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Three generational issues in organizational learning: knowledge management, perspectives on training, and 'low-stakes' development

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### Article information:

To cite this document:

Therese A. Sprinkle, Michael Joseph Urick, "Three generational issues in organizational learning: knowledge management, perspectives on training, and 'low-stakes' development", The Learning Organization, <https://doi.org/10.1108/TLO-02-2017-0021>

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## **Three generational issues in organizational learning: knowledge management, perspectives on training, and ‘low-stakes’ development**

### **Abstract**

*Purpose:* Methods for facilitating learning and knowledge transfer in multigenerational workplaces are of importance to organizations. Yet, intergenerational learning is vastly understudied in academic organizational literature. This conceptual paper recommends future directions for studying intergenerational learning by examining three interrelated considerations.

*Design/methodology/approach:* General knowledge management concepts, various generationally-based perspectives on training, and low-stakes development initiatives are examined by integrating the existing literature.

*Findings:* We suggest improved learning will occur in organizations that facilitate targeted socialization, respond to new preferences and trends in development programs while leveraging multiple approaches including informal/individualized initiatives (such as on-the-job education, mentorship programs), and embrace multiple types of volunteering activities.

*Originality:* Although other work has reviewed intergenerational learning, this is the first research to focus on multigenerational learning while considering tacit and practical learning transference from inside and outside the organization.

**Keywords:** multigenerational workforce, knowledge management, training and development, volunteering

### **Introduction**

Of utmost importance regarding generational phenomena is the ‘brain drain’ that occurs as younger generations are placed into decision-making roles with limited practice in activities necessary to be successful. As older generations are beginning to leave in large numbers

(Newport, 2015), the transfer of tacit and experiential knowledge between more experienced and less experienced workers must occur so organizations may continue to function. Specifically, it is imperative that the transfer and management of organizational knowledge (e.g. appropriate organizational behaviors and acceptable decision making competencies) is designed to meet the needs of both the organization and the multiple generations populating the workplace. The purpose of this paper is to conceptually explore learning given the context of the multigenerational workforce.

Little research explores multiple generations and learning simultaneously. Our conceptual research is unique because it explores learning in organizations while keeping the context of intergenerational phenomena as its focus. We present a brief conceptual overview of three knowledge management issues related to generations in the workplace: (1) general knowledge management considerations; (2) generational perspectives on training and learning initiatives; and (3) generational perceptions of low-stakes development initiatives such as mentoring and volunteering. We then conclude with recommendations for research and practice.

### **Intergenerational Knowledge Management Issues**

We define knowledge management as the transference of specific task-related skills and the transference of tacit and experiential knowledge including appropriate organizational behaviors and holistic decision-making skills (i.e. considerations of culture, organizational politics, and acceptable leadership styles). The transfer of tacit knowledge is important to organizational survival as older generations detach from leadership positions and younger generations assume these roles.

Businesses are unprepared for this generational shift. In a recent survey of manufacturers (ThomasNet's Industry Market Barometer, 2014), while 63% of participant organizations expect

growth, they were not preparing the organization to manage this growth properly. Of the 490 respondents, 80% identified themselves as between the ages of 45-65+, with nearly half expressing a desire to retire within the next decade. Despite this clear demographic drain, 65% of participant organizations had no clear succession plan in place (ThomasNet's Industry Market Barometer, 2014).

These trends are occurring in a variety of economic sectors (Stanford GSB Staff, 2010). Anticipated growth alongside the brain drain, does not appear to be complemented by a knowledge management strategy, leaving younger employees ill-prepared to move into leadership roles. In other words, once challenged to assume these roles, millennials may find themselves underprepared due to a lack of plans to onboard and train them properly as older employees filter out.

While it might be argued that organizational newcomers (i.e. younger generations) benefit the organization because they bring in new innovative knowledge and ideas, newcomers face difficulty in their ability to influence other organizational members to embrace their new ideas (Urick *et al*, 2016). Furthermore, despite the benefit of new ideas, keeping an organization's collective memory intact is important to ensure that knowledge crucial for the organization's survival remains in the organization protecting its cultural identity, knowledge of processes, and understanding of current customer expectations. Retention of this knowledge can lead to improved performance (Moorman and Miner, 1997).

To support anticipated growth, learning organizations must hire and arm the younger generations with the appropriate tools (i.e. pieces of current collective memory as well as the leverage to communicate new ideas). While explicit task-related knowledge can be taught through seminars and degree-programs, tacit and experiential knowledge and an understanding

of the organization's value system can only be taught through observation, mentoring, and trial and error.

