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## Communicating Organizational Vision and Values to a Multigenerational Workforce

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# Walden University

College of Management and Technology

This is to certify that the doctoral study by

Jose M. Peralta

has been found to be complete and satisfactory in all respects,  
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Walden University  
2021

Abstract

Communicating Organizational Vision and Values to a Multigenerational Workforce

by

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MBA, Keller Graduate School of Management, 2012

MS, American Military University, 2010

BS, American Military University, 2007

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

December 2021

## Abstract

Differences in values, motives, and beliefs of members of a multigenerational workforce can negatively impact organizational sustainability. Business leaders who cannot communicate organizational vision and values to a multigenerational workforce risk reduced organizational sustainability. Grounded in generational cohort theory, communication accommodation theory, and organizational culture theory, the purpose of this multiple case study was to explore strategies that leaders of multigenerational workforces within the financial industry use to communicate organizational values and vision for a sustainable work environment. Participants comprised five financial organization leaders in New York City who successfully implemented communication strategies to communicate organizational vision and values for a sustainable work environment. Data were collected from semistructured interviews, company documents, existing literature, and journal notes. The data were analyzed using thematic analysis. The emergent themes were patience, generational or older/younger differences, modes of communication, and the availability of a scripted approach explaining how to work with a multigenerational workforce. A key recommendation for leaders is to create leadership and management training on communication strategies to realize a multigenerational workforce style and mode acceptance. The implications for positive social change include enhancing organizational sustainability and creating the potential increased employment opportunities and improved social and economic conditions.

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## Dedication

I want to dedicate this accomplishment to my mother. She ingrained her father's, my grandfather's, edict "*cuelgame papелitos. Nadie te lo quita.*" Loosely translated from Spanish "*Hang a piece of paper. No one can ever take that away from you.*" Since I was a child, I had always wanted to be known as Dr. Jose M. Peralta. Being called a doctor was a dream and something "cool" to achieve. Though I never met my grandfather, my mother ensured I knew who he was and what he stood for, education. Through my mother sharing my grandfather's edict, I can say that he and she were instrumental in beginning and finishing my journey on becoming a doctor.

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To my friends, thank you for helping me through this journey. You assisted in your unique ways. I want you to know I could not do this without your support and being there when I needed a push or a break from the craziness.

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## Section 1: Foundation of the Study

Managing today's multigenerational workforce can be challenging for organizational leaders. Understanding generational cohorts requires knowledge of structures comprising a generation. With four generations in the workforce (Traditionalists, Baby Boomers, Generation X, and Generation Y), flexibility, and the ability to recognize and lead employees based on their differences, is essential (Akhavan Sarraf, 2019). Employees' perceptions of leadership are dependent on the generation the individual belongs to, the generation the leader belongs to, and the expectations each leader holds for their employees (Heyns et al., 2019). Research shows that generationally motivated perceptions may lead to stereotypes, preconceptions, and tension amongst employees and leaders (Omilion-Hodges & Suggs, 2019). Yet, research on leaders' strategies to communicate organizational vision and values to a multigenerational workforce to develop a sustainable work environment is limited.

### **Background of the Problem**

The challenge of leading a multigenerational workforce lies in leadership's response to employees' value perceptions and how those perceptions may affect organizational values (Ashraf, 2018). Leadership must possess unique attributes and adapt varied leadership styles to bridge generational differences (Lewis & Wescott, 2017). Arrington and Dwyer (2018) deduced that success and continual sustainability depended on a leader's ability to tailor their style to meet employees' needs versus their preferences. Negotiating diversity in the workplace requires understanding and relating effectively with people different from oneself.

Organizational success depends on the workforce and leadership's ability to relate, communicate, and accept differences (Miranda & Allen, 2017). At no time in prior history has there been four generations in the workplace (Lewis & Wescott, 2017). Multiple generations offer challenges and opportunities for business leaders (Eberz, 2019). Problems in communicating, accepting differing vision and values, and best mode to communicate to an eclectic group. Leaders must communicate and be open to adjusting how they deliver organizational vision and values to a multigenerational workforce and revise their perceptions to ensure that the communication is accepted.

### **Problem Statement**

Communicating an engaging vision and values and involving employees in future modeling are significant drivers for workplace sustainability (Caulfield & Senger, 2017). A challenge is that leadership's communication of organizational vision and values may conflict with a multigenerational workforce's values, motives, and beliefs in the workplace (Veingerl Čič & Žižek, 2017). The result may be workplace conflict, which cost U.S. organizations \$359 billion in loss of time and productivity in 2015 (Meinert, 2017). The general business problem is that some leaders' inability to communicate organizational values and vision to a multigenerational workforce has a detrimental effect on organizational performance and sustainability. The specific business problem is that some finance industry leaders lack strategies to communicate organizational values and vision to multigenerational workforces to create a sustainable work environment.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore strategies that some leaders of multigenerational workforces within the finance industry use to communicate organizational values and vision for a sustainable work environment. The target population is comprised of leaders from five financial firms in New York City who have successfully implemented strategies to communicate organizational values and vision to multigenerational workforces to create a sustainable work environment. This study may have implications for positive social change by enabling organizational leaders to apply strategies for improving organizational work environments through heightened awareness of how to communicate and build trust with a multigenerational workforce. Fostering a better understanding of Traditionalist (1922-1946), Baby Boomer (1946-1964), and Generation X (1965-1980) cohorts adapting to Millennial (1980-2000) and other incoming generations may improve organizational work environments and further societal understanding of generational values (Miranda & Allen, 2017).

### **Nature of the Study**

Researchers use three primary research methods: quantitative, qualitative, and mixed (Rubin & Babbie, 2016). I used a qualitative methodology to explore strategies leadership use to communicate organizational vision and values for a sustainable work environment to a multigenerational workforce. Yin (2018) associated the qualitative researcher's role in exploring a phenomenon with analyzing participants' experiences and observing their actions and behaviors. The qualitative research method was the most appropriate because I sought to understand leadership experiences in a real-world



situation. Quantitative and mixed methods were not appropriate for the study.

Quantitative researchers classify numerical or statistical data and provide an understanding of the population's perception of the phenomenon studied (McKusker & Gunaydin, 2015). Mixed-methods researchers use qualitative and quantitative methods to emphasize strengths and diminish the approach researched (Marshall & Rossman, 2016). Because I explored strategies and interpreted what I observed, conducting mathematical analyses of numerical data is unnecessary. Therefore, a quantitative or mixed-methods approach was not suitable for my study.

Qualitative research designs include ethnography, narrative, phenomenology, and case study (Lewis, 2015; Wu et al., 2016). Using the narrative or phenomenology design, the researcher offers stories that detail life and work experiences to define the phenomenon (Neubauer et al., 2019). As the researcher, I did not seek to explore the participants' experiences for understanding; therefore, I did not use a narrative or phenomenological design. Researchers conducting ethnographies describe a group or culture based on data gathered through fieldwork (Marshall & Rossman, 2016). The study of cultural characteristics was not relevant; therefore, I did not use an ethnographic design. I performed a qualitative multiple case study to disclose effective communication strategies used by leadership in a multigenerational workforce. Yin (2018) suggested a case study research method as the best approach in a real-world context with unclear boundaries and in situations of minimal control of the phenomenon. The multiple case study design was appropriate for capturing information and identifying strategies leaders used to communicate organizational vision and values to a multigenerational workforce

and create a sustainable work environment. Through a multiple case study, a researcher can produce a rigorous study to comply with research standards and ensure validity, reliability, and replicability (Kilani & Kobziev, 2016). Using a multiple case study revealed the best strategies finance industry leaders can implement to improve the communication of values and vision to a multigenerational workforce.

### **Research Question**

What strategies do leaders use to communicate organizational vision and values to multigenerational workforces for a sustainable work environment?

### **Interview Questions**

1. How has your communication style evolved and how has it impacted your ability to lead a multigenerational workforce today?
2. What strategies have you used to communicate organizational vision and values for a sustainable work environment?
3. What challenges did you experience when implementing these strategies?
4. Which strategies were more useful to overcome the challenges experienced communicating organizational vision and values to a multigenerational workforce?
5. What strategies do you use to inspire loyalty and engagement?
6. Do you find yourself using varying communication styles with different groups?
7. What additional information would you like to offer on strategies used to communicate organizational vision and values for a sustainable work environment?

## Conceptual Framework

This study's conceptual framework included generational cohort theory, communication accommodation theory (CAT), and organizational culture theory. Generational differences influence the U.S. workforce as its ages (Kalleberg & Marsden, 2019), creating differences in values and goals. As life expectancy increases, more complexities will arise as a generation's values overlap with those of others (Sanner-Stiehr & Vandermause, 2017). Generational differences can lead to a lack of communication and understanding (Kelly et al., 2016). Organizational performance can be directly or indirectly affected by communication (Wok & Hashim, 2013).

Strauss and Howe (1991) first published the generation cohort theory in 1991. Strauss and Howe explained that generational cohorts are similar because of their age, memories, language, beliefs, habits, and lessons throughout life. However, more complexities will arise as generational values overlap (Sanner-Stiehr & Vandermause, 2017). Strauss and Howe's generation cohort theory explained generational differences and perspectives. In addition, it developed present and future leadership communication models in a multigenerational workplace.

Giles and Johnson first published the CAT in 1981. Allen (2017) considered that intergenerational communication is grounded in CAT. Wok and Hashim (2013) provided an example of CAT when communicating with a member of a different (generational) group and adapting communication strategies to the group's stereotypes' needs or styles. Using CAT produced insights on communication processes and their effects on a

multigenerational workforce, and how leadership best communicates organizational vision and values.

Schein and Bennis (1965) introduced organizational culture in 1965 as the climate and practices developed by leaders to manage organizations. Organizational culture is a crucial aspect of changing behaviors and critical to individual and organizational change (Sadiartha & Sitorus, 2018). Openness, proactive behavior, diversity, and system thinking allow a workforce to unfreeze, challenge existing assumptions and beliefs, and learn (Schein, 2017). When not tended to, culture can stabilize current norms and nonproductive and ineffective processes, rather than foster the acceptance of change and innovation (Weiner & Higgins, 2017). Using organizational culture theory enables a further understanding of employee behaviors, emphasizing organizational life complexities, and considering intangibles like values, beliefs, assumptions, perceptions, behaviors, and others (Tran, 2017). For this reason, it was appropriated to include as part of the study's conceptual framework.

### **Operational Definitions**

*Baby Boomers:* Baby Boomers were born between 1946 and 1964 (Lewis & Wescott, 2020).

*Communication strategies:* Communication strategies infuse communication efforts with a plan or agenda (Christensen, 2014).

*Generation X or Gen X:* Generational X, or Gen X, were born between 1965 and 1980 (Lewis & Wescott, 2020)

*Generation Y or Millennials:* Generation Y, also known as Millennials, were born between 1980 and 2000 (Lewis & Wescott, 2020).

*Generational cohorts or cohorts:* Generational cohorts or cohorts are a group of individuals born during a similar era and presumed to be similar because of shared experiences (Fernandez-Duran, 2016).

*Generations:* Generations are a set of historical events and cultural phenomena impacting a distinct generational group (Rudolph et al., 2018).

*Organizational sustainability:* Organizational sustainability refers to the enhancement of societal, environmental, and economic systems within business operations through the creation of meaningful values that shape strategic decision-making and builds a culture that defines desirable behavior. Organizational sustainability is the continuous process of co-evolution (Moldavska, 2017).

*Traditionalist:* Traditionalists are individuals born between 1922 and 1946 (Lewis & Wescott, 2020).

*Trust:* Trust is when individuals allow themselves to be susceptible to other individuals' actions knowing the other individual will perform actions vital to an organization regardless of monitoring or controlling ability over others (Krumm et al., 2016).

*Work values:* Work values are personal or social beliefs essential to an individual's working life (Kuron et al., 2015).

## **Assumptions, Limitations, and Delimitations**

### **Assumptions**

Perspectives assumed to be accurate by the researcher for the study to progress are called assumptions (Marshall & Rossman, 2016; Merriam & Tisdell, 2016). The study's primary focus was leaders' strategies to communicate organizational values and visions to a multigenerational workforce to create a sustainable work environment. Therefore, one assumption was that leaders generalized generational differences like their generational cohorts. However, I assumed that leaders' respective generational categorization should not influence their leadership functions and values. As the researcher, I also assumed that participants answered questions honestly and truthfully during the screening and interview process.

### **Limitations**

Limitations are the weaknesses within the study beyond the researcher's control or ability (Leedy & Ormrod, 2014; Marshall & Rossman, 2016). One limitation of the study was the sample size. I requested participation from five financial industry leaders in New York City to draw a diverse range of leaders with different generational and experience backgrounds. Even so, the sampling process may risk the overgeneralization of information because of the limited number of participants (Yilmaz, 2013).

A second limitation was individual differences, including an individual's generational background, length of service in their organization, and how different experiences as leaders affected other generations' perceptions. For example, older leaders tend to have a longer length of service and more diverse experience than inexperienced

younger leaders (Eberz, 2020). In addition, leaders with differing capabilities leading a multigenerational workforce may also have different expectations (DiFabio, 2017a).

A third limitation was the interpretation of who is considered a younger or older worker (Ratajczak, 2020). There is a blurred line between generations as they share similar phenomena molding their perceptions. For example, a 25-year-old individual in a leadership position may perceive a 50-year-old employee as older. Still, a 45-year-old may not and vice versa. The final limitation was my lack of interviewing experience. Interviews have become qualitative research's staple technique (McIntosh & Morse, 2015). The semistructured interview approach I used (see Table 1) helped address my inexperience in this area.

**Table 1**

*Conducting a Semistructured Interview*

Preparation	Semistructured interview	
	During	After
Location	Listening carefully	Extensive field notes
Technical	Managing silence	Supervision or discussion
Contextual	Being nonjudgmental	
Safety	Allowing the participant to guide	
	Exhibiting focus, professionalism, and emotional control	

*Note.* I developed this table based on McIntosh and Morse's (2015) protocol for semistructured interviews.

## **Delimitations**

Delimitations are elements that bind (Marshall & Rossman, 2016) or limit the study's scope and boundaries (Simon, 2016). Delimitations of this study existed within the population and location. Financial organization leaders from New York City, New York, do not represent all industry leaders. A sample size of five financial firms' leaders does not reflect all leaders within brokerage firms or organizations. The group interviewed may have lacked the sought-after generational diversity. In some cases, an organization's leadership group may not have encompassed all the generational cohorts identified in this study.

A final delimitation was the time frame for interviewing and verifying data for accuracy. As this study was for my dissertation and doctoral studies, time for completion did not allow me to expand the study to more participants. With more time, I could have interviewed a larger group to provide better data saturation. In addition, a more in-depth study could be done with other industries with a multigenerational workforce.

## **Significance of the Study**

Study findings may be valuable to businesses by illustrating leaders' successful strategies to communicate organizational vision and values to a multigenerational workforce. The findings could demonstrate leadership efficiency in creating effective communication strategies to explain vision and values, elicit buy-in for organizational success, and create a sustainable work environment. In addition, the study results may help leaders of financial industries to improve how they communicate with and include their employees to ensure overall organizational success.



### **Contribution to Business Practice**

The cross-fertilization of ideas and experiences guides the implementation of effective strategies to capitalize on generational work values. Lyons and Kuron (2014) claimed that age diversity creates challenges for leaders to create a sustainable work environment. Open communication channels and trust between leadership and employees are instrumental to the sustainability and improvement of organizational culture for current and future generations (DiFabio, 2017a). Generating interest in an organization's values and objectives can improve an organization (Lasierra, 2019). The study findings may expound on effective communication strategies of organizational vision and values to a multigenerational workforce and how the communication strategies can create a sustainable work environment.

### **Implications for Social Change**

Findings from this could increase acceptance, appreciation, retention, and collaboration between generational cohorts. Kaplan et al. (2017) found that intergenerational interactions and activities must improve to enhance a work environment's sustainability. Identifying values, communication, and gaps in trust in multigenerational communities could lead to improvements in leadership strategies, lower workplace tensions, and generational conflict (Kaplan et al., 2017; Lasierra, 2019). A multigenerational workforce brings a diverse set of complementary skills to a workplace. These differences may be beneficial and enriching to the workplace (Sanner-Stiehr & Vandermause, 2017). In addition to the increase in acceptance, appreciation, retention, and collaboration between generational cohorts, the findings could enhance

community relations by identifying differences, improving communication, and fostering lasting relationships among generations and leadership.

### **A Review of the Professional and Academic Literature**

In the literature review, I describe the conceptual theories: generational cohort theory, CAT, and organizational culture theory. The literature review supports the research question, What strategies do leaders use to communicate organizational vision and values to multigenerational workforces for a sustainable work environment? I analyzed and synthesized professional and academic resources to identify leaders' strategies to communicate organizational values and vision for a sustainable work environment.

