



Organizational Assessment Worksheet

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1. Current State Assessment

Begin by understanding the current landscape of your workplace. Identify the generational breakdown of your employees (i.e., Traditionalists, Baby Boomers, Generation X, Millennials, and Generation Z) and consider their unique needs, motivations, and work styles. Also, determine your current employee turnover rate and identify reasons for departures if possible. Finally, take stock of your current culture - what are its strengths and weaknesses?

Generational Breakdown:

- Traditionalists (#):
- Baby Boomers (#):
- Generation X (#):
- Millennials (#):
- Generation Z (#):

Turnover Rate:

- Current turnover rate (%):
- Main reasons for departure (if known):

Current Culture Assessment:

- Strengths:
- Weaknesses:

2. Desired State Identification

What does your ideal multi-generational workplace look like?
What is your target turnover rate? What aspects of your culture would you like to change or enhance?

- Ideal Generational Workplace:
- Target Turnover Rate:
- Ideal Culture:

3. Gap Analysis

Compare your current state to your desired state. Where are the discrepancies? Are certain generations not feeling valued or understood? Are there consistent reasons for employees leaving? Are there aspects of your culture that are driving turnover or dissatisfaction?

Generational Differences:

- Identified gaps:
- Proposed solutions:

Employee Turnover:

- Identified gaps:
- Proposed solutions:

Culture:

- Identified gaps:
- Proposed solutions:

4. Action Plan Development

Based on your gap analysis, develop specific strategies to bridge these gaps. This may include:

- a. Initiating programs or policies that cater to different generations' needs and preferences
- b. Implementing retention strategies targeted at the reasons employees are leaving
- c. Changing organizational practices or behaviors to shape your culture

Generational Differences Strategy:

- Action steps:

Turnover Reduction Strategy:

- Action steps:

Culture Enhancement Strategy:

- Action steps:

5. Implementation

Begin implementing your action plan. This may involve changes in communication styles, adjustments in benefits and work schedules, offering professional development opportunities, or improving feedback and recognition.

Implementation Timeline and Steps:

6. Monitoring and Adjustment

Regularly monitor your progress towards your desired state. Seek feedback from employees and adjust your strategies as necessary to ensure continual improvement.

Evaluation Methods and Timeline:

Please note that this form should be revisited and updated regularly to reflect changes in your workforce demographics, turnover rates, and cultural shifts.

Always consider gathering employee feedback on any changes made and adjust your action steps based on the feedback to ensure ongoing improvement and effectiveness in managing generational differences, reducing turnover, and promoting a positive workplace culture.

