

# EMPLOYEE ASSISTANCE REPORT

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supporting EAP professionals

## Creating Better Needs Assessments:

*Do we Sell What Customers Need, or What we Want to Sell Them?*

By *RaeAnn Thomas*

Our customers are getting smarter. They are more familiar with the variety of services and program models that Employee Assistance Programs offer. They better understand the subtleties of EAP benefits. Now, customers often ask for what they want. That's good. Right? Well, maybe.

The ball is in our court, but too often we are dropping it rather than picking it up and running with it. The EAP industry has been slow to differentiate the benefits and drawbacks of the various levels of service – we have been indifferent to demonstrate the correlation of a particular level of service to an actual organizational outcome.



Sure, we have the old standby, “for every \$1 invested in an EAP, the company will see a savings of \$5-\$15...” That’s good information, but none of my contract companies have ever done that cost analysis. Have yours? My clients want to know how to choose a service package based on needs rather than cost.

Employee Assistance Professionals offer to provide a needs assessment for companies planning to implement an EAP – but it sometimes turns into more of a sales meeting, rather than a true “consultative” needs assessment. Do we even ask companies what their needs and goals are when we help them implement an EAP?

### How do we help them?

We need to help customers understand the implications of the numerous program models we offer. For instance, why should they use a 1-to-5-session model as opposed to a 1-to-8-session model? Are we selling programs based on organizational needs – or on price?

Companies buy EAP services based on *what it will do for them.*

Critical Incident Stress services (CIS), and other counseling services are among the benefits they can choose from. For some organizations, EAP counselors deal with employees’ problems so that Human Resource Departments can focus on work performance and not personal problems. However, some companies need an EAP to do more than assist with workers’ problems. They may need HR sup-

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port in the form of compliance training or other service – but they may not explain what they really want during a needs assessment.

### What do we Save them?

Companies also buy EAP based on *the money it will save the organization* by decreasing absenteeism, lowering accident rates, and reducing turnover, in turn increasing productivity. EAP can also contain costs by controlling use of mental-health benefits and maximizing the effectiveness of the benefits used.

### How does EAP Fit?

Finally, companies buy an EAP based on *how it will fit with the other benefits they offer*. If the organization has a great health benefit plan, EAP may only be needed for assessment and referral services. However, organizations without benefits may need a 1-to-8-session program because the ability to access external providers without mental-health coverage may be poor.

### Examining the Different Models

The time has come for our industry to consider the implications of our programs and map out the company’s goals and objectives before we offer program options. Across the industry, there are multiple versions of EAP models that appear to fall into a number of different categories. (*See the accompanying chart on page 3.*)

In addition to the basic service models illustrated in this chart, some insurance companies offer “introductory EAP” services as part of their mental-health benefits. These “EAP benefits” do not appear to provide the interactive EAP service we typically offer to corporate clients – but focus only on the employee in the session.

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*“My clients want to know how to choose a service package based on needs rather than cost.”*

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### Analyzing Needs

There are two concurrent needs in this situation. The first is to compile and analyze data to ensure that the models we are selling are able to meet the identified company need or goal. This means we need to follow up with companies and use some sort of outcome or satisfaction survey to understand if we are making the impact they had hoped.

We expect that our customers do that analysis themselves, but realistically, except for a few large organizations, most of our customers don’t have the time, budget, or understanding of the EAP field to discover those answers. We promise meaningful utilization reports. This is an area of reporting that should be customized to each company so that it’s meaningful to them.

The second, probably even more important need is that of educating companies to truly understand the impact of each model. For instance, a 1-to-3-session model will not be able to provide the case-management services needed to effectively track an employee from intake to resolution.

We need to help companies take a step back – and *before* considering any program models – assist them in identifying their organizational needs and goals. This is the program development aspect of our service proposal that we in the EAP industry seem to have missed.

Analyzing model comparisons will not only educate companies about the anticipated results of

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 Publisher - Jennifer Heisler  
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implementing a particular program, but it will also offer benchmarks for our own program development and quality control. If this is not possible across our industry, the least we can do is start looking at this issue at an individual client level.

### Summary

We need to create a better needs assessment with companies upfront when implementing an EAP rather

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**Editor's Notebook**

What's in a name? Sometimes everything. We are changing the emphasis of our

name from *Employee Assistance Report* to *Employee Assistance Resource Network (EARN)*.