I used the generational cohort theory to provide insight into the multigenerational workforce (Strauss & Howe, 1991). CAT explores how communication strategies leaders use to communicate organizational vision and values are shaped by CAT (Elhami, 2020). Organizational culture theory provides a blueprint for leaders to achieve an ethical, sustainable work environment (Camelia et al., 2019). In the study, I explored strategies that some leaders of multigenerational workforces within the finance industry use to communicate organizational values and vision for a sustainable work environment. I sought to identify communication methods that successful leaders use and share with other leaders to foster success.

Increasing diversity in today's workforce is one of the most critical issues in the past 40 years (Lapoint & Liprie-Spence, 2017). A review of the literature reveals that generational studies include topics from lifestyle to leadership. Comparing generations in

the workforce was difficult because of different definitions and differing year demarcations for each generation. Most researchers focused on the Millennial generation, with less focus on previous generational groups. This lack of focus and in-depth accounting of Traditionalists, Baby Boomers, and Generation X generations creates gaps in the literature. A limited number of studies included four generations within the workforce. The Traditionalists generation was the least represented in the literature.

This literature review encompassed 157 references (books, articles, and others) in research databases and institutional repositories such as Emerald Insight, Google Scholar, ProQuest Central, SAGE Journal, ScholarWorks, and others. I used 140 peer-reviewed articles, 116 of which were published within the past five years. I used the following keywords and phrases to search for peer-reviewed articles: *generation cohort theory*, *communication accommodation theory*, *organizational culture theory*, *multigenerational workforce*, *Millennials*, *Generation X*, *Traditionalist*, *Baby Boomers*, and *organizational and generational values*.

The literature discusses a general topic of leadership in a multigenerational workforce. Yet, there is minimal discussion of each generation's challenges (Burton et al., 2019). The literature supports the idea that leadership has a substantial impact on a multigenerational workforce. Clohisy (2017) stated that leadership attributes such as integrity, credibility, active listening, vision, fairness, humility, and caring resonate with and attract productive and innovative employees. The literature reviewed alluded to how effective leadership is essential for managing a multigenerational workforce, emphasizing leaders' need to develop knowledge and resources for leading a workforce (Burton et al.,

2019). Understanding how influential leaders communicate with a multigenerational workforce is essential to promoting a sustainable work environment.

### **Introduction to the Phenomena**

The purpose of this multiple case study was to explore leadership's ability to communicate organizational vision and values to a multigenerational workforce to create a sustainable work environment. The general business problem is that some leaders lack strategies to communicate with a multigenerational workforce. The identified business problem is that leaders require strategies to capitalize on similarities in a multigenerational workforce's work values to promote a collaborative, positive, and sustainable work environment. Workplace sustainability is critical for organizational success (Setiawan & Yuniarsih, 2018). With four generations in today's workforce, flexibility, including leading employees based on their differences, is essential in business (Dimock, 2019; Guerrero et al., 2019).

In their foundational generational theory, Strauss and Howe (1991) explained that generational stereotypes depict a generation's values, attitudes, and behaviors. They contend that generational cohorts are similar because of their age, memories, language, beliefs, habits, and lessons. Each generation interacts with other generations, and perceptions form based on those interactions (Omilion-Hodges & Suff, 2019). Workers' perceptions of leadership differences depend on each leader's generation and each employee's expectations (Heyns et al., 2019). These perceptions lead to stereotypes, preconceptions, and tension amongst employees and leaders (Ratajczak, 2020).

Understanding generational cohorts requires an understanding of structures comprising a generation. Guerrero et al. (2019) posited that concurrent generational cohorts need suitable management strategies to address organizational performance. Effective leadership is an essential factor in organizational success. Leadership challenges include understanding the workforce's composition, defining a strategy for work design, and promoting organizational performance through employee satisfaction (Stewart et al., 2017; von Bonsdorff et al., 2018). In addition, there are socioeconomic and sociodemographic corollaries applicable to a workforce's generational composition, which factor into leadership's ability to shape management disciplines (Guerrero et al., 2019). For example, declining birth rates and changing sociopolitical climates keep the older workers employed (Phillipson, 2019).

Communication accommodation is an intricate factor in organizational effectiveness, employee satisfaction, and a sustainable work environment. Scholars such as Kang and Sung (2017) have investigated how internal communication influences organizational performance and employee satisfaction. In addition, Mehra and Nickerson (2019) linked a multigenerational workforce's employee satisfaction with communication within an organization. Mehra and Nickerson hypothesized that while a perceived generational difference in the value of these two factors remains a critical sustainability component.

CAT provides a means of exploring how communication works in various contexts, including how speakers' divergence and convergence facilitate the speaker and listener (Elhami, 2020). Giles (2016) implies that linguistic shifts can be objectively

described as divergent or convergent, while they believe vice versa. As speakers' voices change rhythm, tone, and cadence, the message is accepted differently dependent on the generation and individual. A critical factor in the recipients' subjective evaluation of the leader. The larger the workforce, issues arise from generational work values concerning learning habits, knowledge retention and transfer, ethical beliefs, and how leadership communicates with a multigenerational workforce (Clohisy, 2017).

Life experiences are the basis of generational differences in values and characteristics (Akhavan Sarraf, 2019). With four generations in the workforce, differences in work values abound. Business leaders leading a multigenerational workforce must adapt the work to address the different generations (Locmele-Lunova & Cirjevskis, 2019). Different groups in the workforce present specific problems if their distinctive characteristics are not considered (Lasierra, 2019). The difference in personal and work values present in a multigenerational workforce makes the need for managing each generation differently more pronounced (Locmele-Lunova & Cirjevskis, 2019).

Leadership's response to employees' value perceptions may affect organizational values, requiring leadership style flexibility (Miranda & Allen, 2017). A multigenerational workforce results in varied values, attitudes, expectations, and insights (Lewis & Wescott, 2017). Organizations reap the benefits of having a multigenerational workforce, and leaders must take responsibility for leading them. Leadership must possess and adapt varied styles to bridge generational differences with unique leadership attributes (Lewis & Wescott, 2017). Arrington and Dwyer (2018) surmised that success

and continual sustainability depend on a leader's ability to tailor their leadership style to meet employees' needs versus their preferences.

Whether in small or large multigenerational organizations, communication differences influence perceptions within the workforce and organizational effectiveness. Leadership must recognize and acknowledge employee differences while exploring viable means to create a cohesive and sustainable work environment (Munck & Tomiotto, 2018). Increased understanding of generational value differences creates an improved working relationship amongst employees (Sanner-Stiehr & Vandermause, 2017).

No previous time in history has had four generations in the workplace simultaneously (Lewis & Wescott, 2017), offering challenges and opportunities for business leaders (Eberz, 2020). Negotiating diversity in the workplace requires understanding and relating effectively with people different from oneself. Organizational success is dependent on the workforce and leadership's ability to connect, communicate, and accept differences (Miranda & Allen, 2017). Sarraf (2018) noted that leaders could create a positive work environment that addresses what is important to each generation, fulfilling the demands of generational differences. Leaders must integrate flexible policies with four generations in the workplace to attain success (Heyns et al., 2019).

There has been an increase in studies on leadership behaviors that improve organizational performance (Sandvik et al., 2018). Researchers have examined the relationship between leaders' communication and employee satisfaction and found that positive and influential communication results in employee satisfaction (Sadiartha &

Sitorus, 2018). Sadiartha and Sitorus (2018) identified that effective leadership communication is essential to job satisfaction, organizational commitment, and employee satisfaction. Creating a sustainable work environment for a multigenerational workforce can predicate the positive influences leaders have through communication.

Urick (2019) posited that a misunderstanding of the concept of generation might cause awkward workplace interactions with other generations. Having biases grounded in those misconceptions can lead to a hampering of interactions. Organizational size can be considered positive or negative in an organization's culture and influential in respectful intergenerational interactions. Urick continued that a small workforce facilitated interactions efficiently and effectively across the generations, leading to more significant results. Meanwhile, in larger organizations, this collaboration was not as evident. Urick summarized that culture, workforce size, and business industry are essential factors affecting intergenerational workplace interactions.

In this qualitative multiple case study, I explored strategies leadership uses to communicate organizational values and vision to a multigenerational workforce to create a sustainable work environment. A significant challenge for leaders in the 21st-century workplace is the generational differences in work values (Hapsari, 2019). Generational conflicts lead to misunderstanding, compromised communication, and decreased productivity (Sanner-Stiehr & Vandermause, 2017). In this study, I built on existing leadership research on a multigenerational workforce's communication approach to create a sustainable organizational culture.



## **Conceptual Frameworks**

Jones et al. (2018) argued that scholars and practitioners muddled evidence of studies with different methodological and theoretical perspectives on generational behaviors. Guerin-Marion et al. (2018) endorsed an integrative conceptual framework in the multigenerational workforce field. The primary influence on a sustainable work environment is effective strategies communicating organizational vision and values (Genc, 2017). In my research, I incorporated generational cohort, communication accommodation, and organizational culture theories to ascertain leaders' best strategies for communicating organizational vision and values to a multigenerational workforce in the financial industry.

### ***Generational Cohort Theory***

A generational cohort defines a group of individuals born during a specific period with a shared connection (Padayachee, 2018). Strauss and Howe founded the generational cohort theory in 1991. They explained generational stereotypes as depicting values, attitudes, and behaviors of said generation. Strauss and Howe continued that generational cohorts are similar because of their age, memories, language, beliefs, habits, and lessons. Strauss and Howe's generation theory provides leadership with an understanding of generational differences and perspectives for developing communication models for present and future employees in a multigenerational workplace.

Clark (2017) defined a generation as individuals born and living within a specific period sharing collective knowledge and historical events that affect their thoughts,

attitudes, values, beliefs, behaviors, and lived experiences. Swarbrick (2017) called these shared experiences and events generational signposts. Clark explained that people who grew up in the same period experienced similar social and historical events that formed their core values and characteristics. Furthermore, these social and historical events have a lasting effect on each generation, producing life laws that future generations accept as fact (Smeak, 2020). As a result, each generation contributes capabilities and expertise during their time in an organization.

Certain particularities of each generation may influence an organization's human capital effect (Guerrero et al., 2019). As individuals pass through stages in life, their generational personalities determine their response. Parry and Urwin (2017) championed that generational cohorts' differences are based not only on age differences or life cycle stages but also on lived experiences during specific historical events. Values are stable during an individual's childhood and adolescent years. These values and world views remain throughout the individual's life and anchor their interpretations in later experiences (Kornelsen, 2019). Each cohort's behaviors and values often carry over to the workplace (Eldridge & Stevens, 2017).

Four generations make up the majority workforce: Traditionalists, Baby Boomers, Generation X, and Millennials (Akhavan Sarraf, 2019; Jones, 2017). According to the United States Bureau of Labor Statistics (2019), Traditionalists make up one percent of the multigenerational workforce, Baby Boomers are 27%, Generation X is 31%, and Millennials are the largest generation, 34% of the workforce. However, there is no consensus about the timeframe for each generational group's beginning and end (Stewart

et al., 2017). Therefore, I used Clark's (2017) generational breakdown of the generational cohorts for this study.

**Traditionalists.** Weeks and Schaffert (2019) referred to this generation as the oldest generation in American culture. Most Traditionalists have retired or aged out of the workforce. They comprise approximately one percent of the workforce (U.S. Department of Labor, 2019). Born between 1922 and 1946 (Clark, 2017), Traditionalists lived through the Great Depression and World War II, a substantial life experience challenging family and the economy (Clark, 2017). Traditionalists were considered the Silent Generation because they did not attempt to change the government, worked within the system, and stayed silent (Weeks & Schaffert, 2019).

While being a minimal portion of the workforce, Traditionalists remain in the workforce. They prefer to work in a conservative, hierarchical workplace with a top-down chain of command (Lewis & Wescott, 2020). Traditionalists believe in the importance of loyalty to an organization (Šestáková, 2019). Šestáková (2019) set forth the strength of Traditionalists as their accumulated knowledge and transfer of this knowledge as vital to a sustainable work environment and organizational development. Andre (2018) generalized that Traditionalists are hardworking, cautious, and willing to sacrifice for the common good. Andre continued that they value loyalty and expect the same in return. Traditionalists bring many years of experience to the workforce and are often stereotyped as not modernizing.

**Baby Boomers.** Baby Boomers were born between 1946 and 1964 (Clark, 2017). They continue to work well into their 60s and early 70s (Bradley et al., 2015) and make

up 27% of the workforce (U.S. Department of Labor, 2019). Baby Boomers are more committed to their jobs, have higher job satisfaction, and are less likely to leave an organization. They are inclined to follow the rules and regulations closer than younger generations (Clark, 2017). Baby Boomers are collaborative and optimistic (Lapoint & Liprie-Spence, 2017).

Personal growth is an essential part of Baby Boomers' makeup (Lewis & Wescott, 2017). Baby Boomers strongly believe in working long hours to get the job done (Hisel, 2020). This generation has high satisfaction and commitment to the job while maintaining a lower willingness to quit than other generations (Lewis & Wescott, 2017). Baby Boomers have built a perfect career and excelled (Lewis & Wescott, 2017). They respond best to having information explained through clear communication, which involves support and rapport with leadership (Lewis & Wescott, 2017). The use of technology has been a challenge for Baby Boomers (Sanner-Stier & Vandermause, 2017). If required, they will use the internet but preferred a library as the primary research source (Hisel, 2020). As younger counterparts emerged with technology, Baby Boomers became fluent in using cell phones and tablets (Lapoint & Liprie-Spence, 2017).

**Generation X.** Generation X was born between 1964 and 1980 (Clark, 2017). Members of Gen X comprise 31% of the workforce (U.S. Department of Labor, 2019). Generation X is known as *latchkey kids* because they tend to be alone after school and lock themselves in their homes while their parents work (Hisel, 2020). During their younger years, many insecurities and instabilities surrounded Generation X, which forced them to grow up and become adults at a young age (Taylor, 2018).

Generation X is considered one of the most educated generations in United States history (Fixen, 2018). Bettering through training opportunities and education is a staple for this generation (Fixen, 2018). It exhibits an impatient side, prefers flexible hours, and requires a work-life balance (David et al., 2017). Generation X prefers to do things their way, question authority with no hesitation, and believe that the job is just a job (Lewis & Wescott, 2017). Generation X prefers to communicate via email, personal contact, telephone, or text, and the desire to receive feedback (Lapoint & Liprie-Spence, 2017)

Generation X rarely is referred to in pop culture and media, especially when compared to Baby Boomers and Millennials (Biggar & Hood, 2017; Poo, 2017). Urick (2017) was a panel moderator with a series of questions by intergenerational experts. Through the interview, Urick compiled various themes to describe Generation X. The central theme was that Generation X is *sandwiched* between two large generations, Baby Boomers, and the emerging Millennials. Few formal leadership opportunities for Generation X due to poor timing. Baehr, one of the panelists, claimed Generation X is bitter, having to rise between the rules of Baby Boomers and an emerging Millennial generation (Urick, 2017). Another panelist, Sean Lyons, added that Generation X will always be undervalued (Urick, 2017). Urick summarized that the panel labeled Generation X cohorts as *forgotten, the middle child, and survivors* looking to balance expectations, behaviors, and values between Baby Boomers and Millennials.

**Millennials.** Generation Y, also known as Millennials, were born between 1980 and 2000 (Clark, 2017) and have become the largest working generation, making up 34% of the workforce (U.S. Department of Labor, 2019). Both parents nurtured Millennials

(Sanner, 2020), leading them to be confident (Lewis & Wescott, 2017). In addition, millennials participated in teams that received recognition during their childhood regardless of whether they won, leading to recognition expectations regardless of their job performance (Weirich, 2017).

In terms of work, they require an excellent working environment and relationships. Yet, they lack organizational commitment, not staying long with one organization (Petriglieri et al., 2019). Clark (2017) stated that Millennials do not constrain themselves to one job or career. Millennials prefer working multiple temporary jobs, which provide flexibility and freedom to seek a work-life balance (Petriglieri et al., 2019). Millennials prefer an uninterrupted flow of work and play. This generation desires work-life balance due to its importance in personal life (Sarwono, 2020). Kumar & Velmurugan (2018) claimed that Millennials need constant feedback and a personal relationship.

Millennials are technologically savvy, sociable, diverse, and tenacious (Kumar & Velmurugan, 2018). They prefer to communicate via emails, texts, and instant messaging versus phone or email (Valenti, 2019). Many Millennials have an addiction to technology, social media, blogs, and gaming systems, allowing it to dominate their lives (Lewis & Wescott, 2017). Millennials were not taught how to be independent during their childhood and now need constant reassurance, feedback, and support in the workplace (Weichert, 2017).

