

# Boomers

The rising cloud & the new 'consumerisation' of workplace technology

OFFICE WARS 2012  
A REPORT BY ORANGEBOX INTO THE CHANGING WORKPLACE.



orangebox

# Millennials

**Office Wars 2012** is a project of extensive research into the game changing new technologies impacting the workplace and the new workforce at the centre of workplace technology.

**tracking the challenges and changes**  
reshaping the workplace

Like it or not, the IT proliferation that has shaped the personal lives of anyone under 30 has now spilled into the corporate world.

Accenture

We are entering one of the most **exciting periods of**  
**change**  
**within the workplace.** Two fundamental assets within any organisation are its people and the technology they access. Both are changing more rapidly than at any time in the history of the workplace.

The New York Times reported it recently as, **“A trend which represents a significant shift** from the last few decades, when the most advanced technologies were first available in the workplace and eventually migrated into consumer products”.

For this report, we focus on the people and the technology. Through fourteen chapters we explore the key revolutions/evolutions we believe are topical, insightful and relevant to the changing workplace.

Across all the research we covered, perhaps one of the most salient insights on the need to **better understand the landscape we inhabit**, comes from an observation in Deloitte’s ‘Human Capital Trends 2011’.

‘The population changes that are driving diversity today form a clear and strong trend line. The way businesses approach diversity is a trend, too, but a different one.

Society will keep evolving under its own power, but a thoughtful strategy to derive strength from diversity takes conscious effort. **You can’t stop this train, but you can miss it.**’

Compared with the long established multinational corporations, Orangebox is a new player in the world of office furniture. While we lack the in-house resources of global mega brands, we share the same ambition - to develop office furniture that answers the challenges of our rapidly changing workplace, creatively and effectively.

To achieve this, we need to begin by **tracking the challenges and changes** reshaping the workplace, and enquire how organisations are meeting these challenges.

Change is more dynamic than we want to believe. It’s good to remind ourselves that since the FTSE 100 was established in 1984, 68 of those 100 companies have now disappeared. **“The Times They Are a Changing”** may be a 47 year old song, but its message lies at the centre of business dynamics today.

**Gerard Taylor**  
Creative Director / Orangebox

# 'Office Wars' takes a qualitative approach and reports from the frontline of change, by focusing on four key areas of insight.

## Research Review

Where we extensively review and report on over 100 books, reports, documents and media articles from key and diverse industry sectors.

## Millennials & Boomers Workshops

Review and discussion of The Unwired 2011 Global Survey, with thirty industry practitioners.

## Ten Predictions by Philip Ross

A personal review from one of the most respect commentators on changing workplace technology and work culture.

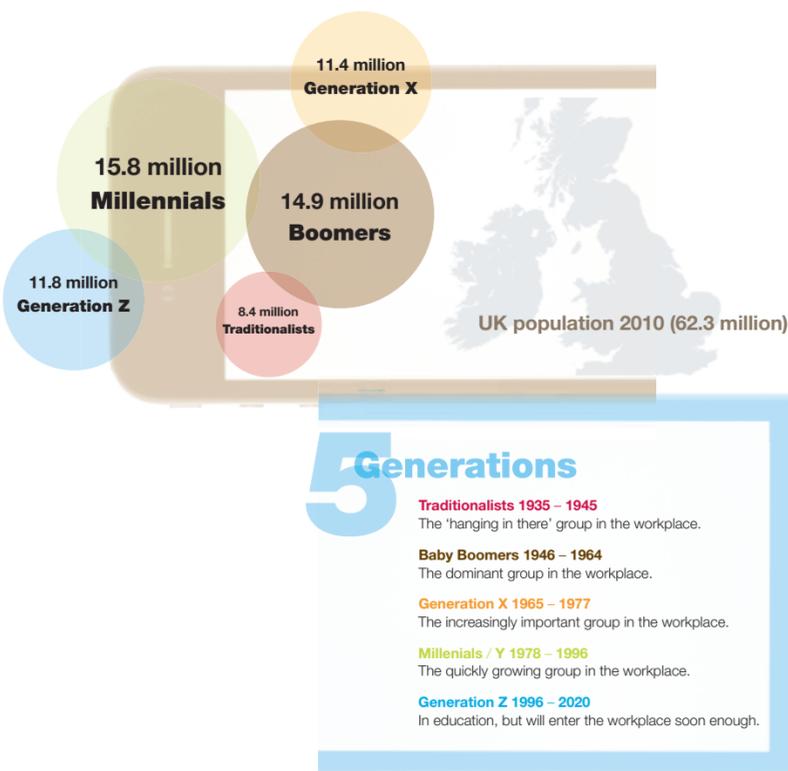
## Interview with Ron Alsop

Insight from the renowned Wall Street Columnist and author of the seminal book 'The Trophy Kids Grow Up'.

To achieve clarity, Office Wars focuses on the two 'bookend' generations within the workplace, Boomers and the Millennials.

The powerful combination of mobile smart phones and tablets, innovative software applications delivered through the internet, and the flexibility of on-premises versus cloud-based ownership models is bringing an end to supremacy of the PC.

Cisco



**Traditionalists**  
(66 to 76 year olds)

**Boomers**  
(47 to 65 year olds)

**Generation X**  
(34 to 46 year olds)

**Millennials**  
(15 to 33 year olds)

**Generation Z**  
(up to 14 year olds)

## Chapters

### 1. Boom goes our technology gadgets

It started with two million iPads sold in the first six months of their release, rising to 64 million tablets sold worldwide in 2011. The new tablet sector alone is projected to be worth £74 billion by 2015. By 2013, the mobile phone is predicted to become the most common device for accessing the internet and Apples Tim Cook is now projecting that tablets, will soon outsell laptop and desktop computers.

### 2. Six Killer Apps

We may be excited by the look and feel of our gadgets but actually it's the software solutions that are bringing all these sophisticated IT gadgets alive. And with the projection that we will download 183 billion apps annually by 2015, apps are proving to be the new essential work tools.

### 3. Say hello to emerging economies

Fact. The new generations in China, India and Brazil are leading the way in uptake of new technologies.

### 4. Millennials at work

It all began with the telex. Then came the fax, then email, which is now giving way to texting, instant messaging and social networking. What's next?

### 5. Collaborating in an 'always on' workplace

We're beginning to get a sense that while our 'always on' technology culture does allow us to be quicker, more dynamic and productive, it's also putting each of us under continuous pressure. This doesn't necessarily make our working lives more enjoyable.

### 6. Rethinking IT security

If a lock-down technology strategy is proving to be unworkable, how will organisations embrace a workplace of personalised IT, via customised downloads?

### 7. The rising cloud

It's not just about redefining outsourcing. These new technologies will help keep costs down, deliver important environmental benefits and redefine how small companies and multinationals compete.

### 8. Knowledge work know-how

By 2014, knowledge workers will account for 45% of all UK workers. It's vital that knowledge work is better analysed, quantified and facilitated within today's organisations. Their future depends on it.

### 9. Wealth or KIPPERS?

The idea of enjoying increasing affluence as we age and a prosperous retirement is diminishing fast. What's replacing it is the realisation that we have a KIPPER generation (Kids in Parents' Pockets Eroding Retirement Savings) who can't really afford to retire from organisations that can't afford to lose their experience and knowledge.

### 10. Boomers: ten key insights

The workplace of the mid-1960's when the early Boomers first began working bears little resemblance to today's workplace, both in terms of what work means and how we achieve it.

### 11. Millennials: ten key insights

They're the most educated generation ever, yet they struggle with a workplace that seems to do things way too slowly. And as for the nine to five 'face time' model - well, that's just old school.

### 12. London Millennials & Boomers workshop

As part of the Boomers & Millennials research, Orangebox and Unwired held round table discussions in London in the autumn of 2011, with thirty industry practitioners, each involved in diverse aspects of realising the contemporary workspace. Sectors ranged from Banking, Technology, Media, Transport, Pharmaceuticals,

Education, Construction, Design and Management. The day's discussions focused on topics central to the Boomers & Millennials debate.

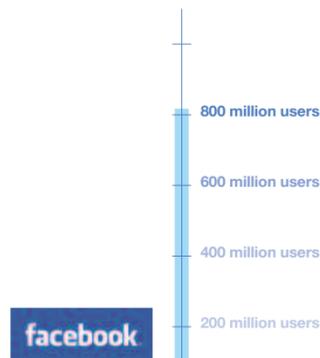
### 13. Ten Predictions by Philip Ross

A timely and personal review from one of the most respect commentators on the changing technology and work culture of the last decade. Philip reflects on predictions that proved accurate and the ones that didn't. He offers his view on how the corporate world should deal with the changes as discussed within Boomers & Millennials, through the next five years.

### 14. Interview with Ron Alsop

The 'Trophy Kids Grow Up' is an international best seller that examines how Millennials are shaking up the workplace and is regarded as one of the most insightful books on this subject. Described by INSEAD Business School as "proving why we can't afford to overlook Millennials attitudes, ambitions and behaviors", the former Wall Street Journal columnist shares his ideas on subjects ranging from how organisations can achieve the best from Millennials to the legacy of Steve Jobs.

### 15. Credits and References



'Our industry (technology) is being redefined and the cards are being reshuffled'.

Financial Times

A recent study by the Office of National Statistics showed that 4.9 million people connected through hotspots such as hotels, cafes and airports over the last year in the UK, up from 0.7 million in 2007.

BBC News

**75%** of Millennials have created a profile on a social network site



# Boom goes our technology gadgets

**450 million** people now access the web from mobile devices

Facebook now has 800 million users

## It started with two million iPads sold

**in the first six months of their release**, rising to 64 million tablets sold worldwide in 2011. The new tablet sector alone is projected to be worth £74 billion by 2015. By 2013, the mobile phone is predicted to become the most common device for accessing the internet. Apple's Tim Cook is now projecting that tablets will soon outsell laptop and desktop computers.

The U.S. PC market continued to contract in 2Q11. One of the main factors for this decline is buyers' continued focus on increasing the share of their IT budget in new IT solutions such as cloud and virtualization, and consumer interest shifts to media tablets.

International Data Corporation

Tablets are walking in through the back door, as employees bring their favorite new tech toy to work and demand access to their corporate e-mail, calendars and other applications.

The New York Times

Makers of PCs and consumer electronics are noticing the shift in consumer expectations. They're incorporating features popularised by the iPad into the new products.

Gartner

Moore's uncannily accurate law of 1965 stated that computer power capacity would double annually and that technology would move apace. Yet, it is still surprising that there is more computing power in today's smart phone than in the Apple Mac's revolutionary design of 2000.

Yet, there is a consciousness that we are only 'at the foothills' of what technology innovation will deliver, as this Guardian article describes: 'The sheer speed of change in the digital economy and the fact that the internet will continue to alter the way we connect with the creators of digital content are two major issues that Tech Media 100 bosses see affecting their businesses in the future.'

"I see continuing disruption for a long time to come," says Mark Curtis from mobile social network, Flirtomatic. "In mobile, for instance, I suspect we are still very early in a long cycle of major innovation - so early that we are comparable to the early days of steam engines in the industrial revolution."

"Augmented reality, cashless payment and near-field communication all hold out the promise of significant disruption. The relationship between the web, TV and mobile has a long way to go to evolve into anything that looks settled."

The introduction of the Tablet, seemingly from nowhere, and the speed with which it has been

embraced by the workplace has been disruptive to all the best-laid technology plans. You could say consumers' embracing of the iPad in the workplace has even taken Apple by surprise. Their worldwide billboard campaign focused on Millennials sitting comfortably at home reading or watching diverse digital media rather than working at the office.

The New York Times reported that, 'During a conference call with investors and analysts in January, Apple said more than 80 per cent of Fortune 100 companies were using or testing the iPad, an increase from 65 per cent three months earlier. Among them, said Peter Oppenheimer, Apple's chief financial officer, are JPMorgan Chase, Sears Holdings and companies as diverse as DuPont, General Electric, Wells Fargo, Mercedes-Benz and Medtronic.'

And as a string of devices tailored for the office enters the market — from the likes of Motorola, Research in Motion, and Samsung, Tablets are all but certain to flood the workplace. In August 2011, The Financial Times reported that, 'Our industry is being redefined and the cards are being reshuffled. Companies are resetting their strategies by taking bold moves'. Behind the upheaval lies deep changes in personal computing that have been set in motion by the industry's most creative mind: Steve Jobs.

In the third quarter of 2011, the Western Europe PC Market declined 11%, mobile devices grew 5.6% and Smartphone sales increased 42%.

Gartner

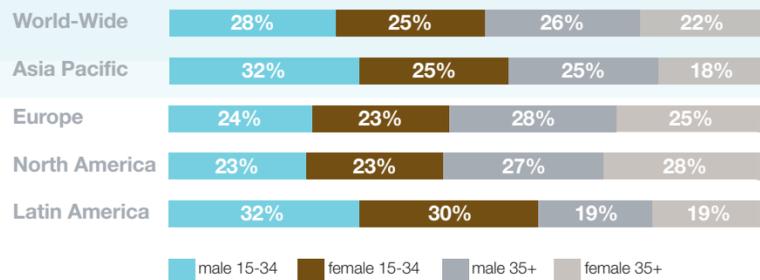
... this revolution in technology, hardware and software offers new potential that will require all of us to embrace flexibility and change in how we work and collaborate. Changes that didn't exist just five years ago.



93%

of teens and young adults are regularly online

Distribution of Internet Users, Age 15+



Source: comScore

"We can't tell people not to use this technology at work. If we did, they'd continue to use it and we'd be in the dark about what they do."

Brandon Edling,  
Director of workplace technology at NBC Universal

The UK has the most registered wi-fi hotspots in the world, according to the Wi-Fi Alliance. London Mayor, Boris Johnson, has pledged to have city-wide wi-fi in time for the 2012 Olympics.

BBC News

IDC's latest survey in consumer trends shows an increasing interest among Western Europeans in iPads and media tablets as next purchase, and a drastic decrease in interest in laptops.

IDC's ConsumerScape 360°

# 'The one-two punch

of Apple's iPhone and iPad have set off the biggest realignment in the tech world since the advent of the PC 30 years ago.'

Financial Times

The New York Times of February 20th 2011, reported that Ted Schadler, a vice president and principal analyst with Forrester Research, said he expected tens of millions of tablets would be in use in America's workplaces by 2015.

"That's huge growth," Mr. Schadler said. "It will be the fastest uptake of any device ever. Faster than PCs, laptops and smart phones".

Impactful as the tablet may be, perhaps even more powerful has been the rapid development of apps for both Apple and Android devices. 100,000+ apps and counting (as highlighted elsewhere in this report) are already rapidly winning their way into worker's lives as increasingly essential office tools.

In the same article, The New York Times reported that, 'To a large extent the iPad's entry into the business world was paved by the iPhone. When Apple first released the iPhone, it lacked capabilities to link up securely with corporate email systems.

But as executives tried the device, they often preferred it to their Blackberrys and other smart phones, and soon began demanding support for them. Apple gradually added capabilities, and the iPhone became standard issue in scores of large businesses. Companies that waited two or three years to support the iPhone began adopting the iPad just weeks after its release.'

It's now abundantly clear for organisations both large and small that this revolution in technology, hardware and software - which has been driven by the culture of the Millennial generation, offers new potential that will require all of us to embrace flexibility and change in how we work and collaborate. Changes that didn't exist just five years ago.

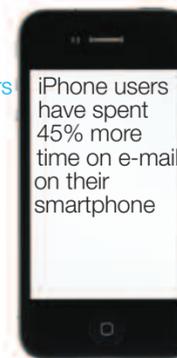
How much and how quickly the 'consumerisation' of technology within the workplace will continue at this pace, we can't be sure. The market capitalisation of leading internet innovation companies may give an indication. From a standing start of just a few years ago - Facebook is now valued at \$83 billion (August 2011), Google \$179 billion, Yahoo \$98 billion, Twitter \$8.4 billion, LinkedIn \$8 billion and the most recent Dropbox (Fileshare) \$ 4 billion, after a recent funding round.

In August 2011, albeit briefly, Apple deposed Exxon Mobile as the world's most valuable company at \$351 billion. Just five years ago, Apple was valued at \$60 billion. Five of the top ten companies worldwide (i.e. Apple, Microsoft, IBM, China Mobile and Google) are technology companies, against only two, ten years ago. It seems that technology companies are viewed as safe bets for the future.

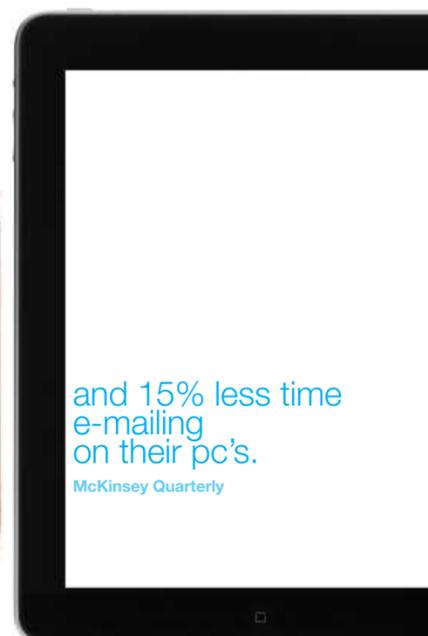
By November 2011 Gartner Research reported that, 'Multitouch interfaces are essential for extending the deployment of computing devices into new markets. Smartphones, tablets and tablet hybrids will become the first pathway to the Internet for many,' and 'the iPad has created a transformational change in how people interact with computers'.

They also report that 'makers of PCs and consumer electronics are noticing the shift in consumer expectations and are incorporating features popularised by the iPad into the new products they are developing. Multitouch technology has become the de facto interface', and 'multitouch is becoming the norm and will prove to be one of the most disruptive technologies of the decade.'

Over the last two years



iPhone users have spent 45% more time on e-mail on their smartphone



and 15% less time e-mailing on their pc's.  
McKinsey Quarterly

41%

of Millennials only use a mobile phone and have no landline

Pew Research

... by 2013 the mobile phone is projected to become the most common device for accessing the internet

Cisco

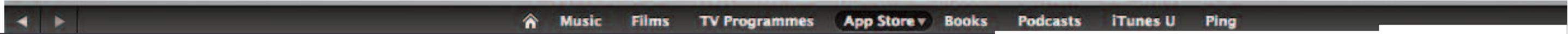
4 billion cell phones are now used worldwide

McKinsey Quarterly

50%

of us are using smartphones to go online, up from 32% in 2008

McKinsey Quarterly



# Six Killer Apps

**‘It’s the economy, stupid’** defined a whole US presidential election. It’s the same with our technology... **it’s not the hardware but the software’.**

We may get excited by the look and feel of gadgets but actually, **it’s the software solutions that are bringing all these sophisticated IT gadgets alive.**

The following six, currently available apps are just the tip of the iceberg into how, bit by bit, quickly and surely, **our workday is being reshaped** by new start-ups and often small, innovative technology companies.