### **Generational Research**

It is generally assumed that there are three major generations represented in the workforce - generation Y (millennials), generation X, and baby boomers (Smola and Sutton, 2002; Burke, 2004). The concept of generation was popularized by Mannheim (1970; reprinted from 1951) who suggested that generations emerge within a specific time-based era and location context so that its members possess an 'illusion' of a unified group. One popular interpretation evolving from Mannheim's statements characterizes generations as age-based groupings with members who are perceived to possess a similar understanding of the social order as well as similar attitudes and behaviors, though some generational experts suggest that this conceptualization is an oversimplification (Pilcher, 1994; Edmunds and Turner, 2002).

Only a few studies have examined age or generations in connection to learning and most who study intergenerational learning focus solely on older workers. For example, Ropes (2013) suggests that intergenerational learning benefits older workers. Warhurst and Black (2015) also discuss older workers' perspectives on intergenerational learning. Very few studies focus on multiple generations' perspectives (see Urick, 2016 for an exception).

Instead, most intergenerational studies have focused on differences between generations and have found largely inconclusive results (Parry and Urwin, 2011; Costanza *et al.*, 2012). Examples include examining differences in: psychological traits (Twenge and Campbell, 2008); personality (Wong *et al.*, 2008); motivation (Kooij *et al.*, 2007; Wong *et al.*, 2008); beliefs about career success and satisfaction (Dries *et al.*, 2008); levels of creativity (Binnewies *et al.*, 2008); and work values (Smola and Sutton, 2002; Cennamo and Gardner, 2008; Twenge *et al.*, 2010).

Although research has been inconclusive regarding generational differences, what is conclusive is that intergenerational tensions and conflicts do transpire (see Urick *et al.*, 2016) thus hampering intergenerational interactions including those in which learning occurs. In our exploration of generations and learning, we focus on three interrelated areas: general knowledge management and transfer relating to intergenerational phenomena; generational perspectives on training; and ‘low-stakes’ development.

### **Knowledge Management**

Experienced workers learn while situated in leadership roles, thus organizational knowledge is increased; if their knowledge is passed down to newcomers, organizations can continue to innovate (Cook and Brown, 1999). Knowledge conversion theory (Nonaka and von Krogh, 2009) suggests knowledge is an asset that should be managed by organizations if they are to successfully compete. Nonaka and Takeuchi (2011) suggest leaders consider three types of knowledge: (1) explicit knowledge, or task-oriented understandings of position, organizational goals, and/or enhanced techniques/software; (2) tacit knowledge, which might include cultural and context awareness, decision making styles and power/politics; and (3) practical wisdom or ‘experiential knowledge,’ emanating from a holistic understanding of the impacts of a decision to the organization and to society as a whole. An organization that does not adequately prepare newcomers for leadership roles at all three levels of knowledge cannot expect these individuals to lead the organization.

Many members of a generation will often enter organizations at the same time, filling roles at a similar level in the organization. Therefore, we use the term *newcomers* to be representative of younger generations entering the workforce (Joshi *et al.*, 2010). Newcomers are often perceived to have limited practical experience (Urick *et al.*, 2016) and it is incumbent

on the organization to enhance their skills. While explicit knowledge is often taught through training and development programs aimed at increasing skills, tacit knowledge and practical wisdom are more difficult to instill through such overt tactics. These must be transferred through observation, learning by doing, and trial-and-error. These areas of knowledge (i.e. tacit, practical wisdom) require *targeted* socialization tactics (Saks and Ashforth, 1997) whereby newcomers are presented with (planned but immersive and informal learning) experiences to transfer cultural, political, and non-role-specific pieces of knowledge.

Organizations have long relied on socialization techniques to transfer tacit knowledge such as: telling stories to accentuate accepted norms, celebrations to highlight cultural beliefs, explicit indoctrination on values system, and emphasizing behaviors to model (Schein, 1985; Levitt and March, 1988). Despite these tried and true tactics, generational differences may limit the message sent and received as negative generational perceptions can taint interactions (Urick *et al.*, 2016). Older generations may withhold information, believing that newcomers won't care about old customs or values. Culture transference through ceremonies, role shadowing, and other events may be set aside because of these perceptions. Conversely, younger generations may perceive the older generation as unwilling to learn (Warhurst and Black, 2015). In many organizations, strong tensions arise between generational members, limiting the type and quality of interactions (Urick *et al.*, 2016).