### ***Communication Accommodation Theory***

CAT focuses on the identification of communication behavior changes. CAT is the verbal and nonverbal adjustment in speech, a strategy used to appreciate or avoid people from different groups or cultures (Elhami, 2020). CAT aims to recognize communication strategies, association with social identity theory, and the influence of objective and subjective accommodation to understand communication behaviors' influence on interactions between different and similar background individuals.

According to CAT, people communicate to minimize their social differences (convergence), maximize their differences (divergence), or maintain the status quo (maintenance) through verbal and nonverbal means. Gallois et al. (2018) proposed that CAT is interaction and understanding at an interpersonal and intergroup level. The authors furthered the theory predicted and explained the adjustments made to create, maintain, and decrease social distances during individual interactions.

CAT separates communication interaction into similarities emphasized during exchanges (convergence) and differences highlighted in communication interactions (divergence) (Elhami, 2020). Convergence and divergence occur throughout the communication process. For example, individuals converge (are drawn) towards communicators they like, respect, or have power over them. Conversely, individuals diverge (distance) from communicators they dislike, disrespect, or regard below them. Therefore, it is essential to understand the factors contributing to communication perceptions and the potential gravity of the outcome.

Intergenerational communication is complicated yet dynamic, making predictions about which behaviors produce reactions (Lin, 2017). People adapt and adjust their

communication to accomplish and communicate their goals (Elhami, 2020). Speech accommodation theory (SAT) is an interpersonal communication theory rooted in social psychology exploring the dynamics between people and the motivation to show friendliness and admiration or the opposite (Gallois et al., 2018). Speech accommodation theory created a relational dynamic and showed motivations and admirations between people (Gallois et al., 2018).

CAT incorporates social identity theory (SIT). SIT divides an individual's self-concept into personal and social identity (Tajfel & Turner, 1979). SIT derives from comparing an individual's groups (in-groups) and the groups they do not belong to (out-groups). CAT's usefulness is detecting cultural and national differences between individuals and groups (Schein, 2017). Leaders' ability to communicate with employees requires an objective understanding of cultural, national, generational differences, and similarities. It includes them in organizational vision and values.

**Four Basic Accommodation Strategies.** CAT has four basic communication strategies, accommodation, under-accommodation, over-accommodation, and non-accommodation (Giles, 2016; Coupland et al., 1991).

**Accommodation.** Accommodation is communicating with the process of reducing or magnifying differences between people (Lin, 2017). It includes convergence and divergence through communication, an essential aspect of both sides (Lin, 2017). If there is not too much or too little accommodation, it is considered positive (Gasiorek & Dragojevic, 2017).



***Under-accommodation.*** Under-accommodation is the receiver's perception that a sender is placing minimal effort into the interaction. Intergenerational communication is often associated with under-accommodation as young people under-accommodate earlier generations because of an older generation's opinion (Gasiorek & Dragojevic, 2019). Older people do not understand them, and older people believe that younger people talk too much about aging (Gasiorek & Dragojevic, 2017; Lin, 2017). As a result, young American adults tend to use under-accommodation more often than over-accommodation.

***Over-accommodation.*** Over-accommodation is the receiver's perception that a sender is overemphasizing the delivery of a message to achieve convergence. Over-communication is common in intergenerational communication, just as under-communication. Older generations maintain the impression that younger people have a condescending tone, patronize, slow their speech, use simple grammar, and excessively smile and touch, which is annoying (Lyn, 2017). Over- and under-accommodation are not relevant to the action, but the intent of the speaker's motives is the matter (Gasiorek & Dragojevic, 2017; Lin, 2017). Under- and over-accommodation are social attributions, not objective behaviors (Gasiorek & Dragojevic, 2017; Lin, 2017).

***Non-accommodation.*** Non-accommodation is the perception that a conversation is not favorable. Non-accommodation is all-inclusive of non-adaptive forms of communication-maintenance, namely, divergence, over-and under-accommodation (Gasiorek & Dragojevic, 2019). Since under-accommodation and over-accommodation are subjective to the receiver, one may perceive the communication as non-

accommodative. At the same time, another will think it is accommodative while hearing or participating in the same dialogue.

**Communication Accommodation Theory in the Workplace.** Generational differences in the workplace are not widely investigated; few works exist on how these differences influence work outcomes (Mehra & Nickerson, 2019). Therefore, leaders must change how they communicate with employees to create an organizational culture of respect (Mehra & Nickerson, 2019). Mehra and Nickerson explained that understanding the differences between the multigenerational employees is essential in attracting, leading, and retaining employees of all ages.

CAT helped analyze communication in the workplace between leadership and a multigenerational workforce. Using CAT examines individualistic perceptions of communication between parties and how they differ based on the communication strategies (Gasiorek & Dragojevic, 2017). In addition, CAT explains the approach used to establish social identity. Understanding how leadership communicates and the workforce's perceptions of the conversation will provide insight into communicating organizational vision and values to create a sustainable working environment.

### ***Organizational Culture***

Organizational culture is the inclusive organizational construct that incorporates patterns that form a workforce's socialization behaviors and experiences, creating norms and work settings that promote results and success (Odor, 2018). Organizational culture includes the interaction between the workforce and other stakeholders (Pathriyanage, 2019). An organization's ability to adapt its purpose to the environment links to

organizational success (Gochhayat et al., 2017). Using organizational culture theory is a way to improve understanding of employee behaviors, emphasizing the complexities of organizational life and consider the workforce and intangibles like values, beliefs, assumptions, perceptions, behaviors, and others (Tran, 2017)

Sadiartha and Sitorus (2018) defined organizational culture as the value system that drives people to make decisions subconsciously and silently in an organization. They furthered the description as a set of values, beliefs, and behavior patterns that differentiate organizations. Organizational culture is established through a variety of sources but primarily from leadership (Pathriyanage, 2019). System thinking provides a coherent and sensible model of the dynamic and ever-changing business operations world to improve and learn organizational intelligence, growth, and transformation (Mella & Gazzola, 2019).

Openness, proactive behavior, diversity, and system thinking allowed the workforce to unfreeze, challenge existing assumptions and beliefs, and learn (Schein, 2017). The workforce's learning experiences and new beliefs and assumptions of leaders and members can shape organizational culture (Odor, 2018). Leadership strongly affects culture because employees mirror their leader's actions (Gochhayat et al., 2017). When not tended to, culture can stabilize nonproductive and ineffective processes and norms rather than accept change and innovation (Weiner & Higgins, 2017).

Norms and values reflect organizational culture established by leaders and teach employees to think along with the organization (Page et al., 2019). This connection is emphatic and has a direct influence on organizational performance (Warrick, 2017).

Leaders directly influence how to conduct work and norms relate to the distribution of power, engagement, and respect in the workplace (Page et al., 2019). Page et al. continued that culture and leadership interconnect, placing pressure on leadership to create and cultivate a culture that supports organizational values. Leaders ensure organizational culture remains intact to create a sense of purpose, vision, and trust as organizational demands become complicated (Schein, 2017). The survivability of the organization's culture relies on the leader's ability to communicate, connect, and build trust with the workforce.

A healthy organizational culture is open to challenges. Theorists argued that organizations are most likely to be successful when they maintain a healthy culture. A significant challenge for organizations is creating a healthy society by promoting a healthy organization (Di Fabio, 2017a; Di Fabio et al., 2017). Leadership styles that support positive relationships and empower employees through autonomy and self-organization make an efficient, happy, and globally competitive workplace (Di Fabio, 2017a; Di Fabio, 2017b; Di Fabio et al., 2017). The authors proposed that leaders must create boundaries to make an organization fluid and improve relationships at the inter-organizational level. Promoting partnership and networking within and outside an organization can improve business prospects and performance (Di Fabio, 2017a).

Although considered significant, the drive to understand leadership and organizational culture has produced limited studies examining the impact of leadership style on organizational culture. According to Setiawan and Yuniarsih (2018), leaders can follow limited leadership strategies to predict organizational success. Organizational

culture data found in studies focusing on productivity, organizational structure, leadership style, efficiency, and effectiveness. Hultman (2020) expressed that to improve overall organizational success, leadership needs the critical factor of recognizing organizational culture. Theorists posit that organizations are most likely to be successful when they maintain a healthy culture.

### **Bridging the Generation Gap**

A positive step towards workplace sustainability is understanding each generation's uniqueness and what each brings to the organization. With four generations in the workforce, leaders must address generational differences as a dominant factor (Burton et al., 2019). Generational differences in opinions and beliefs of employees of different generations with different values working together sharing physical space form a gap (Ashraf, 2018; Subramanian, 2017). Ashraf continued that understanding the gap is essential. Understanding individual coworkers should replace stereotypes and generalizations. There is an opportunity for further research on how an individual's commitment to coworkers, as opposed to a commitment to leadership, is affected by an individual's generational cohort (Burton et al., 2019).

Although the boundary between generations is blurred, understanding differing generational characteristics lead to more knowledge of organizational dynamics and leadership mechanisms (Burton et al., 2019). That information is necessary for leadership to integrate a multigenerational workforce and generate commitment (Akhavan Sarraf, 2020). Orłowski et al. (2017) conducted a study that addressed the workforce's

commitment. Based on their survey, they found perceived conflict regarding tasks and processes resulted in negative employee commitment.

Similar experiences and events commonplace to a generation, including preferences to leadership styles and legitimizing generational diversity, must be recognized, and understood by organizational leaders (Weeks & Schaffert, 2019). Organizational strategies must consider getting the best out of the workforce (Subramanian, 2017). Conflict creates negative repercussions within the workplace. Leaders must be aware and focus on the conflict that generational differences create. It can have a detrimental effect on the professional climate (Ditlmann et al., 2017). There are differences in work values amongst a multigenerational workforce, and leaders must develop their knowledge and understanding of those differences (Akhavan Sarraf, 2019).

### **Communicating Organizational Vision and Values**

A multigenerational workforce encompasses all industries. Leadership must navigate generational differences, communicate organizational vision and values, and create a sustainable work environment. Communication is a crucial factor in organizational effectiveness and employee satisfaction. Scholars have linked organizational communication and employee satisfaction with the influence on organizational culture (Kang & Sung, 2017; Mehra & Nickerson, 2019). Mehra and Nickerson (2019) found that organizational communication was positively related to job satisfaction. However, generational categorization moderated the relationship between communication and satisfaction. Research confirms that organizational mission and vision influence individual performance (Dermol & Širca, 2018). Therefore, leadership

should implement a strategy for communicating and facilitating a daily organizational vision and values culture throughout the workforce (Dermol & Širca, 2018).

Communication within an organization is crucial for organizational effectiveness. Having diverse methods of communicating with the workforce is integral to leadership (Sponaugle, 2019). Sponaugle (2019) emphasized that not every Traditionalist, Baby Boomers, Generation X, and Millennials are created equal. While generational adults can be technologically sufficient because of their surroundings, such as children, they may not prefer communicating through similar means such as email, text, phones, meetings, and other forms for work. How they communicate at work may be different from the way they communicate during their own time.

Sponaugle (2019) stated that one research subject shared that leadership is aware of generational issues but cannot manage them the same way. However, although researchers have investigated generational differences in the workplace, there is little focus on how leadership manages these differences (Eberz, 2020). Understanding the workforce's varying values can allow leadership to interconnect an organization's and workforce's values, create sustainability, and improve the work environment. There is a rising interest among human resource specialists and researchers in identifying leadership strategies for managing a multigenerational workforce (Locmele-Lunova & Cirjevskis, 2019). Literature supports the concept that leadership needs to understand generational values to communicate with employees and create a sustainable work environment.

Values are the driving force that dictates an individual's beliefs of what is right or wrong. Cote (2019) classified values within personal/organizational context as abstract

ideals motivating how individuals think at work and underlying beliefs and attitudes that define an organization. Values are enduring beliefs related to socially and personally preferred conduct (Odor, 2018). Throughout life, individuals compile beliefs through impactful events, generational upbringing, and other happenings, which may form the individual's ideas of the best ways to work and live.

Hultman (2020) stated that values significantly impact work attitude, individual and organizational behavior. Leaders must understand how employees value their job influences their work attitude (Kelleberg & Marsden, 2019). Throughout the research, authors have voiced that employees' values influence work attitude and emphasize leaders' importance in understanding the multigenerational workforce and their values. Like humans, organizations move forward through the years and develop values to match their environment. Kalleberg and Marsden (2019) defined organizational values as a set of commonly held beliefs to attain goals. Values are the purpose and intent of an organization (Page et al., 2019), and play a vital role in an organization's culture and ethics (Tran, 2017), and executive and leadership decision-making and behavior (Tran, 2017).

A mission statement conveys organizational values through established goals, organizational structure, available resources, policies and procedures, and actions towards the community they serve (Schein, 2017). The establishment of organizational vision and values explains leadership's role in the workforce and community. Expecting resistance by some in the workforce, leaders must clearly understand and effectively communicate to explain and support an organization's vision and values (Page & Schoder, 2019). The



vision should describe the tenets an organization will value most in its organizational culture and lead to the correct results (Ciampa, 2017). Successful leaders inspire communication and encourage acceptance by linking organizational values with the multigenerational workforce's values (Caulfield & Senger, 2017). Throughout the research, a healthy relationship between communicated vision statements exists, workforce acceptance of vision statements, and organizational outcomes.

### **Work Values and Conflicts in the Workplace**

According to Purc and Laguna (2019), values are social conclusions individuals adapt through behaviors during life situations. An individual's value system creates a hierarchal structure where some values are significantly more essential and favored over others (Locmele-Lunova & Cirjevskis, 2019). Variations in work values may be distinct because of developmental or situational life experiences in psychological adjustment towards work and social roles (Kelleberg & Marsden, 2019).

One source of conflict is generational differences in values and characteristics based on different life experiences (Saraf 2019). Conflict in an organization happens for a variety of reasons. Misunderstanding a persons' perspective, intent, or perception of a situation causes conflict (André, 2018). André continued that if the unresolved conflict becomes suppressed, it leads to significant conflict unless there is a mutual agreement to a solution and commitment in the agreement's execution.

An example of an organizational value that may be conflicting across generations is organizational learning (Smith & Garriety, 2020). Smith and Garriety continued that while education may be of value across generations, its application may determine its

success in the multigenerational workforce. The training must consider how each generation learns best. Older generations mostly prefer reading and classroom experience (Hisel, 2020). Meanwhile, the younger generations prefer virtual and electronic training. Leaders must set and communicate clear expectations to mitigate misunderstandings and frustrations amongst a multigenerational workforce.

Understanding variations in a multigenerational workforce's work values is vital to leaders seeking to minimize workplace conflict while creating a sustainable work environment. Inclusive strategies and policies that celebrate individual differences are crucial to synergize a multigenerational workforce (Miranda & Allen, 2017). Successful organizations have robust, inclusive strategies and policies to ensure that an organization's strategy and values include all workforce levels.

Communication of organizational values and vision plays a vital role in ensuring the multigenerational workforce's acceptance. A leader's responsibility is to communicate organizational values and vision to the workforce (Tran, 2017). Not addressing the disparity between an individual and an organization's values will negatively impact the individual's performance, suppress motivation, create dissatisfaction, increase stress and turnover (Lewis & Wescott, 2020). An individual's perception of an organization influences their behavior (Muizu & Namuri, 2019). The similarity in values creates a positive work attitude and organizational outcomes (Latta, 2020). Assurances of acceptability from organizational leaders and the workforce are necessary to merge and accept values and vision to create a sustainable workplace.

The ever-changing landscape of an organization may keep it in flux for some time. Leadership's understanding of a multigenerational workforce is key to organizational success. Latta (2020) explained that considering and understanding the multigenerational workforce impacts employee productivity, innovation, and corporate citizenship. Leadership's focus should be on understanding generational values and attitudes to enhance productivity, morale, and retention (Saraf, 2019). As each generation comes to a leadership position, individual values will impact an organization, organizational culture, and HR program achievement and breakdown (Corte et al., 2017). Making significant change and becoming inclusive of multigenerational values might assure continued sustainability.

### **Differences in Generational Work Values, Ethics, and Leadership Styles**

Generational differences revolve around a set core of values and conclude with the generations' thoughts on how things are. Differences in values and perceptions generate conflicts and generational divides as one side fails to understand the other's perspective at the core level (Miranda & Allen, 2017). Differences also reflect gradual trend shifts in workplace-related attitudes and values (Campbell et al., 2017). These conflicts present leaders with recruitment, engagement, and retention challenges (Miranda & Allen, 2017). Effectiveness and sustainability are maintained when leaders mitigate problems and ensure workforce inclusivity (Heyns & Kerr, 2018; Valiskas & Jakštaitė, 2017).

Table 2 provides a synopsis of generational work values and leadership styles each generation prefers.

