

# 4. Succession & Talent Management

## Resource 4-1. Guidance for Cross-Generational Mentoring Programs

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In today's organizations there is a mixture of employees across multiple generations (e.g., Baby Boomers, Gen X'ers, Gen Y'ers/Millennials, etc.). To maximize collaboration and communication, cross-generational mentoring is a critical component of developing a sound human capital strategy for the agency. This will allow knowledge, lessons learned, and best practices to be transferred across individuals with different experiential backgrounds. Reverse mentoring (junior to senior), in addition to traditional mentoring (senior to junior) can be included as part of the cross-generational mentoring program. Based on the review of the literature, best practices, and industry reports regarding cross-generational mentoring, there are five strategies that agencies can use to implement a successful cross-generational mentoring program:

1. Develop a formal mentor-mentee agreement with roles and responsibilities.
2. Apply a hybrid approach to mentoring with “formal” classroom training and “informal” learning mechanisms.
3. Alternate meetings each month between formal classroom setting and meet-at-lunch get-together.
4. Build mentoring into the Recognize and Reward structure and annual performance review. This can be included as one of several learning and knowledge sharing proficiencies considered as part of the annual review.
5. Encourage “reverse mentoring” in technology-related areas with those Baby Boomers who are willing to be mentored by the Millennials.

### 1. Develop a Mentoring Agreement

A standard mentoring agreement to use during the mentoring program typically contains the following [1]:

- The roles, responsibilities, and expectations during the program duration for a mentor and mentee;
- An action plan completion date;
- The number of times (frequency) the mentor and mentee will meet;
- A confidentiality clause between the mentor and mentee;

- Termination of agreement rules: and
- Signatures of both the mentor and mentee.

This agreement can be included in one’s Individual Development Plan [1]. It is also important to have evaluation points during the mentoring process. In 2010, the US Office of Personnel Management mandated that Kirkpatrick’s model (Kirkpatrick Partners, <http://www.kirkpatrickpartners.com>) must be used by all federal agencies. In Kirkpatrick’s model, there are 4 levels of learning: Level 1: Reaction (engagement, relevance, customer satisfaction); Level 2: Learning (what was learned?); Level 3: Behavior (applied learning to on-the-job performance?); Level 4: Results (leading indicators, desired outcomes). Agencies should apply this model, or a similar one, to evaluate the effectiveness of their mentoring program at 6- to 12-month intervals during the mentoring process.

Also, an orientation program should be created for both the mentor and mentee. Orientation is usually a half to a full day. It can include a workshop or session on tools and techniques to begin and enhance a mentoring relationship. Exercises during the orientation should allow mentors and mentees to practice the tools and techniques presented to them [1].

## **2. Use Both Formal and Informal Learning Techniques**

The “formal” classroom training could include “do’s and don’ts” through war stories/organizational narratives, hot topic tutorials, before/during/after-action reviews with case studies, group projects to encourage active learning and collaboration, and interactive computer-based simulations (to take advantage of the “video game” generation).

“Informal” learning mechanisms include online communities of practice (COPs), Mentoring blogs, project team wikis; Knowledge Map on the intranet (FAQ→Answers →Documents→Web sites→People/Depts), use of e-learning and social networking sites, online video tutorials, Wikipedia for the agency, “agency” book (e.g., NASA has “Spacebook” —Facebook for internal NASA employees), and online mentoring if in different geographic locations.

## **3. Alternate Meetings Between Formal Classroom Setting and Meet-at-Lunch Get-Togethers**

The research shows that Millennials like both formal classroom training and informal learning approaches. Both approaches, per Recommendation Two, should be used. By alternating the formal-informal learning settings, this will capture the interests of the Millennials so the mentoring doesn’t fall into a rut. The informal

learning mechanisms, as previously highlighted under Recommendation Two, should be utilized throughout the mentoring program to enhance the enthusiasm of the Millennials, per their collaborative and network-centric learning styles. This will also provide a continual mentoring and knowledge sharing process between not just the designated mentor and mentee, but through knowledge exchanges with other mentees, peers, and mentors at the agency.

#### **4. Build Mentoring into the Recognition and Reward Structure and Annual Performance Review.**

As an example, Merkle Inc. (one of the leading customer relationship marketing/data mining companies—[www.merkleinc.com](http://www.merkleinc.com)) started Merkle University as an internal mechanism to promote learning and knowledge sharing. Each employee, even the executives, must teach a certain number of hours within the internal Merkle University, as well as take a certain number of hours of courses from others within Merkle University. This requirement is part of the annual performance review process and is also built into the company’s recognition and reward structure.

According to the literature, extrinsic motivators (rewards) are temporary and intrinsic motivators (recognition) are more lasting and permanent. For the Millennials and others, recognition is often more important to them than actual rewards (although, rewards like getting time off from a day of work for good performance resonates well with the Millennials, too). Mentors and managers should send an email to their mentees and employees, respectively, within 24 hours of the mentee/employee doing something “good” for the organization. In terms of recognition, Fluor, for example, celebrates its knowledge communities during its annual “Knowvember” campaign [2]. The World Bank has used learning and knowledge sharing proficiencies as part of its annual performance review to promote a continuous learning organization.

#### **5. Use Reverse Mentoring, Too**

When most organizations think of mentoring, they usually think of the senior (by age) employee mentoring the junior employee. However, there are various technology areas, for example, where the younger employee (Millennial) could mentor the older employee (Baby Boomer). Agencies should use both regular and reverse mentoring with the caveat that all parties must be willing to be engaged in either the regular or reverse mentoring. In all cases, there must be interpersonal trust and respect for mentoring to take place.

Companies like GE, Siemens, and Procter & Gamble use reverse mentoring widely, particularly in technology areas.

If these five strategies are followed, agencies should have an enhanced mentoring program that will take into account cross-generational mentoring issues and techniques. This will ultimately lead to creating and nurturing a knowledge sharing culture for building the next generation of agency engineers and managers and instilling continuous learning within the agency for organizational success.

## **References**

1. US Office of Personnel Management (2008), Best Practices: Mentoring, Washington, DC, September.
2. Ball, K. and G. Gotsill (2011), Surviving the Baby Boomer Exodus: Capturing Knowledge for Gen X and Y Employees, Course Technology/Cengage Learning.