

important to have contacts and know how to interact with people.” Gen Y participants overall felt the overuse of technology and a lack of focus on human interaction a disadvantage for his or her generation.

Not all Gen X and Gen BB participants mentioned technology when referring to advantages and disadvantages or any other question. A few comments included, “...*We (Gen X) understand technology enough*” (Mike), in the context of this being an advantage. In the context of using the library as a resource, Raider (Gen X) stated “...*If we (Gen X) wanted to look something up we went to the library.*” Ayanna (Gen X) stated; “...*I have benefitted from working with Gen Y with regards to technology, a Gen Y employee introduced me to Smart Art and it changed my life!*” Lastly one Gen BB (Sam) shared “...*Technology is ever changing but I believe the field (of engineering) is moving more towards software development.*” In the context of this being a disadvantage to his generation.

There were only two references to social media. Simone (Gen Y) said “... *An advantage Gen Y has is that we have a lot more opportunity to connect with other generations through social media such as LinkedIn, blogs and websites.*” James (Gen Y) shared that Gen BB lacks awareness of social media stating “...*They (Gen BB) see me as a ‘whipper-snapper’ that moves too quickly and doesn’t really assess the situation and they think I am knowledgeable when I am actually just ‘Googling’ it.*” Ayanna (Gen X) felt that being in Gen X is advantage when it comes to social media sharing, “...*We are still young enough to ‘get’ social media like twitter and Facebook.*”

Education. Gen X participants also mentioned education as a disadvantage for Gen Y.

For example Ayanna shared, “...*Having just a Bachelor’s degree is not enough.*” Nicole (Gen X) has the same viewpoint and stated “...*A lot of high level jobs require an MBA preferred. Sometimes it’s even required.*”

Retirement/Resignation. During the interviews, when the topic of succession planning was presented to the Gen BB the conversation quickly turned to retirement. The Gen BBs showed concern regarding retirement and the options that are available for them career-wise until they leave the workforce. One Gen BB (Sally) shared, “...*I created a program for phased retirement. Boomers are leaving and there are not many people who can replace what they do. So we are trying to keep Boomers engaged. Lots of companies are trying this out. Like letting them work on a special project for two week or learning other parts of the business to help out.*”

A second Gen BB participant (Sam) expressed little concern for being on a succession plan stating, “...*I don’t really have too many career aspirations because of my age and being close to 50.*” The third Gen BB (Warren) shared this viewpoint; “...*I look at Generation Y and I think ‘that’s (their) our retirement checks, we better make sure they are successful.’*” One participant from Gen X (Mike) mentioned retirement stating: “...*With the Gen BBs retiring, that allows generation X to skip ahead and get higher level jobs.*” Gen BB participants clearly expressed retirement as being a part of their personal experience due to age.

Summary

The theme of individual factors focused, on the participants’ work/professional relationships within the company as well as their personal experiences. This section uncovers the participants’ views on whether or not they feel supported by the

organization and its leaders. Gen Y and X seemed to value career advancement much more than Gen BB. It seemed like Gen BB focused more on career enhancement, rather than advancement. Sally also spoke of keeping the younger generation engaged, but mentioned difficulty keeping the baby boomers engaged. This perhaps is due to being close to retirement age. Gen BB interest in the corporate programs and being on a succession plan was virtually non-existent. The theme shows that the two younger generations view the work atmosphere as negative and stressful. The responses around lack of stability and hierarchy were also mentioned in relation to the climate, which will be addressed in the next section.

Theme 2: Organizational factors

Sub-Theme 3: Views of career mobility programs are impacted the organizational structure and climate.

The finding that the organization’s climate and structure impacts views on career mobility is supported by two sub-themes.

Table 9

Categories and Codes Associated with Organizational Climate and Organizational Structure

Associated Categories	Associated Codes	
Organizational Climate	<ul style="list-style-type: none"> • Organizational context • Work atmosphere • Hierarchy • Corporate Culture 	<ul style="list-style-type: none"> • Stressful • Lack of stability
Organizational Structure	<ul style="list-style-type: none"> • Succession planning • Corporate Politics 	<ul style="list-style-type: none"> • High Potential Programs • Leadership

Sub-Theme 3 (Organizational Factors) outlines the perspectives of the Generations with regards to the *organization climate* and *organizational structure*.

Organizational Climate

Atmosphere/ Lack of Stability/ Hierarchy. A few Gen Y employees felt that the failing defense industry was a driving factor in the culture and budgetary issues. For example, one Gen Y participant shared “...*The current atmosphere is very stressful* because the *Department of Defense is no longer spending so we need to be more agile*” (Dexter). Another Gen Y participant gave further insight; “...It’s a ‘*sink or swim*’ atmosphere. There is *no grace period when you join the company* and *no room to make errors*” (Olivia). These comments help make a connection between the industry and the current working atmosphere within the organization.

The impact of the industry on the climate and/or atmosphere of the organization is also illustrated by one Gen Y participant who shared “...there are so many budgetary issues *it makes stability difficult*” (Simone). Gen X also shared views on the atmosphere such as; “...*We a very hierarchical atmosphere, which makes is harder to move around and there is something different going on every day the atmosphere is very dynamic, but educational at the same time*” (Raider).

Corporate Culture. The corporate culture has a negative impact to career advancement for Gen Y and Gen X. Many participants expressed roadblocks to navigating the culture, similar to views expressed around the corporate atmosphere. One Gen X participant who said she planned to resign made a comment around culture with regards to succession planning stating “...*They don’t care about succession planning*”

strategy they only care about how to double our incentive. That's the culture" (Nicole). All other comments around were made by Gen Y such as "...*Too much of a 'no' culture. You have to think to yourself...how many 'no's' do I want to put myself up against? And I've been told it's my personal responsibility to figure out how things are organized"* (James). Two more Gen Y participants added, "...*A 'great place to work' is a place where you can grow from your mistakes."*

Although Dexter (Gen Y) felt supported by the organization and his leadership, he expressed great frustration with the culture as a whole stating "*this culture does not allow mistakes."* Simone (Gen Y) also expressed great frustration with the culture and told a story:

...I approached my department about building, um, a 'bridge-way' between my department and the other connecting seven or six departments to bridge-, 'bridge-way' so that we would have streamlined communication, not only with, uh, interdepartmental communications, but externally to our employees and to whomever we need to communicate. So, I presented this idea. I pitched it. I talked about all of these different, um, avenues that they would work on and they ended up hiring outside, uh, outside of the company. They hired someone outside of the company, um, to come in and fill that role, but I wanted that role (Simone).

The Gen BB participants did not speak directly about difficulties in the work atmosphere or culture; however, they mentioned the younger generation's difficulty with External Factors hindering career mobility. This will be discussed in the next section.

Sub-Theme 4: Views of career mobility programs are impacted the organizational structure. Sub-theme 4 is supported by the findings related to *Organizational Structure*.

Organizational Structure

High Potential and Leadership Programs/ Corporate Politics. Gen X employees expressed frustration in being told they are too old for certain programs geared towards employees earlier in career yet being too junior in career for the executive leadership programs. There is also prevalence of having to play “corporate politics” to get ahead and into programs. One Gen X participant shared,

...There are a lot of jobs people my age who have tried to go after a spot in these corporate leadership programs and have been told: ‘Well its ideally suited for some who participated in ELDP or FLDP.’ And we're like, ‘let's try to get into those programs.’ And for example I tried to get in to ELP this year and I was told that I had too much experience. So then I said, ‘Okay, well what about the Delta Program?’ The response was; ‘well, you don't have enough experience.’