**Table 2***Generational Work Values and Leadership Style*

Generations	Work Values	Leadership Style
Traditionalist	Loyal, dependable, obedient	Direct, command and control, take charge, delegate, make decisions
Baby Boomers	Consensus, team building, service-oriented, good at relationship building	Participative style, consensus, and work ethic lacking in skills (i.e., understanding, listening, communicating, motivating, delegating)
Generation X	Adaptable, independent, creative, not intimidated	Fairness, competence, straightforwardness, challenge thinking/ideas of others, bring others to decision making, lack of people skills
Generation Y	Collectivism, optimism of the future, trust	Reasonably new to leadership, lean toward a transformational and participative leadership style

*Note:* Adapted from Al-Asfour, A., & Lettau, L. (2014). Strategies for leadership styles for the multigenerational workforce. *Journal of Leadership, Accountability, & Ethics*, 11(2), 58-69 (<http://www.na-businesspress.com/jlaeopen.html>), Salahuddin, M. M. (2010). Generational differences impact on leadership style and organizational success. *Journal of Diversity Management*, 5(2), 1-6. (<https://doi.org/10.19030/jdm.v5i2.805>)  
 Zemke, R., Raines, B., & Flipczak, B. (2013). *Generations At Work – Managing the Clash of Boomers, Gen Xers*, (2nd ed.). American Management Association

Mencl and Lester (2014) examined actual versus perceived generational

differences in workplace perceptions using the best places to work characteristics. Mencl and Lester selected teamwork and collaboration factors, flexible work arrangements, challenging jobs, and other factors like older and younger generations. The authors restricted the study to Baby Boomers, Generation X, and Generation Y. However, their research extends to all generational cohorts. Although searching for differences, the authors found more similarities between generations regarding their values and workplace perceptions.

Mencl and Lester focused on ten values from the best places for a multigenerational workforce to work. In seven of the ten factors, the authors described generational similarities outnumbered differences. According to their findings, educating leadership about actual generational similarities, the importance of training and development, and tailoring human resources management practices to provide employee support, are vital to eliminating generational stereotypes that hinder multigenerational collaboration. My research sought to find how organizational leaders' communication with a multigenerational workforce can encourage trust, encourage dialogue, organizational commitment, and create a sustainable work environment.

Zabel et al. (2017) measured the Protestant Work Ethic (PWE) associated with high work ethics, increased job satisfaction, organizational commitment, job performance, and conscientiousness. The authors stated that PWE is an essential precursor for enabling twenty-first-century skills. They identified soft skills such as integrity, communication, interpersonal skills, teamwork skills, moral and ethical behavior as executive skills required for success. By standardizing mean scores and

conducting their analysis in phases, the authors increased their precision, creating a new approach to measuring generational differences in workplace attitudes. This study was critical because the authors identified the importance of communication and interpersonal skills when leading a workforce.

Differences in work ethics and values have varied amongst the multigenerational workforce in studies. Scholars claim that generational differences are the main reason for conflicts arising in organizations. Zabel and colleagues (2017) claimed that research on generational differences focused on the differences in work ethic and conflict motivation. They found there was not a difference in work ethic between generations. An explanation for their findings considered the younger generation's integration into the workplace and how this affected their work ethic. Future research is necessary to ascertain whether generational differences affect twenty-first-century skills to continue or contrast the consensus.

### **Leadership, Trust, Communication, and the Multigenerational Workforce**

The workforce is a human resource management matter due to three issues: (a) concerning work, generations have differences in values and expectations; (b) compared to previous periods, generations work together for more extended periods, linking lifelong learning policies, raising the retirement age, reducing pension and contributing to older workers staying longer in the workforce; and (c) organizational practices are contradictory, reducing high-quality jobs (Locmele-Lunova & Cirjevskis, 2019). Accountability, learning, adapting to a changing work environment, and communicating across the workforce are essential leadership skills (Miranda & Allen, 2017). Other

necessary skills for effective leadership are managing conflict, innovating, inspiring vision, setting examples, and promoting self-improvement (Miranda & Allen, 2017). Leaders must combine and use these skills for organizational success. In addition, leaders must navigate how to communicate effectively and foster satisfaction in the workplace, given everyone's generational values.

Employee views of leadership practices improve as leaders understand each generations' view of proper management (Cho & Song, 2017). Leaders who understand employees' different views of individual management practices are likely to be productive with a multigenerational workforce (Blackman et al., 2017). Being cognizant of the influence of generational views on organizational effectiveness produces a challenge to leaders (Miranda & Allen, 2017; Sadiartha & Sitorus, 2018). Cho and Song (2017) found that employee trust in leadership is essential in improving organizational culture. Thus, leadership's role can affect the workforce and towards a sustainable work environment.

Leading generational differences have been the focus of studies. Researchers have provided various ways to lead a multigenerational workforce, most focusing on motivation, diversity, engagements, and so forth. For example, Ashraf (2018) detailed five techniques focused on leading generational differences to reveal actions, situations, principles, and behaviors that distinguish each generation. The list's behavioral approach provided leadership with tangible techniques to manage within a multigenerational workforce while considering differences (Akhavan Sarraf, 2018). These techniques are:

1. Focus on goals and set clear expectations. Each generation approaches tasks differently, based on their strengths. Set the objective and provide belief in each cohort.
2. Include all generational employees and practice cross mentorship. Each generation brings strength, experiences, and awareness. Teamwork leads to quicker achievement.
3. Break the bonds of tradition and include all within an organization to ensure the use of the best idea.
4. Show the workforce the future, inform them where an organization is moving towards and how they are a part of this improving culture.
5. Encourage a balance between human resources and their work and private lives.

These techniques take into consideration the diversity of management styles (Akhavan Sarraf, 2019). Leaders' effectiveness is known as mediating mechanisms that link generational styles' openness and influence organizational performance (Sarwono & Bernato, 2020). Stutzer (2019) claimed that leadership's understanding of generations' similarities and strengths is useful for improving workplace communication and teamwork. Accommodating mixed perceptions means identifying generational groups' strengths and weaknesses and considering the most appropriate ways to communicate.

Organizational success is dependent on the appropriate use of all employees' potential regardless of their age (Ratajczak, 2020). Ratajczak set forth that awareness and acceptance of generational differences will recognize employees' potential, values, needs,



and work style and communication. In addition, developing and communicating strong organizational values to employees will minimize workplace conflict and misunderstandings.

### **Challenges and Perceptions**

Organizational goals are set to meet the needs and expectations of customers and stakeholders. Organizations must simultaneously achieve, maintain, and improve their capability and performance to meet these goals while addressing generational stereotypes (Stanton, 2017). Each generational cohort has stereotypical views of themselves and other generational cohorts. For example, Valiskas and Jakštaitė (2017) found that all generations agree that they appreciate a good work environment but differ in their perception of a good work environment. Leaders must understand the challenges in leading each generational group and their perceptions towards one another (see Table 3).

**Table 3**

*Challenges in Leading Four Generations in the Workforce*

Behavior-based tension	Older generation perception of a younger generation	Younger generation perception of an older generation
Earned vs. entitled	The younger generation behaved with a sense of entitlement; they should receive everything. Perceive themselves as a more stable and lower likelihood of changing employment	Perceived older generations as overinvested in their work and (younger generations) sought work-life balance and willingness to switch employment to get ahead
High tech vs. low tech	Perceive the younger generation uses technology as transparent and what they do and not as a tool.	Perceived older generation is reluctant to accept technological advances,

Skilled vs. unskilled communication	The younger generation's lack of communication skills is frustrating, unclear messages, and lack of information.	especially communication (i.e., texting). Skilled communication is entirely different from the younger generation.
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Note. Adapted from Urick et al. (2016). Understanding and managing intergenerational conflict: An examination of influences and strategies. *Work, Aging and Retirement*, 3(2), 166-185. (<https://doi.org/10.1093/workar/waw009>)

Stanton (2017) stated that Traditionalists consider different cohorts as positive entities of the workforce. Their value towards employee loyalty puts them at odds with younger generational cohorts who do not share their values (Guerrero, 2019). Generation-based discrimination is a concern for Traditionalists creating conflict, whether the basis is factual or perceived (Stanton, 2017). Traditionalists felt that younger generations have poor work ethics, low energy, and do not care for work (Weeks & Schaffert, 2019).

Boomers consider younger generations as slackers with no work ethic. Gordon (2017) stated that Baby Boomers perceived that younger generations lacked experience and relied on technology. Baby Boomers felt Traditionalists worked to work. Meanwhile, Baby Boomers preferred work-life balance (Weeks & Schaffert, 2019). Baby Boomers' views of Traditionalists are optimistic and believe the workforce can learn from their experiences.

Generation X believed that Millennials lacked a work ethic but acknowledged that Millennials have a remarkable ability to grasp new concepts and skills (Gordon, 2017). They felt that Millennials were more concerned with their personal life (Weeks &

Schaffert, 2019). Generation X considered Traditionalists as role models and team players who worked with no complaints (Weeks & Schaffert, 2019). However, they maintained an adversarial relationship with Baby Boomers, whom they believed were too rigid and lacked appropriate work-life balance (Gordon, 2017). They perceive Traditionalists and Baby Boomers as slow learners who struggle with technology (Stanton, 2017).

Millennials have a technological advantage over other generations because they were born into technology (Stanton, 2017). Millennials perceived Traditionalists as disciplined and hard-working (Guerrero, 2019). They related to Baby Boomers as ambitious, career-focused, like their life focus (Gordon, 2017). This ambition caused Generation X cohorts problems who focused on work/life balance (Guerrero, 2019). Millennials felt Traditionalists and Baby Boomers worked too much for money (Weeks & Schaffert, 2019). They perceived Traditionalists and Baby Boomers to continue to work because they were working towards retirement (Weeks & Schaffert, 2019). Assurances that equaled opportunities benefited all age groups should be managed responsibly (Mella & Gazzola, 2019).

### **Leaders' Style and Approach to Communication**

A multigenerational workforce offered unique challenges and opportunities for leaders. Generational diversity is a resource of older and younger generations' talents for leadership to manage and develop (Hapsari et al., 2019). However, a conventional approach was impractical for leading a multigenerational workforce. Leaders must adopt

a flexible and adaptable approach to create a cohesive and productive multigenerational workforce (McNally, 2017).

The relationship between organizational leadership, employee attitudes, and the number of personnel from each generation occupying leadership roles is vital. Leadership levels are essential in research on generational differences in employees' attitudes and acceptance of organizational vision and values because older generational cohorts fill leader positions (Heyns & Kerr, 2018). However, studies on generational differences have rarely considered organizational leaders' effect on work attitudes and differences across generations (Hapsari et al., 2019). The differences in job characteristics and workforce across leadership levels may be associated with work motivation differences (Hapsari et al., 2019). Understanding these differences may provide answers on how best to communicate organizational vision and values to a multigenerational workforce.

Leaders direct the affairs of an organization while providing definition and direction for the achievement of mutual goals. Sanner (2017) claimed that leaders must acknowledge and address workplace conflicts caused by generational differences. In addition, leaders are responsible for engaging, communicating, motivating, and addressing multigenerational issues while providing psychological safety and a positive work environment.

A multigenerational workforce requires engaged leaders to understand generational differences and affect productivity (Sanner, 2017). Leaders cannot engage the present workforce or recruit new talent without diagnosing, adapting, and communicating effectively with a multigenerational workforce. Leaders must display

organizational vision, integrate the workforce, provide fulfillment, set standards and goals, involve the working community, and be charismatic.

Also, organizational strategies to engage a multigenerational workforce requires investment in talent development, workforce promotion, and talent management. Career development, enhancement of technical expertise, and workforce evaluation are effective strategies for addressing the need for engagement. Miranda and Allen (2017) concluded that leaders need time, resources, and strategies to transmute their multigenerational workforce into an interconnected workforce.

Leaders of younger generations must provide structure, encourage self-confidence, and prepare to answer questions from inquisitive Millennials and future generations (Burton et al., 2019; Valiskas & Jakštaitė, 2017). Younger generations respond to leaders who mentor and participate and not just manage (Miranda & Allen, 2017). Millennials do not hold leadership vision as necessary, rather the leaders' honesty, communication abilities, and performance recognition (Yildirim & Korkmaz, 2017).

Odor (2018) defined an organization as a social unit comprised of individuals pursuing collective goals. Career development, enhancement of technical expertise, and workforce evaluation are effective strategies for addressing the need for engagement. The authors concluded that leaders need time, resources, and strategies to transform their multigenerational workforce into an interconnected workforce for organizational strategies to become invested.

## **Employee Engagement and Motivation**

Sadiartha and Sitorus (2018) characterized leadership communication as inspiring and encouraging an individual or group through meaningful information sharing. To achieve a sustainable work environment, leadership must ensure that employees maintain their motivation through communication. Motivated employees are loyal employees, and leadership communication can be a precursor to increasing or decreasing employee engagement and motivation (Heyns & Kerr, 2018). Productivity is linked to the motivation of an organization's most critical resource, its employees. However, employee engagement and motivation are a challenge in today's workplace. A highly motivated workforce contributes to increased employee engagement (Bang et al., 2017).

A decrease in organizational productivity may be due to various reasons, including age diversity and differences in values and work styles (Sanner-Stiehr & Vandermause, 2017). Meeting the workforce's needs through proper training and establishing a sustainable work environment is an organization's responsibility. Employees, in turn, will positively contribute to an organization (Osborne & Hammoud, 2017). An organization must perceive the importance of employee engagement and its effect on motivation and not forget the continual increase of employee engagement (Juvesa et al., 2020). The effectiveness in ensuring the workforce is engaged and motivated warrants the success of an organization.

## **Strategies for Communicating With Multigenerational Workforce**

Organizational leaders claim to know the differences between generations and employees but failed to solve the related problems (Hapsari et al., 2019). A

multigenerational workforce finds it challenging to communicate with one another.

Meanwhile, organizational leaders struggle to ensure smooth communications amongst employees, accomplish organizational goals, and steady leadership while failing to create a sustainable work environment (Valiskas & Jakštaitė, 2017).

Leaders admit that no one style is entirely suitable for leading a multigenerational workforce (Valiskas & Jakštaitė, 2017). The authors described that Millennials prefer a strong leader who provides learning opportunities to improve their careers, is open to change, and accepts their opinions. Meanwhile, Traditionalists and Baby Boomers prefer to work with trustworthy leaders. In turn, Generation X wants an engaging and inspiring leader who sets an example, and they can follow into the future (Valiskas & Jakštaitė, 2017).

Overall, the multigenerational workforce looks to leadership that will respect their values and builds trust (U.S. Department of Labor, 2019). Trust in leadership is vital to organizational success (Edelman, 2018; Shafique & Loo-See, 2018). However, as life stages change, leadership communication must accommodate the workforce's differing values while creating a trusting environment.

One aspect of leadership is understanding the importance of building trust to create a sustainable workplace and improve organizational culture (Arrington & Dwyer, 2018). However, most leaders fail to relate to employees as a commitment to the workforce and do not have the required skillset to build trusting relationships with their employees (Edelman, 2018). Leaders must balance individual and organizational needs to achieve significant relational results (Guerin-Marion et al., 2018). Understanding issues

and developing strategies to improve organizational culture is a leadership aspect of leading a multigenerational workforce (Miranda & Allen, 2017; Sadiartha & Sitorus, 2018). Leaders must utilize the information gathered to relate, motivate, and build trust in a multigenerational workforce and create a sustainable work environment.

Leaders who can demonstrate gratitude towards the workforce engender trust within an organization. Researchers have claimed that gratitude is a fundamental variable in positive well-being, positive relationships, and social support (De Fabio et al., 2017; Dickens, 2017). Gratitude promotes a positive organizational environment, psychological security, and supports contextual performance, team learning, and quality connection (De Fabio et al., 2017). De Fabio et al. also stated that developing programs enhancing gratitude as a prevention and resource enhancement perspective is essential.

Gratitude is an antidote against toxic emotion at the workplace, especially against jealousy, perceptions of injustice, and negative perceptions of generational cohorts (Fehr et al., 2017). In addition, gratitude promotes a positive organizational environment, psychological security, and supports contextual performance, team learning, and quality connection (De Fabio et al., 2017). Fehr et al. (2017) suggested that organizations create instruments measuring gratitude in episodic, persistent, and collective organizational contexts. Thus, gratitude is a resource to sustain organizational performance.

### **Value-Add of Generational Inclusiveness**

Incorporating workforce and organizational values are imperative to the success and sustainability of an organization. Due to collective socialization, generations see work differently (Kelleberg & Marsden, 2019). Leaders' understanding of the



multigenerational workforce's differences can add value to an organization (Guerin-Marion et al., 2018). Leaders' ability to communicate across generational boundaries is essential for communicating organizational vision and values (Allen, 2017). Leaders should commit to understanding their employees' needs and appreciate the generation their workforce belongs to (Guerin-Marion et al., 2018). This understanding will create generational inclusiveness within the workplace, foster personal and organizational vision and values, and create a sustainable and productive workplace environment (DiFabio, 2017a).