Able to sell their innovations online for a few dollars to a worldwide audience, they are, amongst other things, ensuring Apple earns considerably more revenue than Microsoft.

**183 Billion Annual Mobile App Downloads by 2015**

International Data Corporation

**At September 2011, 6.7 million Apps are downloaded each day via the Apps Store, which is now available in 77 countries.**

CNN



**Perfect OCR**

Take a picture of a block of text with your iPhone and e-mail to yourself, to use however you choose.

**Word Lens**

Translate from one language to another in real time via the built-in video camera in your handheld iPhone

**Recorder**

When it may be critical, you can now record your telephone conversation.

**Jump Desktop**

Lets you control your computer from your iPhone.

**iSense**

This App tells you how many clicks are coming your way via your advertisement on Google as well as and how much your current spend is.

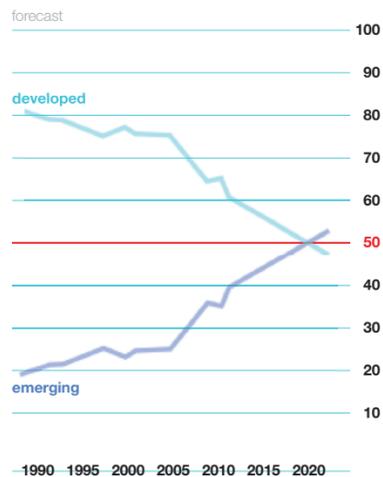
**Square**

Are you a small start-up and want instant payment into your bank account? Add a credit card reader to your iPhone and take instant payment, as well as send electronic receipts.

**our workday is being reshaped** by new start-ups and often small, innovative technology companies.

**Global balance**

Economies' share of world GDP, %



Source: Bloomberg

# say hello to emerging economies

The combined output of the developing economies accounted for 38% of world GDP (at market exchange rates) in 2010, twice its share in 1990. On reasonable assumptions; it could exceed the developed world within seven years.

The Economist

**Fact. The new generations in China, India and Brazil are leading the way in uptake of new technologies.**

The accelerated changes in new technologies and their rapid adoption within the workplace may seem rapid to us. **The fact is, they're slower than in emerging economies.**

**In China, the workforce spends 34 hours per week on new communication tools, against 11 in the rest of the world.**

Accenture



'Jumping the Boundaries of Corporate IT', a recently published report from Accenture, draws attention to how new technology is being embraced in these economies.

'Millennials in the Americas and Asia-Pacific have very positive perceptions of technology, whereas a large share of them in France, Belgium, the Netherlands and Italy feel that technology consumes too much time.

The negative perceptions in Western Europe may result from lack of access to effective technology, as only between 16 per cent and 26 per cent of Millennials in those countries say that they have access to the right technologies at work.

**China and India lead the pack in emerging methods of employee communication. 27 per cent of employers in China already use online chat and 20 per cent use mobile texting to communicate with employees.**

**More broadly, Millennials in China, India, and Brazil lead the world in use of emerging technologies for work purposes, while most European countries and Japan are lagging.**

Young Chinese employees, in particular, are pushing the boundaries of multi-tasking. While the time spent on email is similar to their US counterparts, the Chinese outpace the rest of the world in using real-time communication tools.'

Almost a quarter of the Fortune Global 500 firms, the world's biggest by revenue, come from emerging markets; in 1995 it was only 4%.

The Economist

India absorbs about 4 million to 5 million mobile phones a month, and its mobile rates are about 1 cent a minute, the lowest in the world.

Bloomberg Businessweek

In China during an average week Millennials spend:  
 9.2 hours on email  
 9.2 hours on instant messaging  
 6 hours texting  
 3.3 hours in a blog or tweet  
 3 hours in a virtual community  
 2.9 hours social networking  
 33.6 hours per week.

Accenture

Accenture also report that

# Social networks have become intertwined with business networks.

One in four Millennials globally and four in five in China and India use social networking to investigate employers, superiors, clients, and service providers.



**China and India have invested a rising share of their GDP over the past decade, in sharp contrast to rich countries. In 2010, America's investment was a paltry 16% of GDP, compared with 49% in China.**

The Economist

China, India, and Brazil came to IT relatively late but fresh, without the legacy of earlier, less flexible technologies. These leapfroggers have proven to be aggressive users of all the emerging technologies. Accenture research shows that young IT users in such emerging markets are, if anything, more tech-savvy than their European & American counterparts.

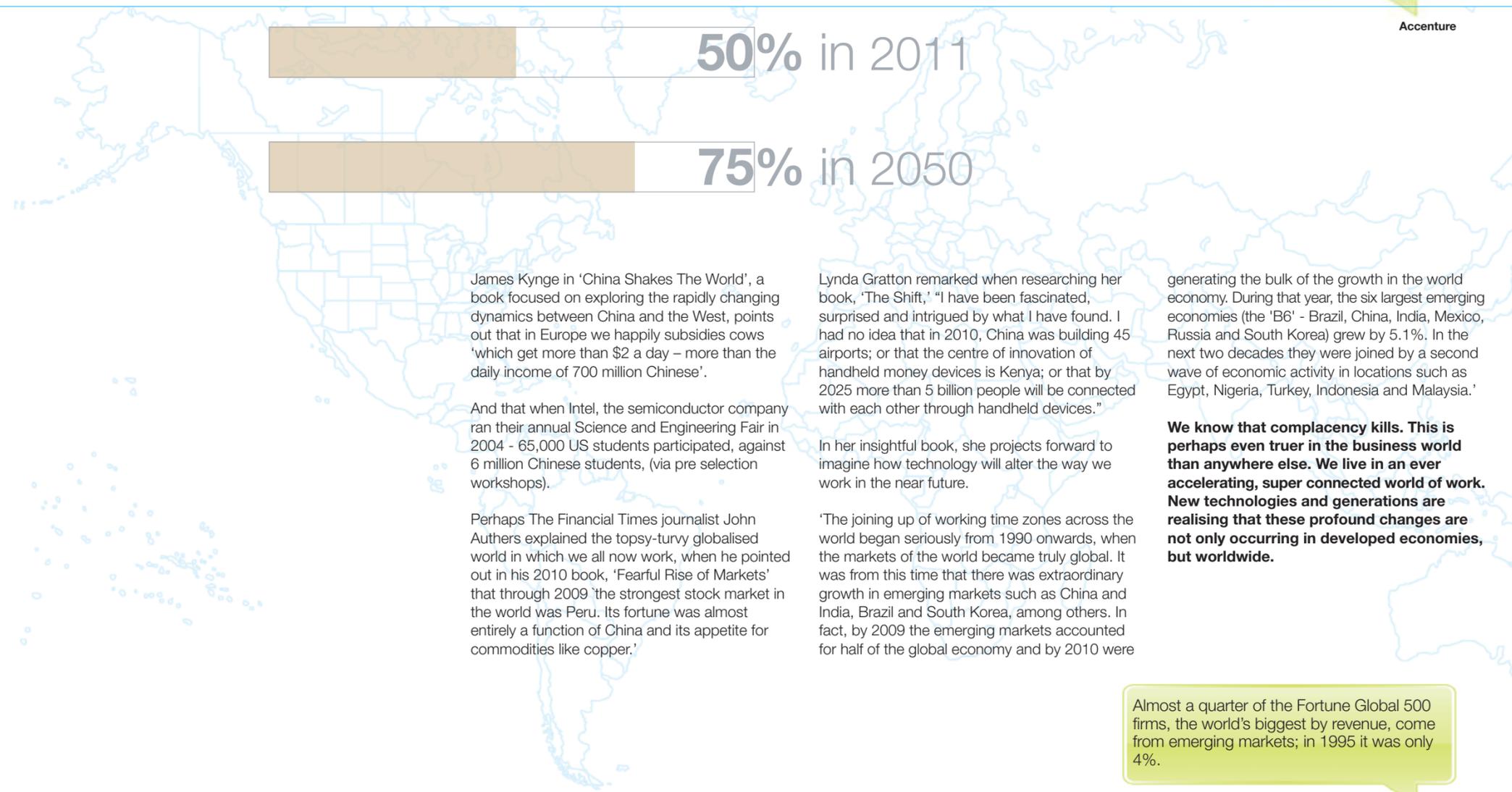
Accenture

**Half of the world's people now live in urban centres and that share is projected to rise to 75% by 2050.**

Accenture

The Chinese spend 14.8 hours a week playing video games (versus 3.4 for the rest of the world), 5.1 hours shopping on the internet (versus 1 hour)

Accenture



James Kynge in 'China Shakes The World', a book focused on exploring the rapidly changing dynamics between China and the West, points out that in Europe we happily subsidise cows 'which get more than \$2 a day – more than the daily income of 700 million Chinese'.

And that when Intel, the semiconductor company ran their annual Science and Engineering Fair in 2004 - 65,000 US students participated, against 6 million Chinese students, (via pre selection workshops).

Perhaps The Financial Times journalist John Authers explained the topsy-turvy globalised world in which we all now work, when he pointed out in his 2010 book, 'Fearful Rise of Markets' that through 2009 'the strongest stock market in the world was Peru. Its fortune was almost entirely a function of China and its appetite for commodities like copper.'

Lynda Gratton remarked when researching her book, 'The Shift,' "I have been fascinated, surprised and intrigued by what I have found. I had no idea that in 2010, China was building 45 airports; or that the centre of innovation of handheld money devices is Kenya; or that by 2025 more than 5 billion people will be connected with each other through handheld devices."

In her insightful book, she projects forward to imagine how technology will alter the way we work in the near future.

'The joining up of working time zones across the world began seriously from 1990 onwards, when the markets of the world became truly global. It was from this time that there was extraordinary growth in emerging markets such as China and India, Brazil and South Korea, among others. In fact, by 2009 the emerging markets accounted for half of the global economy and by 2010 were

generating the bulk of the growth in the world economy. During that year, the six largest emerging economies (the 'B6' - Brazil, China, India, Mexico, Russia and South Korea) grew by 5.1%. In the next two decades they were joined by a second wave of economic activity in locations such as Egypt, Nigeria, Turkey, Indonesia and Malaysia.'

**We know that complacency kills. This is perhaps even truer in the business world than anywhere else. We live in an ever accelerating, super connected world of work. New technologies and generations are realising that these profound changes are not only occurring in developed economies, but worldwide.**

Almost a quarter of the Fortune Global 500 firms, the world's biggest by revenue, come from emerging markets; in 1995 it was only 4%.

The Economist

Globally, more than 25% of Millennials express disappointment with the employer provided technology they use.

Accenture

# Millennials at work

## It all began with the telex.

Then came the fax, then email, which is now giving way to texting, instant messaging and social networking. **What's next?**

The social networking world at IBM includes more than 10,000 blogs and 15,000 wikis, which are knowledge-sharing Web sites that people can freely edit or add content to.

The Trophy Kids Grow Up

Dow Chemical set up its own social network to help managers identify the talent they need to execute projects across different business units and functions. To broaden the pool of talent, Dow has even extended the network to include former employees, such as retirees.

McKinsey Quarterly

For Millennials, Facebook is the dominant digital communication channel.

McKinsey Quarterly

Millennials are a generation for whom email is an antiquated and slow means of communicating. And forget about asking them to use a landline.

They view instant messaging, text messaging, blogs and social networking as much more effective collaboration tools than having to trawl through a static email inbox or have a 'live' one-to-one telephone conversation. Meanwhile Boomers have allowed themselves to become prisoners of their email inbox.

Organisations are recognising that collaborative working via circular emails - when you can't even be sure the right people are involved, may not actually be the best way to collaborate and communicate anyway.

Accenture recently reported a client experience: 'When they moved the discussion to a blog, their email inboxes emptied and the right people joined in as needed. When you open up the community and define its focus, you almost guarantee that you have the right people,' explained the company's CIO. Within the same report, Accenture also outlined that companies: 'that successfully engage young workers, establishing the right balance between IT boundaries and IT freedoms are far more likely to generate breakthrough business ideas than competitors who want their workers to conform to 'old school' IT policies and procedures.

They are also more likely to retain their best-performing Millennials. **Given the realities of today's complex business environment, it is no longer possible to satisfy a workforce with one broad, standard approach.'**

**"The students we hire are used to having Wi-Fi networks and walking around campus with their backpacks, laptops, and cell phones..."**

Cisco

In his extensive study of Millennials, 'The Trophy Kids Grow Up', Ron Alsup observes that it's hardly surprising that Millennials arrive in the workplace with a new mindset, given their education experience. 'To hold the attention of easily distracted Millennials, schools and colleges are making learning a multimedia experience by incorporating podcasts, videos, computer games, and other interactive technologies into their lessons'. He also sets out the implications of what this means when Millennials join the workplace.

'More companies are realising that to compete for talent, they must satisfy the Millennial generation's demands for such tools as instant messaging, social networking, blogs, wikis and corporate training podcasts. Some employers, however, still ban instant messages and videos from the workplace because of concerns about lower productivity and potential security and technical problems.'

In a report published by the United Nations that investigated the four generations within the workplace, it came to a similar finding to Alsup. 'The advent of interactive media such as instant messaging, text messaging, blogs, and especially

multi-player games have generated new skills and styles of collaborating to such a degree that it has made them different. This 'always on, always connected' mindset is at the heart of some of the friction that exists between the generations.

**Millennials have grown up using Facebook, Twitter, YouTube, blogs and wikis and expect to use the same tools or their equivalents in the workplace.**

Millennials advocate for a more fluid use of time in their workday. 'Why not work from morning till noon, take off part of the afternoon, restart again at 5pm and continue till midnight?' In their minds and in their 'always on world', they see this arrangement as perfectly legitimate, as long as they get their work done and meet customer expectations.'

The Financial Times reported an observation by Jerrold Grochow of the Massachusetts Institute of Technology that, "For today's teenagers, email is the equivalent of a written letter - they use it only for formal communication. To them email is for old people". And The Dean of Yale School of

OMG (oh my god)  
AFAIK (as far as I know)  
Y R U (why are you)  
R (are)  
NORDS  
NOW

LOL (laugh out loud)

Google

Follow your interests

Instant updates from your friends, industry experts, favorite hobbies, and what's happening around the world.

Search Twitter

Twitter

Management remarked that: "This generation thinks in hyperlinks. If I give a student a 20-page case study, he complains that it's too long. Yet he has no problem with more than 1,000 pages worth of content that he can navigate through online."

It's clear that asking this new generation to communicate using 'legacy technology' may perhaps not be the brightest thing to do.

Now, technology makes it easy to express emotions while they are being formed. It supports an emotional style in which feelings are not fully experienced until they are communicated.

Alone Together

# Collaborating in an 'always on' workplace

As described elsewhere in this report, we may well be at 'the foothills' of what technology will become within the workplace and the profound changes it will bring to how we work in the future.

Some aspects, though, are already emerging. **We're beginning to get a sense that while our 'always on' technology culture does allow us to be quicker, more dynamic and productive, it's also putting each of us under continuous pressure. This doesn't necessarily make our working lives more enjoyable.**

These demands will only increase as technology ramps up its potential to deliver even more data to our screens. While we'll no doubt embrace this, it's becoming clear that what's also required is a more responsive workplace. A place that recognises our needs and ambitions, provides an environment that allows repose and makes the workday more varied, pleasurable and stimulating.

Teenagers flee the telephone. Perhaps more surprisingly, so do adults. They claim exhaustion and lack of time; always on call, with their time highly leveraged through multitasking, they avoid voice communication outside of a small circle because it demands their full attention when they don't want to give it.

Alone Together

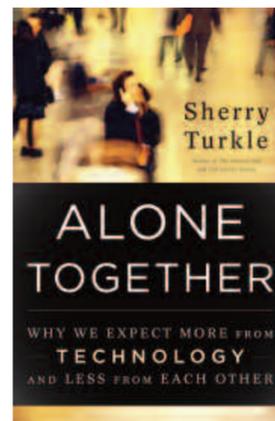
"You wouldn't want to call because then you would have to get into a conversation."

Alone Together

'To keep Millennials, companies must have programmes for increased training, trusting, teaching and teamwork'.

'They are full of fresh insight on how to reach their peers. They are a diverse and inclusive generation and they have critical skills in a highly specialised and fast moving economy'.

Deloitte



**One of the first serious insights to tackle this subject is 'Alone Together' by Sherry Turkle, which examines in detail the implications of the Millennials 'always on' culture.**

**As observed by Howard Gardner of Harvard, 'Her book is essential reading for all who hope to understand our changing relation to technology'.**

Turkle sets the scene for her enquiry: 'These days, being connected depends not on our distance from each other but from available communications technology. Most of the time, we carry that technology with us. In fact, being alone can start to seem like a precondition for being together because it is easier to communicate if you can focus, without interruption, on your screen.'

In this new regime, a train station (like an airport, a cafe, or a park) is no longer a communal space but a place of social collection: people come together but do not speak to each other. Each is tethered to a mobile device and to the people and places to which that device serves as a portal.

Mobile technology has made each of us "pauseable." Our face-to-face conversations are routinely interrupted by incoming calls and text messages.'

These changes, both outside and within the workplace creep up on us and like the frog in slowly boiling water - it's so continuous and subtle we can't get a sense of it happening to us. I'm however not the only person who notices (within my apartment building) all my new younger neighbors are never 'without connection', which invariably means that while we are sharing the same space like the lift, we share no connection, not even a pleasant good morning, or hi!'

**'Alone Together' takes stock of this scenario and points out important changes in how technology is altering our behavior, work practices and its habit of continuously demanding more of us. In this example, she is discussing behavior within the workplace of lawyers.**

'The lawyers insist that they are more productive and that their mobile devices 'liberate' them to work from home and travel with their families. The women, in particular, stress that the networked life makes it possible for them to keep their jobs and spend time with their children.'

Yet, they also say that their mobile devices eat away at their time to think. One says, "I don't have enough time alone with my mind." Others say, "I have to struggle to make time to think." "I artificially make time to think." "I block out time to think." These formulations all depend on an "I" imagined as separate from the technology, a self that is able to put the technology aside so that it can function independently of its demands.'

And even the apparently great 'easy to communicate' invention of email takes on a life of its own that demands ever more from us. The problem with handling your email backlog is that when you answer mail, people answer back! So for each 10 you handle, you get 5 more! Heading down towards my goal of 300 left tonight, and 100 tomorrow. "This is becoming a common sentiment."



"With instant messaging,

'Whassup?'

is all you need to say. Reynold makes it clear that IM does not need "content." You just need to be there; your presence says you are open to chat.