Many formal programs are built to address perceived newcomers' increased technological preferences (Urick, 2016), rather than addressing training needs of all generations. Given the above discussion, we propose that rather than avoid targeted socialization programs because of intergenerational differences, organizations should build these into their culture.

### **Generational Differences Regarding Training**

Workplace training has gradually changed from a less-individualized focus (e.g. on-the-job, shadowing) to more formal training programs (traditional classroom-style events, group-based seminars/workshops, training delivered via technology). In a study of 340 organizations regarding organizational learning trends, it was found that training initiatives were heavily weighted to formal training (70% instructor-led) and a large portion were technology-enabled (38%) (ATD, 2014). Instructor led-formalized training can be crucial to the transfer of explicit knowledge, offering newcomers training in key task-oriented skills, but ignores the need to provide tacit knowledge alongside explicit knowledge.

Behavior modeling is perhaps the most useful with regard to passing tacit knowledge to organizational newcomers. Bandura's (1977) social learning theory emphasized the need for 'interpersonal learning' through the use of behavior modeling as a primary means of passing on culture and values (Warhurst and Black, 2015). Often, organizations have turned to technology to address behavioral modeling rather than using an intergenerational technique such as role shadowing. Technology-enabled education can include web-based instruction, podcasts, webinars, simple web searches to find information on a job-related issue, and computer-enabled entertainment, or 'edutainment'. Edutainment, a type of gamification whereby games are used to provide exposure to concepts and behaviors useful for job performance in a psychologically safe environment, can be leveraged for education because, by being 'fun,' learners are engaged (Kapp, 2012).

Kapp (2012) argues that using games is effective as it increases engagement and immersion while assisting learners in making the connection between concepts and a particular situation. The game models and reinforces appropriate behaviors at work. When training younger generations for decision making roles, edutainment is perceived as an important formal



component of behavior modeling by simulating experiences likely to occur on-the-job. Focused on the younger generations, edutainment builds on an assumption that newcomers learn best through technology-enabled instruction. Unfortunately, despite how well-developed the simulated experiences are, a limited amount of tacit knowledge can be taught through simulation; edutainment tends to be more successful overall for explicit knowledge transfer.

Nonaka and Takeuchi (2011) stress the importance of *experiential* knowledge, which emanates from making decisions as explicit, tacit, and practical bases of knowledge converge; knowledge management which is best leveraged through more individualized means. Saks and Ashforth (1997) suggest that if it is necessary for the individual to demonstrate proactive strategies and behaviors – such that are necessary in leadership roles – individual socialization tactics (such as customized on-the-job training or mentorship programs) are important.

Individualized knowledge management is lacking in the multigenerational workplace perhaps due to an organization's preference for other types of training or because of a biased interpretation of generational training preferences. In a sample among members of younger (under 44) and older (over 44) generations, Urick (2016) discovered that, although the older sample group expressed a preference for on-the-job training and mentorship, both younger and older samples were under the impression that younger employees would be more comfortable leveraging technology-enabled training. That is, because individuals belong to one generation versus another, each carried a perception of the other's preferences.

The lack of intensive knowledge management programs which consider individual and group-oriented, as well as formal and informal, approaches will prove detrimental. Group-based training and development has its place in transference of explicit knowledge and as a means of investiture of some cultural aspects (Ashforth *et al.*, 1998). However, informal individualized

initiatives allow employees to learn behaviors immediately applicable to their jobs and are a means of emphasizing necessary skills and competencies. Warhurst and Black (2015), in their exploration of training in older workers, found that shadowing and observing others were most helpful in transferring role behavior. Additionally, these programs help organizations achieve decreased costs due to fewer instructor or technology development fees, but also because actual work occurs in tandem with the training (Frazis and Loewenstein, 2007).

The development of a formal mentoring program is one option for organizations to manage tacit knowledge and practical wisdom. Mentoring programs are neither instructor-led nor classroom-based, rather they are offered while both employees continue to be engaged in work. Regular meetings are encouraged to allow for behavior modeling (Wilson and Elman, 1990). Having a mentor exchange knowledge with a newcomer could be useful as those with a desire to learn exhibit a preference for leveraging personal sources of knowledge (Abrams *et al.*, 2003).

