

Generation What

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Workforce Management
CVS

With Contributions from Allen Manchester

Paychex Inc.



2024 SWPP Web Series

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Marshall Lee



Marshall brings a wealth of experience in training, workforce management, business process improvement, and coaching, offering a comprehensive understanding of the WFM landscape. He has a proven track record working across diverse industries including telecommunications, tech support, insurance, HR support services, and healthcare services, with experience in both contact centers and back-office support teams. Marshall has held positions at Charitable Resource Foundation, Charter Communications, SHPS, Carewise Health, ADP, Firstsource Solutions, and most recently served as Director of GWFM at TTEC. He is a sought-after speaker and published contributor for industry leaders like ICMI, SWPP, QATC, and CRMXchange, and remains passionate about the CX field through his board positions with the Quality Assurance and Training Connection and the Society of Workforce Planning Professionals. In his current role as Senior Manager, WFM Forecasting & Capacity Planning at CVS Health, Marshall leverages his expertise to optimize forecasting, capacity planning, and the overall WFM strategy.



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I am a Xennial or Oregon Trail Generation Member



It doesn't matter – but it does, oh and I think “Millennials” and Gen Z get a bad rap ... more on that.

The Issues with Intergenerational Workspaces



It's like an awkward Holiday Dinner ...

Gen Z is not needy and clueless.

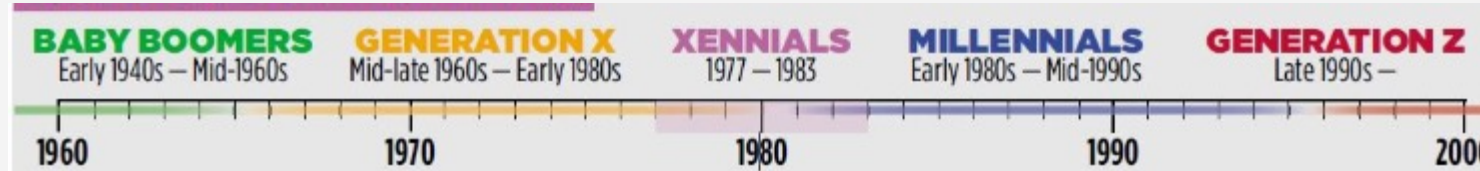
Millennials are not lazy and entitled.

Boomers are not grumpy and stodgy.

Xers are not angry and judgmental.

... but it can feel that way.

Defining Generations (Consensus of Years Being Used)



Baby Boomers

Born 1946-1964

Age 59ish-78ish (span 18ish years)

Generation X

Born 1965-1980

Age 43ish-58ish (span 15ish years)

Millennials

Born 1981-1995

Age 28ish-42ish (span 14ish years)

Generation Z

Born 1996-2010

Age 27ish - 13ish (span 14ish years)

Generation X

- Impacted by recessions
- First Generation of high “latch-key” kids
- Pushed towards adulthood at an earlier age
- Technological advancement gap between class room and workplace
- Second Mass Media Generation latter half come of age in “cable” or MTV Era
- More College Educated than previous Generations
- Schools continue graded Pass/Fail Standard but begin experimentation in “goal setting”

Millennials

Affected by Columbine High tragedy and events of 9/11

First Truly Child Centric Generation children's calendar dictates parents' schedules.

Most college educated generation until Gen Z

Instant communication evolves

Video gaming / online networking replaces “going outside”

Academics focus on holistic goal setting vs. just Pass/Fail

Social service and meaning stressed as part of education



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Gen z



What traits does each gen bring to the table aka workplace?

Baby Boomers

Work dictates life

Team focus

Work to get ahead

“Can-do” attitude

Meetings, Collaboration

“Consensus”

Trusting until proven otherwise

Millennial

Life first work should be flexible

Immediate gratification

Instant communication

Steady feedback

Fast communicators multi-channel in bullets

Expect meaning in work

Values input in decision process

Generation X

Work to live not live to work

Skeptical and Rational

Feedback Essential

Individualistic within a team context

Value decisiveness over universal consensus

Skeptical of motives until prove otherwise

Technically competent

Generation Z

Who am I at work?