Alone Together

Talking on a landline with no interruptions used to be an everyday thing. Now it is exotic, the jewel in the crown.

Alone Together

"The advent of interactive media such as instant messaging, text messaging, blogs, and especially multi player games have generated new skills and styles of collaborating to such a degree that it has made them different. This "always on, always connected" mind-set is at the heart of some of the friction that exists between the generations. Millennials are challenging the rigidity of the eight to five workday'.

United Nations

When people have phone conversations in public spaces, their sense of privacy is sustained by the presumption that those around them will treat them not only as anonymous but as if absent.

Alone Together

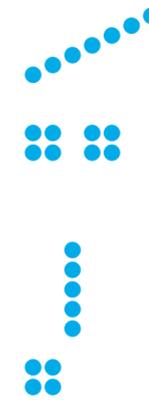
"Turkle begins to focus on the early adopters of our new communication technologies and through extensive interviews and observation gets a sense that while Millennials love their communication tools, they are beginning to get a sense of their potential downsides.

"I interview Sanjay, sixteen. We will talk for an hour between two of his class periods. At the beginning of our conversation, he takes his mobile phone out of his pocket and turns it off. At the end of our conversation, he turns the phone back on. He looks at me ruefully, almost embarrassed. He has received over a hundred text messages as we were speaking. Some are from his girlfriend who, he says, is having a meltdown." Some are from a group of close friends trying to organise a small concert. He feels a lot of pressure to reply and begins to pick up his books and laptop so he can find a quiet place to set himself to the task. As he says goodbye, he adds, not speaking particularly to me but more to himself as an afterthought to the conversation we have just had, "I can't imagine doing this when I get older." And then, more quietly, "How long do I have to continue doing this?"

Living within a continuously connected world demands continuous attention and input and young Millennials may not be as enamored with this as the media would like us to believe.

These issues are crucial for the work environment. **As this report sets out to illustrate, the four generations collaborating within the workplace do not share the same values and culture.** In fact at times they may well see the world from completely different viewpoints. Yet they have to work together to achieve the goals of their employers and their clients. If the Millennials already within the workplace are different, 'Alone Together' offers invaluable insight into what's to come, as Turkle observes: "You have to give to Facebook to get from Facebook." He continues, "If you don't use it, people are not going to communicate with you. People are going to see no one's communicating with you, and that, I think, leads to kids spending hours on Facebook every day trying to buff it out."

The media has tended to portray today's young adults as a generation that no longer cares about privacy. I have found something else, something equally disquieting. High school and college students don't really understand the rules.



Teenagers turn away from the "real-time" demands of the telephone and disappear into role-playing games they describe as "communities" and worlds.

Alone Together

"Some people try to have conversations on texts, and I don't like that."

Alone Together

## In the middle of a conversation,

she takes out her BlackBerry. She wasn't speaking on it. I wondered if she was checking her e-mail. I thought she was being rude, so I asked her what she was doing. She said that she was blogging the conversation.

Alone Together

There is an upside to vagueness. What you don't know won't make you angry. Take Julia for example, who says, "Facebook and MySpace are my life." If she learned something too upsetting about what, say, Facebook can do with her information, she would have to justify staying on the site. But Julia admits that whatever she finds out, even if her worst fears of surveillance by high school administrators and local police were true, she would not take action. She cannot imagine her life without Facebook.

One sixteen-year-old says, and her comment is typical, "Oh, they [Facebook] keep changing the policy all the time. You can try to change their policy, but usually they just put the policy in fine print." She herself doesn't read the fine print. She assumes that in the end, Facebook will take what it wants. "You can try to get Facebook to change things."

Today's young people have a special vulnerability. Although always connected, they feel deprived of attention. Some, as children, were pushed on swings while their parents spoke on cell phones. Now, these same parents do their e-mail at the dinner table.'

Not only is Turkle describing a cultural clash, but a profound change in how this generation views privacy and discretion. As outlined within 'Rethinking IT Security and Protocol' in this report, these changes will cause sleepless nights for IT Directors; and yet a corporate 'lock-down' of IT cannot be the response either.

As Accenture described in their report on IT and Millennials, if the potential of the Millennial generation is to be realised, mindsets have to change and quickly. If not, the 'opportunity to improve performance for organisations that can integrate the social shifts and technology-based skills that Millennials bring to the business environment', will not be realised.'

They also point out that, **'Millennials routinely bypass corporate approval when using devices and applications.** For example, a staggering 45 per cent of employed Millennials globally use social networking sites at work, whether prohibited or not.

Only 32 per cent say that the social networks they use are supported by their IT department and meet their expectations. The majority of

underserved or unsatisfied Millennials are accessing social networks from a free website. Millennials also regularly download free, non-standard technology from open source communities, including ' mash up' and 'widget' providers.'

Being vague or uncommitted is not an option in how we realign our workplace to deal with the changes sweeping our way. We all want to collaborate with our colleagues, whatever their age or background. We all want to have access to the best technology.

To do this, the workplace will need to change accordingly.



121

# Rethinking IT security

If a lock-down technology strategy is proving to be unworkable, how will organisations embrace a workplace of personalised IT, via customised downloads?

45% of Millennials globally are using social networking sites from a free website at work, whether prohibited or not

When it comes to IT, the typical attitude is, "Who says I need permission?"

Asked which technologies they currently use or access for work-related activities that are not supported by their employers

- mobile phones 39%
- social networking sites 28%
- instant messaging 27%
- open source technology 19%
- online applications 12%



Perhaps because they are so mobile, 10 percent of working Millennials tell us that their employers already communicate with them through online chat and mobile texting.

But twice as many (20 percent) would prefer that employers communicate with them more through online chat and mobile texting and less in person, via email, or by phone.

## 10-YEAR-OLD GIRL HACKER DISCOVERS SMARTPHONE SECURITY FLAW.

"Technology is part of the DNA of today's younger generation, says Karen Calo, IBM's vice president for global talent. "They're naturally attracted to things like Second Life and expect IBM as an innovative company to be there."

The Trophy Kids Grow Up

This was the headline to an article published on multiple web media by London's 'Telegraph' in August 2011. It reported on a presentation at the recent Defcon conference in Las Vegas that aimed to discover the next generation of computer security experts. **The ten year old 'got bored waiting for virtual crops to grow in a game, so she hacked the game and advanced the clock'. She explained: "It was hard to make progress in the game, because it took so long for things to grow. So I thought, why don't I just change the time?"**

Globally, almost one in two mid-Millennials (age's 18-22) expect not only to use the computer of their choice once they are on the job, but also to access their preferred mobile and technology applications.

Accenture

The Defcon conference is organised by benevolent hackers, partly to promote research on security vulnerability. During the conference, they held a weekend competition to illustrate why big corporations seem to be such easy prey for cyber criminals. Their findings were that it's mainly the result of corporate workers being poorly trained in security.

In some cases, hackers taking part in the competition found it ridiculously easy in some cases to trick employees at some of the largest US companies into revealing information that can be used in planning cyber attacks against them.

The contestants also managed to get employees to use their corporate computers to browse websites the hackers suggested. Had these been criminal hackers, the websites could have loaded malicious software onto the PCs.

In one case, a contestant pretended to work for a company's IT department and persuaded an employee to give him information on the configuration of her PC, data that could help a hacker decide what type of malware would work best in an attack.

"For me it was a scary call because she was so willing to comply. A lot of this could facilitate serious attacks if used by the right people", said Chris Hadnagy, one of the conference organisers.

There is no doubt that Millennials and Gen Z will present profound challenges for those who manage IT. This is the most tech savvy generation to ever enter the workplace and we have all experienced the reality that older generations are a little slow in recognising the potential of these new technologies. The other factor is that Millennials are profoundly different in how they view and use personal information and security protocols within the workplace.

'Jumping the Boundaries of Corporate IT', a recent insight by Accenture, reports on Millennials use of technology in the workplace.

'Having practically been nursed via personal computers and mobile phones, they don't see bright lines between work and personal, virtual and physical, sanctioned and prohibited. It's not "would you approve this, boss?" but "whatever gets the job done".'

The truth is that Millennials are probably ignoring or violating a company's IT policies right and left using non-standard applications and improvising where they think it makes sense.

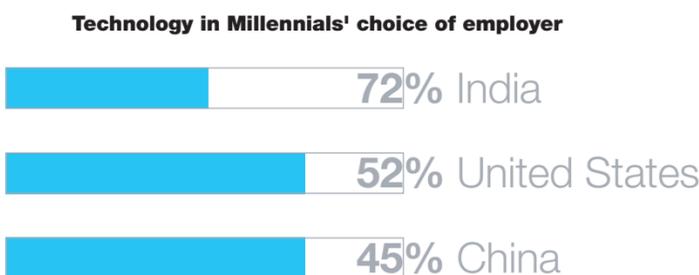
They're interacting with customers, vendors, and partners in new ways through new channels. As Baby Boomers retire over the next two decades, Millennials will be increasingly prominent both in absolute and relative terms, as employees, customers, partners and competitors.

**This demographic shift can be either frightening or exhilarating, maybe a bit of both. But it can't be ignored.**

McKinsey, reporting on the same concerns also highlighted that: 'Advancing technologies and their swift adoption are upending traditional business models. Senior executives need to think strategically about how to prepare their organisations for the challenging new environment.

The rapidly shifting technology environment raises serious questions for executives about how to help their companies capitalise on the transformation underway. Exploiting these trends typically doesn't fall to any one executive and as change accelerates, the odds of missing a beat rise significantly.'

The new collaborative, connected workplace is not only about redefining our mindset about what furniture we need and how our office space needs to be reconfigured to be effective. It requires a profoundly different appraisal of how people and technology interact, for the benefit of employer and employee alike.



Accenture

Social networking accounted for 22.8% of all page views in Europe in 2010

Comscore



# the rising cloud

Over the next 5 years, almost 50% of all CIOs expect to operate the majority of their applications and infrastructures via Cloud technologies.

Gartner

Medical records in the Cloud are now being used to help medical teams in disparate locations view the same information about a patient, update it and work in real time together to save lives and promote optimum health.

Accenture

**It's not just about redefining outsourcing.** These new technologies will help keep costs down, deliver important environmental benefits and redefine how small companies and multinationals compete.

"Connected devices beyond the PC will increasingly come in a breathtaking number of shapes and sizes, tuned for a broad variety of communications, creation and consumption tasks. It's important that all of us do precisely what our competitors and customers will ultimately do: close our eyes and form a realistic picture of what a post-PC world might actually look like".

Ray Ozzie Microsoft CTO

Media tablets are changing what users will expect out of their computing devices. During the next 5-10 years, media tablets will instigate change in computing form; modular designs will enable tablets to take on new functions, becoming the cross-platform controller and brain for hybrid consumer electronics and computers.

Tablets will be substitutes for several of the consumer electronics consumers often carry with them. Thin-and-light mobile PCs with tablet-like features will become mainstream, pushing out some bulkier PC styles that have been the norm.

Gartner

The computer within the workplace began with the original mainframe versions of the 1960's. Applications were run centrally, before migrating to the PC where the user had more control over creating their own software and applications. This became the dominant role for decades.

Fast-forward to today and we're entering an age with a dizzying pace of change. Rapidly developing technology means **the PC is giving way to a myriad of different devices** that capitalise on the computing infrastructure of the Cloud and virtualisation technologies.

Three leading players advising on the migration to Cloud technology - Accenture, IBM and McKinsey, report that: 'A number of new and evolving technologies have contributed to Cloud formation. Among them are: the continued commoditisation of hardware, virtualisation, service-oriented architectures, open-source software, the automation of technology management, bandwidth capacity increase, enhanced mobility and social computing platforms. These technologies are being combined in ways that provide rapid access to massive compute capacity and flexible functionality at dramatically lower price points'.

'A new reality is emerging for organisations of every size from every part of the planet. It's called the Cloud - a profound evolution of IT, creating new possibilities and enabling more efficient, flexible and collaborative computing models.

'Cloud computing is a new model of consuming and delivering IT and business services. **It enables users to get what they need, as they need it** - from advanced analytics and business applications to IT infrastructure and platform services, including virtual servers and storage. It can provide significant economies of scale and greater business agility, while accelerating the pace of innovation.'

'Cloud computing is a tool that can assist executive teams in keeping costs down. Corporate leaders are also using Cloud computing to help them find innovative ways to move ahead in their markets and leapfrog competitors who are not taking advantage of Cloud's benefits.'

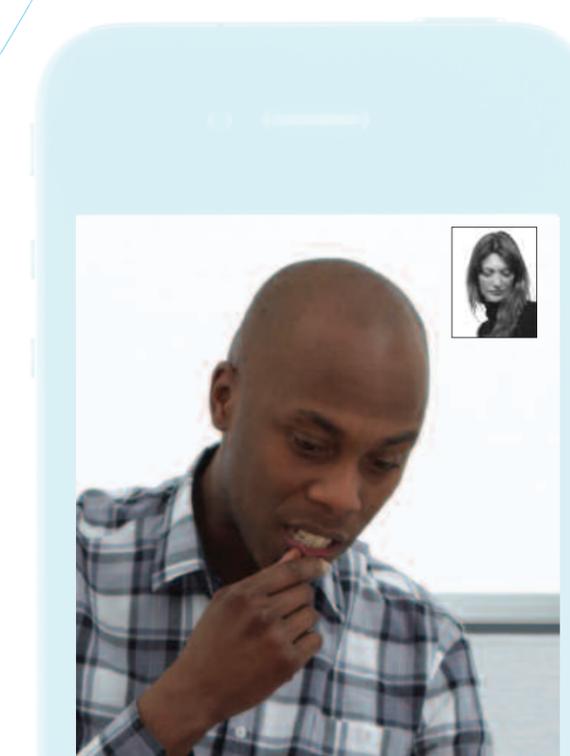
These technology changes are rapidly reducing costs by achieving a new economy of scale; all enterprises will eventually be able to access and use even the most complex software and applications. The Cloud means we no longer need to individually invest in our own IT resource.

'The Shift' by Lynda Gratton explores the potential of these technologies by projecting forward to a new world of work in the future. 'What Jill loves about the Cloud is that it is convenient, on-demand and allows her to work with her colleagues to pool their resources. Jill does not actually own the physical infrastructure she uses or the applications she downloads.

Instead she rents usage as and when she needs it - paying only for the resources she uses. The Cloud has also created endless possibilities for people across the world to access pooled resources.

That's one of the reasons why avatars and holographs are the norm. To use her avatar or work in a holographic representation of her office, Jill simply has to hook up to the immense computational power available on demand from Cloud computing'.

While it can be argued that we're still in the 'early adopter' phase of the new potential, the Cloud and virtualisations will bring, there is no doubt that we've entered a profound evolution of IT within the workplace that will change things dramatically.



Most knowledge workers haven't been trained in search or knowledge management and have an incomplete understanding of how to use data sources and analytical tools.

McKinsey Quarterly

UK knowledge workers are 42% of all employees in UK, up from 31% in 1984 & projected to be 45% by 2014.

Business in the Community



The average time before we are interrupted at work.  
Management Today

# Knowledge work know-how

**By 2014, knowledge workers will account for 45% of all UK workers.** It's vital that knowledge work is better analysed, quantified and facilitated within today's organisations.

## Their future depends on it.

**40% of work is considered unproductive**

(consensus of UK conference executives)

While workers may know how to use technology tools, they may not be skilled at searching for, using, or sharing the knowledge.

McKinsey Quarterly

Knowledge workers' information needs vary. The key to better productivity is applying technology more precisely.

McKinsey Quarterly

"Older workers who grew up in a face-time culture believe young people have no work ethic if they leave at five o'clock," she says. "What they don't realize is that the Millennial worker gets online and is working at home at midnight."

The Trophy Kids Grow Up

The debate between the merits and needs of processing work versus knowledge work is becoming more fully understood within organisations - hardly surprising given "knowledge working", was first defined in 'Landmarks for Tomorrow' by the renowned business thinker and writer Peter Drucker, way back in 1959.

However, with this realisation comes increasing demand from organisations that knowledge work is not only fully embraced and facilitated - but has to account for its productivity in much more quantifiable ways.

An informative examination of this issue is the McKinsey Quarterly of February 2011 by Thomas H Davenport. He argues that: 'A wide variety of recent research has begun suggesting that 'always on', multitasking work environments are so distracting that they are sapping productivity.

After researching the productivity of knowledge workers for years, I've concluded that organisations need a radically different approach.

Yes, technology is a vital enabler of communication, of collaboration, and of access to rising volumes of information. But less-common-denominator approaches involving more technology for all have reached a point of diminishing returns.

It's time for companies to develop a strategy for knowledge work - one that not only provides a clearer view of the types of information that workers need to do their jobs, but also recognises that

the application of technology across the organisation must vary considerably, according to the tasks different knowledge workers perform.'

The implication is that **we need a more varied environment for different working scenarios** where we are interacting with technology - either individually or collaboratively. We also need to be more focused on the technology provided.

This need for achieving better control on the use, allocation and training of new technologies is also highlighted in a McKinsey interview with JA Joerres, CEO of Manpower, in which he observes: "When I look ahead I see a talent crunch creating structural changes in the workforce, and companies that aren't paying attention might find themselves healthy one year and in trouble the next - it will be that dramatic.

Companies will need to focus on the whole equilibrium of talent because they're running themselves so lean that if they get a little sand in their gears, the whole organisation breaks down."

"The largest companies have good training programs, but they don't mandate training, because there isn't time in the day given this lean machine they've created".

And again as summarised by Deloitte in their 2011 Human Capital Trends. "Today's workplace isn't what it used to be: The pace of change is faster. Organisations are flatter. Work is more virtual, collaborative and project based. The corporate

ladder, rooted in the industrial era, takes an outdated, one-size-fits-all view of managing work."

Deloitte also suggests that the corporate ladder is collapsing and that the 'Corporate Lattice' is emerging. It urges organisations that they have to find ways to measure results and not 'face-time'.

'The changing world of work rendering measures of 'face time' as a measure of performance - however subtle or not, is irrelevant. Organisations must up their game in goal setting and assessing the results of employees that managers don't see day to day.

These days, the idea of attempting to reach an increasingly diverse population without an equally diverse corporate team is a self-defeating proposition.'

In 'What Matters', from October 2009, McKinsey suggests that the first step to achieving more effective productivity with knowledge work is to recognize the different types of work going on.

On their interactive micro site <http://whatmatters.mckinseydigital.com/flash/collaboration/>, they identify twelve distinct types of knowledge workers and their needs:

Administrator, Agent, Aid/Apprentice, Buyer, Counselor, Creator, Instructor, Investigator, Manager, Performer, Salesperson, Scientist

They also comment: 'Knowledge workers are growing in numbers. In some sectors of the economy, such as healthcare providers and education, they account for 75 per cent of the workforce; in the United States, their wages total 18 per cent of GDP. The nature of collaborative work ranges from high levels of abstract thinking on the part of scientists, to building and maintaining professional contacts and information networks, to more ground-level problem solving.