These programs have been found effective; mentored employees are likely to achieve higher compensation, job satisfaction, and transfer of tacit knowledge (Allen *et al.*, 2004). Mentoring offers a dual-purpose to an organization: (1) to strengthen mentees' understanding of corporate culture, while (2) providing vital information concerning those of leadership potential (Wilson and Elman, 1990). Establishment of a mentor/mentee relationship can also remedy tension in intergenerational interactions (Urick *et al.*, 2016). Intergenerational mentorship pairing forces participants to look beyond stereotypes and to seek out experiences needed by the mentee to be successful in leadership roles. The mentee may begin to accept and appreciate the insight gained from the mentor. Given our above discussion, we suggest that tacit and experiential knowledge would be best transferred by minimizing the impact of perceptions of

intergenerational differences. Rather, organizations seeking to transfer culture and values should return to Bandura's (1977) social learning theory – organizational members learn best through interpersonal learning. This is not to suggest that the technology-enabled training should be abandoned. Rather, it should be supplemented with informal/individualized initiatives such as on-the-job education and mentorship programs.

That said, mentoring programs may not be ideal for all employees, nor may the organization be designed to support a mentoring program. Organizations may seek to provide other experiences which instill practical wisdom, offering time to practice 'live' decision making across a variety of development opportunities that will appeal to a broad set of employees and generations such as through low-stake activities like pursuing a volunteer strategy where leadership experience is gained *outside* the organization.

### **Learning through 'Low-stakes' Experiences**

A 'low-stake' experience provides organizational newcomers with the skills they might need at work in a stress-free environment with limited potential for negative impact. One type of low-stakes experience is volunteering with a nonprofit organization. Nonprofits typically manage their organization with smaller staffs, relying on volunteers to fill the employee void by assuming seats on committees or boards (Grimm *et al.*, 2006). An employee's work organization benefits because of the exposure employees receive to growth and transference of practical wisdom, expediting leadership maturity. Similarly, volunteering has multiple benefits for the individual employee as it offers experiences that they may not yet be privy to in the organization, providing an external world-view, and improving job performance (Rodell, 2013). Yet, volunteering experiences are not always accepted as learning opportunities.

When seeking low stakes experiences for the newcomer, the organization may accept participation in only a narrow interpretation of volunteer opportunities. Volunteering, giving of time or skills ‘during a planned activity for a volunteer group or organization’ (Rodell, 2013), suffers from a perspective in many organizations which hinders generational acceptance. That is, a common definition for volunteering focuses on dedicated service: active service (a donation of time or service), planned action (not spontaneous; Clary and Snyder, 1999), and an act committed for an organization (as opposed to an individual; Penner, 2002; Musick and Wilson, 2008). This perspective overlooks episodic volunteering (i.e., shorter, more flexible opportunities limited in length of time; Eisner *et al.*, 2009). Often, long-term opportunities are more accepted by organizations, while more episodic opportunities are conducive to work life balance hoped for by a newcomer (Urlick *et al.*, 2016). For example, volunteer activities centered on family (i.e. coaching soccer teams) or episodic events (i.e. organizing food bank drives, walks) may fit into a newcomer’s schedule easily, balancing leadership development with a growing family. A disconnect arises when one generation defines volunteer activities differently from the other. Because these volunteer opportunities do not fit traditional expectations, tensions could arise when older workers perceive that their younger colleagues do not seek appropriate opportunities for leadership development. Similarly, newcomers may perceive that forcing traditional volunteering devalues their chosen activity, as well as the need for work-life balance.

By ignoring the leadership experiences offered by non-traditional volunteer positions, mature workers may overlook the leadership preparation already completed by newcomers. For example, one interviewee in Urlick and colleagues’ (2016) research noted coaching his child’s team as volunteering. This activity consists of motivating a group of individuals (i.e. in this case

children) to accomplish a unified goal (i.e. winning a game), skills crucial to becoming a leader in a work organization. However, a more mature employee might not see the relevance this activity would have on developing the employee and, instead, classify it as a family-related (non-volunteering) activity with limited value. We suggest that enforcing more traditional volunteer opportunities on a younger employee, before assessing non-traditional volunteering, ignores potential flexibility and diversity of low-stakes opportunities for leadership skill development. We suggest that organizations should recognize that younger employees may already be practicing leadership skills through volunteer opportunities aligned with their need for balance.

