Effectively Working Across Generations in Investing
For Conference of County Investment Academy
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Texas County Elected Officials & Staff…

What is your #1 priority?
WHO will be doing your job?

WHAT knowledge will they need?

HOW will they acquire it?
Better hurry…10,000 Americans turn 65 each day

(Pew Research)
Percent of the U.S. Labor Force (2017)

- Greatest: 2%
- Boomers: 25% (Born: 1946-64)
- Gen Xers: 33% (Born: 1965-80)
- Millennials: 35% (Born: 1981-96)
- Post-Millennials: 5%

Note: The percentages are approximate and do not necessarily reflect exact numbers.
Shared experiences *define a generation*
Greatest Gen Attributes:

Self-reliant
Work ethic
Resilient
Modest
Boomers’ Attributes:

- Confident
- Achieving
- Teamwork
- Civic-minded
Gen Xers’ Attributes:

Practical
Self-reliant
Tech savvy
Lone wolf
Millennials’ Attributes:

- Digital natives
- Social media
- Cautious
- Diverse
Post-Millenials’ Attributes:

- Online life
- Pro-technology
- Team-oriented
- Green
Are These Real (or Imagined) Generational Differences?
ME360 Case Example #1

Challenge:
High (and costly) turnover of ECEs

Outcome:
Reduced turnover by 50% over 2-year period saving the client $150,000
ME360 Case Example #2

**Challenge:**
Department heads not collaborating effectively

**Outcome:**
Increased awareness of workloads & work styles, & enhanced communication
ME360 Case Example #3

Challenge: Limited bench strength to support high growth

Outcome: Cohort of high-potential employees learned & applied leadership behaviors
ME360 Case Example #4

**Challenge:**
Retirements of senior leaders

**Outcome:**
New mission, strategic plan, & succession plan
ECE Recruiting Tips

Meaningful work

Social media

ECEs as recruiters
ECE Onboarding Tips

- Intentional process
- Buddy approach
- Intergenerational team
Training Tips

- Tailor to different generations
- Applied and transferrable
- Reinforce it with projects
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Teamwork Tips

- Bridge gen differences
- Transfer knowledge
- Effective/efficient meetings
Mentoring Tips

- Reverse mentoring
- Multi-gen project teams
- Capture/share the learning
KNOWLEDGE IS POWER, BUT ONLY WHEN YOU APPLY IT

-KRISTEN POBORSKY
One size does not fit all…

Be creative & agile when developing impactful, lasting solutions for your county!