Our research shows that the performance gap between top and bottom companies in collaboration-intense sectors is nine times that of production i.e. transaction-intense sectors. That factor underscores what remains a significant challenge for corporations and national economics alike - how to improve the productivity of this prized and growing corps.

For companies, knowledge workers are expensive assets, earning a wage premium that ranges from 55 - 75 per cent over the pay of workers who perform more basic production and transaction tasks. Yet there are wide variations in the performance of knowledge workers, as well as their access to technologies that could improve it.'

Creating a great collaborative workspace is fine as an ideal, **but it's a wasted opportunity if not part of the larger cultural change within organisations.**

The needs of the new types of knowledge work and the ability to access ever faster working data is putting pressure on organisations to redefine the structures of control and accountability management.

Furniture helps deliver intelligence to working space and while it cannot solve the need to better quantify and measure the effectiveness of knowledge work, it can become a tool in **delivering an effective environment that addresses the shortfalls of the open plan and shared collaborative workplace.**

60% of Boomers won't be able to maintain a lifestyle close to their current one without continuing to work

McKinsey Quarterly

41% of Boomers contribute financial support to their adult children; on average \$471 a month in direct assistance.

Harvard Business Review

42% of Boomers project they will continue working after age 65 and 14% now say they don't think they will ever retire.

Harvard Business Review

# Wealth or Kippers?

The idea of enjoying increasing affluence as we age and a prosperous retirement is giving way to the realisation that we have a **KIPPER generation** (Kids in Parents' Pockets Eroding Retirement Savings) who can't really afford to retire from organisations who can't afford to lose their experience and knowledge.

87% of Boomers say being able to work flexibly is important, because they're eager to pursue other passions while keeping a hand in at work

Harvard Business Review

The older we get the more our brain regulates our emotions. We become less impulsive, more considered.

Management Today

Right now, roughly two experienced workers will leave the workforce for every one inexperienced worker who enters.

Rainmakertinking Inc

Boomers are the most highly skilled ageing workforce in US history & account for a disproportionate share of US knowledge workers

51% of all managers  
45% of all professional people

McKinsey Quarterly

Surveys from Europe and the US both report that **the vast majority of Boomers now plan to work past retirement**, part-time if not full-time.

RainmakerThinking Inc research in the US, found that as of 2010, one in three workers will be aged 50+ and 'their experience and accumulative knowledge increasingly becomes a value proposition'.

Perhaps the clearest indication of the rapid redefining of retirement is illustrated in an article from 8th August 2011 in London's Guardian newspaper. It reported that the City of Central Falls in Rhode Island is the first city in the state to go bankrupt and is unlikely to be the last.

The article states that within a decade, cities such as Los Angeles, New York and Chicago could face similar fates. 'This city's problems have been decades in the making and stem from a pension burden created for Baby Boomers in the 1970's who were promised far more than Central Falls - and many other US cities - can now afford'.

Balance this with the findings from a recent McKinsey report that 'when a large multinational manufacturer accelerated its succession planning, the company realised that it would have to replace 80% of its executives within six years at a period when in the US alone, between 8,000 to 10,000 Baby Boomers turn 60 every day.

We are living through a **period when the position of older workers within the workplace is anything but stable** and needs to be reevaluated.

Major multinationals are now beginning to address this. Dow Chemical, for example, are setting up new working networks that are inclusive of retired employees being able to contribute to specific projects. USB is choosing older workers as the perfect representatives for client-facing retirement products. UK retailers such as B&Q are realising the value of an older sales team and their experience and calmness, making their stores more attractive and successful retail environments.



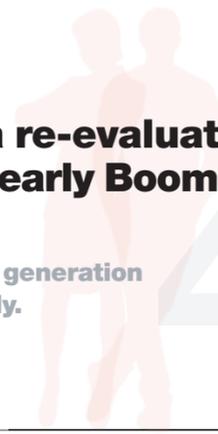
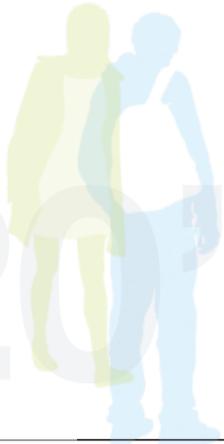
As the workforce continues to age, by 2010 almost one in 3 will be at least 50, and knowledge and experience increasingly become value-added propositions.

Every organisation will be scrambling to create a reputation as an age-friendly workplace.

Rainmakerthinking Inc

## Clearly, we're at the beginning of a re-evaluation of the roles and contribution of the early Boomers within organisations.

As highlighted in Lynda Gratton's book 'The Shift', the generation demographics are changing - dramatically and rapidly.



20's 30's 40's 50's 60's

'In Europe the working population is rapidly ageing due to low birth rates, longer life expectancies and in many countries low immigration. By 2050, it is estimated that the median age of Europeans will rise to 52.3 years from 37.7'

How will this impact the design of a workplace that now has to address both the physical and emotional needs of older workers - from technology to chairs, lighting and the acoustic environment - and the smart, engaging and lively environment desired by Millennials and Gen Z workers.

Because of slow population growth between 1966 and 1985, there aren't enough Gen Xers and Millennials to replace older generations who will retire during the next 10 years.

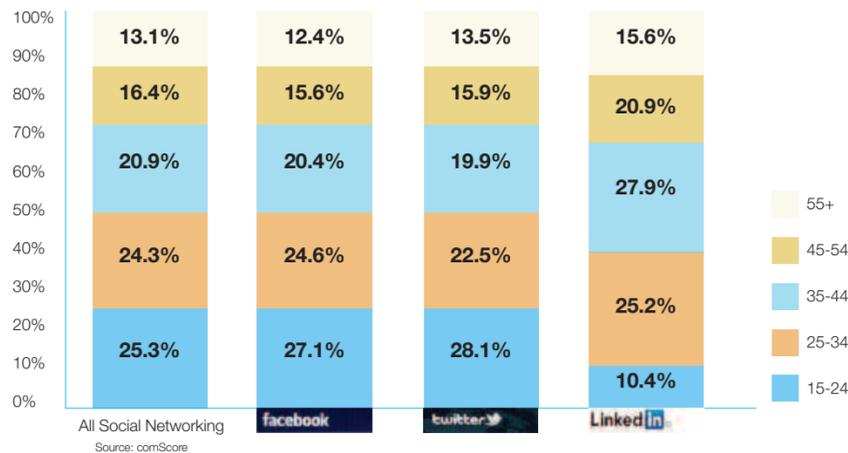
Rainmakerthinking Inc

Companies that need large numbers of Boomers must create a compelling value proposition for them & the most important elements

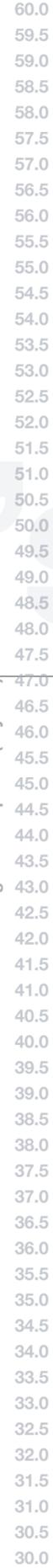
- Flexibility
- Physical environments
- Workplace camaraderie
- Health care

McKinsey Quarterly

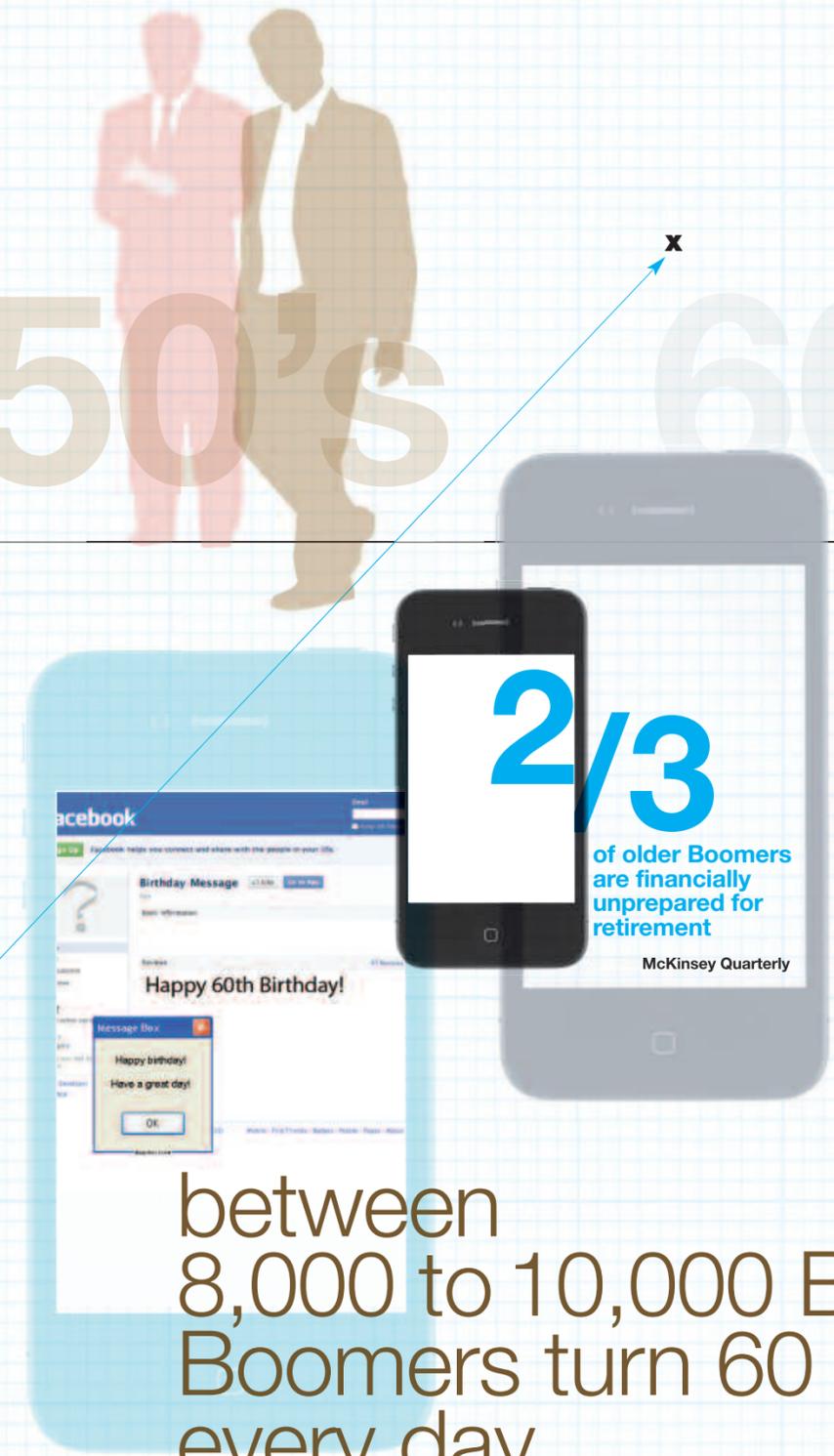
European Visitors to Facebook, Twitter, and LinkedIn



Median age of Europeans (in years)



2010 2020 2030 2040 2050 decade



between 8,000 to 10,000 Baby Boomers turn 60 every day

IBM and P&G seek retirees to work on projects that let them share expertise with younger workers.

UBS hires Boomers as retirement advisers because it believes that they are extremely effective with clients in the same life phase.

The McKinsey Quarterly

80% of Boomers say they enjoy trying new products and services.

The McKinsey Quarterly

## The workplace of the mid-1960's when the early Boomers first began working

bears little resemblance to today's workplace, both in terms of what work means and how we achieve it.

# Baby Boomers

## ten key insights

Recently, when a large multinational manufacturer accelerated its succession planning, **the company realised that it would have to replace 80% of its executives within six years.**

McKinsey Quarterly



Within less than a decade, all Boomers will be

**51 to 70**  
years old  
and is now discussed daily.

McKinsey Quarterly

Over the period of the Boomers generation. (Worldwide)  
1/3 increase in global income  
1/3 increase in life expectancy  
2/3 decrease in infant mortality

Management Today

What are your organisation's most pressing talent concerns today?

41% Competing for talent  
38% Developing leaders & succession planning  
37% Retraining employees  
35% Training  
34% Creating career paths

Deloitte

1. Boomers invented 'youth culture'.
2. For Boomers, work defined them.
3. Boomers are the most highly skilled generation in history.
4. Boomers have rewritten the rules through each decade of their careers.
5. The last decades of Boomers careers aren't going to be as budgeted for.
6. Companies are now waking up to what it will mean to lose Boomers knowledge and experience.
7. Boomers are improving as IT adopters.
8. Boomers are 'nine to five' natives, unlike Millennials.
9. Boomers enjoy change and trying the new.
10. The two 'bookend' generations are finding it easy to get along in the workplace .

For many, work became their identity, competition their driving force, and **self-improvement a way of life.**

Johnson & Johnson believe in following the strategy that, if valuable people leave, we will reconnect with them in a few years and try to re-recruit them.

The Trophy Kids Grow Up

By 2015, more than one third of the labour force will be over the age of 50.

McKinsey Quarterly

Multiple careers are becoming more prevalent. After a long and successful career at Tesco, Sir Terry Leahy now takes a role in smaller, entrepreneurial companies.

Management Today

Boomers seven rewards as important as compensation

1. High-quality colleagues
2. An intellectually stimulating workplace
3. Autonomy regarding work tasks
4. Flexible work arrangements or boss
5. Access to new experiences and challenges
6. Giving back to the world through work
7. Recognition from one's company or boss

Harvard Business Review

By 2015,  
Boomers will  
account for  
40% of all US  
spending.

McKinsey Quarterly

## Boomers were always in the right historical place at the right time.

### 1.

#### Boomers invented 'youth culture'.

Boomers are nothing if not resilient and adaptable. Each of the decades since their birth and through the span of their careers has brought profound changes to work, the workplace and the organisations for which they work.

It seems increasingly difficult to relate the speed and demands of today's workplace to the pace of work in the 1970's. This Office Wars report sets out to highlight the developments now underway that are set to bring profound changes. Some commentators believe they will be every bit as dramatic as that of the last four decades, albeit at a more accelerated rate of change with regard to how technology will allow us to communicate, collaborate and create.

For Millennials, the two big talking points have been their prowess with technology and the emotional consequence of an upbringing of being chaperoned. Research on Boomers, on the other hand, has highlighted the dramatic implications of changing demographics and the realignment of retirement finances now underway - a consequence of over two decades of overspending.

To keep parity with Millennials, we have set out ten key insights that have emerged from our research:

The image on the previous page of the rock group Cream, circa 1967 made it almost impossible for any generation that followed to ever look as cool again. Given the decade of austerity that had proceeded, the swinging sixties were all about the reinvention of what it meant to be young and able to create a new world order. Of course, the seeds were sewn a decade earlier by the likes of Bill Haley, Jerry Lee Lewis and Elvis Presley.

For the early Boomers, the sixties were their formative years and helped define the generational values that would endure over the coming decades, as reported by RainmakingThinking in 'Managing The Generational Mix' of 2007: 'The Boomers were always in the right historical place at the right time. They were kids when it was cool to be a kid, teenagers when it was cool to be a teenager. They were in their twenties when you couldn't trust anyone over thirty. By the time they reached college in the mid-60's, they were ready to rebel against the safe, secure, "ticky-tacky", rule-bound world their traditional parents had created.'

### 2.

#### For Boomers, work defined them.

Boomers' ambition stems from their belief established during the late sixties that the rules of society were there to be broken and redefined.

This was also when Boomers began to equate work as the means to define what they stood for and after an initial period of rebellion, they evolved into decades of continuous ambition, reaching a crescendo in the 'monied' 80's. A short history of the key Boomers decades is covered by RainmakingThinking: 'Most researchers define the huge Baby Boom generation as those born between 1946 and 1964. However, every day we meet people born after 1953 who tell us they can't identify with the "old rock and rollers" and feel like proverbial fish out of water.

Their voices have become too loud for us to ignore. While all Baby Boomers share much in common--namely, a child-centered upbringing, a focus on individuality and youth, and a distrust of anyone in authority - there are enough differences between the first and second waves to make them distinct cohorts: older and younger.

They cut their hair, donned business suits, and slipped into the very establishment they had railed against the decade before. For many, work became their identity, competition their driving force, and self-improvement a way of life.

Reflecting on their generation, a group of 40-something HR professionals concluded: "We think we should call our generation the 'Bridges' or the 'Seekers'. We are the bridge between older and younger generations, and we are seeking ambitious goals and dreams as we strive for work/life balance."

Boomers questioned authority much more than any other generation; **they encouraged equality.**

After their youthful rebellion, many older Boomers grew up and settled down in the early to mid-70s. Although Young Boomers were just graduating from high school or college at that time, both cohorts ultimately followed the same workplace path: They hitched their wheel to the star of an established organisation and started paying their dues.

They waited for their bosses to notice their hard work and reward them in due course. They believed in job security and figured the system would take care of them through retirement.

But, then, just as they started to earn seniority and move into positions of authority, they were hit by the downsizing days of the late 80's - early 90s. Shell-shocked Boomers watched organisational hierarchies flatten, jobs disappear, and the lifetime employment bubble burst.

Others stayed on board, struggling to do more with less, and championed teamwork and consensus as the way to meet their goals. Still others were cut adrift and spent months, even years, trying to re-establish themselves in their careers.

Whatever their situation, Boomers, whose personal identity was often defined by their work ("I am what I do" was a Boomer anthem), took a punch in the stomach of self-worth and self-esteem. They gradually realised that the loyalty they had given to their organisations wasn't reciprocal.

A new HR director in a large midwestern bank explained, "I understood what Gen X was all about when the company I worked with for 17 years let me go. I love my job right now, but I'm not sure I'll be retiring from it. I'm keeping my options open." By necessity, the savviest Boomers became free agents whether they wanted to be or not.

In the early 2000s, some Boomers were understandably conflicted over the many changes in the workplace. The rules were changing, nifty Xers were making demands these seasoned pros would never have dreamed of making, and those pesky Gen Yers were just arriving, expecting big league jobs with little league experience.'

### 3.

#### Boomers are the most highly skilled generation in history.

McKinsey reported that: 'This generation is not only the best educated, most highly skilled ageing workforce in the US but also accounts for a disproportionate share of US history 'knowledge workers' - 51 per cent of all managers and 45 per cent of all professional people, such as doctors and lawyers - while representing just 41 per cent of the workforce.'

The research organisation Culture Coach International observed: 'Boomers were more educated; which led to a raised awareness and consciousness, and thus they demanded social change through the human rights movement.