### **Discussion**

This paper takes a conceptual approach to exploring the concept of knowledge management and transfer from a generational perspective. While organizations have designed training programs in the hopes of appealing to younger generations, the types of knowledge transferred in these settings may be limited to explicit or task-oriented (Saks and Ashforth, 1997).

A return to individualized, non-technology based training is needed. Behavior modeling, as well as practical wisdom, may be best managed through individualized techniques such as mentoring or other low-stakes opportunities such as volunteering. Mentoring offers multiple benefits, including assisting employees in moving past generational tensions and helping to seek out developmental leadership experiences. Volunteering, taking a variety of forms, may offer leadership practice in non-threatening environments. However, pushing younger generations to engage in structured or traditional volunteering activities (Rodell, 2013) may result in failure.

Researchers of knowledge management should continue to assess the transference of organizational knowledge through the lens of generational phenomena. By viewing each

knowledge management activity through the three broad considerations addressed here (general knowledge transfer concepts, generational perceptions of training and development initiatives, and low-stakes opportunities for growth); we may be able to determine a more balanced approach to building the next generation of leaders. Generational researchers should continue to explore the influence and bias associated with each generation as these may challenge the approach to knowledge management, training and development initiatives, and HR policies.

For example, one of the biggest intergenerational challenges organizations face is to breakthrough negative perceptions and stereotypes of other generations to facilitate positive interactions (Urlick *et al.*, 2016). The success of knowledge transfer mechanisms such as mentorship and other personalized learning initiatives (Warhurst and Black, 2015) are largely dependent on the *quality* of interactions between members of various generations. Organizations must not only seek learning and knowledge management approaches that will appeal to a variety of generations (Urlick, 2016), but also seek to improve intergenerational interactions holistically.

From a practitioner standpoint, training and development specialists should work to provide a balance of formalized initiatives alongside opportunities for individualized experiences which could facilitate acquisition of various types of knowledge. Mentoring initiatives and leadership development programs should explore learning styles (Kolb *et al.*, 2001) of all employees to embrace the appropriate means of knowledge management, instead of making learning style assumptions by generation (Warhurst and Black, 2015). Organizations must recognize the contribution of low-stakes volunteering. Supporting episodic volunteering would signal that the organization understands newcomers are making a foray into leadership development.

Some logical areas for future research relate well to this conceptual paper. While this paper represents a strong starting point for a discussion on intergenerational knowledge management, the lack of data supporting our claims is a weakness. Thus, future data collection and empirical studies are necessary. Our theoretical statements related to personalized hands-on intergenerational knowledge transfer, the use of traditional and technology-enabled initiatives, and the effectiveness of low-stakes volunteering should be empirically tested. Specifically, we suggest:

- Examining the quality and quantity of knowledge transferred for organizations that (1) facilitate targeted socialization and (2) respond to new preferences and trends in development programs across all generations.
- Assessing the effectiveness of leveraging multiple approaches to development including informal/individualized initiatives (such as on-the-job education and mentorship programs) with regard to learning in a multigenerational workplace.
- Exploring the perceptions and usefulness of volunteering activities (traditional and episodic) with regard to developing tacit and experiential knowledge in younger generations.

We suggest taking a qualitative grounded theory approach (Glaser and Strauss, 1967; Strauss and Corbin, 1998), appropriate for areas of study where limited theory is available (such as intergenerational learning). Future research might also consider the role of institutions outside the firm (i.e. institutions of higher education) that influence newcomers. As this paper represents a starting point for theory development, future research should expand our statements to develop a more actionable model for practitioners.

## Conclusion

We advance the understanding of knowledge management and transference by exploring three learning-related issues in the context of a multigenerational workplace. We accomplish this by viewing explicit, tacit, and experiential knowledge not simply from the perspective of training and development initiatives, but also in terms of the influence that generational phenomena have on selection of these initiatives. We explore appropriate and less traditional approaches that may be useful for intergenerational learning. We suggest that a greater exploration into generational issues related to knowledge management may assist in developing stronger leadership for future organizational success. Our major contributions, in light of the previous literature, include: (1) advocating the treatment of each employee as an individual (not a stereotype of a generation) when considering development, (2) emphasizing a mix of development approaches to meet the needs of *each* individual while considering the various types of knowledge that may need to be transferred between generations, and (3) being flexible when setting up mentoring relationships and low-stakes (i.e. volunteering) activities to provide maximum development opportunities for newcomers. Engaging in these recommendations will help organizations to remain competitive.



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