Another Gen X participant shared: “...There are many high potential programs (such as ‘Catalyst’) that help people to move up in the company” (Mike). However, he did not get accepted into the program and did not want to mention why. Gen Y participants expressed appreciation and gratitude for these programs if they were accepted into one. One Gen Y participant shared, “...I like the fact that there are different tiers for programs for each stage of my career” (James). Another responded and mentioned: “...You need to have a good relationship with your manager to get in, it doesn't matter what you are producing...no relationship...no program” (Simone). A third Gen Y participant also mentioned the programs stating: “...I'm in a leadership program right now and I hope to finish and get a position to gain more experience. There

are also great programs where employees can attend conferences together, then have to make presentations as a team” (Olivia).

There are also rotational programs participants mentioned as a means to experience career mobility. Being a part of a rotation program helped one Gen Y participant in getting promoted. The participant shared; “...*I participated in a leadership development program, where I had rotational assignments. Then I got a job supporting a senior leader” (Dexter).* Other than sharing the advantages and disadvantages of being in Gen BB, the participants of this generation did not have much to share. One Gen BB stated, “...*We need to groom our successors”* in relation to preparing for the next generation of leaders (Warren).

Summary

Overall, the importance of climate and organizational structure is shown through how participants navigate their careers through the corporate landscape. Questions around how participants navigate their careers led to discussions around the corporate culture, the atmosphere of everyone’s work environment and how to navigate ones career...especially within a hierarchical structure. Leadership and High Potential Programs (which includes lateral and rotational movement) were mentioned by participants as a way to move around if you are not on a succession plan or do not have a clear career path.

Theme 3: External Factors

Because of the rapid economic and organizational changes facing organizations today, one of the many challenges facing employers is retaining employees in a volatile market. Rotational movement being the norm may be a great way to retain talent in the

organization but it cannot be repetitive and just for “rotations” sake. There was also some inconsistency regarding the importance of cross-departmental assignments. Participants used words and terms like “stressful,” “sink or swim,” “difficult” and “dynamic” to describe the atmosphere at Company X.

Sub-theme 5: Viewpoints of available opportunities and external influences create a perspective of lack of stability.

Sub-theme 5 emerged from the discussions around career mobility and succession planning at Company X and the industry impacting the opportunities that are available to them.

Table 10

Sub-theme 5 Categories and codes for External Influences and Available Opportunities

Associated Category	Associated Codes
External Influences	<ul style="list-style-type: none"> • Industry • Job Market
Available Opportunities	<ul style="list-style-type: none"> • Career Mobility • Higher-level jobs • Job change • Job expansion • Longevity • Succession planning • Job opportunities • Rotational jobs • Technology • Promotions (formal and informal)

External Influences

Job Market/ Industry. Gen X and Gen BB showed sincere concern for Gen Y being in the current job market and having difficulty finding and securing a job.

Participants shared “...*The younger generation (Gen Y) understands that they may or may not get jobs right away after college. So instead they are going right to grad school*”

to get their Masters. As well as; I know a lot of people in the younger generations (Gen Y) are in school a lot longer because they can't find a job" (Nicole). Participants also mentioned that frequent lay-offs in general, sharing how it makes career mobility difficult to navigate your career and bringing to light, *"...Lots of people are getting laid off and I feel like this could be me as well. There is a lot of uncertainty and ambiguity. The people who are more risk adverse are less mobile"* (Dexter).

Two out of the three Gen BB participants also shared thoughts on the *job market* and *industry*. Sam shared, *"...My generation (Gen BB) didn't go through lay-offs that bad and so many jobs are going overseas."* There was also mention of the impact the global mobility practices is having on career mobility by two members of Gen BB) who added, *"...We are working on a global mobility project to help people move around internationally. However, as a defense company it's really hard to move people from country to country because of security laws"* (Sally).

Available Opportunities

Another category that emerged is *Available Opportunities*, which impacts the generational perspective on longevity and opportunities overall (within and outside the company). This area of the study focuses on participants' views on whether or not they will stay with the company.

Career Mobility/Higher-level jobs/Longevity. Participants in Gen Y and X based the outlook of longevity on obtaining a leadership role (manager or director/senior leader level. Dexter (Gen Y), Olivia (Gen Y), Ayanna (Gen X) and Mike (Gen X) all stated (in some fashion), that they see themselves being with the company longer if they are promoted sharing views such as, *"...I see myself sitting on a team and being*

groomed for a leadership role. I see myself being here for the next 7-10 years” (Dexter).

Another Gen Y participant shared: “*...If I were to stay, I would like to reach director level within the next five years, but if that does not happen I will need to look outside the company” (Olivia).*

Ayanna, a Gen X participant added: “*...If I were to stay, I would like to reach director level within the next five years but if that does not happen I will search outside of the company.*” Another Gen X who likes the structure of the organization added “*... You have to constantly be working to better yourself and the organization, when you do a good job, leaders will steer you in the right direction and it will increase your longevity. It’s not just about showing up to work every day” (Raider).* Although Mike (Gen X) expressed frustration throughout the interview he seemed hopeful of his long-term prospects within Company X stating “*...Long-term I see myself in a director role within the organization. I am participating in business development activities and developing finance skills.*”

Although Sally (Gen BB) spoke of creating a program for individuals who are planning to retire she also added: “*...I think people realize I bring value but for a long term perspective based on my age- people my age are not really thinking where we’re going to be in the next 510 years.*” In contrast, James (Gen Y) stated, “*...My outlook for longevity with the company is arrogantly high” (James).* Gen X also expressed frustration with the disadvantages of being a member of their generation. One Gen X participant shared: “*...I feel like I am in limbo with my career” (Mike).* Another participant shared a similar view stating: “*...I feel trapped. I was told I has so much*

expertise, then I was told by someone else I did not have enough experience for the same job opening” (Nicole).

Job expansion. One Gen Y participant also made a comment in reference to job expansion and wanting to have different experiences and longevity: “...*I will give it about 2-3 years. I will have longevity if I am able to have different types of experiences. Not sure how being in the leadership program will impact my longevity” (James).*

Rotational Assignments. Rotational assignments at Company X allow employees to gain experience in lateral positions. These assignments can last six to eighteen months. Rotational assignments are considered a positive aspect of career mobility and are very common for those who do not have opportunities for upward mobility. However the Gen Y participants shared mixed views regarding the practice of rotational programs. One Gen Y participant stated,

...I don't see a lot of lateral or vertical moves for me. It's so political and more about who you know and your network” (Simone). Another Gen Y participant shared: “...*The lateral moves I will be able to make will depend on where the business is going and how well we are doing.* (Olivia)

Gen BB participants saw lateral moves and rotational programs as a viable way to make a career move, with one Gen BB stating “...*I see myself managing a department, not necessarily teams” (Sam).* Another stating, “... *I created a role that is rotational and I would like to see more of this in the company” (Sally).* The third Gen BB participant stated: “...*My boss just came up to me one day and said 'hey it's time to rotate.'* It was easy” (Warren). The rotational assignments may change constantly and may be presented to an employee unexpectedly. One Gen Y participant stated: “...*I was part of*

the interim leadership development program, which is a rotational program, and so I was continuously rotating” (James).

Succession Planning/Job Opportunities. All participants were asked to express their thoughts around succession planning. Simone (Gen Y), stated *...I do not see plans being successful for people at her level.* Although there is formal succession planning practice at Company X, a Gen Y participant mentioned that he has seen it down informally and stated the following: *“...How would I define succession planning? I think it's, you know, identifying who you would think would want to be the next you when you leave. And so, um, I imagine that identification, then notification, and then the training to be the next you. Simone (Gen Y) shared: “I ... at least in the roles I have been in have not seen successful succession planning for people at my level.”* Adding to this, James responded that; *“It’s not necessarily done in a formal way. If it is, higher ups really like you, but, you know, um, I ... I’ve rarely heard of any success in planning for employees at my level. I’ve seen entire plans laid out for other people” (James).* The fourth Gen Y participant (Dexter) gave the more detailed response of: *“...It’s all about the future pipeline, grooming, preparing and equipping successors. It’s a very important process. I think leaders have accountability to development, and it’s all about the future pipeline, grooming, preparing and equipping successors. They need to be able to see potential...then develop them so the successor has assurance.”* The last two Gen Y participants expressed a viewpoint that was more positive than their counterparts.