Boomers questioned authority much more than any other generation; they encouraged equality. Competition for everything was very high. With such a large population, everyone had to fight for what they got, whether that be a spot in the football team, getting into their preferred college or landing a dream job.'

It's no coincidence that, as discussed elsewhere in this report, the implications of this generation moving out of the workplace is the one issue of greatest concern to both organisations and national governments alike.

# 65%

## of Boomers say that Millennials look to them for advice and guidance.

Harvard Business Review

Every organisation will be scrambling to **create a reputation as an age friendly workplace.**

Boomers are the most economically successful generation ever, which has contributed to huge productivity growth.

While Boomers may have worked hard and consumed hard, the one thing they have not done is **save for their old age.**

4.

**Boomers have rewritten the rules through each decade of their careers.**

This is a reoccurring observation about Boomers, who are universally seen as self-reliant and confident and who grew up to believe they could reform the wrongs of society and even change the world. They continuously questioned established authority and the status quo, as these excerpts from two different research papers highlight:

Carolyn Martin and Bruce Tulgan of RainmakingThinking: 'They experienced the economic disappointments of the 70s. They learned early on that, of course, you can't trust politicians, that of course, ideals don't easily translate into action; ... you have to struggle to realise your dreams; that of course violently protesting war doesn't get what you want. In essence, harsh realities tempered any idealism their elders offered. But it also taught them that real change unfolds from the inside, not the outside.'

As reported by Denise Kingsmill in a Management Today article, from April 2011. 'We British Boomers are supposed to have reaped the benefit of free education, house price inflation, and index-linked pensions, while at the same time saddling our children with the cost of supporting us in our old age. According to some commentators, we are responsible for most of society's ills, from global warming to the financial meltdown, from increased rates of divorce and family breakdown to obesity and drug addiction. Boomers are seen as the 'me' generation, expecting the world to change to meet their needs and with a highly developed sense of being special.'

This is a grossly distorted view of what has been the most economically successful generation ever, which has contributed to huge productivity growth, technological innovation and medical advances throughout the world. The dramatic social changes and causes, such as civil rights, feminism and gay rights to which this generation has also applied its energies, have transformed our society.'

5.

**The last decades of Boomers' careers aren't going to be as budgeted for.**

Of all the issues affecting Boomers, this is by far the issue producing the most observation. It seems to be a subject that can't stay out of the media and is now discussed daily. Four examples are from The McKinsey Quarterly and RainmakingThinking in the US and the UK, from Management Today and The Financial Times.

'Soaring stock markets and home prices made Boomers feel richer and thus diminished any sense of urgency they might have felt to save.'

Boomers will have to continue working beyond the traditional retirement age, and that will require important changes in public policy, business practices, and personal behaviour. These adjustments have become even more urgent with the recent financial turmoil.

New McKinsey research reveals that 60 per cent of Boomers won't be able to maintain a lifestyle close to their current one without continuing to work.

Despite the economic power of Boomers, many ageing ones face the prospect of shattered expectations. A generation that lived through unprecedented prosperity and has correspondingly high hopes for its golden years must cope with significant financial, physical, and social challenges.'

'While Boomers may have worked hard and consumed hard, the one thing they have not done is save for their old age.'

Rapidly rising stock markets and house prices made them feel rich with no need to save. Mortgages, credit cards, car loans and overdrafts were cheap and easy to obtain, making them a highly indebted generation – and as a result the majority are financially unprepared for retirement.

There is only one solution. Far from enjoying the sun-filled ease of a Saga cruise or the simple pleasures of golf and gardening, the golden oldies are just going to have to work longer, even if that means working for themselves. Not just to provide for their own needs but because society cannot afford the cost of withdrawal of their economic activity.'

And as reported in 2010: 'In the UK, a survey in October by the Chartered Institute of Personnel and Development found that 41 per cent of employees plan to work beyond the state retirement age. Nearly three quarters of these said this was for financial reasons. But social interaction at work and the desire to continue using their skills were also important factors.'

Boomers & Millennials are roughly twice the size of Generation X, which lies between them.

Harvard Business Review

6.

**Companies are now waking up to what it will mean to lose Boomers' knowledge and experience.**

'While the previous insight relates to the individual employee, the same issue has obvious and profound implications for all organisations.'

The RainmakingThinking report of 2007, 'Managing the Generation Mix' states that: 'As the workforce continues to age, by 2010 almost one in three workers (US) will be at least 50 and knowledge and experience increasingly become value-added propositions; every organisation will be scrambling to create a reputation as an age-friendly workplace.'

Boomers are also redefining retirement in ways that will impact future generations. 'Retirement increasingly becomes not a date on a calendar but a process and organisations who can extend that process for as long as it's beneficial to both sides, will have a competitive advantage for the next 20 years, a period of 'unretirement', 'recareering' and 'career shifting.'

Similarly from the Harvard Business Review, in their report 'How Gen Y & Boomers Will Reshape your Agenda': 'As the economy recovers, companies will return to the challenge of winning over enough highly capable professionals to drive renewal and growth. Only then will they realise that the rules of engagement have changed - that the landscape of talent management has been transformed.'

The combination of Generation Y eagerly advancing up the professional ranks and Baby Boomers often refusing to retire has, over the course of a few short years, dramatically shifted the composition of the workforce.'

The review gives examples of companies working to revitalise the contribution of older Boomers within their organisations. From the large US pharmacy chain CVS/Pharmacy which allows employees to relocate from winter to summer, to Citigroup's Alternative Work Solutions, which the report states 'has successfully maintained productivity while allowing people to work where and how they want'. Or to UBS, which encourages employees to give back to the community via their Responsibility Fellows Programme.

Management and accounting experience is shared with 'entrepreneurs in parts of the world where management capabilities are scarce'.

Within the UK, the Financial Times discusses a report from the Chartered Institute of Personnel and Development (CIPD) in 2010, which examined the consequences of nearly a third of the UK workforce becoming over 50 by 2020:

'This report shows that many organisations have neither a strategy in place for managing an ageing workforce nor a coherent range of provisions to respond to emergent issues. Mr. Ball (CE of The Age and Employment Network) says he has seen, nonetheless, some intelligent organisational approaches to age management.'

Some have planned strategically - profiling employees' ages against skill requirements to identify areas at risk from retirement - and considered a range of interventions related to the health needs of older workers, flexible work and retirement options, skills and learning and the way people choose to develop their careers.

In the best cases, he says, people are no longer given the stark choice 'to stay or not to stay' but can 'phase in or out' of the workforce, for example by returning in a mentoring role or parallel job that might be less physically demanding or even to do something different.

Mr. Ball cites the UK's NHS Employers as an example of an organisation that has promoted intelligent policies on age. Karen Charman, head of employment services, points out that the UK Health Service is Europe's largest employer, with a higher percentage of workers in older age groups than in the UK as a whole.

Spurred on by age discrimination legislation, says Ms Charman, NHS Employers has been producing briefings and advice on age management for healthcare trusts in England since about 2006.

Demographic trends also provided impetus. Ms Charman says the population is ageing and therefore care needs are greater, but fewer young people are coming into the NHS. Many trusts now promote pension flexibility - employees can, for example, 'step down' to part-time work and still contribute to pensions without being disadvantaged at final pension stage. NHS Employers also recommend techniques for 'knowledge management' or skills transfer.'

There is no doubt that in the coming years, the contribution of older Boomers within the workplace will increase and reshape the collaborative workplace in new and interesting ways.

**Many trusts now promote pension flexibility** - employees can, for example, 'step down' to part-time work and still contribute to pensions without being disadvantaged at final pension stage.

To broaden their access to talent, Dow Chemical created a network that now extends to retired employees.

McKinsey Quarterly

“Managers have to let their guard down and get over the mindset that their employees need to be here at our corporate campus from nine to five”.

Increasingly, organisations are exploring ways to help Boomers into new generation technologies.

“We are the first generation to open up, to taste it, to try it, to do it”.

7.

#### Boomers are improving as IT adopters.

Time Warner recently developed a mentoring program that engages people on both ends of their careers. In this case, some of the company's senior executives were challenged to stay at the forefront of a rapidly evolving new-media landscape.

To raise their awareness of digital media, Time Warner launched Digital Reverse Mentoring- a program in which tech-savvy college students mentor senior executives on emerging digital trends and technologies such as Facebook, Twitter, and other Web 2.0 applications.'

Boomers are not taking the tsunami of new technology lying down and increasingly organisations are exploring ways to help Boomers into new generation technologies, as this previous example from the Harvard Business Review illustrates and a similar example at IBM from Ron Alsop's 'The Trophy Kids Grow Up'.

'IBM offers 'reverse mentoring' and 'speed mentoring'. Reverse mentoring pairs new Millennial employees with executives who want to hear about the Millennials' experiences and learn from them.

At speed mentoring events, IBM employees spend a set amount of time with one person before moving onto the next. "People end up connecting not only with executives but also with their peers," Bing says. "They find people they never thought they'd need to connect with."

And as reported in a recent Business in the Community report, what's happening at home and in the wider world is also playing its part. 'People have embraced the web outside of the workplace because it extends their knowledge, allows them to participate in networks and communities and gives them enjoyment – and

people do want work to be fun. Using the web dynamically within the organisation could dramatically reshape organisational intranets and enhance the employer brand.'

However, as observed elsewhere in this report, Boomers in BRIC economies are engaging in these new technologies more readily, as reported by Deloitte in their report 'Gen Yers, Baby Boomers & Technology: Worlds Apart'?

'In emerging nations like China, India and Brazil, older workers are adopting new technologies at a rapid pace – more quickly than Boomers in the United States, Canada and the United Kingdom. Current research shows that geography, not age, has a larger influence on employees' technological preferences. The very technologies that today's older workers grew up with created habits and preferences that have been understandably hard to shake.

American, Canadian and British telephone networks, for example, have been delivering reliable land-based services for a century. Contrast this with emerging nations, many of which still have major service gaps in their land-based telephone infrastructure.

Now fast-forward to the 21st century. Next-generation technologies, from wireless to email, are suddenly available to both younger and older workers in blossoming economies like China, India and Brazil. Lacking a familiarity with traditional technologies, older workers in these countries adopt the new ones at similar rates as their younger peers.'

It seems the challenges from the world's new economies is not solely confined to the Millennial generation.

8.

#### Boomers are 'nine to five' natives, unlike Millennials.

"Older workers who grew up in a face-time culture believe young people have no work ethic if they leave at five o'clock," says Kristina Parker, who heads up recruiting at Best Buy.

"What they don't realize is that the Millennial worker gets online and is working at home at midnight." For flexible work styles to succeed, it takes a strong commitment to change, a risk-taking mentality, and perhaps most important of all, trust in employees. "Managers have to let their guard down and get over the mindset that their employees need to be here at our corporate campus from nine to five," she says.

At IBM, mobile workers may soon outnumber deskbound employees. Already, about 40% of IBM employees work from home, from client offices, on the road, or at a 'mobility centre' where they can drop in to use phones and Internet connections. "We offer Millennials true work-life integration," says Karen Calo, IBM's vice president for global talent. "People can do work anywhere anytime. They are not judged on their face time."

Similarly, Deloitte pleads for a new appraisal of 'face time' in their 'Human Capital Trends 2011' 'Measure results, not face time. The changing world of work is rendering measures of 'face time' as a measure of performance, however subtle or not, irrelevant. Organisations must up their game in both goal setting and assessing the results of employees that managers don't see day to day.'

It is understandably difficult for Boomers to realign a value system that has seen them classified as having invented the phenomenon of the 'workaholic'. This extends back to the belief that a fundamental requirement to success is working hard. While Boomers are highly ambitious, they also believe that being part of a collective effort is more rewarding in achieving that success and 'face time' is part of that culture. A culture that is not part of the Millennial mindset, which sees 'coming together' in completely different terms.

Quotes from 'The Trophy Kids Grow Up', Ron Alsop

9.

#### Boomers enjoy change and trying the new.

A big boon to the growth of Skype has been older generations exploiting it to stay in touch with their younger, extended families. This highlights the consciousness that 'older people are getting younger'" and are using technology to add new vitality to their lives.

McKinsey expresses this insight with real clarity within their report, 'Serving Ageing Baby Boomers': 'Our research—which combined economic forecasting, demographic modeling, and market research on a cross-section of Boomers approaching retirement also turned up grounds for optimism: the Boomers' resourcefulness and willingness to change.

Optimism defines Boomers: 86 per cent agree that "I have always believed that I deserve a good life." What's more, this generation's experiences and dynamic times have generated a real openness to change. More than 80 per cent of Boomers say that they enjoy trying new products and services; 77 per cent regularly use the Internet.

As one of our interviewees said, "We are the first generation to open up, to taste it, to try it, to do it." 78 per cent believe that they can control their own destiny and survive anything life throws at them.

Already, 40 per cent are ready to "change my life as I age." Yet the Boomers' flexibility will be tested as they strive to redefine retirement, protect their health and wealth, achieve their aspirations on a budget, and create a sense of community.

Despite the financial limitations of unprepared Boomers, they are brand conscious and share many aspirations with their affluent counterparts. Creating brands that help these people feel smart, innovative, proud and not old - Boomers are touchy about ageing - will be a critical part of meeting their needs.'

10.

#### The two 'bookend' generations within the workplace are finding it easy to get along.

This Bloomberg Businessweek article, 'The Boomer-Gen Y Love Fest', expressed this most eloquently.

'Y's, (Millennials) when faced with a new challenge, tend to function like a heat-seeking missile - single-mindedly pursuing the person in the organisation with the most relevant experience. In many cases, this person is a Boomer - often in some distant part of the organisation, or several hierarchical levels removed.

This approach reflects how Y's like to learn - from an expert, just-in-time, and in response to the specific challenge they need to address. It reflects their comfort in relating to Boomers on a peer basis, developed over an adolescence of friendly interaction with their parents and parents' friends.

And who doesn't like to be sought out for your expertise? Especially by an eager to learn, admiring younger person who may remind you of your own children? Boomers are finding they enjoy the questions (once they get over the shock of receiving emails or text messages from very junior employees) and the obvious recognition of their expertise.

They are even learning a lot themselves - new ways of communicating and thinking about getting things done.'

And as the Harvard Business Review observed: 'Both Boomers and Gen Ys want to contribute to society through their labor; seek flexible working arrangements; value social connections at work and loyalty to a company; and prize other rewards of employment over monetary compensation.'

RainmakingThinking observed that: 'While some older workers who grew up with 'sink or swim' managers may still regard asking for help as a show of weakness, it is the most intelligent approach to getting things done today. You'll find that Gen Yers will ask for help instinctively. While they want to appear independent and they are to a great degree, they'll also want to know who's available to support them.'

Of course, these two 'bookend' generations are profoundly different, yet they share common values, from their shared ambition to find a balance between more flexible working and life and in the way that they increasingly value employer rewards which are more than monetary.

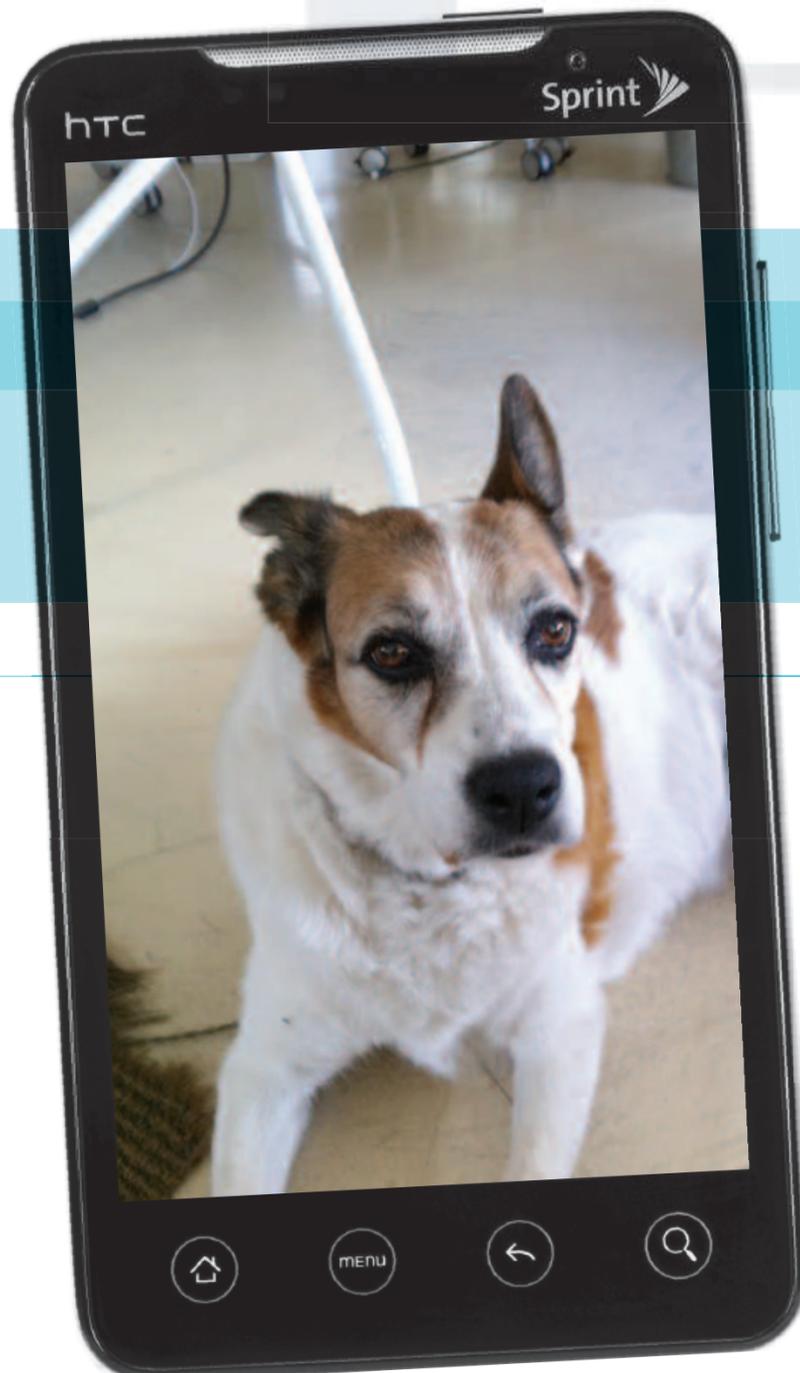
70% of workers who have not retired reported that they plan to work into their retirement years or never retire; almost 50% expected never to retire.

Rainmakerthinking Inc

These two 'bookend' generations are profoundly different, yet they share common values.

Teenagers report discomfort when they are without their cellphones. They need to be connected in order to feel like themselves.

Alone Together



$$\begin{array}{r} 15 \\ \times 7 \text{ (dog years)} \\ \hline 105 \end{array}$$

## They're the most educated generation ever,

yet they struggle with a workplace that seems to do things way too slowly. And as for the nine to five 'face time' model - well, that's just old school.