Multitasker

Constant communicator

Communicates in Images and Concepts vs. Words

Accepting and inclusive

Stability and Security important

Entrepreneurial

Individuality

Creates safety



Generational Challenges within the Contact Center

Baby Boomers

Feeling of insult at “having to be watched” WFM and Quality
May feel this exists because “people don’t do their job”
Performance based scheduling goes against seniority / loyalty mindset

Quality coaching may seem like they are being constantly coached leading to a feeling of never succeeding

Technology based “reminders” can seem intrusive to the day
Constant changes in technology and process may get an “If it ain’t broke don’t fix it” reply.

Millennial

Desires work to conform to life; inflexible schedules create a rigid structure

Seeks meaning in the workplace; scheduling systems may reduce perceived individual value

Seeking praise or positive reinforcement, constant quality may can feel like too much negative feedback

Outspoken tendencies can create lower employee buy-in on new systems and processes

Optimized breaks and lunches may hinder needed social interaction at work

Individualized working environment may limit perceived contribution and value of position.

Generation X

WFM and Quality systems strike at the natural distrust of authority “Why am I being monitored”

Lack of self direction around schedule and call flow may reduce needed internal lotus of control

Perceives a WFM/QA systems as the “man behind the curtain” or big brother

Will feel a sense monolithic removed leadership

Rigid scheduling may create a feeling of work taking over too much in life

Generation Z

Expects Customization

Digital native – just gets tech – no learning curve.

Communicates faster multi-focused

Generation not connected to “real world” as much as virtual more prone to depression, fewer coping mechanisms for real world conflict and obstacles.

“Blurring” creates a LOT of questions about nuisances that never existed before. “Does this policy really apply to me?” Splitting hairs on understanding – it seems like they just don’t get simple things.

Team often lost on the group looking for individual place.

Strengths for each generation in the contact center

Baby Boomers

Desires reward for performance

Bring a sense of team unity in focus

Gives consistency

Measurable accountability

Creates fair balance of workload

Keeps “stragglers” with the pack

Allows for collaboration

Bring a measure of experience and stability to processes

Can View Quality, Training, and WFM as a means to empower
the above attributes

Strengths for each generation in the contact center

Generation X

Encourage consistent feedback

Respond to performance based scheduling

Means of communication around goals

Allows a voice in process

Work load balancing

Will respond to feedback more readily even if not constant

Views ongoing training and process evolution as a natural development

Adopts new concepts quickly

Appreciates on-line resources

Strengths for each generation in the contact center

Millennial

- Technology based solutions are more readily adopted
- Options for staffing more wide open due to the understanding of how work and life should integrate and balance
- Gives the Why the Y's love, as to why we do it this way
- Allows a conversation on roles and goals giving a true sense of empowerment
- More likely to sign on for special projects
- More readily geared to own individual value they provide if they believe the role is truly one of value
- Adopts new knowledge quickly
- Appreciates virtual communication

Strengths for each generation in the contact center

Generation Z

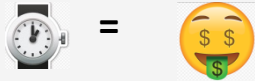
Omni Channel Naturals

Work from home

Virtual work

Multi Skill champs

Entrepreneurial = innovator



Open to new stuff

Make Self Care matter for themselves and others

PTO- Prepare The Others

We don't really know yet ...

Ask yourself “Why am I here?”

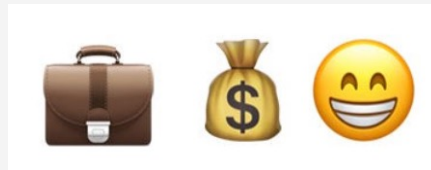
When understanding the motivators you can understand how to enhance buy-in and the experience across the board.

Boomer: “If I work hard and contribute, I’ll be able to excel and be happy.”

Gen X: “I need this job, I like what I do, and I’m glad I can still be there for my family and friends”

Millennial: “My job adds value to the world, I add value to my job, and I can still go to Zumba!”

Gen Z:



Integrating the Generations

The conversation to bridge the gap.

Does our coaching model best address the needs of each generation?

Does our knowledge base flow with each style of communication?

Is training offered in a way that best addresses all the modes of communication for each group?

Take a new look at scheduling, step back look at the big picture who wants to work where?