The name of this newsletter hasn't changed per se, but we are increasingly using the *EARN* acronym to better reflect the numerous EAP tools that we offer to increase utilization rates. This means that *EAR* is but one part of the Utilization Tool-Kit you receive with your subscription under the *EARN* umbrella, along with Lifestyle Tips, Brown Bagger, Posters, etc.

If you have any questions, please be sure to call or email.

Moving on, shift work stress, a requested topic from an *EAR* subscriber, is the focus of this month's Brown Bagger insert. Some of this stress could be avoided – *if* people would take sleep more seriously!

Most of us can function on a little less sleep from time to time, but doing so day after day runs completely counter to the productivity required in today's competitive, global economy. In other words, how can we work well if we're sluggish all the time? Until next month.

*Mike Jacquart*

Mike Jacquart, Editor  
(715) 258-2448

[mikej@impact-publications.com](mailto:mikej@impact-publications.com)

**Examining the Different Models** *By RaeAnn Thomas*

The time has come for our industry to consider the implications of our programs and map out the company's goals and objectives before we offer program options. Across the industry, there are multiple versions of EAP models that appear to fall into a number of different categories.

Model	What it does	Company need/goal	EAP expertise
1-to-3 session	Assess and Refer	<ul style="list-style-type: none"> <li>✓ Gatekeeping benefit</li> <li>✓ Access to other EAP services (CIS or other training)</li> <li>✓ Compliance (if EAP is a mandatory benefit)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Efficient assessment skills</li> <li>✓ Knowledge of referral networks and procedures</li> <li>✓ Knowledge of resources and areas of strength</li> </ul>
1-to-5 session	Short-term counseling and referral	<ul style="list-style-type: none"> <li>✓ Assistance with work performance issues</li> <li>✓ Influence/ control over mental-health benefit utilization</li> </ul>	<ul style="list-style-type: none"> <li>✓ Efficient assessment skills</li> <li>✓ Realistic "treatment" planning goals</li> <li>✓ Skill in referring to a long-term provider if necessary</li> </ul>
1-to-8 session	Brief counseling and case management	<ul style="list-style-type: none"> <li>✓ Assistance with more complex personal and family issues</li> <li>✓ Case management of employee issues that impact work performance</li> <li>✓ Access to mental-health services when no company benefit is available</li> </ul>	<ul style="list-style-type: none"> <li>✓ EAP counselors may need to strengthen their "social work"/case management skills</li> <li>✓ Clearly defined treatment planning goals</li> </ul>

than just jumping to the sale. We have to help companies define goals and organizational needs – AND THEN pick the model best suited for them.

If we are really offering a valuable service that will meet the iden-

tified needs of each organization, we need to resist the urge to put the cart before the horse and rush to the sale. We must invest OUR time and expertise to help potential clients choose the right product or service to meet their needs. ■

*RaeAnn Thomas is the executive director of Associated Employee Assistance Services (AEAS). She may be reached at (800) 540-3758 or email her at raeann.thomas@ministryhealth.org. RaeAnn is also a former contributing editor of Employee Assistance Report.*

LEGAL LINES

# Employee Terminations: Handle with Care – Part II

By James W. Bucking

Part I of this article in the July *Employee Assistance Report* described how most employment litigation stems from employee terminations. Nearly 90% of discrimination charges filed with the Equal Employment Opportunity Commission (EEOC) are discharge-related claims.

The best time to head off a discharge-related lawsuit is at the moment of the termination, if not before. Five tips appeared in part one of this article. The following are the remainder of my recommendations.

• **Don't be cruel.** What to you is a legitimate business decision is to the employee a highly personal event, and hurt feelings lead to lawsuits. If a case does go to trial, it does not play well before a judge, and especially a jury, for an employer to appear cold-hearted.

• **Conduct the termination in a respectful way.** The manner in which an employer "gives notice" is important. A recent news article quoted a plaintiff, who had just won a million-dollar judgment from his former employer, as having been "devastated" by his dismissal at 10:30 a.m. in front of his co-workers. A good practice is to be as private, respectful, and decent as possible. The employee

*"The best time to head off a discharge-related lawsuit is at the moment of the termination, if not before."*

surely is not enjoying himself — the employer should not appear to be enjoying himself/herself either.

• **Have a back-up.** Just as the employer should document the reason for the termination, the company should also plan and document the termination itself. Two people should be present, and both should take detailed notes. Be sure to record anything of substance the employee said.

The employer should also

record what he/she said, particularly the reason for termination. To avoid pretext claims, it is important to have documentation that what the employee was told was consistent with previous oral and written statements regarding discharge.