A Gen X participant expressed frustration around not knowing whether or not he is on a succession plan and stated, *“...I think if you are on a succession plan managers should be required to share that with you and make the process more transparent”*

(Mike). Another Gen X participant shared is it not a mandatory corporate-wide program. Nicole (Gen X) stated: “...*My department does not do succession planning. However, I define it as making sure the business has sustainable options of leaders and employees in the pipeline, so the business has continuity even though a lot of people are retiring.*” The Gen BB participants in the study focused more on retirement than succession planning with one Gen BB briefly mentioning “...*We need to groom our successors*” (Sam) and Warren stated; “*that’s (Gen Y) our retirement plan.*”

All participants (in each generation) were able to give a description of the process and some were able to give a detailed and accurate explanation of the process. For example one Gen Y participant (Dexter) explained, “...*Well, I define successful planning in two ways. I would say one is, the person who’s in a position right now has had a very clear job description, has very clear roles and responsibilities, has a very clear, um, documentation of what they do and how they do it and they do cross-training with other people on the department, not that they know the intimacy though, but they have an awareness of what we do.*” Olivia (Gen Y) shared “...*You know, that person who's already in the position, right? And the person who maybe wants that position latches on to something or gravitates towards something that the, the person above them already does and try to work to be able to have expertise or, uh, um, the expertise of the subject, subject matter so that they could then fulfil that role later. Um, that's what I would see, see a succession planning.*”

One Gen Y participant’s response (James) made it clear that his view of succession planning practices have been inconsistent sharing,

...How would I define success in planning? I think it's, you know, identifying who you ... you would think would want to be the next you when you leave. And so, um, I imagine that identification, then notification, and then the training to be the next you. And I ... at least in the roles I have been in have not seen successful succession planning for people at my level. It's that's not necessarily done in a formal way. If it is, higher ups really like you, but, you know, um, I ... I've rarely heard of any success in planning for employees at my level. I've seen entire plans laid out for other people.

Informal and Formal promotions/Higher Level Jobs/Career Mobility. The sentiment of a process or the culture being an enigma was present throughout the data collection across the generations. However, when asking about career mobility participants made a clear distinction between formal and informal promotions expressing either appreciation or resentment views about both. A Gen Y participant (Dexter) added: *"...We have a formal process but it's all a popularity contest and I find the formal promotion process to be 'clean,' straightforward, where everyone communicated clearly and it was very transparent."*

Gen X participants made statements that were favorable of the formal job promotion process stating *"...It was a very simple (formal) process. I heard about the job, applied for it and I got it"* (Ayanna). Another added: *"...The process was pretty simple. I met the goals and requirements for a specific job and surpassed all of my goals, so when the position became available I got it"* (Raider). However, the other Gen X participants shared: *"...Unfortunately the (formal) process for jobs is not open and transparent and the job will be posted for only 48 hours because they already know who*

they want” (Nicole). For Nicole, this creates a “black box” approach and mentality to informal and formal promotions.

Not only were there views and perspectives expressed around what happens during the promotion process, but there was also discussion around how to go about getting the promotion or being promoted. One Gen BB stated: “...*You have to make sure you always ‘out-perform’ your role*” (Sam). When asked about being looked at for a promotion. A Gen Y participant (Simone), shared the sentiment of the Gen BB stating:

...What I'm starting to grasp and understand is that, if there's no invisible line or the positions that's in front you isn't available, or someone already had that spot and they can't move up another level, um, kind of create your own. In the company it's about who knows your name and who believes in you. It's not about if you do the work, but who finds you amicable then and likes to work with you, and you know, find that you can do something that someone else can't do. So, um, yeah, I think that's, that's, that is how you have the, um, vertical movement in the company.

There was also some frustration shared by another Gen X participant (Mike) in relation to not getting a promotion which was, “...*I didn't understand why an opportunity was not presented to me since I was more knowledgeable and on the job a lot longer. This is what we (Gen X) have to deal with.*” The fourth Gen X participant shared a view on where he was in his career stating, “*Gen X'ers tend to go above and beyond what it expected of them because we are looking for career advancement*” (Mike).

Some participants shared a more passive view to promotions. A participant in Gen Y mentioned: “...*Opportunities don’t just ‘flow down’ like I would have hoped*” (James). Another Gen Y stated regarding promotions: “...*I used to think if you worked hard you continue to show, an exceeding level of effort, exceeding expectations in your effort and in your work product, and you kind of progress up the ladder that was invisible to you but known by a bigger manager, your supervisor, the director in your department*” (Simone). A Gen X participant (who happened to be on a succession plan) said her boss told her “...*that person over there is leaving, go set up your desk there, figure out what they do and start doing it*” (Nicole). She ended with “...*and that’s how I got the job.*”

Participants shared whether or not they are on a succession plan. They also shared how long they have been with the company and how many times they have been promoted. One Gen BB participant has been with the company 17 years and has never been promoted or placed on a succession plan. Yet, three people with the shortest amount of tenure have all been promoted at least once.

Table 11

Overview of participants on a succession plan

Participant/ Job Overview and Succession Plan candidates				
Participant	Job level	Years of Service	Promoted	On a Succession Plan
Dexter	Individual Contributor	4	Yes (1)	Yes
Simone	Individual Contributor	6	Yes (1)	No
Olivia	Individual Contributor	4	Yes (1)	No
James	Individual	8	Yes	No

	Contributor			
Ayanna	Individual Contributor	2.5	Yes (1)	No
Raider	Manager	6	Yes (3)	No
Mouse	Manager	5	Yes (1)	Yes (1)
Nicole	Manager	18	Yes (5)	Yes (3)
Warren	Manager	17	No	No
Sally	Senior Leader	5	Yes	No
Sam	Manager	5.5	No	No

Summary

Several of the participants expressed various professional challenges regarding the current job market and feeling uncertain about their careers because of constant change. The participants in this study commented on professional experiences that influence career mobility. Several employees commented on the job market, retirement, promotions (formal and informal) and succession planning.

Chapter 4 Summary

In summary, the findings presented in this chapter include the perspectives shared across and within three generations (Gen Y, Gen X and Gen BB) on career mobility and succession planning. The interview structure and the literature review provided a foundation to understand the responses. The findings from the data also show that although participants may be of the same generation their perceptions may possibly differ due to organizational context. Participants discussed their personal plans and experiences with regards to relating to other generations, mentoring, the organizational

atmosphere and more. Several of the participants expressed various professional challenges regarding the current overall job market and feeling uncertain about their careers because of constant change.

Chapter 5 revisits the impact of employees leaving the organization, not being on a succession plan or having opportunities as well as concerns for future leader planning written in Chapter 1. Additional findings that are unrelated to the research questions are presented in Chapter 5. Chapter 5 connects the findings of this research with previous research outlined in Chapter 2. Finally, Chapter 5 provides recommendation for future research with regards to this study as outlined in Chapter 3 and subsequent studies conducted by future researchers on this same topic.

CHAPTER 5: INTERPRETATIONS, CONCLUSIONS, AND IMPLICATIONS

Introduction

Currently, participants are experiencing three (or four possibly) generational groups working together. This study highlighted some differences in perspectives with respect to career mobility and succession planning, spanning three generations. This chapter is organized into three sections: 1) conclusions (addressing the research questions and gaps in the research), 2) interpretations of the findings and 3) implications (theoretical implications as well as recommendations for research and practice). The chapter concludes with a summary section. The purpose of this study was to describe the perspectives of three generations on career mobility and succession planning and to answer research questions surrounding the differences and similarities between generational views on the topic. There have been other studies conducted on generational differences in the workplace; however, there are few examinations of generational differences as they relate to succession planning in a corporate atmosphere. The research questions that guided this study are:

- (1) What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning and career mobility?
- (2) How do the three generations think the organizational context influences their perspective on succession planning?