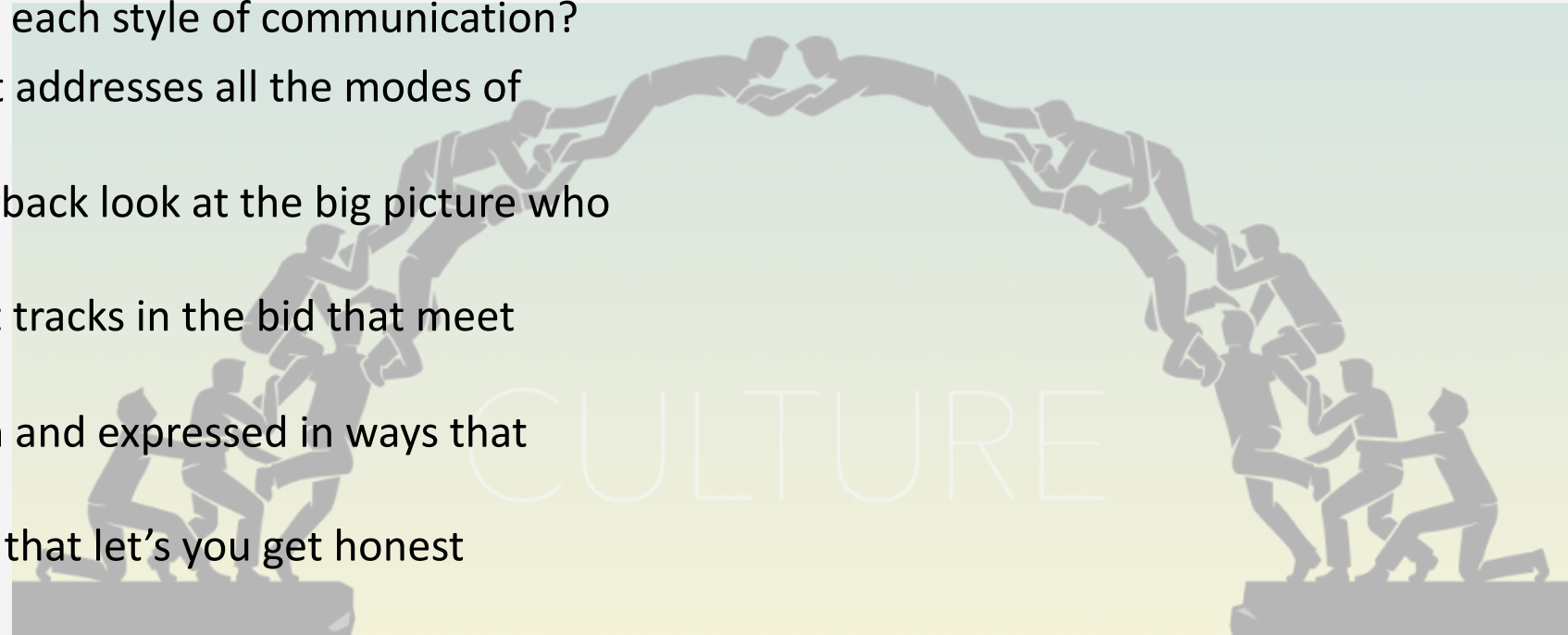
If you shift bid can you run different tracks in the bid that meet different needs?

Can scorecards or metrics be shown and expressed in ways that appeal to each group?

Does everyone appreciate a system that let's you get honest feedback?

The same rules apply, but they allow us to have a conversation about shared goals.

What can we learn from each other?



Integrating the Generations

The actions to bridge the gap for WFM.

Use metrics and goals to empower associates to converse about the goals themselves to give feedback on operational targets.

Implement a workforce or quality ambassador program that communicates in all the channels that work for each group, chat, meetings, e-mail, and forums.

Retrain agents and leadership annually on Quality/WFM and their purposes. Include the QA/WFM strengths that appeal to each group focusing on each one.

Focus on your agents in the same way they focus on customers, help the experience be the best it can be.

Foster a sense of community look into incentives that appeal to each generation. Boomers may like a gift card or certificate; Millennials and Z would love that extra 30 minutes off the phone.

As always – just ask?



Integrating the Generations

Your actions to bridge the gap.

Have you addressed these issues in the past?

What do you take away from this session?

What is your next step?

Resources

The Remix: How to Lead and Succeed in the Multigenerational Workplace

Lindsey Pollak

Generation Z in the Workplace: Helping the Newest Generation in the Workforce Build Successful Working Relationships and Career Paths (Generations in the Workplace: Gen Z) Dr. Candace Steele Flippin

Y in the work place: Managing the “Me First” Generation

Lipkin, Perrymore: Career Press

Connecting Generations: The Sourcebook for a New Workplace

Raines: Blue Cloud Books

Generations

Straus, Howe: William Monroe and Company

<http://www.ngenperformance.com>



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