• **Pay all compensation due.** Wage claims are one of the fastest-growing categories of employment litigation. Wage laws tend to favor the employee, often allowing the employee to recover double or even triple damages, litigation costs and attorneys' fees, and civil and criminal fines.

In planning a termination, it is important to ensure that all monies due to the employee are

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paid promptly. In Massachusetts, and many other states, all compensation owed to an employee must be paid on the day of discharge. Employees being terminated are losing future income, which is hard enough to accept; losing part of their past income only makes it more likely that they will find a plaintiff's lawyer or file a claim.

• **Think about other agreements and commitments, whether real or potential.**

Although most employees are at-will, there are nonetheless agree-

ments between the employer and employee that should be revisited at the time of termination. These may include non-compete, non-disclosure, and severance agreements.

The employer must understand and comply with any obligations to the departing employee – as well as making sure the worker understands any obligations to the company. Depending on the circumstances, it may be a great investment to pay a few weeks of severance for absolution from future litigation.

## Summary

Regardless of the steps you take, the most an employer can hope for is to minimize the risk that a lawsuit is filed, and to maximize its chances of winning if it is. However, following the tips described in this two-part article will be a big step in that direction. ■

*James W. Bucking is co-head of the Employment Department at Foley Hoag LLP in Boston. He regularly represented corporations and other employees in labor and employment disputes, including those arising from employee terminations. He may be reached at [jbucking@foley-hoag.com](mailto:jbucking@foley-hoag.com).*

## Workplace Trends

# Curbing Personal Internet Use Isn't Easy

By Erika Fitzpatrick

It's almost an accepted fact of life that employees will use their office computers for some personal Internet surfing – checking sports scores, logging onto home emails, etc. – but supervisors must still try to minimize this drain on productivity. Organizations are responding in various ways; none of which are without obstacles. The following are a few of them:

Bonnie Brae, a New Jersey-based nonprofit, monitors electronic communications by employees and youth, in part to help it comply with governmental regulations. Bill Wraight, information technology manager at the 200-employee organization, uses SurfControl Web Filtering, a product by Websense that costs \$771 a year for a 50-user subscription.

The software, which resides on the server, filters all Web and email data and allows Wraight to globally block websites according to Bonnie Brae's "disallow" rules. Workers

can't get to sites with sexually explicit, violent, or otherwise inappropriate content.

At the same time, up to 50 employees at any given time are monitored, with Internet/email usage reports generated for supervisors, who can take disciplinary action against violators. While not foolproof, all new hires sign a detailed document that outlines usage rules.

Even agencies that control online behaviors by staffers are less successful with tech-savvy youth who can get around some filters. As a result, the New York-based Children's Village is looking for a more robust solution.

According to Jeffrey L. Tischler, Children's Village technology director, his understaffed workforce wastes time tracking down Internet abusers and often just shuts down access for all youth – an unfair universal punishment for the bad actions of a few.

Others can't justify the expense of high-tech monitoring gizmos that

are inherently fallible. Clear Internet and email usage policies and careful management are the best solutions, said Christina Hemmer, the employee learning, development and safety coordinator for Dakota Boys and Girls Ranch, a faith-based program for at-risk youth in Minot, N.D.

But Kelly Shifflett, director of public relations and prevention at Rockbridge Area Community Services, noted that as younger generations move into the workplace, having been raised on text messaging and social networking websites like Facebook – which bypass internal controls – neither software nor strict rules may be enough to control inappropriate use of technology.

There is "a looseness in how we handle ourselves that we may have to address a little bit more firmly, just as this generational thing moves through," she said. ■

*Reprinted with permission of Youth Today, [www.youthtoday.org](http://www.youthtoday.org). This is a condensed version of the story that appeared in the May 2008 issue.*

## The Truth about Safety Incentive Programs

By Carl Potter and Deb Potter

In spite of the millions of dollars that companies spend each year on safety incentive programs, research shows that not only do injuries still occur, but these programs often actually demotivate employees, yielding diminishing returns over time.

Ask yourself if any of your corporate clients have one of the following ineffective safety incentive programs – or something similar.

### Play Lotto!

In some companies, the names of employees without a recordable injury are entered in a lottery-type drawing for great prizes, like vacations or trucks. The result is one very happy winner and a lot of disappointed losers. Talk about demotivating.

### Racking Up Points

Other companies dole out incentives based on a points system. Employees accumulate points by attending safety meetings, participating on safety committees, etc. Employees receive monetary rewards based on accumulated points.

The problem with this system is that employees often feel as if they have no control over the outcome. As a result, employees and supervisors tend to under-report or play games with the numbers, so no one trusts the outcome.