Kelleberg and Marsden (2019) exerted social scientists' attempt to identify generational values reflecting the experiences of people born and matured during the same period as highlighted by Mannheim's (1927/1952) generational problems. Researchers agree that impacts on communication are the differences in generational perceptions (Urlick et al., 2017), generational values (Marcus et al., 2017), and perception of other generations' values (Campbell et al., 2017). Therefore, studying the value differences between generations helps understand the best approach for communicating with a multigenerational workforce.

Speculations on Millennials' distinctive work values can compare to questions raised when Generation X, Baby Boomers, Traditionalists, and other generations entered the workforce (Kelleberg & Marsden, 2019). Variations in work values are due to experiences linked to aging, developmental, or situational life dynamics over time (Kelleberg & Marsden, 2019). The authors continued dissimilarities in work values are produced in the psychological adjustments to work and other social roles. These

differences can also be due to social, economic, and cultural features people lived (Kelleberg & Marsden, 2019). A person's social environment during the early stages of life learning shapes their work value beliefs.

### **Promotion of Organizational Sustainability**

Researchers have shown a growing interest in building a sustainable environment (Jonge & Peters, 2019). Jonge and Peters (2019) proclaimed that gaps remain regarding employees and sustainable work performance. Klapper et al. (2020) contended that employee health and well-being and shared organizational vision and values are related to organizational sustainability. A responsible and sustainable work environment is conceptualized through social and environmentally social equality (Munck & Tomiotto, 2019).

The *Report of the World Commission on Environment and Development* declared sustainable development as meeting the needs of current generations without compromising the needs and desires of future generations (Baral & Pokharel, 2017). According to Munck and Tomiotto (2019), attempting to sort how competing pressures should be balanced and measured and how a value means much or little to an organization is a part of sustainable development. It is a trade-off between short-term profitability and long-range survivability (Munck & Tomiotto, 2019). The promotion of organizational sustainability is crucial to diminishing deviant organizational and interpersonal workplace behavior (Aleksić et al., 2019).

How a leader thinks about decisions that will affect other's future is a central determining factor for an organization's longevity and sustainability (Munck & Tomiotto,

2019). Leaders face a workforce with an age range between 18 and 80 (Ashraf, 2018).

Three attributes are considered in corporate sustainability: financial viability, social equity, and environmental integrity (Baral & Pokharel, 2017). Maintaining a sustainable work environment is crucial to keeping the workforce motivated and meeting the bottom line.

Past generations passed on ethical corporate vision through behavior promoted intergenerational generosity, leading to future generations' benefit (Bang et al., 2017). The authors posited that decisions affecting future generations are formed by considering how their leaders treated the previous generation's leaders. Leaders concerned with leaving a positive corporate legacy for future generations work towards transparency in their intentions, decreasing intergenerational conflicts (Bang et al., 2017). Without legacy motivation, leaders would engage in self-centered behaviors that affect future generations (Bang et al., 2017).

Employees who feel leaders have gone beyond normative to ensure employees are well informed and engaged are likely to be grateful and compelled to demonstrate similar aptitude towards future workers (Bang et al., 2017). The authors continued that gratitude would promote positive intergenerational behavior and shape social group norms to foster moral attitudes and lessen others' harmful or burdensome actions. The emotional response to moral excellence acts is moral elevation and occurs when individuals experience or witness examples of loftier human nature. Moral elevation promotes the tendency to imitate moral maturity, minimize selfish behaviors, and generate thoughtful actions that consider future generations (Bang et al., 2017).

Researchers have claimed that gratitude is a fundamental variable in positive well-being, positive relationships, and social support (De Fabio et al., 2017). In addition, gratitude promotes positive performance and a healthy organization, recognizing the significance of human resources (De Fabio et al., 2017). De Fabio et al. stated that programs that enhanced gratitude as a prevention and resource enhancement perspective were essential.

How employees view their role in an organization is crucial to organizational sustainability. Older generations emphasize the importance of a sustainable workplace, where all workers can work today and in the future (van Dam et al., 2017). Leaders should be conscious of the moral intentions to transmit to others and their role in communicating past-generation behaviors that foster gratitude and moral elevation (Bang et al., 2017). Leaders who promote positive legacy motivations affect an organization's sustainability.

Baral and Pokharel (2017) stated that leaders must question their motivation as part of their strategy to embrace sustainability. Leaders must understand that their business decisions affect their customers, employees, suppliers, communities, and regulators. Organizational leaders must listen to employees more frequently because their identity has expanded beyond personal agendas (Baral & Pokharel, 2017). Riggs (2017) summarized that a successful and productive workplace must address and take advantage of generational differences, mindsets, values, and expectations while fostering, encouraging, and promoting a work environment where generations can present ideas, concerns, and complaints.

Leaders must recognize that Traditionalists and Baby Boomers have institutional knowledge that they can tap into and share with a younger generation of the workforce to motivate them and improve organizational performance (Gordon, 2017). Gordon continued that younger managers could improve performance and motivate senior subordinates by respecting the professional experiences of Traditionalists and Baby Boomers. Together, the generations can motivate one another to meet organizational goals, improve communication, and create a sustainable work environment.

### **Conclusion**

Generational differences in the workplace may be small, and leaders are aware of these differences (Cucina et al., 2018). These differences lead to intergenerational conflict (Urlick et al., 2017). Understanding behaviors within a multigenerational workforce and recognition of conflict can assist leaders in attesting to workplace needs. Sanner-Stiehr & Vandermause (2017) stated that an assessment of the workplace must factor in employee age, professional and personal priorities, and economic status. These factors impact workplace values and familiarization to employees and workplace functionality. Leaders must acknowledge generational stereotypes and work towards effecting positive changes by providing inclusiveness and age-related friendliness (Ratajczak, 2020)

Introducing a multigenerational management system that allows better use of organizational employees is an appropriate solution for the workforce's current demographic (Ratajczak, 2020). Ratajczak explained that appropriately managing multigenerational employees creates conditions of cooperation, minimizes the risk of conflict, and results in a mutual exchange of experiences. This function creates open

communication, feedback, understanding, and a sustainable and productive work environment. It also leads to mutual respect and a change in attitude towards one another.

As the organization fosters diversity, it has a good reputation attracting the best and talented future employees. As a result, the organization will become an attractive place to work for, especially with future generations and experienced talent (Beazley et al., 2017). Therefore, maintaining a robust communication system of organizational vision and values and the inclusion of the multigenerational workforce will ensure its sustainability.

Employers must understand generational values and remain focused on creating useful communication patterns amongst employees and between leaders and followers to ensure understanding, respect, and communication (Sanner-Stiehr & Vandermause, 2017). Sanner-Stiehr and Vandermause emphasized how the facilitation of relationships, respect, and communication amongst employees is essential, and employers can leverage talents and build productivity between the two. Knowledge sharing and transfer are crucial parts of multigenerational workforce cooperation, with trust being critical in developing this cooperation.

Leading through vision and value are vital principles to leadership. The vision statement is the inspiration to reach high levels of performance. Meanwhile, values define the best ways to attain acceptance of organizational visions. Leaders' ability to communicate vision and values is contingent on how they reach the workforce. The leader can design the best approach to get the multigenerational workforce through CAT by adapting its message delivery of organizational vision and values. Organizational

success hinges on the way organizations translate values meant for the workforce into the practice of those values (Smith & Garriety, 2020). When leaders consider that understanding and respecting each generation's values, and skillsets are crucial to sustainability, organizational culture and cooperation evolution occur across generations (McNally, 2017). Workplace changes as older generations leave the workplace and new generations occupy the vacancies. Leaders must accommodate their communication of organizational vision and values to a multigenerational workforce and subject their perception to ensure the communication is accepted.

### **Transition**

In Section 1 of the doctoral study, I introduced the phenomenon, problem statement, purpose statement, and nature of the study, which justify using qualitative, multiple case study design. The research and interview questions, conceptual framework, the study's significance, and a professional and academic literature review also included the research and interview questions. My study focused on leaders' communication strategies to relay an organization's values and vision for a sustainable workplace. Generational differences in work values create workplace challenges (Miranda & Allen, 2017; Sadiartha & Sitorus, 2018). As the workforce continues its diversification, it is essential that leaders understand generational differences and how to communicate with the individuals within each generation.

The conceptual framework included CAT, generational theory, and organizational culture theory. CAT influences the sharing of organizational vision and values with a multigenerational workforce. Leaders' understanding of generational differences can

increase communication effectiveness with the workforce, create a sustainable work environment, and improve organizational culture (Miranda & Allen, 2017; Sadiartha & Sitorus, 2018).

Section 2 included the project and the qualitative method approach description, including details about population and sampling, data collection and analysis, and reliability and validity. In Section 3, I analyzed the data gathered, the findings discovered, the application to professional practice, and social change. This portion of the study also included further research, a summary, conclusions, and reflections.



## Section 2: The Project

The purpose of this qualitative multiple case study was to explore the strategies used by leaders to communicate organizational vision and values while also establishing a sustainable work environment. In Section 2, I state the study's purpose, describe my role as the researcher, and provide information on the research method and design. Section 2 includes the ethical parameters and information on the data collection process, analysis, reliability, and validity. Finally, the section concludes with a summary and a transition to Section 3.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore strategies that some leaders of multigenerational workforces within the finance industry use to communicate organizational values and vision for a sustainable work environment. The target population comprised leaders from five financial firms in New York City. They successfully implemented strategies to communicate organizational values and vision to multigenerational workforces to create a sustainable work environment. This study may affect social change by enabling organizational leaders to apply solutions to improving organizational work environments through heightened awareness of how to communicate and build trust with a multigenerational workforce. In addition, fostering a better understanding of Traditionalist, Baby Boomer, and Generation X cohorts adapting to Millennial and other incoming generational cohorts may improve organizational work environments and further societal understanding of generational values (Miranda & Allen, 2017).

### **Role of the Researcher**

In the context of business and organizational research, McKusker and Gunaydin (2015) described the qualitative researcher's role as gaining a deeper understanding of the phenomenon through interviewing, recording, transcribing, and analyzing the data within a study; the researcher can use the resulting information to develop themes from the gathered information. Researchers are instruments in the qualitative research process (Marshall & Rossman, 2016). As the researcher, I was the primary data collection instrument responsible for recruiting participants and collecting, analyzing, and interpreting data while reducing biases and reporting valid and reliable information.

In this study, I aimed to ascertain how leaders communicate vision and values in a multigenerational workforce to create a sustainable work environment. The targeted population was leaders from the finance industry. Therefore, I paid attention to verbal and nonverbal indications that participants displayed during an interview to be effective.

I obtained Walden University's Institutional Review Board (IRB) approval to conduct this research, approval number 04-14-21-0664025. I recruited a minimum of 10 finance industry leaders with experience in leading a multigenerational workforce and communicating organizational vision and values in New York City for an interview. The *Belmont Report* authors defined the researcher's role as ensuring that participants are unharmed throughout the study (The National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). I extended care in protecting the integrity and safety of the participants throughout the study. Because my study involved human subjects, I followed the *Belmont Report's* four critical principles for ethical

research: (a) ethical action, (b) respect for participants, (c) generalized beneficence, and d) negotiated justice.

For this study, I used a qualitative multiple case study design to conduct a semistructured interview, including open-ended questions with each participant. A semistructured interview can elicit subjective responses regarding the phenomenon experienced (McIntosh & Morse, 2015). Using a semistructured interview format encourages two-way communication creating a comprehensive discussion of the topic (Ponterotto, 2014). Moustakas (1994) suggested excluding personal experiences, beliefs, attitudes, culture, and generational views during the interview process. Personal and professional biases may affect the validity and reliability of the study. I used an interview protocol to treat participants equally and mitigate bias (see Appendix A).

I was the primary collection instrument using a face-to-face interview whenever possible and including follow-up questions as needed to probe more deeply for more information. I used member checking because of the level of reflection required on the part of participants. Yin (2018) referred to member checking as a method to validate researched experiences, with the caveat that if there is a disagreement between the research subject's perception of their experience and the researcher's perception of the experience, the study may be considered unfinished until a resolution of the disagreement is forthcoming. Candela (2019) considered that member checking was not a check back with participants for validation but a tool that may improve the participant's practice through reflection. Yin further stated that a researcher must avoid bias by avoiding personal or professional interaction with participants throughout the research process. As

the researcher, I did not have a personal or professional association that may have resulted in a conflict of interest outside the research activities.

### **Participants**

Yin (2018) asserted that participant criteria should align with the research for the gathering of data. The research question was, What strategies do multigenerational workforce finance industry leaders use to communicate organizational vision and values for a sustainable work environment? The participants were financial organization leaders who had used strategies to communicate organizational vision and values to a multigenerational workforce for a sustainable work environment. New York City is a large metropolitan area with a large financial district providing a broad base to select participants. The participant criteria were New York City financial firm leaders who had successfully implemented communication strategies to create a sustainable work environment. Upon receiving IRB approval, I began participant recruitment.

There are multiple methods to recruit participants. Social media is one option for participant selection. Chaffey (2021) noted that 56.8% of the global population, or 4.5 billion individuals, used social media in 2020. In the United States, 72%, or 240 million individuals, use social media in 2020, providing a rich platform for collecting research data (Kemp, 2021). Social media allow researchers to answer research questions more quickly than conventional means (Hammer, 2017). Social media platforms provide a means for researchers to connect with potential participants and share interests and information while maintaining separation and anonymity (Gelinas et al., 2017). I solicited leaders from the New York City finance industry across social media platforms, such as

LinkedIn, Facebook, and Twitter. Organizations create social media pages to distribute information and attract new clients. Through these pages, I garnered the contact information for participants. This method proved more efficient than cold calling or emailing organizations.

I arranged for a call for participants to be posted on organizations' social media pages with permission. I also sent participation requests via email to financial organizations in New York City after locating email addresses via each respective organization's website. Organization websites often provide company hierarchy and contact information. I sent an email to senior leadership and executives requesting participation in the study.

With every solicitation for participation, I asked potential participants to forward the request to colleagues who may be interested in the study. This expansion of participants' reach is called the snowball technique (see Dusek et al., 2015). Qualitative studies allow the researcher to approach potential participants through sponsorship from a mutual acquaintance (Dusek et al., 2015). This method can expand the universe of participants.

Upon agreement to participate, I sent participants a welcome email. The email included the participant consent and confidentiality form, the interview protocol and interview questions (see Appendix A) for their review and signature. Participants selected the best location, method, date, and time for the interview. My preferred method for interviews was via phone or face-to-face, but I allowed participants to submit answers via email if they had a busy schedule, for instance.

Following the criteria for participant selection ensured the alignment of participants and the research question. After selecting participants, I used a qualitative case study research method to ask broad, open-ended questions through a semistructured interview. Additionally, I conducted a review of organizational documentation. This method allowed me to identify leadership strategies to communicate organizational vision and values to a multigenerational workforce.

### **Research Method and Design**

Three research methods are quantitative, qualitative, and mixed-method designs (Rubin & Babbie, 2016). The method and design that I chose was a qualitative multiple case study. The qualitative multiple case study methodology is a comprehensive approach used to describe and explore the phenomena relevant to businesses (Harrison et al., 2017). A qualitative multiple case study's flexibility allows for creative implementation and rigorous, in-depth understanding of the study's participants (Yin, 2018).

### **Research Method**

The qualitative method allows researchers to understand experiences in a real-world situation (Leppink, 2017) and investigate participants' ideas for a more in-depth data collection process (Taylor et al., 2016). I used the qualitative method to explore the business strategies, behaviors, practices, and dynamics leaders use to communicate organizational vision and values to a multigenerational workforce. The qualitative method was appropriate because it allowed for the examination of leaders' experiences in this area.

Mixed-methods researchers combine a qualitative and quantitative approach (Leppink, 2017). Researchers collect quantitative and qualitative data in mixed-methods studies and conduct counterpart analyses (Gutterman, 2017). The study did not include a quantitative component, so the mixed-method approach was not appropriate.

I analyzed data to examine strategies leaders use to communicate organizational vision and values to a multigenerational workforce to create a sustainable work environment. Qualitative researchers collect data from individuals regarding a current event (Yin, 2018). The qualitative method is used to gain a deeper understanding of the participants' experience in strategies communication. In addition, this method is appropriate to identify simplifications, patterns, and themes (Yates & Leggett, 2016), which was the current study's goal. Appendix B compares the qualitative and quantitative methods and justifies my use of the qualitative method.