The categories and themes used are in no way absolute and may be viewed several ways depending on ones' discipline. The findings are listed in no particular order. The interpretations include thoughts from chapters 1 through 4 and include references to

the research questions or related theories. This chapter also includes a summary chart that compares the themes, research questions and basic interpretations.

Conceptual Framework Revisited

The conceptual model depicts the relationship between the research questions in this study and the concept of generational perspective. Succession planning (a component of talent management), Generational theory and Talent Management Theory were explored in Chapter 2. Each generation's perspective on succession planning (career mobility) and the influence of the organizational context was the focus of the interview questions as a direct link to the research questions.

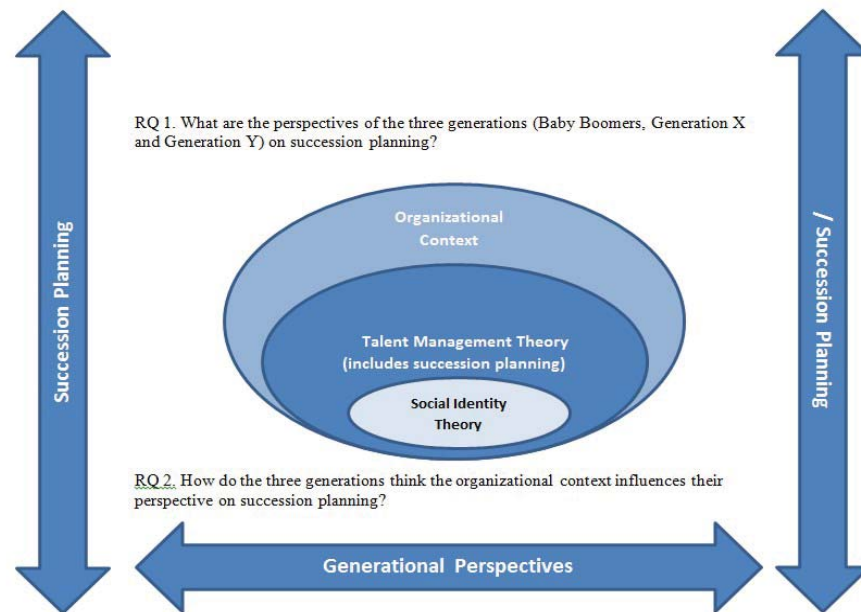


Figure 4. Conceptual Framework

According to HR.com and Creelman Research (2011), these different views inform talent management (succession planning) practitioners, because younger

generations may not want to wait ten years to be promoted. This research facilitated a better understanding of the perspectives of three generations on succession planning and career mobility. The data was inductively analyzed to identify the recurring patterns or common themes.

Addressing the Research Questions Conclusions

The first two themes and sub-themes are related to Research Question 1. The second and third themes, as well as and sub-themes three through five are related to Research Question 2.

Research Question #1

What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning and career mobility?

Participants had a solid understanding of succession planning. The results of the data analysis found many similarities and differences in the perspectives of the three generations interviewed. The three generations expressed their views around the topic of succession planning in great detail. The literature suggests that Gen BB tends to sacrifice their personal lives for work and started the workaholic trend (Parks, 2007). In this study, a Gen BB participant also labeled his own generations as workaholics.

In this study Gen BB seemed sincerely concerned about passing leadership roles onto the younger generations even stating things like “that’s our retirement.” Karp, Fuller and Sirias, (2002) state that what Baby Boomers see as slacker behavior, Gen X employees see as legitimate choices in how they spend their time. In this study a Baby Boomer did referenced both younger generations as being “lazy,” and ironically, Gen X referred to participants Gen Y as being “coddled” or “entitled.” However, a few Gen Y

participants mentioned that they resent being referred to as “entitled” or in some way undeserving of their accomplishments.

Generational issues extend beyond just knowing what the differences are between the generations. It’s not just a matter of young versus old but a matter of adapting to and embracing work life. Gen X expressed being ready to move into higher leadership positions with the Baby Boomers retiring. Overall Gen Y shared similar views with regards to getting a leadership position and longevity with the organization. Joshi, Dencker, Franz, and Martocchio (2010) suggest that a generational cohort is a way to categorize the traits, inclinations, psychology and social relationships of each generational group. Employees are unclear how jobs are obtained outside of the formal promotion process and showed signs of resentment in some cases and appreciation in others.

Research Question #2

How do the three generations think the organizational context influences their perspective on succession planning and career mobility?

According to Kim (2008), talent is essential to competitiveness in the new economy. Ensuring preparation of the next generation to take over leadership is a business issue. It was imperative to consider the organizational context in this study. The organizational context strongly influences the generation’s views on career mobility due to the organization climate, available opportunities and external influences. Although it did not come out as a major theme, the presence of a hierarchy at Company X was evident from participants who referred to their bosses a lot when mentioning certain things such as asking for “approval” or getting “permission” to do projects. The turnover

rate is also likely to increase when employees' values and goals, and their strategies for attaining those goals, do not fit with those of the organization. Those employees who choose to leave the organization may have experienced diminishing job satisfaction because their work is no longer providing the emotional benefits they desire and had limited opportunities.

Company X is a large organization, and according to Child (1972), larger organizations tend to be more hierarchical. In the context of the organization if the leaders (mostly members of the Gen BB group) have created a competitive work atmosphere where one will either thrive or just survive. The younger generations (Y and X) expressed very clearly that if they do not move up in the organization, that they will leave for opportunities outside of the organization. Perhaps it may be time for employees of every generation to emulate what Gen X has been doing for decades, which is taking an aggressive role in creating their own career path.

Since many Baby Boomers will be retiring of the next 5-10 years that may pose a problem for Company X if they are not preparing the next two generations to take on leadership roles. The results showed that current length of time with the company is determined by the opportunities afforded which ranged from 2-10 years. This is a longer time-frame than expected by the researcher. The view of the generations on succession planning within the organization is that there are only the chosen few people who are being placed into specialized programs and developed (or groomed) for leadership roles. I would argue that being in a corporate leadership program does not guarantee a promotion...but it helps the employee feel more confident about their opportunities.

Summary

Based on study participant responses, employees at Company X believe that there are limited opportunities for advancement. It is clear that employees will stay long enough to be on a succession plan and seek higher positions, if more opportunities are presented and relationships are forged. At the organizational level it is possible leaders believe due diligence is being practice in the selection and promotion process; however, there may be an issue with perceived fairness at Company X at the individual level. The feeling of being treated unfairly at work is crucial to a persons' psyche and self-esteem.

Table 8

Themes and Sub-Themes Related to the Research Questions

Theme	Sub-Theme	Research question addressed
Individual Factors	Sub-Theme 1: The views of the three generations on career mobility and succession planning are impacted by their Relationships.	What are the perspectives of the three generations (Baby Boomers, Generation X and Generation Y) on succession planning and career mobility?
	Sub-theme 2: Perspectives of career mobility are influenced by personal experiences and career plans.	
Organizational Factors	Sub-theme 3: Views of career mobility programs are impacted by the organizational climate.	How do the three generations think the organizational context influences their perspective on succession planning and career mobility?
	Sub-theme 4: Views of career mobility programs are impacted	

by the organizational structure.

External Factors

Sub-theme 5:
Viewpoints of available opportunities and external influences create a perspective of lack of stability.