Rather than try to “buy” employees’ commitment to safety, managers should consider techniques like these :

**1. Make safety a core value.** Safety needs to be as important to an organization as productivity and profits. Employees should be told that no job is so important that it should be done at personal risk. Every meeting should begin with a safety update of some kind.

**2. Commit management to worker safety.** When executives, managers, and supervisors are actively engaged in organizational safety efforts, employees will notice. Leaders can demonstrate their commitment to safety by listening to and acting upon employees’ concerns, and participating in safety meetings.

**3. Involve employees in the safety process.** Encourage employees to take part in making the workplace safe by including

them on safety committees, inspections, and safety suggestion programs. Give them time to participate during regular work hours, and recognize their efforts.

**4. Allow employees to set their own goals.** Incentive programs that develop around corporate safety objectives are fine — but employees can be expected to resist when the proclamations of management are out of touch with workers’ day-to-day experiences. However, employees will respond positively to setting their own goals. Give them autonomy, and encourage them to make it a personal goal to go home each day without an injury.

### Summary

Invest in motivation, not incentives. In this way, each individual becomes responsible, not only for their own safety, but also for that of everyone in the organization. ■

*Carl Potter, CSP, CMC and Deb Potter, Ph.D., CMC, have worked with hazardous industries for a combined total of more than 44 years. They work closely with many large corporations as speakers and consultants. For more information, visit [www.potterandassociates.com](http://www.potterandassociates.com).*

## Resources

© *No More Bets, Please! Overcoming Problem Gambling*, presented by H.G. Nelson with Alex Blaszczynski and Michael Walker, 40-minute DVD, \$45, Guilford Publications, [www.guilford.com](http://www.guilford.com). Pathological gambling is a significant public health problem, yet few clinicians are experienced in treating it. This DVD fills that gap by offering techniques for treating patients with gambling problems.

📄 *Why Good People Jump Ship – And What You Can Do to Keep Them*, \$99, .pdf download, PBP Executive Reports, [www.pbpexecutivereports.com](http://www.pbpexecutivereports.com), (800) 220-5000. This is a no-nonsense plan designed to help ensure that top employees stay put.

📞 *Mortgage Payment Assistance*, (800) 750-8956.

📞 *Tax Relief Hotline*, (800) 288-8580.

📖 *The Occupational Outlook Handbook 2008-2009*, \$39 hardcover, \$20 softcover, U.S. Government Printing Office, <http://bookstore.gpo.gov/collections/occupational-outlook.jsp>, (866) 512-1800. Revised every two years by experts at the Bureau of Labor Statistics, the *Handbook* covers a wide range of occupations, and describes areas such as working conditions; training and education required for the job; employment outlook; and earnings.

## In Sickness or in Health...

Employees considering a job change seek many sources of guidance, but the opinion they value most often comes from the person closest to them.

Nearly half (46%) of executives polled by Accountemps said they turn first to spouses or significant others for advice when evaluating a potential job change, up from 42% in 2002.

The survey also shows that mentors carry greater clout than five years ago: 41% of respondents said they would consult their mentors first, compared to 28% in 2002.

“A spouse or significant other is not only familiar with a partner’s overall priorities and moti-

vators, but also has a stake in the outcome of his or her career decisions,” said Max Messmer, chairman of Accountemps and author of *Job Hunting For Dummies®*, 2nd Edition (John Wiley & Sons, Inc.).

Along with seeking advice from family, friends, and mentors, Accountemps advises professionals to consider the following questions before making a career transition:

- **Is the grass really greener?**

If you were satisfied in your present job, what changed? Will the new position be more fulfilling, or would you be better off trying to enhance your current role so it

includes more enjoyable duties?

- **Will you have room to grow?** When considering a new position, ask about advancement potential. If a career dead-end is prompting your desire to make a change, you want to be sure you don’t end up in the same situation at a different company in a year or two.

- **Have you done your homework?** Is the firm in good financial condition? Have you researched the industry, and the company’s mission and values? Try to determine if the new work environment will appeal to you. ■

Source: Accountemps  
([www.accountemps.com](http://www.accountemps.com)).

### Health Care Trends

## Studies Reiterate Benefits of Wellness Promotion

Two recent studies – one from academia, and the other from the health-management industry – both reiterate the importance of shifting health-care spending away from treatment, and toward prevention by promoting wellness in the workforce.

In addition, the *SHPS Health Practices* and *New England Journal of Medicine* reports advise that getting workers to adopt or maintain healthy behaviors can save money, reduce absenteeism, and increase productivity.