### **Research Design**

For this study, I used a multiple case study design. I identified communication strategies that leaders use to communicate organizational vision and values. Yin (2018) stated that using a case study is best to understand the real-life phenomenon. A case study is a descriptive and heuristic study of a bounded system (Merriam, 1998). Merriam (1998) explained the bounded system as the study (communication of organizational values and vision), which leads to discovering a method to solve a problem. Each case consists of a person, program, group, or organization (Yin, 2018). Smith (2018) described the case study as descriptive and suitable for exploring documents, quotes, samples, and artifacts. Thus, a case study design was appropriate.

I used various data sources, including semistructured interviews, organizational policies, documentation, and literature reviews. As Yin (2018) noted, these data types can convey organizational data processes, strategies, and practices. I analyzed and interpreted the data using thematic analysis to explain how an organization developed a sustainable work environment. The participants were financial organization leaders in New York City with strategies for communicating vision and values to a multigenerational workforce to create a sustainable work environment.

Ethnographic, narrative, and phenomenology are other qualitative designs (Lewis, 2015; Wu et al., 2016). Ethnographic design researchers study a group or culture based on facts and data gathered through fieldwork (Marshall & Rossman, 2016). Creswell (2013) stated that this approach is best suited when focusing on the way things are accomplished. This approach provides an opportunity to gather data from each participant in their field of work. Because the current study was not about cultural characterization, the use of an ethnographic design was unnecessary.

Researchers portray the phenomenon in a storied, detailed life, and participants' work experience (Joyce, 2015; Lewis, 2015). The narrative design comprises an in-depth, written story (Joyce, 2015). Joyce (2015) posited that narrative design helps the researcher to understand and interpret the meanings of the participants' experiences. Hunt (2014) added a consideration of the researcher's environment when constructing the researcher's narrative. The use of narrative design was unnecessary because interpretation and in-depth stories were not elements of this study.



Researchers focus on the participants' lived, personal experiences with the phenomenological design (Franklin, 2012). A phenomenological design is ideal when researching specific, yet familiar, human experiences (Yates & Leggett, 2016). A semistructured interview is used, focusing on the participants' descriptions of their experiences. This makes it challenging to reach data saturation through an interview technique. I did not research the participants' lived experiences; therefore, a phenomenological design was inappropriate for the study.

Identifying effective communication strategies by leaders for a multigenerational workforce entailed using a qualitative multiple case study. The case study method involves direct observation, field notes, and focusing on human actions and real-world events (Yin, 2018). Yin (2018) suggested that a case study research method is the best approach in a real-world context with unclear boundaries in situations with minimal control of the phenomenon. The multiple case study design is appropriate for capturing firsthand information and identifying strategies used by leaders to improve communication of organizational values and visions to a multigenerational workforce to create a sustainable work environment. A researcher can produce a rigorous study to comply with standards, validity, reliability, and replicability criteria through a multiple case study (Kilani & Kobziev, 2016). This study addressed strategies finance industry leaders can use to communicate values and vision to a multigenerational workforce. I gathered data through semistructured interviews, follow-up questions, and a review of organizational documents and reports.

Researchers can gather case study data from six sources: documentation, archival records, interviews, direct observation, participant observation, and physical artifacts (Stake, 1995; Yin, 2018). Three data collection principles are to gather evidence through multiple sources, creating a database that separates raw data, and linking data to the research question (Yin, 2018). Marshall and Rossman (2016) specified that interviews are foundational to a case study with other sources to validate the information. Using two or more sources will enhance understanding of the phenomenon (Yin, 2018). Guest et al. (2020) espoused that case study researchers should rely on triangulation of data.

A case study is a preferred strategy when asking what and how questions (Yin, 2018). In the current study, I highlighted the best strategies leaders used to communicate organizational vision and values. I examined these strategies using “what” and “how” questions. The exploration, explanation, or description of one or more organizations in a single or more location for the sake of comparison is a case (Stake, 1995; Yin, 2018). I compared participants’ communication strategies occurred to understand which approach is best.

Qualitative research reaches data saturation when the data are analyzed, and no further data collection is necessary (Saunders et al., 2017). Failure to reach saturation will impact the research quality and its validity (Yin, 2018). Data saturation is confirmed when no new information, codes, or themes are available (Hennink et al., 2017). I ensured data saturation by describing strategies, exact quotes from participants, substantiating data interpretation, and exhausting all data and coding to initiate themes.

### **Population and Sampling**

The target population for the study consisted of leaders from five financial firms in New York City who successfully implemented strategies to communicate organizational values and vision to a multigenerational workforce to create a sustainable work environment. A mixture of knowledge and experience is suitable for a qualitative study (Olubunmi, 2014). Financial organization leaders provided information on existing strategies and suggested potential additions for communicating with a multigenerational workforce. Leaders may also provide insight regarding their experiences and knowledge of working with a multigenerational workforce to create a sustainable work environment. Therefore, recruiting leaders from five organizations was reasonable.

The snowball sampling technique offered the best opportunity to contact additional participants if direct contact and social media requests were insufficient. I implemented the snowball sampling technique by reaching out to qualified participants and requesting they refer potential participants or forward information directly. This technique was suitable because it mitigated problems with studying hard-to-reach populations (Lune & Berg, 2017). Organizations' executives, presidents, directors, and senior leadership are hard to reach because corporate websites control their contact information. Contacted participants were asked to forward the request to fellow peers who met the selection criteria and may be willing to participate in the study.

### **Sampling**

A purposive sampling approach is appropriate when researchers provide a descriptive analysis of the phenomenon and require participants with experience relevant

to the phenomenon (Yin, 2018). Purposive sampling methods ensure the selection process is from a predetermined criterion (Barratt et al., 2015; Robinson, 2014). In this study, the criterion was experienced in the phenomenon.

Boddy (2016) stated that the appropriate sample size for a qualitative study is determined within the research design context and paradigm. In this current study, the target group included those in the highest level of leadership. The root of organizational leadership is its upper echelon, and these individuals are influential in workplace engagement (Nnamboozie & Parumasur, 2016; Singh & Gupta, 2015).

Due to time constraints and the availability of executive leaders, participants from five financial industry organizations were recruited to ensure data saturation while acknowledging that it may be difficult for interested individuals to participate. Also, I recruited additional participants to offset cancellations. If no cancellations occurred, I interviewed the extra participants to confirm saturation.

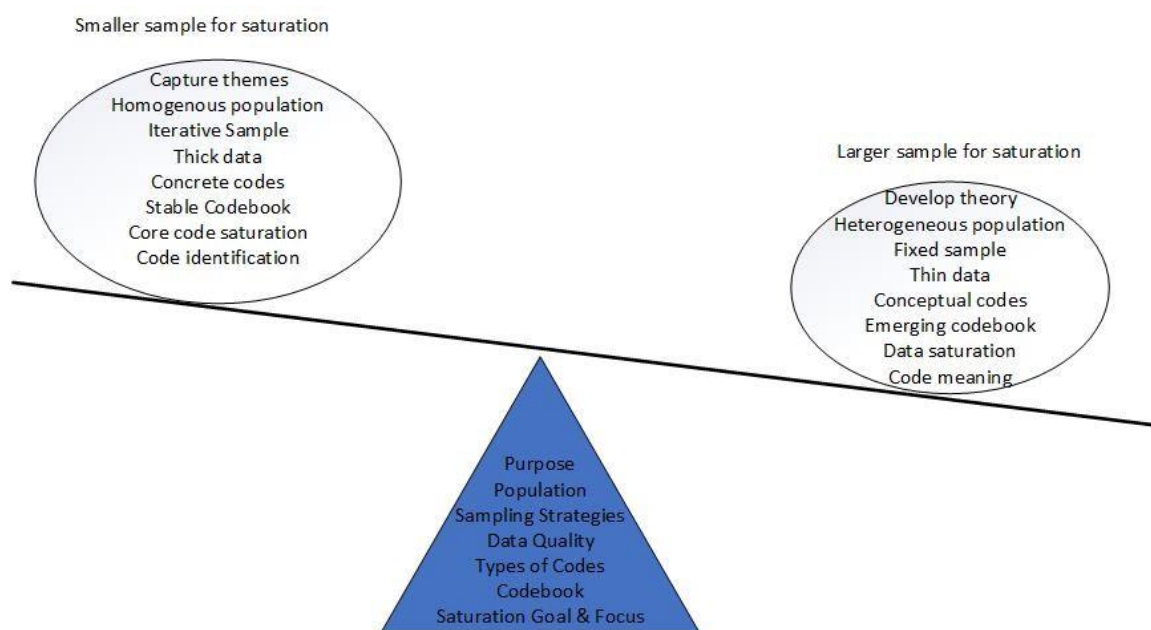
### **Data Saturation**

Data saturation is the guiding principle researchers use to determine sample size in qualitative research (Guest et al., 2020). Saunders et al. (2017) defined *saturation* in qualitative research as a criterion for stopping data collection and analysis. Data saturation occurs when the collection yields no new data (Fusch & Ness, 2015; Marshall & Rossman, 2016). Hennink et al. (2017) highlighted that multiple parameters influenced data saturation (see Figure 1). Hennink et al. conducted 25 in-depth interviews and found that code saturation was met within nine interviews. Hennink et al. continued that to gain a textured understanding of the issues, 16 to 24 interviews were necessary. Saunders et al.

(2017) said that the data's depth determines saturation, not the number of participants. As a researcher, I strove to ensure that the data were rich and thick, as Dibley (2011) suggested.

### Figure 1

#### *Parameters of Saturation and Sample Size*



*Note.* From “Code Saturation Versus Meaning Saturation: How Many Interviews are Enough?” by M. M. Hennink, B. N. Kaiser, and V. C. Marconi, 2017, *Qualitative Health Research*, 27(4), p. 606 (<https://doi.org/10.1177/1049732316665344>).

In the current study, I conducted interviews with financial organization leaders from five different financial organizations to obtain data saturation. Various factors determine the number of interviews necessary to meet data saturation, such as location, time limitations, sampling techniques used, and taking what the researcher can get Saunders et al., (2017).

I gathered data from participants' answers to interview questions on strategic approaches to communicate vision and values to a multigenerational workforce to create a sustainable work environment. I offered participants the following options for the interview method: email, telephonic, or face-to-face. If the participant preferred face-to-face, I took suggestions for location, date, and time to accommodate them as much as possible. If the interview was on the phone, I administered the interview during their preferred time. If participants preferred email, I forwarded the interview questions via email and requested a 3-day turnaround with their response. Upon reviewing their answers, I used member checking by providing each participant with a summary of their interview for their review. Participants then made changes and clarified their responses to the interview questions as needed. When necessary, I provided follow-up questions for clarification or to complement information to ensure saturation.

Member checking is integral to creating trustworthy qualitative research (Lincoln & Guba, 1986; Stake, 1995). Through member checking, the researcher can ask follow-up questions and allow the participant to review the researcher's interpretation of their narratives and make corrections if necessary (Candela, 2019). The study's reliability and validity were substantiated through member checking (Candela, 2019), leading to the maximum benefit for reliability and validity.

Member checking allows the researcher to capture the voice of the participant (Candela, 2019). The basis for my research question was to gather strategies and perspectives on the best approach leaders can use to communicate organizational vision

and values. I checked off boxes through member checking to ensure my interpretation of the participant's perspective was correct (see Birt et al., 2016).

Examination of data to confirm saturation and strengthen trustworthiness is met using three methods of data analysis: (a) thematic analysis, (b) analysis by the individual, and (c) analysis the day of study (Hancock et al., 2016). For this study, I used thematic analysis to identify and describe core themes. I reviewed transcripts to identify strategy themes by participants, assigning each theme to a code group. The codebook included codes, themes, organizational documentation, definitions, and other forms of data.

I analyzed the raw data to create themes and concepts through an inductive approach. During the data review, I assigned codes to segments of the text as concepts unfolded (see Bradley et al., 2007; Curry et al., 2009). Neely and Dumas (2016) explained this as a recursive process involving repeated cross-checking between data and literature to create meaning out of emerging concepts.

The inductive approach occurred after the interview, follow-up, and review of transcriptions. Identifying new codes and themes occurs as new insights are discovered during the data analysis (Saunders et al., 2017). I categorized new codes in the codebook.

### **Ethical Research**

The process for scientific research involves problem identification, literature review, the definition of the population and sampling, development of the research instrument, collecting and analyzing data, and reporting the results (Kiliçoglu, 2018). As the researcher, I conducted interviews to capture the experiences of the interviewees. Ensuring the participant's safety is central to qualitative research (Velardo & Elliott,

2018). Ellertson et al. (2016) indicated that morality is not an epiphenomenon to ethical conduct.

An emphasis on ethical responsibility occurs at the institutional level through an IRB application, which requires researchers to explain risks to participants and obtain informed consent (Dickson-Swift et al., 2009). The IRB is an authority with oversight regarding participants' safety and privacy (Stang, 2015). I submitted my IRB application upon meeting the proposal requirements. Once approved, I adhered to ethical standards and U.S. regulations established for researching humans. All participants signed an informed consent form, and a process followed during the interview process (see Appendix A).

There were specific concerns with the use of social media for research. Social media platforms provide a connection and shared space while maintaining physical separation and anonymity (Gelinas et al., 2017). Social media provides the researchers access to a broader population segment, making them accessible and allowing the researcher to infer participants' eligibility (Gelinas et al., 2017). Gelinas et al. identified two categories for a salient ethical consideration: (a) the respect and privacy of social media users and (b) transparency of the researcher. Because I used social media for data collection, these categories were considered.

I used an alphanumeric code to identify participants, and the code had meaning only to me during analysis (see Morse & Coulehan, 2015). I used a password-protected flash drive to store all digital data. A locked cabinet houses all written data along with a



flash drive for five years. Afterward, a professional document destruction corporation will destroy all data.

### **Data Collection Instruments**

Marshall and Rossman (2016) designated the researcher as the primary data collection instrument in qualitative research. I was the primary data collection instrument in this study. Researchers using a case study design should include at least two data collection techniques (Krichanchai & MacCarthy, 2017).

I used semi-structured interviews as a data collection technique. Participants were chosen based on their ability to provide sufficient information to answer the research question and provide reliable gateways into the business and leadership practice (Saunders & Townsend, 2018). The number of participants necessary to answer the research question depends on the research purpose, the saliency of the data, what is considered credible, and the researcher's position (Saunders & Townsend, 2016).

The semi-structured interview is the most often used data collection method in qualitative research (Kallio et al., 2016). I conducted interviews using five open-ended questions. I reviewed the interview protocol (see Appendix A) with the participant before starting the interview. The interviewees had assurances of their confidentiality and were informed that the interview was recorded for accuracy and validity. The participant's words represent lived experiences (Merriam & Bierema, 2013) and provided rich details of the phenomenon (Morse, 2015). I audiotaped the interviews with the participant's permission and reflected with handwritten notes. Member checking ensured an accurate

presentation of the experiences of the participants. The interview protocol outlines this process.

The secondary source consisted of organizational policies and documents related to communication strategies, organizational vision and values, and engagement with a multigenerational workforce. Documentations included archived policies and memos to see how organizations have evolved throughout the years, addressed complaints based on age discrimination, and managed conflicts between employees and leadership. Johnston (2014) claimed that the researcher's use of secondary sources provides much information to attain an in-depth analysis of the phenomenon. Through the secondary sources, I validated the data collected previously. I reviewed organizational documents to identify and understand engagement in trends and scores. After transcription, I invited participants to comment on their views on organizational strategies. Including participants improves the triangulation of data collected during the analysis.

Achieving reliability and validity in research improved the credibility of the findings (Anney, 2014). The researcher developed a structured protocol to ask questions and record answers (Bong & Cho, 2017). I used an interview protocol and a set of interview questions for each participant (see Appendix A). A careful review of transcripts and codes' application to the data was another strategy to ensure the data's reliability (Azevedo et al., 2017). I adopted these strategies for the study.

I ensured the validity of the data collected between three sources: semistructured interviews, organizational documents, and archived records. The collection of data through multiple sources helped confirm themes that ensure validity (Yin, 2018).

Member checking involves participants reviewing the researcher's interpretations and modifying their responses as need (Simpson & Quigley, 2016).

### **Data Collection Technique**

The three conventional data collection techniques in qualitative research are observation, interviewing, and member checking (Covell et al., 2012; Draper & Swift, 2011). The primary collection technique I used was a semistructured interview. Data collection of interviews involves the participants' responses to the interview questions. Yin (2018) maintained that a case study's most important source for evidence is the interview. An interview has positive and negative attributes as a data collection technique. Positive qualities are (a) the interview targets and focus on the study's topic, and (b) is insightful, provides explanations and personal views, perceptions, attitudes, and meaning (Yin, 2018). Negative qualities are (a) the researcher receives bias answers because of the questions' framework, (b) participants' recall of past experiences is inaccurate, and (c) participants provide answers the reviewer wants to hear versus honest answers (Yin, 2018).

