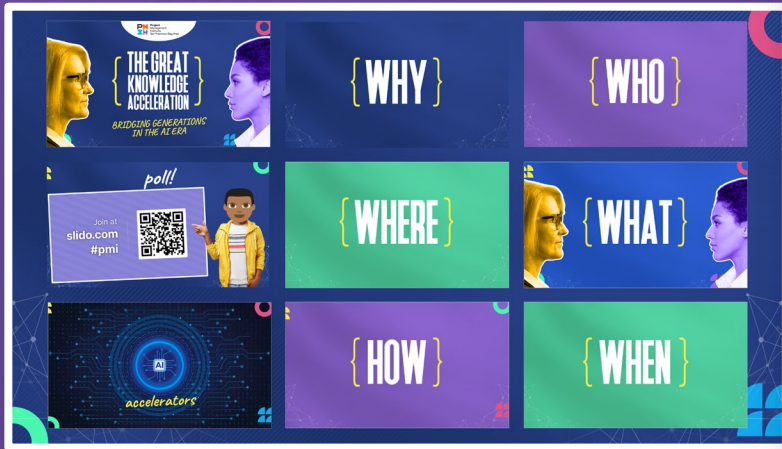


CHEAT SHEET

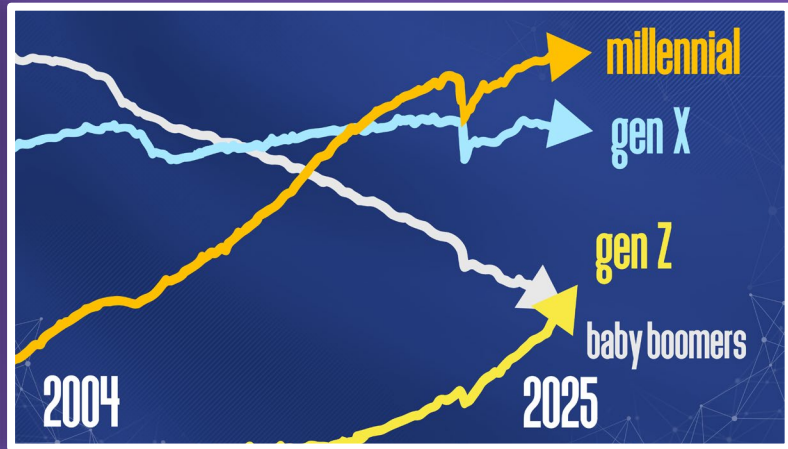


presented by
Luke Goetting

CHEAT SHEET



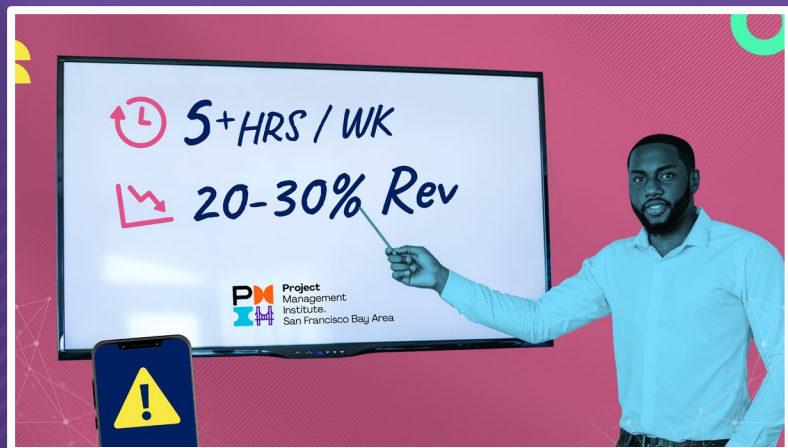
Key presentation framework using Who/What/When/Where/Why/How to facilitate knowledge transfer initiatives



Workforce demographic trends showing generational shift through 2025: Digital Natives becoming majority while Baby Boomers retire



5 key drivers: Stretching of the Workforce (people working longer), impending Baby Boomer retirement surge, majority Digital Native workforce, ineffective Knowledge Transfer programs and AI's evolving impact



5+ hrs/week lost waiting for info + 20-30% revenue drop from duplicated efforts



CHEAT SHEET



Legacy + learning: crystallize expertise through sharing



Accelerate growth via network + holistic insights



Legacy leadership meets continuous learning, translating experience into lasting organizational impact



Blending traditional methods with adaptable mindset, bridging communication gaps through practical problem-solving



CHEAT SHEET

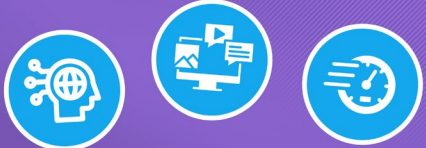
millennial
{ 29-44 }



"Let's circle back after I check my Slack messages"

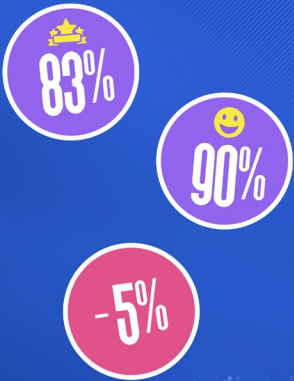

Digital pioneers leading transformation: Blending tech-enabled solutions with collaborative instincts

gen Z
{ 13-28 }



"The vibes are off in this meeting"

AI-native multitaskers: Expert at synthesizing information across digital channels