Both studies recognize that companies incur most of their employee health-care costs from treatments for both catastrophic

and chronic health problems that often result from poor health choices, according to Chris Ryan, chief strategy and marketing officer for SHPS, a leading provider of healthy advocacy and health-benefits solutions.

Direct employer involvement goes a long way in accomplishing better preventive care. Susan Okie, MD, points to several characteristics of effective employer health promotions, including annual risk assessments with feedback to increase employee awareness of their health status and advice for improving it.

Some companies, she added, also offer incentives for participating in risk-reduction programs, provide free prevention services at

work, cover most or all of the cost of medications for certain chronic diseases, and offer onsite health-management programs, medical clinics, gyms, and pharmacies.

SHPS points to two key findings that came to light in both studies:

- ☑ **Preventive care and screenings** are key to detecting problems or diseases before they escalate to catastrophic proportions.

Employers can address these challenges and reduce risk factors by helping workers to choose healthier behaviors, while also adopting innovative ways to

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manage diseases when they do occur. According to the SHPS study, this translates to an average of 18% lower health-care costs.

☑ **Direct employer involvement** goes a long way in promoting wellness.

Dr. Okie notes that effective health promotions need to be tailored to the specific employee population, marketed creatively, and given the support of top man-

agement. According to SHPS, this translates to nearly 13% lower health-care costs.

The SHPS study is available at [www.shps.com/2007healthstudy](http://www.shps.com/2007healthstudy). The *New England Journal of Medicine* report is available at [www.nejm.org](http://www.nejm.org). ■

## On the Job

# Survive the Mass Exodus of Baby Boomers

By Anne Houlihan

The nation will soon experience the most dramatic economic changes in its history. With 76 million Baby Boomers leaving the workforce and only 46 million Generation Xers available to take their place, this represents a deficit of 30 million workers!

And while the Millennials (also known as Generation Y) number approximately 100 million, the oldest of them are too young and inexperienced to step into leadership roles.

The bottom line is that to survive, all companies need to harness the young leadership already in their company. The following are some tips to make this transition smoother.

### 1. Know what you're up against.

Find out as soon as possible how mass retirement will affect the organization. How many Baby Boomers are currently working in the company, what are their positions, and what are their anticipated retirement dates? For example, are all the middle managers positioned to retire in the next five years? Will three key machinists be leaving all at once? Will the sales department shrink by half in the next few years? You need to know what the impact will be to get ready for the transition.

### 2. Develop a knowledge transfer strategy.

Most companies have policy manuals that detail each position's job requirements. While manuals are a

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*“Smart organizations will take a proactive approach and start addressing the issue now.”*

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good start, they're not enough. For one thing, you can only document so much of the day-to-day activities. Moreover, there are subtleties of every job that people do just because experience and knowledge points them in a certain direction. You simply can't document those kinds of things. That's why you need to go a step further and develop a strategy for transferring the knowledge and skills of older workers to younger successors.

### 3. Mentor younger workers.

As part of a knowledge transfer strategy, companies need to implement some type of mentoring program. For a company to have a successful transition, the younger generation needs to work side-by-side with older workers for a period of time. You simply cannot transfer 40+ years of knowledge and expertise overnight. If you know that a key person is going to be retiring in three years, have that person start mentoring a younger worker now. This is *not* something you can do during a new hire's 90-day training period! True mentoring takes at least a year to accomplish. Additionally, Generation

X workers who receive this sort of mentoring will feel more valued and will be more likely to stay with the company long term.

### 4. Retain the older workers in some fashion.

Realize that just because someone turns 65 doesn't mean they want to retire that very day. Many older workers will want to stay in the workforce in some sort of capacity, either by choice or by necessity. Whatever the circumstances, many older workers will still want to work. They can still be a valued resource by working part time or as a consultant. The more flexibility, the more likely they'll be to stick around as a resource for the company.

### 5. Put a strong management team in place.

This is a tough one, and yet it's necessary in order to get through this transitional period. Management must be able to motivate *both* generations of workers and be open and willing to learn from each group. Leaders simply must be involved to see this transitional phase through.

### Summary

The coming years will definitely be a challenge for companies, as more people will be retiring than usual. Smart organizations will take a proactive approach and start addressing the issue now. ■

*Anne Houlihan is the founder of Elevated Leadership International, where she helps bridge generation gaps and overcome adversity. For more information, visit [www.ElevatedLeadership.com](http://www.ElevatedLeadership.com).*