Basic Interpretations of the Findings

The study enabled the examination of generational perspectives of career mobility and Succession Planning as how these views are impacted by the organizational context. Across the generations there were many similarities and differences that relate to views of everyday work experiences. Between the generations the differences include views on formal versus informal promotions, succession planning, and career mobility. There were also differences that appeared within the generations. These views are divided into three themes; Individual Factors, Organizational Factors and External Factors. Individual Factors are aspects of the study that impact the participant views on a personal or individual level. Organizational Factors are aspects of the study that have an impact on the participant's views on career mobility and succession planning in the context of the organization. External Factors have an impact on areas that related to available opportunities and external influences. Further analysis revealed five sub-

themes that help describe how these findings and translate into implications for practice and additional research.

Theme 1: Individual Factors

Sub-Theme 1: The views of the three generations on career mobility and succession planning are impacted by their Relationships.

The major theme of Individual Factors is comprised of two sub-themes and two categories which are: 1) the views of the three generations on career mobility and succession planning are impacted by their Relationships (category: Relationships at Company X) and 2) perspectives of career mobility are influenced by personal experiences and career plans (category: Personal Plans and Experiences). A major output of this is the view of each generation of themselves and each other. These views led to stereotyping across generations. Each generation also expressed the advantages and disadvantages of being a member of their generation with regards to navigating their career.

Being connected with leadership is important for career mobility at Company X. It's up to the individual to forge these relationships and navigate their career. One participant (in Gen X) simply said he did not view the organization as supportive of his goals, but would not give further explanation on the matter. His demeanor seemed negative towards the topic. However, the same person said he would stay with the company if promoted to a director level position. It is very clear (according to a few members Gen Y and Gen X) moving around the company is related to who you know and who you are linked to. For example, although James (Gen Y) felt confident

about his longevity he stated: “*certain people KNOW they have upward mobility,*” meaning they have relationships in place to support career mobility.

Negative stereotypes between generations are perpetuated at Company X and may impact views on career mobility. Research conducted on generations typically includes broad descriptions of each generation. Melton (2003) states, “we know very little about the vast majority of interpersonal and intergroup conflict that occurs in work settings” (p.138). This study helps to reveal a few causes of inter-group conflict through the perpetuation of negative stereotypes at Company X. Gen Y experienced negative stereotypes in the workplace from Gen X and Gen BB, creating more pressure to achieve. Gen Y has also been influenced by Baby Boomer parents who gave them the confidence to be optimistic about their ability to makes things happen; Gen X’ers gave Gen Y enough skepticism to be cautious (Lancaster & Stillman, 2002). Surprisingly, Gen Y had mostly negative views of Gen BB for example; James shared: “...*They (Gen BB) see me as a ‘whipper-snapper,’*” adding to the stress and feeling that one cannot make a mistake at Company X. The results in this area indicate that Gen X’s influence of being cautious may have had an impact on Gen Y.

According to Stet and Burke (2000), members of a social group hold a common social identification, or view themselves as members of the same social category. According to Lancaster and Stillman (2002), the American workplace is being disrupted by generational “collisions.” What is interesting about the literature and findings for this sub-theme is Gen BB had similar resentment and views of Gen X, as Gen X entered the workplace, providing a historical example of generational “collisions.”

Current research on generations that is based on popular notions which empirically are not valid, and reinforces simplistic if not stereotypic. Lancaster and Stillman (2002) say Baby Boomers are *optimistic*, Generation X is characterized by *skepticism* and Gen Y are *entitled*. Although it is peer reviewed research, it still sounds simplistic and stereotypic. An organization that disregards this view may misstep with regards to fostering healthy work relationships necessary for career mobility and succession planning.

There are advantages and disadvantages with career mobility for each generation. In discussing relationships within Company X, advantages/disadvantages one has, also became a topic of conversation. Gen Y seemed frustrated with this concept. Gen X accepts their position as the “middle group” between Gen Y and Gen BB and sees the advantages/disadvantages of this position. It is also important to note that Gen BB saw the stability of their own generation’s careers throughout the years as an advantage over the younger generations. Meaning, they did not have to deal with as many lay-offs and job changes.

Although the notion of career stability was important, it was initially confusing as to what career mobility meant from their perspective. The perspectives of the traditionalist may have had an effect on the Baby Boomers and how they view work ethic in regards to working long hours and not being too focused on moving up the ranks. Raider, who works with older top executives at Company X, said he planned on staying with the organization until retirement. He feels being in Gen X has more advantages than disadvantages mainly being “next in line” for senior leader positions. It

can be assumed that who a person knows and who a person is linked to, determines formal selections and is an advantage regardless of the generation.

Sub-theme 2: Perspectives of career mobility are influenced by personal experiences.

Sub-theme 2 is informed by the category Personal Plans and Experiences. Participants discussed personal experiences with regards to working relating to other generations, mentoring and technology. The participants in this study commented on professional experiences that influenced or will influence career decisions.

Technical knowledge is an advantage at Company X. It can also be a double-edged sword for Gen Y. All of the Gen Y participants saw having technical knowledge as an advantage to career mobility. However, Simone and James, felt limitations with being referred to as “tech support” by their leaders and teammates. All members of Gen Y said they have an issue with relationship building and navigating social settings off-line (or in person). Simone was the only participant in her generation to reference to social media, which was surprising. Again, Gen X made references to being “in the middle” of Gen Y and Gen BB and mentioned it as an advantage with regards to technology. Sharing that Gen X understands technology enough. A Gen BB participant showed some frustration in this area stating: “technology is ever changing- meaning it’s difficult to keep up.

There are limitations to career mobility and succession planning. Gen Y participants were all promoted once except for James. However, the promoted participants still desired moving to a higher position. Dexter was the only Gen Y participant on a succession plan, and he knew the most about succession planning. However, Dexter left his position for another (within the company) soon after the

interview. Younger generations may feel more pressure from the professional environment and experience sensitivity to the atmosphere. While the majority recognized that economic and career pressures would continue to impact career and life decisions (Sandfort & Haworth, 2002).

Raider worked with top executives at Company X and wanted to stay with the organization until retirement. However, he was not on a succession plan (to his knowledge). Raider felt being in Gen X has more advantages than disadvantages, mainly being “next in line” for senior leader positions. At the time of the interviews, Nicole was on three succession plans, however, Nicole handed in her resignation two weeks after the interview. There were references to the promotion process using the term “black box,” which may have had an impact on many participants leaving the organization.

Another reason that may inform why Gen X participants left Company X relates to a study by Karp, Fuller, and Sirias (2002) who found, “Generation X is viewed as a disengaged, disloyal, generation of slackers.” However, Mike (Gen X) would strongly disagree since his perspective is that “*Gen X’ers tend to go above and beyond what it expected of them*” because they’re looking for career advancement. Perhaps it is not so much that it is true, but the feeling of being viewed and labeled as disengaged, creates apathy and distrust. According to the literature (Karp, Fuller & Sirias, 2002), Generation X tends to be more distrustful of organizations and the people who manage them due to the fact that they grew up in an era of downsizing and restructuring. This distrust may lead individuals within Gen X to believe that job security is a myth, and their best chance of survival is to keep moving from company to company until they find the best fit for their lifestyle. Raider, Ayanna, and Mike were not on a succession plan and collectively

wanted higher positions. Nicole was on three succession plans but did not feel confident about her future with the company and subsequently left.

Parks (2007) states that, “Boomers tend to leave unsatisfying jobs and relationships, seek personal gratification through goal attainment and they often sacrifice personal lives for work, and started the ‘workaholic’ trend” (p. 3). Aside from being labeled “workaholics,” Gen Y and Gen X may leave for the same reasons. Gen BB participants seemed satisfied with their jobs and relationships. Warren and Sam were never promoted nor are they on a succession plan; however, they plan to stay with the company most likely due to age. The Gen BB participants focused more on retirement than succession planning. Warren mentioned he plans to retire very soon. Sally stated she really enjoys working for the organization and plans to stay until retirement and she created a program to help employees who are transitioning into retirement. Raider (Gen X) and Sam (Gen BB) said their ex-military background shaped their views around career mobility. Raider said: “...When you do a good job people notice, *you can’t just show up every day*” (Raider). Sam shared: “...*I have to acquire the skills and keep an eye out for opportunities*” (Sam).