I greeted participants, reviewed the consent form, and explained the parameters for this study. The participant had an opportunity to ask questions before the start of the interview. Upon verbal consent indicating they understood the interview session's parameters, I informed the participant I would record the interview, the interview began. An audio recording of the interview began when the first question was asked and saved on a password-protected USB flash drive. A recorded interview is the most accurate way to transcribe verbal data (Malagon-Maldonado, 2014).

During the interview, I took notes to keep track of my thoughts and provide cues for follow-up questions or further interpretation. Muswazi and Nhamo (2013) stated that note-taking during the interview process could facilitate analysis. At the end of the interview, a review of the notes taken provided the researcher with further insight into their thoughts (Draper & Swift, 2011). The flash drive with audio recordings of the interviews and handwritten notes and journals are kept in a locked file cabinet that only I can access.

Validation of participants' answers is essential and verified through the member checking process (Candela, 2019; Fusch, 2019). Member checking involves reviewing the researcher's summary by the interviewee to validate the interview's synopsis. Upon receiving the participant's validation, I reviewed the data for themes. The data were analyzed based on the themes discovered. Member checking will end with determining that no new information was disclosed by the participant (Livari, 2018).

### **Data Organization Technique**

To organize, categorize, and review the data provided, I assigned each participant a code. The codes consisted of a participant code and organization code (C01, M04, H05). Table 4 provides the participant and organizational code list.

**Table 4**

*Participant Position Code*

Participant Code		Organization Code	
Code	Title	Code	Organization Name
C	Executive Officer, President, or similar	01	Company 1

Participant Code		Organization Code	
O	Operating Officer, Vice President, or similar	02	Company 2
M	Marketing Officer, Chief Finance Officer, or other	03	Company 3
H	Human Resources, Training, or Personnel	04	Company 4
		05	Company 5

I used NVivo transcription service to transcribe interviews. Using this tool contributed to the accuracy of the information. Transcription included reduction, interpretation, and representation to make the information gathered meaningful (Elo et al., 2014). Each interviewee was assigned a Participant Position Code (see Table 4), which provided confidentiality throughout the study. Digital files, documents, and handwritten notes associated with the corresponding participant were labeled with this code. The flash drive containing data is secured in a locked cabinet. The destruction of the flash drive will occur five years after the study's completion date.

### **Data Analysis**

The deconstruction of organized data into common themes and patterns and synthesis of outcomes is qualitative data analysis (Yates & Leggett, 2016). Nassaji (2015) furthered the definition of data analysis to include inductive exploration and interpretation of recurring themes, patterns, or concepts. Moustakas (1994) stated that researchers use analyses to extract a clear meaning of the phenomenon. The data analysis occurs when the collection process results in understanding the themes (Morse & Coulehan, 2015). I compiled participants' answers, interview notes, organizational documents and policies, and member checking. I collected data into Word documents,

imported to NVivo to disassemble, then reassembled and analyzed based on themes and codes.

NVivo is software to assist in the coding and categorization of textual data. The software requires analytic reasoning to address how the codes represent the information (Yin, 2018). Coding provides an overview of the data and how it relates to the research question. After the interviews, transcriptions, and member checking, I expanded the categories and codes already noted to include new information. Coding allows the researcher to handle the data, understand, spend time with it, and render it to something reportable (Elliott, 2018).

To analyze the data, I used thematic analysis. The thematic analysis identifies, analyzes, and reports themes within the data (Braun & Clarke, 2006). Coding data collected through interviews examining the descriptions of the participant's reality through the creation of themes is an example of thematic analysis (Vaismoradi et al., 2016). The development and expansion of the codebook will happen by categorizing the participants' thoughts using similar keywords, views, life experiences, and rooted sentiments (Yin, 2018).

I applied the six-phase thematic analysis as planned by Braun and Clarke (2006). The thematic analysis will provide a concise, coherent, not repetitive, and account of the data in and across themes (Nowell et al., 2017). Through the six-phase thematic analysis, I gathered the tools and knowledge to understand the data, present the findings, and provide a summary analysis for the readers. Appendix C contains an overview of the phase of thematic analysis and the means of establishing trustworthiness.

My intent for the data analysis was to describe strategies leaders used to communicate organizational vision and values. I used the CAT to frame the analysis of the data. The review of emergent themes provided parameters for developing codes and themes. Once themes were in place, I analyzed the data and interpreted the best strategies used and their effects on leaders' communication methods.

### **Reliability and Validity**

Reliability and validity are essential elements to conduct quality research and create trustworthiness (Yin, 2018). My goal as a researcher was to ensure that the data collected was reliable and valid. Dependability is an element of reliability. Creditability, transferability, confirmability, and data saturation are elements of validity.

#### **Reliability**

Achieving reliability and validity in research improved the credibility of the findings (Anney, 2014). The researcher developed a structured protocol to ask questions and record answers (Bong & Cho, 2017). I used an interview protocol and a set of interview questions for each participant (see Appendix A). A careful review of transcripts and applying the code to the data was another strategy to ensure the data's reliability (see Azevedo et al., 2017). Member checking was used to address the dependability of data collected through interviews. I adopted these strategies for the study.

#### **Validity**

I ensured the validity of the data collected through triangulation between interviews, organizational documents and policies, and archived records. The data collection from multiple sources assisted in the confirmation of themes (Yin, 2018).

Member checking focuses on the participants' involvement to review that the interviewer's interpretations reflect what the participant wants to communicate (Simpson & Quigley, 2016), ensuring validity. (Simpson & Quigley, 2016), which ensured validity. Trustworthiness increases the dependability, credibility, transferability, and confirmability of the data (Birt et al., 2016). I established validity during the data analysis phase using data verification.

**Credibility.** In qualitative research, credibility is vital (Baskarada, 2014; Yin, 2018). Credibility is the research's trustworthiness (Erlingsson & Brysiewicz, 2013) based on the participant's perspective (Lincoln & Guba, 1985). I assured the study's credibility through member checking and methodological triangulation of the data collected through interviews, organizational documents, and archival records.

**Transferability.** The measure of trustworthiness used to develop descriptive and relevant statements that could transfer to other populations and settings is transferability (Lincoln & Guba, 1985). Yin (2018) claimed that open-ended questions could lead to findings that transfer to other industries. To establish transferability, I documented and described the research process as it progressed. The inclusion of detailed descriptions in the outcomes ensured that the reader could judge the potential to transfer any data, results, or recommendations to other industries.

**Confirmability.** Confirmability is the impartiality and correctness of the information (Simpson & Quigley, 2016). Lincoln and Guba (1985) described confirmability as discussing the evidence, data and processes, data collection, organization, and analysis, which leads to results. To ensure confirmability, researchers



must check that the results are from the study's process and not from the researcher's prejudice (Simpson & Quigley, 2016). I mitigated biases through member checking, which validated the data (Yin, 2018).

**Data Saturation.** A critical component of the research method to ensure an adequate amount of data is obtaining data saturation (Constantinou et al., 2017; Tran et al., 2017). Data saturation occurs when additional data yields no further discovery, and data collection is unnecessary (Fusch & Ness, 2015; Marshall & Rossman, 2016). The participants were leaders from five financial industry organizations with strategies to communicate organizational vision and values to a multigenerational workforce to create a sustainable work environment. Saturation is met based on the researcher's experience and judgment (Tran et al., 2017). Gathering additional leaders was not necessary to collect information. Conducting member checking from the selected participants was enough for data saturation (Hancock et al., 2016). Hancock et al. continued reliance on many unnecessary participants due to the participant's opinions and perspectives. As stated earlier, data saturation is complete once the data becomes repetitive, fewer and no new questions are addressed.

### **Transition and Summary**

The purpose of this qualitative case study was to explore strategies leaders use to communicate organizational vision and values to a multigenerational workforce to create a sustainable workforce. Section 2 details the participant criteria, recruitment approaches, and methods to gather and use data. I described the interview process, data collection, and saturation, and assurances to meet ethical standards. I will discuss the steps to gather,

analyze, and interpret the data to assess leaders' strategies to communicate organizational vision and values to create a sustainable work environment.

Section 3 presents the findings and describes the analysis process and responses to any emergent themes. Section 3 includes a discussion of the results, their application to professional practice, and their implication for social change. Last, the section will conclude with a discussion of recommendations for future research and suggestions for expansion.

### Section 3: Application to Professional Practice and Implications for Change

#### **Introduction**

The purpose of this qualitative multiple case study was to explore strategies some leaders of multigenerational workforces within the finance industry use to communicate organizational values and vision for a sustainable work environment. The population for this study was five financial industry leaders within New York City. I asked participants seven semistructured interview questions focused on communication strategies with a multigenerational workforce.

I obtained data through the interviews and performed member checking and methodological triangulation to ensure data saturation. The conceptual framework for the study consisted of generational cohort theory, CAT, and organizational culture theory to answer the central research question. The findings aligned with the literature and conceptual framework.

#### **Presentation of the Findings**

The research question for this study was, What strategies do leaders use to communicate organizational vision and values to multigenerational workforces for a sustainable work environment? There were five participants. I based their selection on their experience leading and communicating with a multigenerational workforce. I conducted the interviews during the COVID-19 pandemic, and face-to-face meetings were discouraged. Therefore, I offered participants to participate via video call, telephone, or email. Invited participants were provided the questions for their review before the interview, advised that their participation was not mandatory and was

anonymous, and given a consent form for their review and agreement. Three participants (O01, M02, O04) were Generation X. Two participants (O02, M03) were Baby Boomers. The participants lead workforces ranging from 25 to 300 employees with leadership and executive experience ranging between 14 and 30 plus years.

Three of the participants (O01, M02, O04) chose telephone interviews. One (O02) chose to participate via Zoom. M03 preferred to answer the interview and follow-up questions via email. Three participants were vice presidents, and two were senior directors at their respective organizations with employees in various generational cohorts.

Data collection included semistructured interviews, document review, journaling, note-taking, and recording during interviews. Member checking was completed when each participant reviewed and returned transcriptions of their interview. I used NVivo to develop themes within the data. The emergent themes were patience, generational or older/younger differences, modes of communication, and a leadership styles script for leadership to use. These themes align with the literature and conceptual framework of this qualitative multiple case study.

### **Emergent Theme 1: Patience**

The first theme to emerge from the data was patience by leadership. Allen (2017) considered that intergenerational communication is grounded in CAT. CAT details four basic communication strategies: accommodation, underaccommodation, overaccommodation, and non-accommodation. Participants' capacity to accept and tolerate differing communication styles within their multigenerational workgroups was salient in their responses. All participants identified their communication strategies as

primary accommodation, as they sought to reduce differences between generations in their cohorts (Lin, 2017).

Participant O04 summarized the role of patience by stating that listening is an essential skill all leaders must develop and continue to practice. Considering that employees have a voice and are an integral part of the organization's success is imperative for the leader to heed. Participant M02 also stated that patience is an essential strategy leaders used when leading a multigenerational workforce. A key to reducing work stress and employee turnover is listening to employees' feedback (Harms et al., 2017). Millennials expect employers to listen, respond, and understand social issues (Blancero et al., 2018). M02 concluded that patience could set the tone for future communication within the organization, allowing future communication lines to remain open.

Organizational culture theory improves understanding of employee behaviors, emphasizing the complexities of organizational life and considering the workforce and intangibles like values, beliefs, assumptions, perceptions, behaviors, and others (Tran, 2017). On the way to achieve understanding, communication must be a two-way process for leaders. Listening is just as critical as the delivery of the message. Leadership decisions should coincide with the employees in mind to create a healthy organizational culture.

A positive organizational culture was preeminent in the participants' answers throughout the interviews. Mehra and Nickerson (2019) found that organizational communication was related to job satisfaction and generational categorization moderated

the relationship between communication and satisfaction. Organizational culture is inclusive to the organization's construct and incorporates patterns that form the workforce's socialization behaviors and experiences, creating norms and work settings that lead to results and success (Odor, 2018). Participant M02 phrased it best by stating that culture is everything. Without organizational culture, leadership communication does not matter.

### **Emergent Theme 2: Multigenerational Differences**

The second theme to emerge from the data was multigenerational differences. The generational cohort theory by Strauss and Howe (1991) explains that generations had differences in values, attitudes, and behaviors. Strauss and Howe's generation theory provides leadership with an understanding of generational differences and perspectives for developing communication models for present and future employees in a multigenerational workplace. A common problem voiced by all participants was difficulties communicating with the different generational cohorts.

All participants named reasons for communication difficulties, such as attitude, lack of acceptance of the participant's role by employees, problems with an employee's understanding of the message, lack of an acceptable communication modality for each generation, and issues with technology savviness. Participant M02 added that identifying generational differences in values and work ethics is problematic. M02 expressed that attitude differences towards work between the younger generation (Millennials) and the older generations (Traditionalists, Baby Boomers, Generation X) were stark and troubling. He continued that Millennials tended to be more selfish when receiving the

message, wondering how it would affect them or propel them further. They also preferred the message to be detailed and specific versus the other generations who understood it and moved forward with the task.

Another agreement amongst the participants was the generational acceptance of direction. All claimed that their approach to direction and communication was “the boss said so,” rarely questioning or challenging the message was the norm, and it was part of them from their first day of work. It was instilled in them from childhood and carried through their early days working. Participant O01 explained that it was easier to communicate with Baby Boomers because of their maturity level and being of the same, or close to the same, generation. The participant felt that communication was more productive and simpler to get to the point. Lewis and Wescott (2017) claimed that Baby Boomers responded to clear communications with support from leadership. Hence, the participants felt it was easier to communicate with Baby Boomers versus some of the younger generations in the workforce.

Addressing communicating with Millennials, M03 stated that communication with them involves being questioned and challenged. As per M03, the communication was calculated. If the communication was not to a Millennial's liking, the participant might be reported to human resources. M02 provided a quote that summed the participant's complicated experience when trying to communicate with younger employees: “trying to jam traditional thinking into a nontraditional mind.” This finding suggests that managers may want to stop forcing the message during their communication and change their style to be more accommodative to reach a wider workforce audience.

### **Emergent Theme 3: Modes of Communication**

The third theme to emerge from the data was modes of communication. Mehra and Nickerson (2019) explained that leaders should change their communication mode with employees to serve the organization's culture better. In addition, the mode of communication must be conducive to the multigenerational workforce. The interviewed participants voiced various modes of communication in individual or group sessions such as face-to-face, video, telephonic, email, newsletter, and others. Each leader expressed interchanged communication modes to understand which generation cohort preferred a mode different from what they were using.

The participants agreed that the tone of the message must be even across all communication modes used. Gasiorok and Dragojevic (2017) stated that CAT examines the individualistic perceptions of communication between leaders and employees and the differences based on the strategies employed. The participants used convergence and divergence in their communication strategies to accommodate the employees (see Lin, 2017). Therefore, the participants deduced that the best way to communicate organizational vision and values to the workforce was using an accommodative approach. Using different modalities assured the deliverance of the message and led to a sustainable work environment.

The modality of communication was also a problem participants had to overcome. The participants claimed the best modality, especially during the pandemic, was videoconferencing, although they all preferred face-to-face communication. Baby Boomers may find the use of technology to communicate challenging (Sanner-Stier &



Vandermause, 2017). Participant O02 commented that it took a few months to get older employees to use technology, especially videoconferencing. Training and assistance were required until they were capable of doing it on their own.

All participants stated that using technology to forward the organization's vision and values were essential as it provided further avenues of communication. In addition, it provided them an efficient way to spread the vision and values throughout the organization in minimal time. Participant O02 expressed that the workforce in the younger generational cohort brought good change to the workforce by introducing advanced communication technologies.

#### **Emergent Theme 4: The Script**

The fourth theme to emerge, leader's request for a script to assist on how to communicate with a multigenerational workforce. They requested a book on how to communicate with a multigenerational workforce for dummies approach during the early stages of the amalgamations of generations in the workplace. The five participants wished for a guide or manual on how to lead a multigenerational workforce. They proclaimed that a manual or matrix of how each generation acts, their characteristics, and values would have been invaluable at the start of their leadership. O01 summarized leading a multigenerational workforce as an unknown. Leaders must be opened to the unknown, learn to handle situations, and effectively communicate with a multigenerational workforce.

Mehra and Nickerson (2019) asserted that the impact of a multigenerational workforce was not widely investigated. However, understanding generational differences

are crucial to identify ways to manage and lead a multigenerational workforce (Mehra & Nickerson, 2019). Participant M03 figured the challenge in managing a multigenerational team was the differences in work ethics and home values. Being able to identify the values employees deemed as a priority regardless of their generation would be helpful. A chart or matrix would be an excellent tool for leadership when creating the organizational message of its vision and values can make initial communication more efficient.