## "Millennials actually mean it

when they talk about work-life balance. This is not a generation we should expect to stay in the office doing noncritical work on weekends."

The Trophy Kids Grow Up

# Millennials

## ten key insights

1. They believe they travel faster than the rest of us.
2. They know with IT they have the upper hand over the generations above them.
3. 'Being unconnected' is not an option for Millennials and this generation leads the consumerisation of technology within the workplace.
4. They view privacy differently.
5. They get bored easily and believe they are the best multi-taskers since high wire cycling, plate-spinning clowns.
6. Their lives have been so chaperoned and controlled through childhood, school and university, they need continual guidance and praise.
7. It's hardly surprising that there is such a good rapport, between Millennials and Boomers. Almost universally, Boomers have been the 'helicopter parents' of Millennials.
8. Pushy 'helicopter parents' while not resenting being 'KIPPER' parents, want value for their children.
9. They've observed how their parents were treated by their employers and the economy and have shifted their perspective on loyalty accordingly.
10. They believe older generations have desecrated world resources and they don't want to continue in the same vein.

## of Millennials cite career/life fit as their top priority.

Deloitte

Cisco Systems has begun letting workers choose from a handful of laptops, and by the end of 2010 plans to expand the list of approved devices. Cisco estimates the initiative should actually save money.

Accenture

Millennials often have scant patience for things that aren't working for them, and will either find ways around the barrier or quickly leave.

Nearly half of 18- to 24-year-olds said they were likely to leave their employers in the next year, and 61% said they believe they increase their career potential by periodically switching jobs.

The Trophy Kids Grow Up

### 1.

**They believe they travel faster than the rest of us.**

This is my dog, (Fife). In human years, she's 15. In dog years, she's 105 (if 1 human year = 7 dog years). How is she connected to Millennials? Millennials believe the agile technology at the end of their fingertips means they travel much quicker than the generations older than them.

This is a useful image to help navigate and interact with a generation, whom I always have to remember have a very different mindset from my own. The reporting of how different this generation is has appeared in the media for some time. This is from BusinessWeek in 2005:

"Its causing hand-wringing among top executives at corporations and creating worry lines in the foreheads of deans at business schools. Companies are finding it harder to hire and retain young people."

Ron Alsop, author of 'The Trophy Kids Grow Up', observes a generation that redefined education, and is carrying this through into the workplace.

'Many Millennials see their careers and personal life as one. They don't talk about balancing work and life but rather about blending them. They want to break down boundaries between work and play - take the afternoon off to play tennis and resume working late in the evening after the kids are tucked in.

"Millennials want a life where work and life activities intermingle throughout the day," says Dennis Garritan, director of graduate programs in human resource management at New York University. "The message I get from Millennials, is 'Yes, I'll work for you, but I need to bring my pet parrot to work, and by the way, where's the cappuccino machine?'"

Adapting to the new realities of our young workforce should not be put off for another time. Millennials often have scant patience for things that aren't working for them, and will either find ways around the barrier or quickly leave for jobs elsewhere. If you haven't already experienced the collision of cultures, it's now on your doorstep.'

RainmakerThinking research observes similar findings; 'When middle and high school students collaborate with teachers on how to use technology in the curriculum (thus shaping how and what they learn), when they easily create websites and blogs to share information and make their voices heard, when they gain instant access to people and information around the world, it all adds up to a sense of empowerment that still baffles less techno-savvy adults.'

**Many Millennials see their careers and personal life as one.**

They have a 'smash & grab' attitude to IT and are fearless to pull and push it around to configure what they want to achieve.

Two hours after meeting, they're probably best friends on Facebook.

For Ernst & Young, the Millennial generation is also serious business. In 2010, the accounting firm expected it to account for more than half of its client-serving employees, up from 32% in 2007.

### 2.

**They know with IT they have the upper hand over the generations above them.**

Again Ron Alsop writes: 'One of the most common generational conflicts is over the number of hours worked in the office. Millennials feel that they should be measured by the quantity and quality of work completed, regardless of when and where it's done.'

Employers are benefiting from their technology, multitasking, and teamwork skills, but bristling at their demands for flexible working conditions, frequent feedback and guidance and rapid promotion.'

Millennials have never lived without instant and fluid technology and view everything before their time as 'legacy technology', much as older generations now view first generation mobile phones and anyone who wants to use a fax machine.

They have a 'smash & grab' attitude to IT and are fearless to pull and push it around to configure what they want to achieve. They are accustomed to adults standing over their shoulder, not having a clue of what they are doing and often Millennials don't either. But they bring with them a confidence to know that it will get sorted, even if it means working till two in the morning to do so.

They see their generation as the inventors of this new technology world and they viewed the movie 'The Social Network' as proof of this, if proof were needed. This stems from a generation who were raised to be empowered and to be unafraid to express an opinion, and they do.

### 3.

**'Being unconnected' is not an option for Millennials and this generation leads the consumerisation of technology within the workplace.**

Alsop cites an example from cosmetics multinational L'Oreal, which illustrates this generation's ability to connect and exchange via their technology with ease.

'He particularly observes the common bonds between Millennials of different cultures at L'Oreal's annual marketing and strategy competitions for business school students. "It's the best way to witness how alike this generation is, whether they're from Malaysia, India, France, Argentina, or the United States," he says. "They wear the same clothing, have the same iPods, and mix and connect easily. Two hours after meeting, they're probably best friends on Facebook." Indeed, this is clearly a high-tech generation, regardless of geography. Technology has linked young people from all corners of the globe and allowed them to share information and experiences virtually.'

An Accenture report, 'Jumping The Boundaries of Corporate IT' reports that:

'Millennials' attitudes about security, loyalty, privacy, and work style are colliding with the policies and norms at many large companies. That's not wholly surprising, since the past decade of IT innovation, from Internet search to smart phones to social networks, has been embraced more aggressively by consumers than by companies. As a result, many Millennials are extremely fluent with state-

The Trophy Kids Grow Up

of-the-art technologies and creative workarounds. Millennials are more intimate with technology than any previous generation. Even high school interns can now add value.'

Report after report offers the same insight – that the technology prowess of Millennials and the generation below them offers new levels of productivity. Their innate ability to embrace and exploit the new technologies will bring profoundly beneficial values to the workplace. The catch is that this will only be achieved if organisations can clear a way for this to happen, while balancing the need for security and control that remains fundamental to business.

“Millennials attitude is always what are you going to give me,” says [Natalie Griffith](#), manager of human resource programs at Eaton Corp.

The Trophy Kids Grow Up

“For today’s teenagers, e-mail is the equivalent of a written letter – they use it only for formal communication. To them,

# e-mail is for old people

Financial Times

Combine this “giving back” impulse with Millennials facility with technology, and you have a generation on fast-forward with self-esteem.

The Trophy Kids Grow Up

Millennials strike employers as being book smart but suffering from a deficit of common sense.

Like it or not, Millennials are often breaking the rules around corporate IT.



## 4.

**They view privacy differently. Millennials mindset of being excessively open within the online world will continue to cause real issues within the workplace.**

As in Sherry Turkle’s ‘Alone Together’, she expresses real concern with Millennials inability to hold back, and discernment is a skill set that’s being left up to employers to instill. She writes: ‘On a recent train trip from Boston to New York, I sat next to a man talking to his girlfriend about his problems. Here is what I learned by trying not to listen: He’s had a recent bout of heavy drinking, and his father is no longer willing to supplement his income. He thinks his girlfriend spends too much money and he dislikes her teenage daughter.

Embarrassed, I walked up and down the aisles to find another seat, but the train was full. Resigned, I returned to my seat next to the complainer. There was some comfort in the fact that he was not complaining to me, but I did wish I could disappear. Perhaps there was no need. I was already being treated as though I were not there.

What is not being cultivated here is the ability to be alone and reflect on one’s emotions in private. On the contrary, teenagers report discomfort when they are without their cell phones. They need to be connected in order to feel like themselves.

Technology does not cause but encourages a sensibility in which the validation of a feeling becomes part of establishing it, even part of the feeling itself.

For young people in these circumstances, computers and mobile devices offer communities when families are absent. In this context, it is not surprising to find troubling patterns of connection and disconnection: teenagers who will only “speak” online, who rigorously avoid face-to-face encounters, who are in text contact with their parents fifteen or twenty times a day, who deem even a telephone call “too much” exposure and say that they will “text, not talk.”

Accenture is also articulating this fundamental behavioral change when they advise clients:

‘The IT proliferation that’s shaped the personal lives of anyone under age 30 has now spilled into the corporate world, like it or not. Millennials are often breaking the rules around corporate IT. Moreover, they’re growing in number and importance - as employees, customers, suppliers, and partners.’

In the meantime, they needn’t worry about their next paycheck because they have their parents to cushion them. They’re comfortable in the knowledge that they can move back home for an indefinite amount of time while they seek another job.

## 5.

**They get bored easily and believe they are the best multi-taskers since the high wire cycling, plate-spinning clowns.**

Again both Ron Alsop and RainmakerThinking reach a common insight. RainmakerThinking suggest that: ‘Millennials are independent, entrepreneurial thinkers who relish responsibility, demand immediate feedback, and expect a sense of accountability hourly. They thrive on challenging work and creative expression and love freedom and flexibility. They’re more than willing to tell you how to fix your team, department, and organisation, even before they’re through your organisational program. And they’ll do that with ‘attitude’.’

Ron Alsop agrees: ‘Indeed, these outspoken young people tend to be highly opinionated, and fearlessly challenge recruiters and bosses. Status and hierarchy don’t impress them much and they find bureaucracy simply maddening.

This generation possesses significant strengths in teamwork, technology skills, social networking, and multitasking. Millennials were bred for achievement by success-driven parents, and most will work hard as long as the task at hand is engaging and promises a tangible payoff.’

## 6.

**Their lives have been so chaperoned and controlled through childhood, school and university, they need continual guidance and praise.**

‘While respecting their aptitude for technology and their ability to work well in teams, many recruiters and managers find Millennials far too demanding when it comes to needing guidance, frequent performance appraisals, rapid career advancement, and work-life balance. Although many of them are well educated, Millennials strike employers as being book smart but suffering from a deficit of common sense.

To help retain talent, L’Oreal now provides employees with formal feedback twice a year through its talent development program.

Carol Calkins of PricewaterhouseCoopers, states that losing teams “want a lot of feedback about what the winning team did right and what they could have done better. They are very intense and competitive and want to learn from the feedback.”

Kanika Raney, campus recruiting chief for the financial services company Wachovia Corp., supervises a team of about a dozen Millennials and has learned to take a milder approach, too. “I’m a very direct person, but I try to be careful when coaching these young people because I see that it can be detrimental,” she says. “They’re such go-getters who have always succeeded, so they feel like their world’s falling apart if they get

## 7.

**It’s hardly surprising that there is such a good rapport, between Millennials and Boomers. Almost universally, Boomers have been the ‘helicopter parents’ of Millennials.**

any criticism.” For one thing, she always makes a point of giving a balanced critique that highlights her employees’ most positive attributes as well as their weak spots.

The need for explicit direction is a common characteristic of the Millennial generation. Many Millennials struggle with independent thinking, decision making and risk taking. They are especially flummoxed by unexpected, ambiguous challenges, the kind that business is all about. This tendency worries some educators and employers, who foresee a generation that can’t cope well with the sudden twists and turns of their jobs and of life in general.’

Boomer parents were determined not to repeat the mistakes they perceived their parents as having made. They set out to ensure their children realised the best scenarios in life and they sacrificed a huge amount of personal gratification to help them achieve this. Ron Alsop observes that: ‘The so-called helicopter parents have been calling most of the shots from childhood through the college application process. They have programmed their kids’ lives very carefully, filling every waking moment with play dates, music lessons, sports practices, tutors and other structured activities. Millennials didn’t have to be creative to fill their free time; there wasn’t any’.

This results is a scenario where there is empathy between these two generations within the workplace, as this Bloomberg Businessweek article testifies: ‘Forget stories about tension and misunderstandings. Millennials and Boomers are finding that they enjoy spending time together and learning from each other.’

Because of their grand expectations most Millennials have no intention of settling down for long with one employer, **they always have one foot out the door.**

Recruiting Millennials isn't employer's biggest challenge. **It's retention that worries them most.**

The Trophy Kids Grow Up

# “ 42% female and 30% male Millennials talk to their parents every day ”

Harvard Business Review

**They are unwilling to stick out tough situations that take more time to solve than they are willing to give. They will job-hop without thinking about the consequences to their careers.**

Wall Street Journal

Social networking is a revolutionary technology which appeared with such speed that few businesses have been able to proactively stay ahead of developments, anticipating how this new technology could be made to work for them.

KPMG

IBM's Innovation Jam in 2006 attracted 140,000 employees, family members, clients, and business partners, and yielded ideas for 10 new projects.

The Trophy Kids Grow Up

At Booz Allen, an innovative information and social networking site called Hello.bah.com drew in 36% of employees within a few months. Using blogs and wikis, it connects a workforce that spends a lot of time away from company offices—on the road, at client sites, and working from home.

Harvard Business Review

Millennials have a mindset that they will not allow themselves to commit the mistakes they've seen in their parents' generation.

Some hovering 'helicopter parents' try to get involved in job interviews, salary negotiations, and even performance reviews.

Cisco uses a Facebook-like internal directory to find everything from lunch partners to a subject-matter expert. An internal YouTube-like video-sharing site lets employees share product reports, engineering updates, and sales ideas.

Accenture

## 8.

**Pushy 'helicopter parents' while not resenting being 'KIPPER' parents, want value for their children. This may, by the way, extend to attending their first job interview.**

We all know from first hand experience that Millennials are much closer to their doting parents than any previous generation and stay in contact with them, in some cases daily and long past when they would have previously 'flown the nest'.

In many cases, they no longer even do that. This is a consequence of the direct cost of education, the current ongoing recession, the high cost of property and accessing finance to acquire it. It is also a reflection of this generation's unwillingness to move out and trade down from the pampered comforts of 'home'.

Accenture reports that: 'Even as the Millennials head off to college and take jobs, their parents remain their trusted advisers. That is creating havoc in the workplace as some hovering 'helicopter parents' try to get involved in job interviews, salary negotiations, and even performance reviews. Clearly, Millennials and their parents need to strike a better balance so that this generation learns to think and act more independently.'

The chapter, 'Take Your Parents to Work' from 'The Trophy Kids Grow Up', sets out the new phenomenon of parents staying close to their children through their education and carrying this through into their children's first contacts with work. It outlines how some employers are recognizing that it may prove more effective to work with this, rather than to fight it.

## 9.

**They've observed how their parents were treated by their employers and the economy and have shifted their perspective on loyalty accordingly.**

Millennials are two generations below their grandparents, who committed themselves to a company for life and were generally looked after.

Through the harsh 1980's, the same loyalty that their parents showed was, over time, misused by both companies and the economy at large. Loyalty was not repaid and first Gen X and now the Millennials have a mindset that will not allow themselves to commit the mistakes they've seen in their parents' generation.

Loyalty now means something different than entrusting everything unquestionably to your employer. As reported in the RainmakerThinking report of 2006 'Managing the Generation Mix':

'While Boomers secretly mistrusted anyone in authority, they kept their heads down and worked hard. But then, just as they started to earn seniority and move into positions of authority, they were hit by the downsizing daze of the late 80s to early 90s. Shellshocked Boomers watched organisational hierarchies flatten, hundreds of thousands of jobs disappear and the lifetime employment bubble burst.'

The culture of work over the last thirty years has shaped the Millennial generation within today's workplace. The idea of a 'command and control' mindset has given way to a more collaborative arena, in which the connected world allows employees to be more informed and in control than at any time in the history of work.

'Companies today aren't just hiring the child; they get the whole family in the bargain, like it or not. L'Oreal's human resource managers in New York City were very surprised when parents called to investigate possible job opportunities for their children. It was something this Paris-based, beauty products company hadn't experienced in its European offices.

Even performance reviews aren't off-limits. The head of a small advertising agency tells of a friend who was flabbergasted when an employee's father showed up the day of his son's very first performance review.

Alsop gives extensive examples of companies such as Ernst & Young, Goldman Sachs, Office Depot Inc, Enterprise Rent-A-Car all embracing ways to get closer to new recruits and their families such as having parents open days and a parents section on their website. This is not confined to pockets of the US, as Alsop points out that Goldman Sachs Group Inc created 'Spend a Day @ GS in India, which helped achieve job acceptance of 75% to 80%, Goldman says it believes that the event helps cement its relationship with the students and their parents.'

"'Most of our managers are welcoming to parents," says John Leech, FedEx's director of recruitment, "but some complain that we're not hiring the family. I gently remind them that 'Yes, we are hiring the family. In fact, we want to hire the students' entire tribe of friends and family. We want to become part of their personal network, which has a lot more influence in attracting future talented employees than any recruiting ad.'"

# Boomers & Millennials London

## Attendees

**Andrew Allan** RBS  
**Matthew Battle** IBEX Interiors  
**Mark Breingan** Europa  
**Gillian Burgis** NBBJ  
**Russ Camplin** RBS  
**Joanne Casselle** TTSP  
**Martin Colberg** MONO  
**Neil Edmond** HSBC  
**David Faichney** M Moser  
**Tony Fowler** Nationwide  
**Sue Francis** Francis Consulting  
**Garry Gordon** British Council  
**Angus Harding** Nokia  
**Mat Holden** Nationwide  
**Gita Kitbamna** GSK  
**Julia Kitchen** Independent Consultant HBDS  
**Barry Martin** Hampton School  
**Andrew Mawson** Advanced Workplace  
**Andy Mc Bain** RBS  
**Alison McKerracher** ADP  
**Conor Molloy** Lewis & Hickey  
**Robert Naylor-Stables** The Austin Company  
**Christine Peppiatt** TFL  
**Kevin Scott** Allianz  
**Brian Szpakowski** Broadway Malyan  
**Jim Taylor** Orangebox  
**Jonathan Tompson** GSK  
**Nick Toft** M Moser  
**Anja Toxvaerd Larsen** JJW  
**Steve Wright** TTSP



# Workshops

**As part of the Boomers & Millennials research, Orangebox and Unwired held round table discussions in London in the Autumn of 2011.**

Thirty industry practitioners, working in sectors ranging from Banking, Technology, Media, Transport, Pharmaceuticals, Education, Construction, Design and Management met to discuss the diverse aspects of realising the contemporary workspace.