Theme 2: Organizational Factors

The major theme of Organizational Factors refers to the views and experiences of participants in the context of the Organization. It is comprised of two themes and two categories: views of career mobility programs are impacted by the organizational climate and views of career mobility programs are impacted by the organizational structure. The corporate atmosphere and the sentiments around the how everyone is able to navigate

their career in a very dynamic environment, seems to inform the overall climate of the organization.

Sub-theme 3: Views of career mobility programs are impacted by the organizational climate.

Company X has a difficult climate in which to navigate ones career, due to its perceived highly guarded, hierarchical and closed system. Based on the responses from participants succession planning seems to be the perception of a highly guarded closed system. This type of system may prevent groups of people who do not understand the process of succession planning (or have advocates in the organization), from understanding how to get on a succession plan or prepare for leadership positions by being accepted into a leadership program. As a result of interviewing employees at Company X, it seems that administering programs in closed systems may lead to an uptick in resentment and turn-over. It cannot be assumed (based on the findings) that the employees who are accepted into the corporate programs automatically qualify to be on a leader's succession plan.

Organizational support of employees' career goals is inconsistent across generations. During the second interview, participants were asked if the organization would support their career goals. With the exception of Simone (Gen Y), who expressed strong views around lack of support and being overlooked for opportunities, Gen Y participants believed being in a corporate (leadership) program aids in the support they feel from the organization. Most of the Gen Y and X Participants are confident the organization supports their goals, conditionally.

Kunreather (2003) found that Baby Boomers want to supervise or micromanage Gen X and expect them to ‘pay their dues’ before giving them real authority. This may hold true for the Gen X participants in this study, whether they are aware of it or not. A few participants mentioned they felt supported by their leader, but not by the organization. This could be due to a failed attempt to enter a corporate leadership program. Participants suggest that when navigating a career path, it may help to work in a stable and predictable atmosphere. However, they also suggest that this is not the climate at Company X.

Generation Y and X shared views of a negative work atmosphere. It is unclear whether or not the younger generations felt the impact of the organizational climate due to their interest in seeking a higher position and feelings of insecurities around not being in a leadership program or having a mentor. It is also unclear if the current work atmosphere is directly related to the industry having a downturn or if the corporate culture is the same regardless of industry impact. What is clear to the researcher is that within the context of being in the organization and being told “no” and not feeling that opportunities are consistent add to the negative atmosphere expressed by younger employees. Seemingly, the Gen BBs felt least likely to be promoted. However, that was attributed to age, not the atmosphere. What’s interesting about Gen BB’s position is that if Gen X is being told they are told old for programs, Gen BB may be thought of as too old for promotions.

Lateral and rotational programs are the norm. Overall, the lateral positions and rotational programs were mentioned by participants as a way of moving around when an employee is on a succession plan or when he or she does not have a clear career

path. Some participants in Gen Y and Gen X were more concerned about the importance of being in a corporate leadership program than on a succession plan. Retirement (not succession plans) is on the minds of the Gen BB. Baby Boomers also seemed to be more interested in lateral/rotational moves. One alternative interpretation may be that those who are aware of their limited time with the organization may just simply have a decreased interest in moving up in the organization. Overall no participants expressed a negative view of rotational assignments, rather embraced it as a norm, even if the decision was involuntary.

Sub-theme 4: Views of career mobility are impacted by the organizational structure.

Corporate Leadership programs are beneficial for career mobility, but only for a chosen few. Employees in Gen Y and X who were not in corporate programs felt the least amount of organizational support for their career goals. With the exception of James, Gen Y shared the perspective that corporate leadership programs serve as a clear path for moving into a higher position. Two members of Gen X clearly stated the same. However, Nicole, Gen X participant, was told she was too old to be nominated into a corporate leadership program. Gen BB did not mention corporate leadership programs.

The understanding of succession planning is clear; who is on a plan is not always clear. According to Bersin and Associates (2009), making plans for choosing future leadership is vital to the health of an organization. Succession planning can be used as a guide for selecting future leaders at Company for all leadership positions; however, if all employees are not accessed and considered, there may be gaps in process of selection. Participants were asked about their understanding of succession planning towards the end of the interview. All participants expressed clear knowledge and

understanding of the concept of a succession plan. Participants' answers were descriptive and insightful. Knowing what a succession plan is along with the benefits of being on a plan versus not being on plan may have led to a lot of frustration from participants.

Succession planning at Company X may not be successful if there is a lack of commitment and accountability on behalf of talent management practitioners (and leaders) to educate all employees on the process. Information does not seem to be cascaded throughout the organization on this topic. The participants were also asked if they were on a succession plan. Only three participants out of the eleven were actually on a succession plan. All participants who are on a succession plan have also been promoted at least once. Sally indicated that she would like to be promoted again but does not think anyone will place her on a succession plan because of her age.

Depending on the perspective, the “Black Box” of formal/informal promotions may help or hinder career mobility. If employees at Company X see a clear path to a leadership position they will stay with the company longer. The term “black box” at Company X refers to an unknown practice or process. There were participants who expressed glee over having “inside” knowledge of an upcoming opportunity and being able to effortlessly move into a role. For those who watched others move into unannounced roles there was confusion and feelings of unfair practices within the organization. Gen X also shared views on the promotion process that seemed to vary. Ayanna and Raider thought the process for getting promoted was simple. Mike (Gen X) and Nicole (Gen X) expressed overall frustration and reported lack of upward mobility and unfairness. Although Nicole expressed these views, she seems to have benefitted the most from the “black box” atmosphere.

The outlook of longevity with the company is based on opportunity. It is important for employees at Company X to understand the corporate culture in order to successfully navigate careers. The responses from participants imply that the longer an employee is with

Company X the better his or her chance of getting on a succession plan. However, all of Gen Y and Gen X participants said that their opportunity to get a higher position will determine the length of time with the organization. This further affirms that the younger generations may not be willing to “wait their turn” for a promotion. Olivia (Gen Y) sees herself with a company for many years to come, but assures that length of time is dependent on getting another promotion. James feels confident about his future and longevity at Company X. Both of these Gen Y participants were fortunate to have gone through a leadership development program, which may impact their views on career mobility. Dexter was very descriptive with regards to his explanation of succession planning. He spent two years in a leadership development program within the Human Resources department that enhanced his knowledge of succession planning. Overall he feels confident about his future at Company X, and he is still with the company.

Ayanna, who had the least amount of tenure of all participants feels that the organization supports her goals. Overall Ayanna felt confident about her future and longevity at Company X. However, her length of stay was shortened due to lack of opportunities. She said she would not stay longer than five years if she did not receive a promotion. Since Ayanna left the organization, an assumption can be made that she did not see career opportunities at Company X in the near future.

Theme 3: External Factors

Sub-theme 5: Viewpoints of available opportunities and external influences create a perspective of lack of stability.

The current state of the industry and job market elicited fear and negative views on career mobility. Limited available opportunities had an impact on views of the stability needed for career mobility. Because of the rapid economic and organizational changes facing organizations today, one of the many challenges facing employers is retaining employees in a volatile market. It is costly to hire and develop new employees, so when the investment is made in an employee that investment should be protected. Employees who feel fear due to lack of available opportunities in an organization (that has structured leadership programs and succession planning is alarming. In addition, there are issues around clarity and trust that became quite clear during the analysis phase of this study with regards to the promotion process.