### **Applications to Professional Practice**

The purpose of this qualitative multiple case study was to explore strategies some leaders of multigenerational workforces within the finance industry use to communicate organizational values and vision for a sustainable work environment. The findings of this study may have a positive impact on how leaders communicate and create communication strategies to inform the multigenerational workforce organizational vision and values to create a sustainable work environment. The participants' responses provided an understanding of barriers and strategies that affect the communication of organizational vision and values, leading to a sustainable work environment. The participants agreed that effective communication is an essential factor to engage employees effectively and spread the organization's vision and values. Leaders must understand the role of creating an environment where a multigenerational workforce can contribute effectively to the organization's vision, values, and goals (Burton et al., 2019). Leaders should seek to mitigate differences and ensure the communication of the mission and vision is homogenous as different generations enter the workforce. Participant M02 conveyed the sentiment expressed by all participants best; a leader must understand the

message communicated by the organization, why it is conveyed, understand the meaning behind the message, and explain it to the workforce. Naim and Lenka (2018) indicated that managers who understood how to engage Millennials could communicate organizational vision and values to increase engagement, performance, and retention.

By using the results and recommendations from this study, leaders may better understand the communication styles and acceptances of the multigenerational workforce. The growing diversity in the workplace has created challenges that affect communication and sustainability in the work environment. Leaders need to understand the labels used for different generational groups and categorize generations according to maturity, history, and formative experiences (Mehra & Nickerson, 2019). My study focused on the best way to satisfy the message delivery to a multigenerational workforce in the organization. The leaders interviewed voiced a perceived difference in values, which could cause miscommunication between leaders and the workforce. As other studies have reflected, the issue of value differences may be a perception versus reality (see Mehra & Nickerson, 2019).

The results provide awareness into best practices and insights leaders used when communicating with a multigenerational workforce. These findings apply to business practices as the study centered on modes leaders use most effectively to communicate organizational vision and values. These modes influence the relationship between organizational communication and a sustainable work environment. Leaders used accommodation to minimize conflicts with employees. Participants said that they sought to ensure that their message was clear and concise, using a direct approach to deliver the

message. Business leaders may gain insight into effective communication modes that create a sustainable work environment, enabling them to review policies and strategies to improve business practices.

### **Implications for Social Change**

The findings of this study may contribute to a positive social change by highlighting differences in how a multigenerational workforce accepts communication of organizational vision and values. A multigenerational workforce is challenging, and the ability to effectively communicate the organization's vision and values to a diverse workforce may be lost due to differences in interpretation of generational values, ethics, morals, and others. Workers typically want to do well for the organization, but the interpretation and delivery of the organizational message are essential for organizational success. Therefore, leaders must acknowledge the problem of communicating the organization's vision and values to a diverse group and find the most effective way to spread that message and create acceptance by the workforce.

There is a possibility of an increase in the workforce's morale and motivation through engagement and communication. To reach this status, leaders identify the best possible modality to communicate and extend the organization's vision and values throughout the organization. For the message to be effective, it must reach through generational and individual differences and beliefs. To reach and be accepted by the broadest possible workforce population, the message must accommodate all generations.

The participants' shared information may help leaders in business industries identify and understand the best approach to reach a multigenerational workforce and

spread the organization's vision and values. The implication for social change is that leaders must (a) improve communication between leaders and workers, (b) improve communication and relationship between leaders and the workforce, (c) improve motivation and productivity, and (d) enhance the ability towards a sustainable work environment.

The goal is to effectively communicate the organization's vision and values to a multigenerational workforce to create a sustainable work environment. Leaders must find the most effective communication modality to convey the organization's vision and values throughout the workforce, regardless of generational differences. Leaders who understand effective communication strategies can create a positive work environment and relationship between themselves and the multigenerational workforce.

### **Recommendations for Action**

With a workforce comprised of four generations and newer, younger generations entering soon, the strategies shared could be beneficial to the improvement of employees' understanding of the organizational message, productivity, and the overall organizational culture. My recommendation is to share successful leaders' strategies in communicating with their respective employees. Leadership must acknowledge the multigenerational workforce's similarities to foster a high-functioning, productive, and sustainable work environment (Bencsik et al., 2016). Bencsik et al. (2016) posited that generations working together might lead to conflict and positively affect communication.

Mehra and Nickerson (2019) recommended that organizations offer communication training such as mentoring, openness, and information sharing for Baby

Boomers and coaching, succession planning, mentoring, and buddying for Generation X managers. Organizational communication has a vast effect on job satisfaction. Creating cross-functional and cross-generational assignments could improve collaboration, communication, and information-sharing efforts.

Three strategies were identified in the results of this study. The first strategy provided various means to communicate: face-to-face in a one-on-one or group setting, videoconference, telephone, media such as newsletters or email blasts. The purpose is to reach the workforce's maximum amount through means comfortable for individuals in the different generational cohorts. This strategy continuously drove the message that communication is integral to the success of the organization.

The second strategy is training on various technological approaches to distribute the message. Providing training as technology comes available is necessary to ensure all generational cohorts have the same accessibility to the message by choosing which is best for them individually. The third strategy is providing consistency of the message. The message cannot be delivered one day and forgotten for an extended period. Leaders must provide a consistent, transparent, open, and honest message when delivering their vision and value to ensure all employees know their expectations while creating a relationship with their multigenerational workforce.

I will disseminate the findings within this study through professional and organizational conferences, training, and business-related events. I plan to reach out to organizations such as the Society of Human Resource Management (SHRM), the American Association of Retired Persons (AARP), the American Finance Association

Journal, and other journal and organizations to share this study with their members. My study will be published in the ProQuest Dissertation and Theses Database for public review and use. I will provide all participants with a copy of the study upon conferral.

### **Recommendations for Further Research**

After analyzing studies on generational differences within the workplace, Lyons and Kuron (2014) recommended future research on differences following a clear theoretical framework and using classical generational theories. The recommendation for further research is to explore beyond the financial industry, to include the public and private sectors. The study's limitation was that the study had reluctant leaders who declined the invitation, even after accepting the request for participation. Leaders must not avoid social sciences and favor observed and schematic generational differences solely on the birth year (Lyons & Kuron, 2014). As well, consideration of variable effects must include (a) industry and organizational size, structure, and culture; (b) select gender, ethnicity, socio-economic status, family status, and position (Joshi et al., 2010; Laufer & Bengston, 1974; Parry & Urwin, 2011).

Studies on generational differences in the workplace have mixed results and lack research focusing on facets of communication effectiveness. Despite media and leader perceptions of generational differences, there are competing conceptual and theoretical hypotheses on generational differences (have minimal conceptual and theoretical (Cucina et al., 2018). I feel that conducting additional research on generational workplace differences is essential.

Kelleberg and Marsden (2019) found evidence that individuals from more advantaged social backgrounds emphasized interesting work versus extrinsic rewards like high income, security, and advancement opportunities. Therefore, broadening the study to encompass a 360° review of the best communication process, not just a leadership down approach, may prove more beneficial. Listening to both sides of the communication spectrum will provide a more robust picture of communication strategies.

Future research should include Millennial leaders who did not take part in this study. Also, broadening the delineating area to include financial industry leaders from different cities may provide a deeper understanding of the differences and how culture affects communication strategies with a multigenerational workforce. I also recommend extending the study sample size to a larger leadership pool to pinpoint the best communication strategies further. Exploring communication strategies other industries use to communicate organizational vision and values may provide a deeper exploration of leaders' best strategies.

Furthermore, I would extend the research to include all generational cohort levels to provide a more diverse analysis of the data gathered. Participants should have a minimum of 10 years of experience, which will allow the researcher to explore a broader range of approaches on how leaders communicate vision and values to a multigenerational workforce to create a sustainable work environment. Chawla, Dokadia, and Rai (2017) claimed that leaders with more years in management provide more strategies that engage a multigenerational workforce. These leaders may have written and



expanded on organizational policies which provide the best means to engage a multigenerational workforce.

### **Reflections**

The Walden University Doctor of Business Administration (DBA) Program has been a whirlwind emotional ride that provided significant rewards and experience. I had a smooth ride during the journey's beginning, moving through and receiving a false sense of security. However, once I began the tail end of the road, an overwhelming sensation of discouragement swept over me. Throughout the two residencies, I heard *life happens*, and it did happen. The process was effected through two position changes and promotions, family and personal problems, a pandemic that challenged my work and study habits, and my family's care. Nevertheless, the thought of showing my sons a quitter was never an option. Instilling in them a sense of never give up on your goals was essential, and the push I needed each time negativity peeked its ugly head.

This journey has taught me new ways to seek out information, make better-informed decisions, and improved my communication with coworkers, superiors, employees, and family. Today, the office I lead has a wide range of generational cohorts, from Traditionalists to Millennials. The organization is going through a hiring spike, and I can expect younger employees (Generation Z) to enter the workforce, bringing new communication challenges. Through this study, I continue to expand my knowledge of managing the different generations, placing me in a favorable position to navigate the changing landscape of the workforce.

I look forward to continuing my study about leadership, communication, and the multigenerational workforce. I want to publish papers on these subjects, collaborate on more extensive studies with other researchers, explore business consulting, and enter academia.

### **Conclusion**

This study findings demonstrated leaders' inherent strategies to communicate organizational vision and values to create a sustainable work environment. The findings indicate that further exploration of these strategies and the leaders who engage the workforce can benefit a larger population of leaders who seek effective communication with their multigenerational employees. Leaders who consider facilitating various communication methods to ensure that all generational cohorts receive their organizational message are the leaders that ensure the organization's vision and values are communicated, understood, and accepted. Facilitating the best communication strategies is imperative to promote a healthy professional relationship, a productive workplace, and an effective workforce and is essential for the success and sustainability of the organization.

The present workforce consists of four generations, Traditionalists, Baby Boomers, Generation X, and Millennials. Organizations that consider facilitating leadership training on communication with a multigenerational workforce will establish the best communication strategies. Soon, a new generation, Generation Z, will be more prevalent within the workforce and bring their differences and nuances. Organizations can benefit from proactive in creating effective communications strategies that motivate,

express expectations, and explain the organization's vision and values, so all generations accept it. Leaders who can tune in to their workforce, express, explain, and create buy-in of the organization's vision and values can create a sustainable work environment and promote a productive workplace.

The strategies discussed within the study may serve as a framework for financial industry leaders to implement within their respective organizations, increasing the understanding and acceptance of the vision and values by the multigenerational workforce. Leaders can select the best communication strategies that are most useful and effective in communicating the organization's vision and values. Organizations that adopt their approach to communicate to a multigenerational workforce will strengthen their relationship with the workforce by providing effective communication strategies and impacting the sustainability of the work environment.

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## Appendix A: Interview Protocol

Date:

Name:

Financial Organization:

Position:

Start Time:

Stop Time:

Total Time:

Participant Code

Thank you for taking the time to participate in my study. This interview will take 30-45 minutes. My name is Jose M. Peralta, and I am a candidate for the Doctoral in Business Administration degree at Walden University. The purpose of this qualitative multiple-case study is to explore strategies leadership use to communicate organizational vision and values to a multigenerational workforce to create a sustainable work environment.

I will ask you several open-ended questions and take notes during your responses. Throughout the interview, you will remain anonymous. I will not ask you to identify yourself during this interview. You can choose not to answer a question if it makes you uncomfortable, and you have the right to terminate this interview at any time. Do you have any questions before we get started?

Do I have your permission to audio record this session, as we previously discussed?

*[Researcher turns on recorder]*

The recorder is now on. For the record, please verbally confirm that you have read, signed, returned, and understood the information contained in the consent form emailed to you previously.

*[Interviewee response]*

Which generational cohort are you a member of?

Traditionalists    1922-1946

Baby Boomers	1946-1964
Generation X	1964-1980
Millennials	1980-2000

*[Interviewee response]*

How many years have you worked in the financial sector?

*[Interviewee response]*

We will now commence with the interview questions.

1. How has your communication style evolved, and how has it impacted your ability to lead a multigenerational workforce today?
  - a. Did you find it difficult to convey any information to the staff? What kind of information did you find difficult to convey?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

2. What strategies have you used to communicate organizational vision and values for a sustainable work environment?
  - a. Do you think the directive approach or coaching approach is better?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

3. What challenges did you experience when implementing these strategies?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

4. Which strategies were more useful to overcome the challenges experienced communicating organizational vision and values to a multigenerational workforce?
  - a. Do you think culture has an impact on employees understand the organization's vision and values?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

5. What strategies do you use to inspire loyalty and engagement?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

6. Do you find yourself using varying communication styles with different groups?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

7. What additional information would you like to offer on strategies used to communicate organizational vision and values for a sustainable work environment?

*[Interviewee response. The researcher asks pertinent follow-up questions based on interviewee response]*

Those are all the questions I have for now. I thank you for participating in my study. If it is OK with you, I may contact you if I need further clarification on any of your answers. Over the next few weeks, I will continue to interview additional participants. I will transcribe and study each transcript before conducting my analysis.

Within three days, you will receive an interpretation and synthesis of the interview for your review and concurrence. If you do not receive the interpretation within three days, please contact me via email at jose.peralta@waldenu.edu. Upon receiving, review and let me know if you have concerns over its inclusion in the study. If you do not reply within three days of receiving the summary, I will assume your consent to continue participating in the study. If you are interested, I will share the results of my study with you once my analysis is completed and the study accepted by Walden University.

Are there any additional aspects you wish to discuss before the interview ends?

*[Interviewee response]*

We have now come to the end of the interview. I will switch off the recorder.

*[Researcher turns off recorder]*

## Appendix B: Decision Method

Feature	Quantitative	Qualitative
Focus	Phenomenon: an observed fact or situation that exists or happens; the cause or explanation is in the explanation	Phenomenon: an observed fact or situation that exists or happens; the cause or explanation is in the explanation
Interpretation	Systematic investigation of the phenomenon through statistical and mathematical analysis and process and analyze numerical data	The sequence of techniques seeking to describe, decode, and translate phenomena, not capture frequency
Usually selected when	Verify hypothesis or theory through analysis and process of a large amount of data No uncertainty about conceptions under consideration Research can be accomplished using questionnaires with simple questions and short answers to quantify and compare.	Requires interpretation Research necessary in new research areas Answers research questions related to what, how, when, and where Uncertain of the conceptions under consideration
General context	Correlation with experiments Hypothesis relates to phenomena Use of statistical tools Use of questionnaires	Related to observation. Use of flexible questionnaires. Investigation of phenomena. Use of interviews for in-depth research.
Question form	Closed questions	Open questions
Data format	Numeric data got through questionnaires	Usually, text or spoken words transposed into text

(table continues)

Feature	Quantitative	Qualitative
Question form	Closed questions	Open questions
Data format	Numeric data got through questionnaires	Usually, text or spoken words transposed into text
Advantages	<p>Results are numerical, considered objective.</p> <p>Facilitates processing and analysis of large volumes of data</p> <p>Easier to highlight changes and differences</p> <p>Easier to compare numerical data</p> <p>Facilitates the development of quantitative valuation indicators</p>	<p>Allows understanding of the phenomenon</p> <p>Facilitates new research areas</p> <p>Supports the observation of a phenomenon in its natural environment</p> <p>Supports in-depth research</p>

*Note.* Adapted from “Quantitative and Qualitative Research in Business & Technology: Justifying a Suitable Research Methodology,” by N. Basias and Y. Pollalis, 2018, *Review of Integrative Business and Economics Research*, 7, pp. 93-94

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## Appendix C: Establishing Trustworthiness During Each Phase of Thematic Analysis

Phase of thematic analysis	Means of establishing trustworthiness
Phase 1: Familiarizing Yourself With Your Data	Prolong engagement with data. Triangulate different data collection modes. Document theoretical and reflective thoughts. Document thoughts about potential codes/themes. Store raw data in well-organized archives. Keep records of all data field notes, transcripts, and reflexive journals.
Phase 2: Generating Initial Codes	Peer debriefing Researcher triangulation Reflexive journaling Use of a coding framework Audit trail of code generation Documentation of all team meeting and peer debriefings
Phase 3: Searching for Themes	Researcher triangulation Diagramming to make sense of these connections Keep detailed notes about development and hierarchies of concepts and themes.
Phase 4: Reviewing Themes	Researcher triangulation Themes and subthemes vetted by team members Test for referential adequacy by returning to raw data
Phase 5: Defining and Naming Themes	Researcher triangulation Peer debriefing Team consensus on themes Documentation of team meetings regarding themes Documentation of theme naming
Phase 6: Producing the Report	Member checking Peer debriefing Describing the process of coding and analysis in enough detail Thick descriptions of context Description of the audit trail Report on reasons for theoretical, methodological, and analytical choices throughout the entire study

*Note.* Adapted from “Thematic Analysis: Striving to Meet the Trustworthiness Criteria,” 2017, by L. S. Nowell, J. M. Norris, D. E. White, and N. J. Moules, *International Journal of Qualitative Methods*, 16, p. 4 (<https://doi.org/10.1177/1609406917733847>). CC BY-NC.