**These sessions were chaired by Philip Ross, CEO of Unwired and UnWork.com (a company that looks to the future of work), and Gerard Taylor, Creative Director of Orangebox. The day's discussions focused on topics central to the Boomers & Millennials debate.**

**Research was presented for discussion, including results from the 2011 Unwired Global Survey, involving 600 people worldwide on a range of issues around the future of work.** The workshops included both insights and questions, on which the participants voted. These responses are summarised in the following ten pages.

An experience that proved universal was that the contemporary office building shares many characteristics with the super tanker. Because of life cycle and legacy of both buildings and technology, it takes time and careful planning to implement change to reposition a workforce and realise new corporate branding, work culture and technology strategies.

While we are all witness to how rapidly technology is impacting on how we work, it will, take time and considerable effort before its potential and benefits are implemented within all organisations.

# To commute or not to commute.

**The majority of people commute to an office day in, day out, four or five days a week. The figure is 63.5%, perhaps not as high as you'd expect, with 36.5% of people seen as mobile workers.**

We asked if people would like to work from home. Only 12% said yes and when we asked them their ideal, it was for a short commute - ten to twenty minutes of travel but no more than 40 minutes spent coming into the middle of a city.

We did some interesting work on patterns of movement around London. What you get when you map out how people move and the modes of transport is similar across almost all cities and towns globally - a massive peak in the morning, constrained to about 40 minutes, and a longer peak in the afternoons.

In the next 30 years, it's projected that will be another 0.5 million jobs to come to the City of London in professional services and banking, so there'll be a huge rise in transport demand to this area, unless things change. Even with the current planned investment in the Tube and Crossrail, corridors will stay at their current stress levels for 30 years.

Counter to this is the idea of a polycentric city - one of the London Mayor's strategies, and very much reflected in this study. The idea is that people want to work near their communities but not necessarily in the centre of cities.

By 2030, the United Nations predicts that six billion people globally will live in urban areas - well up from three billion today. Clearly, it's an issue for emerging cities.

"I don't mind commuting four days a week but five days is just too much. If you give somebody a choice, I mean, the reality is, many people do believe that the weekend starts earlier if they can work from home on a Friday. It's very rude now, to organise a meeting on a Friday in an office".

## Would you personally like to commute less?



60% yes



36% no



4% undecided

"It's about moving gridlock, motivating the individual, so its performance management by objectives as opposed to being passive. That's been ongoing for about ten years now, in thinking about how we work".

"I actually think that a lot of people like the commute. It's a buffer zone between the pressures and demands of home and work. Especially now that you can listen to music, go on the Internet and watch videos, if you're not driving. People really value that buffer zone in their life each day. What they don't want is to do it five days a week, but maybe three days a week, and work from home the other two days."

"I wonder whether we're encouraging the two-hour commute by not challenging it? I'd suggest that it's not acceptable, even in the new generation".

"Our experience in Beijing, where we positioned our campus on the outer ring road, was financially driven. What we've done is try to fix the problem by putting a new solution in place and by providing the transportation. The reverse commute is so horrible, we've had to try and solve the problem, so we run 50 bus routes".

"You're right. It's an opportunity to mutate almost from one being into another one. Your priorities change and technology has become the facilitator for making that process a little bit smoother".

"We did a flexible working survey, about 6500. It wasn't right across the whole organisation but it was representative. We asked the question, re: whether they'd like to work from home on an ad hoc basis, so you don't always have to come into the office and we got 60% positive".

"While I can see it working for other industries, if anything, we've had to recognise that innovation slowed down as we opened up the doors and allowed people more flexibility. We're now encouraging people back in to try and get that sense of community happening, to encourage colleagues to bounce ideas off each other".

"You will see more people coming into the office, if you're doing a change project. They want to be seen and they want to be seen to be busy".

"I think it depends on the quality of that commute. If you can work comfortably on your train, it offers that bit of time where you can focus or read your journal. It's like valuable time but not if its shoulder to shoulder".

## Do you believe you can achieve your work anywhere?



54% yes



46% no

"I think IBM have set up something called social business where they're looking at taking what they've learned from splitting everybody up and changing it so that it becomes a much more personal thing. You are still virtual but you know a lot more about the people you're connected with".

"We have observed something that I call 'Freaky Friday', and that is that on Fridays in our buildings, globally, you just won't find anybody, because they're working at home. People are compressing their hours, Monday to Thursday, and then maybe avoiding the commute on the Friday, getting up a bit later, catching up on a bit of sleep - a soft entry into the day".

"There are a lot of assumptions about the idea of working from home. For example, the UK has medium sized residential accommodation. You go into Vietnam and China, there's just no way people can work at home. There are two or three generations there - kids, grandparents, perhaps some cousins. There's no way you can base people at home."

# Hey! You! Get on my Cloud.

A survey in The Economist, has predicted that “computers are evaporating altogether and becoming accessible from anywhere”. Similarly, the FT has stated that at some stage we’re going to walk into the office and there will be ‘nothing there’ in terms of technology infrastructure.

We’ve had 20 years of significant spending on high tech, ‘fat’ buildings, with the cooling and the power and the raised floor and redundancy and all the rest of it. We’ve moved out of older stock with no raised floor, which was seen to be obsolete. One of the ideas that we’re looking at is that buildings will become thin; the era of the fat building will decline.

We will come together in more ad hoc spaces. We’ll carry a laptop or tablet device and a Smartphone that will deliver software from the Cloud. It’s a matter of software being a service, a utility, that’s pumped in from the Cloud.

In the survey, 79% of people now feel they’ve got the right technology in the workplace and just over half believe they can work anywhere. That’s a big change from five years ago when everyone was moaning about technology; it wasn’t keeping up with workplace innovation.

“I think the other dimension is resilience. While I have my files or my applications on my laptop, at least I know if the network goes down, I’d still be able to operate. But in the new world, you are very dependent on whether the infrastructure is truly robust”.

“We’re looking at a new CRM system and most of the providers have been offering us Cloud technology”.

“There’s a maturity in the IT community that needs to come through in this evolution. If you take some of the professional services companies. Ernst and Young, for example, they have no problem with everybody bringing laptops and working with the security on their networks and they’re working with pretty sensitive stuff”.

“The only time we’ve ever done it is when we’ve had two separate systems. A lot of companies have a guest system, which is also for staff so that when they’re off-duty, or they’re away from their desk, they can log in at a different system and keep the two separate. It’s the only way we can find to actually please the IT team”.

## Do we think the next generation will have a fundamentally different acceptance and expectation of technology?



“My company still works from a security force IT system. My iPad’s not connected to the system because they don’t particularly like it because it’s not bought by them. But from my laptop to iPad, I can pull things down to whichever device I have at the time, rather than carrying a great big rucksack.”

“At the moment, the adoption rate about this technology is picking up, but the security issue is something that people are still very skeptical about and people just don’t understand it well enough”.

“I know what the adoption rate is and what that curve looks like, but I’d suggest that it’s probably going to become exponentially faster”.

“Buildings used to have a five to fifteen year life cycle, so it takes a little time for the business to shake out. This is changing fundamentally. Previously, a building was for the long term, but now it can’t necessarily be, because, three years is too long into the future”.

“In one company I know of, the IT department basically said, “you can go and choose whatever device you want”, within reason. Cisco have also done this”.

## Do you have access to the right technology in your workplace?



“I went to see a major new corporate building in New York recently. You’re talking about 3,000 traders in this new trading floor. All the infrastructure is in New Jersey so it’s a kind of a private Cloud but it still is a Cloud. Their stuff isn’t on-site and even they can do it, and they’re paranoid”.

“I was working on banking systems for one of the oldest investment banks and they’ve now put their customer data into the Cloud with Salesforce”.

## Should the space we create for work change?

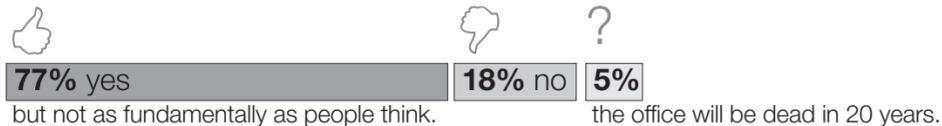


# Will the next generation use technology in a dramatically different way to workers today.

**Will people communicate without speaking? Will they work without paper? Will they combine traditional methods with new work modes?**

I think there may be a two tier thing going, the sense of a dual mode. What I mean is that office-based work and use of technology may be fairly structured. Because of the building, there's a certain infrastructure that's difficult to change. But when people get home, maybe there'll be much more flexibility with technology use.

## Will the next generation reject the office of their parents?



"I don't agree that it's entirely a generation thing. I think it's actually a personality thing. There are adults who can multitask, or be perceived to multitask. It's debatable whether the output would be even greater, if someone concentrating on one or two things, as opposed to many. I've now got a teenager at home, and what's fantastic is that we carry on doing things, and yes, she does do wonderful things, but it's her natural style, she's done that since she was a baby. I think the generation thing is over emphasised".

"In fact I heard of a beautiful demonstration of this with a child's birthday party. The child wanted to do the birthday party invite on Facebook, and mum said, 'No, let's do something interesting. I want you to send a written invitation out in the post.' Her daughter laughed at her and said, 'Don't be stupid, Mum!', but she did it, and she was really shocked by the positive response".

"This all resonates with me within the education sector. We could, theoretically, deliver the entire educational programme to someone's house online and there are learning programmes out there that do just that. The whole country could move to that, but nobody wants to. People want to get together for the process of learning and working – in this sense, they actually seem to be quite similar".

"I personally love paper. It gives me a little bit of breathing space. I'm judged on my decisions and you need the time to think through the idea. Younger generations often reach decisions a little too quickly and believe within an hour, there's the answer. After 30 years' experience, you know it's a little bit more complicated than that".

## Will children at school today have a completely different perspective when they enter the workplace?



"Virtually every boy in my school and I've got 1,216 boys, average IQ about 130, and they're all wandering round with mobile deluxe, and they're going to use it for good or ill. It's fundamentally changed all sorts of things about schools. There's also massive disciplinary implications and organisation implications".

"I think also, maybe even more shockingly, this is all changing the way people think and the way our brains are wired. For example, you're not so committed to storing things in your short-term memory, because you can rely on Google. So people are using their brains in different ways".

"As a father of a teenage daughter, it's something that I see, they truly can multitask. It's not just a gender thing, it's that generation. They can do the multi-screen, multi-input and they can produce quality input output across all these things. That's a fundamental difference I think, from my generation and hers".

"My son basically has a ten-hour online day. He had an online relationship but he's broken up now. I don't think they actually met".

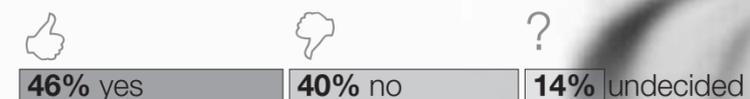
"I think what some Millennials bring to this is a mix of business and pleasure. I don't think, often, they see the difference between Facebook or a game or whatever and something for business - so they're introducing things that potentially could be seen by an IT team as a hazard".

"My friend's daughter, on her 13th birthday, was given a Smartphone. Within six days she'd sent 1,300 texts, and this was during the school week. I thought, 'how can she physically be able to send 200-odd texts a day? But she does'".

"I think the really interesting thing is how their minds work. They have fewer boundaries than we have. We tend to assume automatic boundaries. They don't think like that. They sit on the sofa, and then they connect and technology comes to them. So automatically, they have a completely different relationship with it".

"We need this social phenomena. Most of us want to be together and then maybe break off by ourselves to think. You may go home and do that, or to a cafe, or wherever, and sit with your laptop and do it".

## Do you think they will use technology in a dramatically different way?



# Does a BYO world and a 'thin building' idea appeal.

Let's look at this idea of bring your own, buy your own technology, People like Kraft and Citrix have adopted this and have launched it in the States.

Can you foresee the idea of a building as a place where you bring your technology with you and when you're there, you connect and collaborate, but your stuff is delivered from the Cloud.

For the financial sector, what are the issues with regulation? Whenever I work with banks on new ways of working, you have Chinese wall issues. You've got to be in your own office, because what's on screen is customer data. What's the current view on that, how does that restrict you, and where do you see it going?

"Within a big financial organisation, there's still a huge population who engage with customers, who require banking and support functions. So banking is a big complex beast. But within that arena, there's plenty of opportunities to move over to handheld devices".

## In your organisation is it difficult to find meeting space?



78% yes



22% no

"Actually, the IT director becomes your best friend sometimes, because in effect, their budgets go up, because the property savings justify investment in IT, so that often works quite well".

"For me, it goes back to the idea that it's software not hardware. Yes, you can buy your own technology, but you're still working on your company's software and their data systems and things like that, which you don't necessarily use to do your work".

"There's also the incentive within any large organisation to reduce costs, so if there's a small investment in bring your own, some companies are already finding a saving of something like 25%".

"On my travels, we see companies who are apologising, because often they're still on corner desks, they've still all got their own boxes. They know the future is here but they haven't done anything because they can't afford to. Some things are 30 years old, and other things, where they've rushed the technology are up to date.

## In your experience is there an issue with under-utilised space?



89% yes



11% no

## Does a BYO world and the 'thin building' idea, appeal to you?



64% yes



18% no



18% undecided

"For me, it goes back to the idea that it's software not hardware. Yes, you can buy your own technology, but you're still working on your company's software and their data systems and things like that, which you don't necessarily use to do your work".

"There's also the incentive within any large organisation to reduce costs, so if there's a small investment in bring your own, some companies are already finding a saving of something like 25%".

"We had a debate about human capital theory, such that people who jump from job to job and portfolio jobs and portfolio careers; maybe it's about them having their own technology which is then used for different employers and contracts and projects".

"Some of the banks are recognizing this. They're saying that they're trying to get graduates not to go into university because too many university graduates are coming out without a job. Some banks have recognized this and have set up management programmers to say, look, we will give you this structured career path through the next five years. They recognise that the biggest thing about the Millennial generation is - they need to see their career path mapped out".

"Tom Peters, the management guru, has been speaking for years about 'brand me'. Millennials have this mindset that they will never, give everything over to the organisation".

# Will we stick together or go virtual.

**Gupta, a brilliant global management strategist, has predicted that the HQ will go from a physical to a virtual network.**

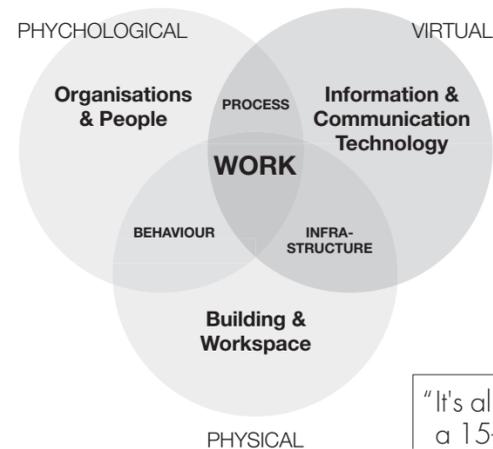
**Meanwhile, Steven Johnson, author of 'Where Good Ideas Come From' has tracked innovation for 200 years. He believes innovation comes out of the 'adjacent possible', as he calls it - places with hives of activity where people get together and use the components existing in their environment.**

I also wanted to move to one area that I think we should reflect on, which is how companies are using their space today. We examined a global business with headquarters in the city of London. It has 1,500 people in one building, 50,000 square feet. They shared their total occupancy cost, per square foot, per annum is US (\$133). That's the real cost of the space, and over their lease, this was about a \$300 million liability.

We looked at how they broke down the space in detail and it's really interesting, with only 3% allocated to meeting space. This is a professional services organisation. A time and motion study found that on any one day, 600 desks were empty and they realised, with our input, that it was costing them \$6 to \$11 million in that one building.

They found that the cost of giving somebody a desk in London is now \$17,000 year, which is staggering. That's the real cost, including IT, operations, rent, rates. It's a lot of money.

**Do you have similar bottom-line numbers that you could identify if you did that kind of exercise?**



"It's all about the time frame, you've got to remember that when you're talking about a 15-year lease, then the driver for change has to be more flexible. You want shorter leases and you want more adaptable space so it's the balance of that. It takes a while, a good few years to sort the strategy out to start again. It doesn't happen overnight. That's a strategic decision and it takes three, four, five years to start seeing the benefits. That's the drawback, taking that long to see the results".

"I think the observation that it takes a little while to migrate is in the nature of a complex building".

"They just have to get people together and work out new rules because if you don't do that, if you just stick with the old ways, then you will get mismatches".

"Given what we've been discussing - should we change the spaces we create for work? You made that interesting point that we need to get shorter leases and more flexibility, but let's have a conclusion here. We know, yes, people need new space, given what we've described in terms of expectations and technology".



## Anil K Gupta

'The concept of corporate HQ will change from a physical location to a virtual network. The next generation of global enterprise will operate as a network of global hubs with distributed intelligence and direct peer-to-peer collaboration. Key executives will sit close to where the action is, rather than in an ivory tower 10,000 mile away.'

The Telegraph London.

"One thing that's come out of these discussions for me is the challenge that we have with leaders and management and about how they measure productivity".

"If you take a factory, then it's quite easy to measure productivity because they're making so many widgets. You've got shifts coming in and out and you're making x amount of widgets. Outputs from an office environment are very different. Everyone has the output of their work but what are you measuring? There is no real acceptance from our leadership and management about actual, measured productivity and that's the challenge".

"I think another element in this is a behavioural issue. My previous role was in facilities management. Part of that was managing people and resources and the most negative thing about meeting spaces, for me, is that they're just poorly managed in terms of people booking them and not using them. If everybody subscribed to better behaviour then you could actually have less desks, more meeting spaces, fewer parking spaces".

"Actually there's no difference between the younger and older generations, except that the older generation feel less able to express it. The younger generation quite happily say, I can't concentrate in this space, because they feel they have a right to be able to. In fact, both groups need to and there's that requirement in terms of concentration space and collaborative space for everybody."

"The history books like to condense these slower, evolutionary processes into eureka moments dominated by a single inventor, but most of the key technologies that powered the Industrial Revolution were instances of what scholars call "collective invention."

Textbooks casually refer to James Watts as the inventor of the steam engine, but in truth Watt was one of dozens of inventors who refined the device over the course of the eighteenth century.'

Where Good Ideas Come From

WHERE GOOD IDEAS COME FROM



"In every large organisation, you've got years and years of programming. People have learned that organisations and teams work in a particular way and have all sorts of chores and processes built around that and that takes a lot of energy to unglue".

"Yes, we've done similar stuff because there's nearly always space. It's more about change the culture of- whether people feel they need a meeting room. Do you actually need four walls to deliver privacy or could you just sit down in a quiet corner and have a chat".

"What we've found is that the spare desks are individual desks. We have individual teams all over the campus and they can be at different desks every day, so without completely refurbishing, it's actually quite difficult to reconfigure".