The current job market being wrought with constant change and uncertainty has an impact on career mobility perspectives of each generation as well. Career Security is when employees build portfolios of skills and experiences that guarantees a job no matter what is occurring in the current job market (Lancaster & Stillman, 2002). It is not evident at Company X career security is experienced across the generations. The talent management practice of replicated external job market dynamics by creating an in-house market that links available talent to jobs” (Kim, 2008 p. 649) also does not seem to be present.

Lancaster and Stillman (2002) report that the generations view career planning differently, which held true for this study. According to their report, Baby Boomers

believe in building a stable career. Gen BB in this study were with Company X for many year and planned on staying with Company X until retirement. According to the Lancaster and Stillman report (2002), Gen X believes in building a portable career. In the present study Gen X showed evidence of this belief, especially since all four participants took their skills to another organization. The same report from Lancaster and Stillman (2002) revealed that Gen Y believe in building a “parallel career” by learning several jobs simultaneously. The present study confirms this since each Gen Y participant mentioned working on (or wanting to work on) additional projects.

The literature suggests that it is a job applicant market, yet the participants spoke of the market being tough job for them with regards to lay-offs budget cuts across the industry. According to the results of this study the Baby Boomer generation shared a strong perspective that the younger generations have experienced a volatile job market. This means that it may be difficult to attract people across job markets, but within the defense industry it may be more difficult.

Krantz, Maltz, and Peppers (1998) explain that a critical factor in organizational performance leadership is of central concern to assuring the long-term viability of modern companies. Kim (2008) argues many factors can impede succession planning, such as poorly planned staff cutbacks, an aging work force, and competition from other organizations. With Gen X employees leaving the organization, the company will spend more time and dollars developing the new and younger Gen Y group, when there are Gen X employees who feel they are overlooked and want development.

Table 12

Participants who plan to leave Company X or transition to another role within the organization.

Exiting the Organization Summary					
Participant	Generation	Age	Considering leaving Company X?	Resigned	Transitioned
Dexter	GEN Y	29			Left his department to work for another part of the business in a higher position.
Simone	GEN Y	26	Yes	Yes	
Olivia	GEN Y	28	In five years		Very nervous to tell manager that he accepted another role within the organization with more responsibility and more money.
James	GEN Y	31			
Ayanna	GEN X	38	Yes – within the next year	Yes	
Raider	GEN X	42	No	Yes	
Mike	GEN X	40	Yes		
Nicole	GEN X	41		Yes – reported lack of upward mobility and unfairness.	
Warren	GEN BB	62	No		
Sally	GEN BB	53	No		
Sam	GEN BB	48	No		

Table 13

Summary of interpretations by theme

Theme	Sub-Theme	Basic Interpretations
Individual Factors	Sub-Theme 1: The views of the three generations on career mobility and succession planning are impacted by their Relationships.	<p>Being connected with leadership is important for career mobility at Company X.</p> <p>Negative stereotypes between generations are perpetuated at Company X and may impact views on career mobility.</p> <p>There are advantages and disadvantages with career mobility for each generation.</p>
	Sub-theme 2: Perspectives of career mobility are influenced by personal experiences.	<p>Technical knowledge is an advantage at Company X.</p> <p>There are limitations to career mobility and succession planning.</p>

Organizational Factors	Sub-theme 3: Views of career mobility programs are impacted the organizational climate.	Company X has a difficult climate in which to navigate ones career, due to its highly guarded, hierarchical and closed system
		Organizational support of employees' career goals is inconsistent across generations.
		Generation Y and X shared views of a negative work atmosphere.
	Sub-theme 4: Views of career mobility programs are impacted the organizational structure.	Lateral and rotational programs are the norm and considered a viable option for career mobility.
		Corporate Leadership programs are beneficial for career mobility, but only for a chosen few.
		The understanding of succession planning is clear, who is on a plan is not always clear.
		Depending on the perspective, the "Black Box" of formal/informal promotions may help or hinder career mobility.
		The outlook of longevity with the company is based on opportunity.
External Factors	Sub-theme 5: Viewpoints of available opportunities and external influences create a perspective of lack of stability.	The current state of the industry and job market elicited fear and negative views on career mobility.

Implications and Recommendations for Research and Practice

The present research attempted to fill the gap of research perspectives and experiences of generational cohorts related to talent management and the implications of these findings on succession planning. A review of the literature indicated that there is a dearth of scholarly research on generations as well as succession planning but limited research on the two topics together. Ford, Harding, and Stoyanova (2010) maintain that current research is narrowed to self-reported descriptions of talent management/career progression systems without any evaluation of how they work in practice. There are also research gaps on how generational and talent management theory link to the practical application of generational differences and talent management.

Research

This study focused on three theories, generational theory, social identity theory and theory w (a talent management theory). Social identity theory informs generational theory.

Generational theory. Generational theory is a sociological theory (Codrington, 2008). According to Straus and Howe (1997), generational theory seeks to understand and characterize cohorts of people according to their birth generation. Codrington (2008) states that generational theory accurately predicts that each new generation entering a specific life-stage will redefine that life-stage and change it either subtly or dramatically and should also be considered by researchers. Whenever a participant mentioned his or her own generation or another (in any context) it was noted to gain further insight into the experience of that generational cohort. Participants shared stereotypes and views of their own generation, as well as others, affirming the application of generational theory for this study.

According to Straus and Howe (1997) generational theory seeks to understand and characterize cohorts of people according to their birth generation, and generations are defined not by formal processes, but rather by demographers, the press and media, popular culture, market researchers, and by members of the generation themselves. The generational and social identity theories are linked by the researcher's effort to group individuals into categories.

Social identity theory. According to Hogg (2006), social identity theory is a social psychological analysis of the role of self-conception in group membership, group processes, and intergroup relations. The interview questions led to responses and data

that reveals how the generations view and categorize each other as well as identify themselves as related to Social Identity theory. Joshi, Dencker, Franz, and Martocchio (2010) state that social identity theory would further posit that cohort-based identities emphasize a collective identity because they are associated with a shared set of organizational experiences and outcomes.

The present study included research from a sociological perspective on differences in the ways that each generation approaches various life-stages. The participants were clear about which generational group they belong in. As such, the perspective will align more with social identity theory (SIT). SIT shows how generational distinctions (with regard to in-group/ outgroup) may be even more profound or pronounced, thus the group identification uncovered by SIT, may well be intensified in organizations, which is the case with Company X. Succession planning, which is a component of talent management is considered an important part of business strategy (Crumpacker & Crumpacker, 2007).

The **Theory W triangle** was examined in chapters 1 and 2 in order to capture some of the uncertainties that relate to talent management. The W triangle includes three “uncertainties,” including (1) the *What* uncertainty- when the business goals are slightly set and there are vague suggestions, (2) the *Who* uncertainty- when an organization is not quite clear about employees potential, and (3) the *When* uncertainty- which occurs when a company knows employee strengths but is uncertain about management expectations with regards to the timing of moving employees around. The aspect of the Theory W Triangle that pertains to this study are the *Who* and *When* uncertainties.

Company X displays evidence of addressing the *What* uncertainty based on the creation and implementation of the corporate leadership programs and succession planning practices. However, the certainty of the *Who* is difficult to determine when it's not clear to employees how people are selected for succession plans. With Nicole being on a number of succession plans and still wanting acceptance into a corporate leadership program, the organization may not have assessed her skills and the timing of moving her into a higher position. This consideration may have prevented her departure.

Future Research

Future research about generational differences in the workplace and succession planning should focus on leadership skills or styles, since the findings of this study show relationships are important to career mobility. According to Manheim (1970), leadership styles can vary from the personal to the more impersonal and does not always match the working style of the employee. More specifically, incorporating a measurement/evaluation of the corporate leadership programs as related to succession planning and promotions would benefit studies in the area of Human Resource Development.