83%
90%
-5%

83% of Gen Z seek mentors + 90% mentored workers report job satisfaction

{ CO } MENTORING



Two-way skill exchange: Structured sharing across generations via project-based and micro-mentoring formats



CHEAT SHEET

SKILLS MARKETPLACE



Digital skill-swap platform: Cross-generational expertise exchange (4-6 person groups)

asynchronous KNOWLEDGE MARKETS



Flexible learning ecosystem: Combining, platform, incentives to contribute and rewards

CONVERSATION CAPTURE



Recording tribal knowledge: AI transcription tools for preserving critical discussions

ENHANCED DOCUMENTATION



AI-assisted knowledge capture: Turning complex documents into accessible resources



CHEAT SHEET

KNOWLEDGE MINING



AI Tools: Auto-categorize + tag existing knowledge bases

intelligent KNOWLEDGE CAPTURE



AI chatbots: Domain-specific knowledge assistants trained on internal expertise

targeted PROCESS DOCUMENTATION



AI Tools: Map + document critical workflows for recommended efficiency gains

SMART MENTORING



AI-powered matching: Skills-based pairing + effectiveness tracking



CHEAT SHEET

 Psychological Safety

 Flexibility in Work Arrangements

 Purpose-Driven Context

 Clear Expectations

 Value Learning Styles

 Achievement Pathways & Progression


 Balanced Knowledge Exchange


 Core Values Alignment

 Authentic Leadership

 Active Listening & Adaptation

 Purpose-Driven Context



Ask for context respectfully:
"Could you help me understand why
this process developed this way?"
rather than challenging its existence


Share the historical context and
past failures that led to current
processes; explain "why" before "how"



Top 10 Soft Skills to help facilitate intergenerational collaboration success

Example of intergenerational approaches to maximize success


Focus on outcomes rather than
"face time"; trust that work can
happen outside traditional hours


 Flexibility in Work Arrangements



Maintain high visibility in your
achievements when working flexibly;
over-communicate about progress



Example of intergenerational approaches to maximize success

 Achievement Pathways & Progression


Break down long-term development
paths into visible milestones; create
"achievement levels" for key skills


Document small wins and skill
acquisitions; build portfolio of
achievements rather than
focusing solely on title changes



Example of intergenerational approaches to maximize success



Book Luke!

VIEW FULL WORKSHOP INFO

VIEW SPEAKER SITE & REEL

BOOK LUKE FOR YOUR ORG



RESOURCES



more info



- <https://www.vox.com/money/24080062/retirement-age-baby-boomers-older-workers>
- <https://www.pewresearch.org/social-trends/2023/12/14/the-growth-of-the-older-workforce/>
- <https://www.weforum.org/stories/2024/01/could-the-age-of-longevity-hold-a-powerful-source-for-growth/>
- <https://www.prnewswire.com/news-releases/two-thirds-of-peak-baby-boomers-are-not-financially-prepared-for-retirement-302120313.html>
- <https://www.housingwire.com/articles/baby-boomers-are-reaching-peak-65-but-retirement-age-debate-continues-cnbc/>
- <https://scholarworks.waldenu.edu/cgi/viewcontent.cgi?article=3053&context=dissertations>
- <https://finance.yahoo.com/news/gen-z-are-the-most-disgruntled-workers-and-thats-a-problem-for-employers-150517925.html>
- <https://www.forbes.com/councils/forbesbusinesscouncil/2024/02/20/cultivating-loyalty-employee-retention-strategies-for-the-younger-generations/>
- <https://www.barna.com/research/generations-ai/>
- <https://www.hrdive.com/news/gen-z-millennials-tech-demands-workplace/596995/>
- <https://www.lhh.com/us/en/insights/why-temping-baffles-boomers-and-benefits-gen-z/>
- <https://www.bls.gov/opub/ted/2024/median-tenure-with-current-employer-was-3-9-years-in-january-2024.htm>
- <https://www.linkedin.com/pulse/mastering-knowledge-transfer-more-productive-workplace-golinks-famac>
- <https://www.nboa.org/net-assets/article/bridging-the-gap-in-multi-generational-workplaces>
- <https://www.peoplemanagement.co.uk/article/1865594/generational-war-playing-workplaces>
- <https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/ageing-and-employment/Career-Paths-and-Engagement-of-Mature-Workers.pdf>
- https://pdxscholar.library.pdx.edu/cgi/viewcontent.cgi?article=3299&context=etm_studentprojects
- <https://www.hrdive.com/news/inefficient-knowledge-sharing-costs-large-us-businesses-47m-a-year/527892/>
- <https://psicosmart.net/blogs/blog-what-are-the-hidden-costs-of-not-implementing-knowledge-management-software-in-your-organization-219621>
- <https://www.hellonesh.io/blog/employee-turnover>
- <https://www.rev.com/blog/knowledge-loss>
- <https://splore.com/blog/inefficient-knowledge-management>
- <https://www.apollotechnical.com/working-from-home-productivity-statistics/>
- <https://plansource.com/resources/blogs/the-benefits-of-offering-flexible-work-arrangements/>
- <https://jobera.com/flexible-work-statistics/>
- <https://www.hrdconnect.com/2024/04/26/gen-zs-unexpected-yearning-for-office-life>
- <https://economictimes.indiatimes.com/jobs/hr-policies-trends/most-gen-z-professionals-prefer-growth-path-mentorship-over-salary-report/articleshow/115694946.cms/>
- <https://www.mentorcliq.com/blog/mentoring-stats>
- <https://www.evidencebasedmentoring.org/gen-z-has-less-access-to-mentoring-resources/>