"Every time we do a utilisation survey, and we've done a lot of them, we will find 40% of our meeting rooms aren't occupied".

## Ten Predictions by Philip Ross



# the cloud has reached mainstream

**A timely and personal review from one of the most respected commentators on the changing technology and work culture of the last decade.**

Since 1994, Philip Ross, CEO of Cordless Group and UnWork has co-authored books with Jeremy Myerson on the future of work and the workplace. This includes the 'Creative Office', the '21st Century Office' and 'Space to Work'. He also consults worldwide, advising corporations on how to better utilise new technologies within the workplace.

Ross is also founder of the agenda-setting Worktech conference through Europe, the US and Asia. Here, he reflects on predictions that proved accurate and offers his view on how the corporate world should deal with the changes discussed within Boomers & Millennials and emerging technology.

There is no doubt that technology is changing our society as well as the way we shop, work and enjoy leisure. The pace of change is unstoppable and I believe **we are now at an inflexion point where future technology will fundamentally change the way we work and the physical spaces we create for work.**

It was Niels Bohr, the Danish Scientist, who famously said that 'prediction is very difficult, especially about the future'. But we've done pretty well so far. In 1994, I wrote the Cordless Office Report that predicted the rise of wireless technology and its impact on work as an enabler of mobility. **In 2003, with Orangebox, we first researched and published Office Wars that predicted the emergence of Third Space. Eight years later, third spaces are exploding as agile work takes off.**

Now, I've summarised some predictions for the near and medium term future, based on our research, our analysts visits to the labs of leading technology players and our visions of the future, developed with clients who are breaking new ground.

# The Near Term

## 01 The end of the cable

It seemed so implausible 17 years ago when I published the Cordless Office Report. Back in 1994, people had never heard of wireless technology, or if they had, they were worried about speed, reliability and security. The office world was obsessed with structured cabling and the networked PC. The talk was of cable managed systems furniture, of raised floor and intelligent buildings.

Now the cable is dead, at least for voice and most data. People are used to wireless technology – indeed they rely on it; the iPad has no Ethernet port, a smart phone synchronises with the cloud over wireless. The fears over performance, speed and security are now largely gone and **people have embraced the flexibility and mobility that wireless technology brings.**

Now the cloud will just work in the background – **unconscious synchronicity will become the new normal**, and a wireless 'bearer' will just work behind the scenes to keep everything up to date.

## 02 The death of the desk phone

The idea of a lump of plastic with a receiver and 12 buttons, tethered down to a piece of wood as the communications mechanism of the modern workplace will seem laughable by Gen Z. Why would you want to call a desk or room? 'You want to speak to a person, not a piece of furniture', says a Gen Zer. And so that ubiquitous office accessory, the telephone extension along with the phone directory will become a relic of the past.

Listening to dial tone will die along with the muzak that all too often sterilises and dehumanises our workplaces. **Instead, make way for the converged or unified communications and collaboration (UCC) platform, accessible through any device: people talking to people, emailing, messaging, sharing documents, video conferencing and collaborating in real times spaces.**

## 03 The death of the 'desk'

What is a 'desk'? If we define it as **a personal piece of wood, where an individual's PC, their telephone, personal files and Rolodex occupy a 1200mm of 'home from home'** then yes, I believe that the desk is dead.

With its pedestal full of the paraphernalia of office life; the tipex, spare stapler, cup-a-soups, phone directory and pair of running shoes, these vestiges of a workplace dedicated to Taylorism will be seen as a relic of a bygone age dominated by the baby boomers who relished order and predictability.

A space fit for battery hens and not the free range knowledge workers of tomorrow.

Gen Z will not want a gonk or picture of their dog pinned to the fabric panel that separates them from the next human being by a few millimetres. They want choice, variety and spaces that provide them with a more eclectic, variegated workplace.

The Schnell brothers were right – they were just 50 years too early. Tomorrow's workplace will be a sea of choice – **a landscape of workspaces that suit activities and tasks, personalities and preferences. Surfaces for working on will replace the idea of a 'desk'.**

# What Next?

## 04 The world will be thin

A few years ago, technology disappearing into thin air would have seemed like a fantasy. Now, the concept of the cloud has reached mainstream, with software as a service (SaaS) joining the party. This virtualised computing that challenges not just place, but the very premise of the office as a container for work.

**New cloud services will deliver applications, data, and services to people on any device, anywhere and at any time, rendering most of the 'old' rules obsolete.** The psychology of work in the workplace will change. When there is no premium experience from using technology inside the office, and once the office houses none of the servers, software or data needed for work, the reason and need to be there will be reappraised by a workforce increasingly fed up with commuting.

People will begin to question why they need to journey to the corporate building. Office buildings will also be 'de-specified' as the over-engineered spaces that housed IT no longer need the power, resilience, cooling and fire suppression required in a world where servers are housed inhouse.

What's more, older buildings that were regarded as obsolete can be reused by companies keen for more eclectic, interesting workspaces.

## 05 Jelly Bean Working

Managing by supervision, watching the backs of people's heads has been the predominant way of control at work. We have tended to measure inputs and not outputs.

Much is changing, with companies moving towards results-orientated management. This will be accelerated as Jelly Bean working takes off. Rather than wondering where people are or if they are working (i.e. 'shirking from home' phenomenon), the Jelly Bean or corporate presence icon allows people to see their colleague's status in real time, on any device and in any application.

Jelly Bean working will be the bridge we've been waiting for, replacing observation with an automated way of connecting, communicating and collaborating across distance. It replaces doubt with trust and dispels the 'out of sight' mentality that has prevented many companies and especially their middle managers from adopting flexible working.

## 06 Connect, don't commute

'It's cheaper to move bits than butts' say the Americans. This succinct phrase summarises the tensions that exist between suburban and central business district (CBD) working. Do we need to be in a CBD in a world where we have ubiquitous connectivity, from broadband in the home to Wi-Fi on the high street?

The growth of the connected, polycentric city has a big impact on patterns of people movement, as the traditional commute gives way to more permeable working styles that avoid 9 to 5.

With transport networks at breaking point, alternative approaches to stagger use of the transport infrastructure are being sought. We predict the rise of polycentric working in the digital city, where people will increasingly look for places to work 'on the pause'.

## 07 C-Work

The polar extremes of the office and the home as the main choices for work, with a few exceptions in between, will change. As a growing number of entrants and some established players launch professionally designed co-working facilities, people from different employers will **share workspace** that provides effective spaces for agile workers.

Co-work will become the new normal; with people working away from traditional leased premises. Instead, shared workspace will introduce the idea of provisioning work and offering people space on demand, where and when they want it.

## 09 Paper – less?

With the growth of BYOC and a 'browser-centric' world, along with the explosion of tablet devices such as the iPad, we now predict with some certainty the slow demise of paper. While paper still has a huge intrinsic advantage, mobility and access from anywhere on any device will drive people to leave the analogue world and adopt 'digital flow' – as the advantages of choice and mobility outweigh the habit of the paper file by the desk.

We believe that people will still use paper, but they will then scan and recycle it, storing everything in the cloud or sharing documents in team spaces such as SharePoint or new digital shared post trays such as Dropbox.

The growth in simultaneous co-authoring and collaboration will also signal the death of sequentially developed pieces of paper. **We predict that millennials will be the first generation to read and annotate on screen comfortably.**

## 08 BYOC

**The consumerisation of the workplace will become common**, as people are increasingly able to bring or buy their own computer – a trend known as BYOC.

Providing people with an annual budget or stipend to select their own 'device' will, we believe, become the norm in an increasingly consumerised workplace where people want choice and the ability to express personal preferences.

BYOC goes hand in hand with 'internet-centric computing' - the idea that all applications and data will be accessed through a browser and not through specialist software or locally stored files. Browser centricity means that people can work from any device, anywhere in the world.

## 10 Watch out for 'real time real estate'

**Today, the office building is a fairly 'dumb container'.** For all the talk of intelligent buildings, it can adjust the M&E but real estate has no idea about real time occupancy. Buildings do not load balance, nor do they know 'who is in'.

We believe that real estate will now become real time, where it will adjust energy use based on **real time occupancy**, enabling floors to be hibernated or a meeting room's air conditioning to be adjusted based on the actual number of occupants.

But a 'mash-up' is also predicted, between social networking systems such as Linked-In and real time building technologies such as radio frequency identification (RFID). Real time real estate will engineer the serendipitous encounters which can no longer be left to chance.

Philip Ross is the founder and CEO of Cordless Group and UnWork, pioneers in the new world of work. He founded Cordless Group in 1994 with the publication of the Cordless Office Report and has built a business that comprises: UnWork.com, Unwired, Cordless Consultants and Building Zones.

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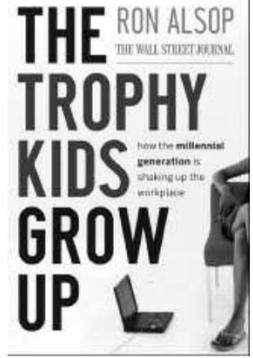


**'The Trophy Kids Grow Up', is an international best seller and one of the most insightful books that examines how millennials are shaking up the workplace.**

Described by INSEAD Business School as "proving why we can't afford to overlook millennial attitudes, ambitions and behaviors", the former Wall Street Journal columnist shares his ideas on subjects ranging from how organisations can achieve the best from millennials, the downside of 'always on' technology and the legacy of Steve Jobs.

**03** A worldwide recession arrived in 2008 and after a brief upturn, is back. What advice would you offer to the corporate organisation that may view economic uncertainty as a reason to check the uptake of the new technologies such as the cloud and virtualisation?

**My advice: Be prepared to capitalise on a strong economic rebound – which could come unexpectedly - invest now in technology. While resources may be scarcer in this tepid economy, companies should be thinking about the many efficiencies, including cost savings, they will realise from new technologies.**



Interview with Ron Alsop

# sit back and contemplate

**01** The consumerisation of technology within the workplace has happened so quickly, almost all corporate organisations have to run to catch up. Why do you think the workplace has been so slow in anticipating this shift in IT, which has moved from 'office technology as king' to the consumer having the more interactive, engaging and productive technology?

**Many companies have been very cautious about letting new technology in the door, especially social media. They worry about many things, including proprietary information leaking outside their firewalls, employees wasting time on personal social media and downloads, such as YouTube videos, overwhelming their information technology systems. Those concerns aren't unwarranted, but companies must figure out a way to allow new technologies in, while safeguarding their systems and private information. Otherwise, they risk alienating the millennial generation, their future workforce, which demands access to social media and other online sites in the office.**

**To be sure, some companies have embraced social media technology and created their own internal Facebooks to connect employees and encourage them to share their knowledge with one another. Some employers have also created internal blogs and wikis, again for the purpose of information sharing.**

**02** Millennials are the foot soldiers for the uptake of the new technology tools, within the workplace. What do you believe are the best ways for their bosses, the older generations to embrace and engage with the potential this offers?

**I believe millennials can play a significant role in helping older generations see the benefits of new technology tools and learn how to use them most effectively. That's why some forward thinking companies, such as IBM, are encouraging what they call "reverse mentoring." Instead of older, more experienced workers helping new employees navigate the workplace, millennials are mentoring baby boomers and even some Gen Xers on new technologies.**

**04** It's a widely held view that we are just at the foothills of how technology will change our workday and how we will collaborate and be productive. What do you see as the critical issues organisations must address to be able to realise and exploit the advances these technologies will bring?

**Social media offers companies many opportunities for internal collaboration and communication, both inside and outside the corporation. But there are many issues yet to be resolved, including how much freedom employees have on Facebook, Twitter and other social sites. Some companies are firing employees for posting comments about their jobs and bosses on such sites, spurring legal actions against them.**

**There are no easy answers, but companies must, at the very least, develop social media policies detailing what is and isn't allowed. There will still be areas of contention, such as some people's belief that they can post whatever they want on their personal social networks, but at least such policies will clear up some of the confusion.**

**05** Soon after the x-ray was invented, it appeared in the most advanced shoe stores for parents to ensure their children could get the best shoe fit. How concerned are you that our 'always on' technology may prove to have many more downsides that we currently imagine?

**I believe there are many pros and cons to our 'always on' technology. On the positive side, it enables us to find information and connect with people within minutes, or even seconds. Such instant information and connectivity are bound to increase productivity and collaboration.**

**But there's no doubt in my mind that we are too hooked on the instant gratification of technology. One U.S. study found that many millennials sleep with their cell phones and on average, exchange more than 100 text messages a day.**

**Such addiction is damaging people's ability to focus on more challenging tasks that can't be solved in an instant. Our obsession with technology also means we take less time to sit back and contemplate. And it's this kind of reflective thought that leads to true innovation.**

**06** Steve Jobs showed that technology can be more humane, intuitive and engaging. Following his tragic death, do you think this, now obvious lesson will be creatively developed by technology companies?

**One would hope so, but frankly, I doubt it. I don't believe most technology companies think too much about the end user of their products. They are more focused on selling as much as possible, often at a lower cost than Apple and also at a lower level of quality and user friendliness. As a result, we consumers end up with computers, cell phones and other devices that don't perform with ease or reliability. For example, I recently was unable to work on the Word documents on the laptop provided by my employer. Then a few weeks later, the same machine failed to stay turned on for more than a few minutes. I have never experienced such problems with my personal Apple desktop computer or my iPhone.**

Ron Alsop lives and works in New York and was a longtime writer and editor for The Wall Street Journal. He is now a freelance journalist, consultant and public speaker, and the author of eight books, including *The Trophy Kids Grow Up: How the Millennial Generation Is Shaking Up the Workplace* and *The 18 Immutable Laws of Corporate Reputation*.

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## Credits and References

Bob Dylan's **"The Times They Are a Changing"** originates from nearly half a century ago. Yet from what we've researched and discussed within this report, its sentiment is perhaps more relevant than ever as we pass through the second decade of the 21st century.

We are all too aware of the profound economic changes that desecrated the world economy from 2008. As this report illustrates, changes no less profound are now sweeping through the contemporary workplace, its people and the technology they use.

At Orangebox, we believe the most challenging and intriguing period lies ahead of us. As stated in the introduction, we're entering what we believe will prove to be one of the most interesting and exciting periods in the history of the workplace.

We hope the global insights reported within 'Boomers & Millennials' stimulate you to ask yourself and imagine –

## How will 'work' be defined in 2017?

### Credits

**Boomers & Millennials was researched and written by Gerard Taylor**

**Boomers & Millennials' London workshops were coordinated and chaired by Philip Ross and Unwired**

**Additional insights: Ron Alsop and Philip Ross**

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### Copyright

The agenda of this report is to help provide insights into the people and technology reshaping where and how we work and to promote a more informed workplace.

To create this report, we have accessed over 100 books, reports, newspapers, magazine articles and diverse print and digital media. The key sources are attributed, where used.

Where we have used direct quotes, we have sought copyright approval. If we have inadvertently used an observation, insight or research data without source attribution, we apologise and would like to reassure that we have sought to name each source of information used.

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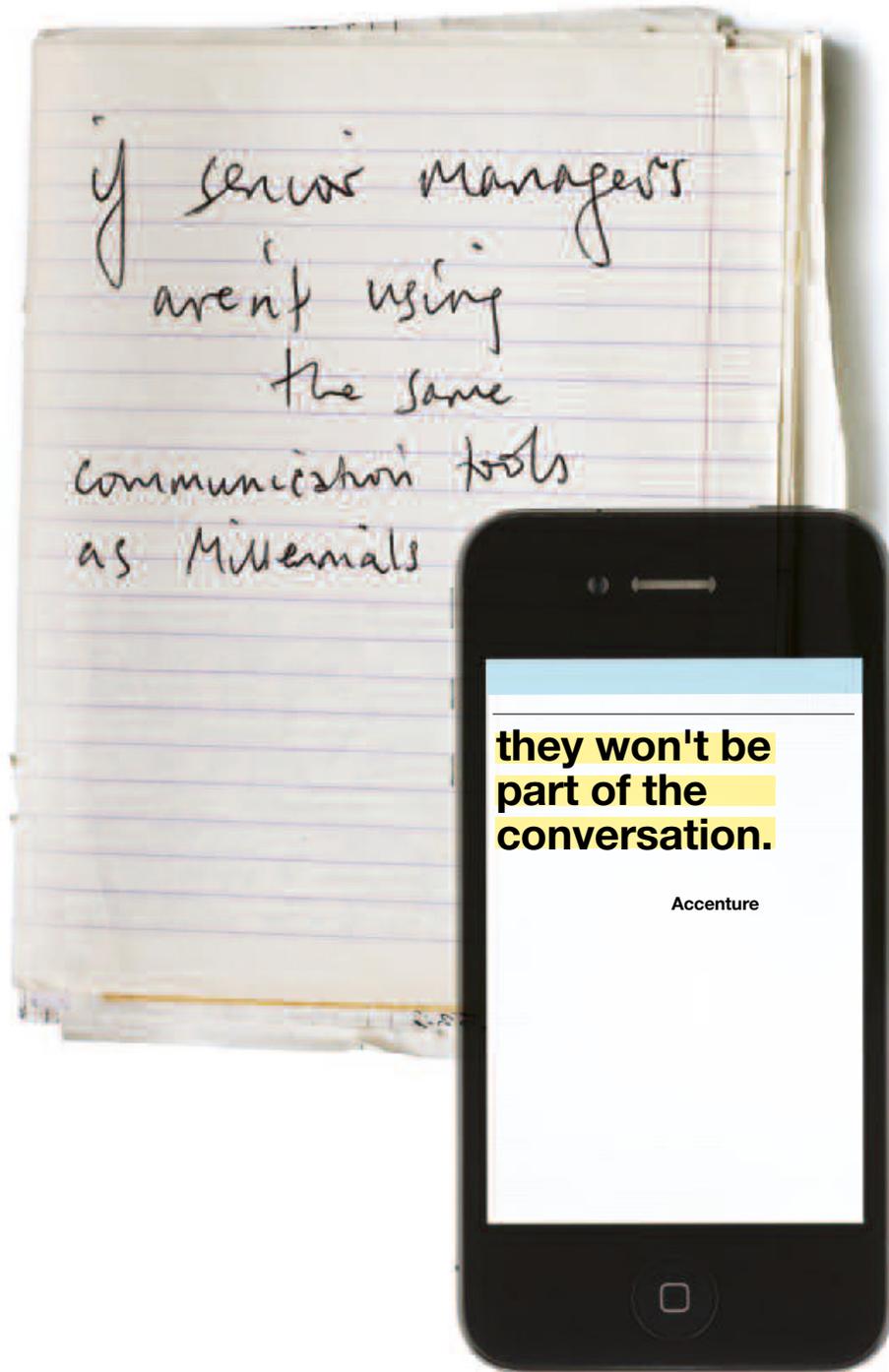
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