Additional research would also be helpful if it could identify what factors within the organization determine if employees will be placed onto a succession plan. Parry and Urwin (2010), caution that significant research is required to disentangle cohort and generational effects from those caused by age or period. Future researchers may consider how professionals at different stages in their careers may experience mentoring and how mentoring might influence decisions and choices within the career at each point in time. What is crucial to the future of such study is that the generational context is analyzed deeper in conjunction with the concepts of cohort and age.

Future research should also include a focus on knowledge of technology as well as persons who have limited and extensive experience with technology. Learning what leadership skills employees believe are important as well as where there are technical skill gaps employees possess will help the transition of power and communication between the generations. It would be interesting to uncover if the Baby Boomers are asking Gen Y employees to assist with technology because they lack the capacity to understand and/or there is truly a skill gap, or if it's a matter of convenience or if they believe the younger generations wants to do it and it makes them feel validated. The researcher also recommends conducting pilot interviews to increase the level of comfort with interview questions and make modifications where necessary.

Practice

This study was conducted to determine the views of three generations on succession planning and career mobility. Level three succession planning on the Bersin and Associates succession planning maturity matrix is called Integrated Succession Management. At this level organizations conduct an assessment of all positions at all levels and develop a strategy that integrates talent management processes. Bersin and Associates' (2009) research shows that only 12% of organizations have achieved a maturity level of three. Company X would most likely rate at a level three. The final level of succession planning maturity an organization can reach is four. At a level four companies completely understand and utilize the full potential of their employees and succession planning decisions are made based on what is best for the business.

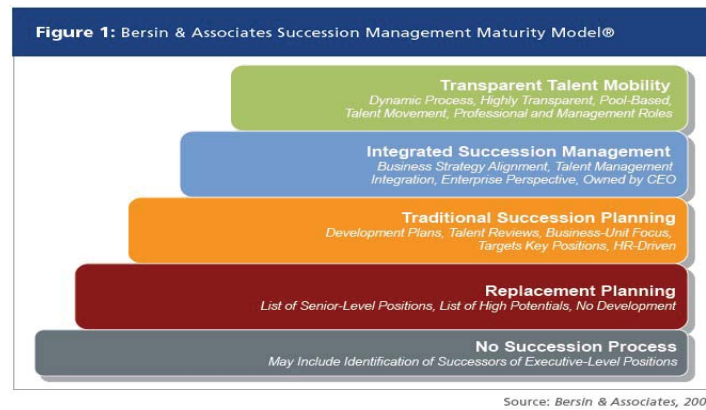


Figure 4. *Bersin and Associates maturity model.*

Developing succession planning programs that help employees better understand the process and providing a methodology for measuring and enhancing existing leadership programs, may help move Company X to a new level on the maturity model.

Future Practice

Rotational movement being the norm may be a great way to retain talent in the organization, but it cannot be repetitive and just for “rotations” sake. To analyze the relative strengths and weaknesses of hierarchies, professionals one should focus on three functions; selection, motivation, and organization. Lawler (2008) states that top management or executives should have some HR expertise on their staff, which is a key recommendation from this study for practitioners. Company X should add a formal mentoring and advocating programs so employees may focus on building relationships and having an advocate rather than spending energy trying to find someone to support them. Participants in the study identified a clear interest in mentoring, collaboration and leadership roles. According to Diversity Best Practices (2006), mentoring programs not only help employees on their career tracks, it’s also an effective way to measure internal impact.

Additional recommendations for future practice include:

- 1) There is strategic planning, however it does not seem to be aligned with generational views of career mobility such as;
 - a. Providing opportunities for younger generations to build relationships with senior leaders
 - b. Providing programs for older generations who may not be accepted into leadership development programs but may need development lateral moves.

Future Succession Planning for Gen Y and Gen X

Based on the findings, future succession planning and leadership development for Gen Y and Gen X employees should involve a more individualized approach. Programs need to consider the individual needs of employees, include opportunities leadership development, coaching, mentoring and advocacy for all employees. Instead of designing and implementing programs based on general leadership concepts.

Future Mentoring Practices

Mentoring may enhance career success and increase chances for career mobility. According to the participants, Company X does not have a formal mentoring program. However, employees mentioned that in the absence of a structured mentoring program, some employees seek mentors in an informal manner. All participants who have participated in an informal mentoring relationship note mentoring can occur throughout all stages of one's career to varying degrees the benefits of such partnerships. Baby Boomers (Sam and Warren) shared a perspective of being in a position to help shape the attitudes and career paths of Gen Y and Gen X primarily through mentor-mentee

relationships. The discussion around the topic of mentoring was generally positive even without the support of a formal mentoring program in place.

Table 14

Diversity Best Practices, Informal versus formal mentoring comparison

Informal mentoring	Formal mentoring
Employees don't always ask for help for the fear of looking dumb	Employees feel questions are expected and will ask more questions and reveal needs
Experienced employees often don't help since they don't want to look like "know it all's"	Veterans know collaboration is desired and expected
Experienced employees don't want to intrude and don't want to appear critical or negative	Mentors are prepared to handle challenges with finesse and skill
Individual informal help is hard to identify and hard to support, affirm and recognize	The organization knows how to support and reward for helping
The need to be productive overwhelms desire to use time to learn and help others	Time for adult learning is more protected and more expected
Experienced employees tend to further the status quo rather than new practices	Results improve as adult learning becomes better supported and more routine

Table 15

Summary of Recommendations for Research & Practice

Recommendations for Research	Recommendations for Practice
<ul style="list-style-type: none"> • Age cohort vs. generational perspectives • Broaden study to include global participants • Examine leadership styles • The effectiveness of corporate leadership programs • Mentoring and advocacy across generations 	<ul style="list-style-type: none"> • Provide opportunities for cross-collaboration projects • Creating a structured mentoring program • The success and turnover rate of employees in corporate leadership programs

Summary

There were many interesting outcomes from these interviews which were highlighted in Chapter 4 and interpreted in Chapter 5. A few of the major findings, include perspectives on the organization’s support of their goals and what generations think about the corporate programs impact on their careers as well as views of the corporate culture. Another interesting outcome of the findings is the renewed interest expressed by some participants in navigating their careers. Most of the participants of the study shared it had been a very long time since they’ve had a conversation regarding their career path, and they enjoyed the interviews. For example, Gen Y participants admitted to feeling good about someone taking an interest in their career goals.

This study captured the experiences of a group of employees at one company who shared their perspectives, not only career mobility and succession planning, but work life balance as a whole. Although several questions were answered during the study there were additional questions raised as a result of the study. Questions raised from this study are:

1. How can the understanding gap between generations be facilitated to clear obstacles necessary for more productive relationships?
2. How do the different generations like to lead and like to be led?
3. What perceptions did BB and Gen X have in their 40s, 30s and 20s to understand periods of development (cohorts) versus generational influence?
4. Do people make meaning of their work experience and career mobility differently at each stage of life or do certain paradigms related to their generation? (Erikson, 1982 in particular wrote about life stages and how people make meaning later in life)
5. Are corporate leadership programs direct indicators of being on a succession plan or promoted?
6. Being that Company X is a global company, what are the views of the generations of career mobility and succession planning if global positions were to be considered?
7. What aspects of global talent management would influence the views of the three generations?

In this chapter, the findings were deconstructed the researcher shared ideas that will intrigue the mind and promote Talent Management practices in a more thoughtful way. The data revealed in this study may help HRD practitioners develop and/or purchase programs to improve communication and work relations across the generations. Just like no two people are exactly alike, there are no two generations exactly alike, making it difficult to determine what talent management practices are the best fit overall. However this study serves as a reference for practitioners and scholars in understanding

the views of the different generations in the around career mobility and succession planning, or at least serve as an impetus for discussion on this important workplace topic.

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