Characteristics of the 5 Generations of People and Considerations for Support of their TMF Management
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Meet the Speaker

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Extensive career in the bio-pharmaceutical industry, 16+ year as TMF management consultant, assisting clients to develop, revise, and operationalize high-quality and compliant TMF management processes engaging people and technologies to achieve complete and inspection-ready of TMFs.

Lisa is a co-founder and a current Steering Committee member of the CDISC TMF Reference Model volunteer team of industry representatives that created and maintain the model.
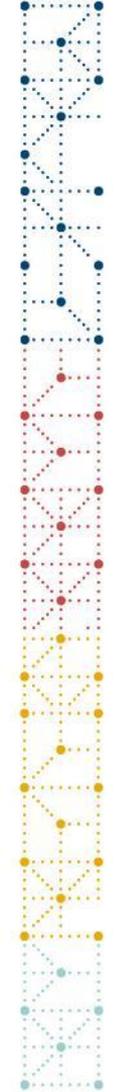
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- *The author(s) have no real or apparent conflicts of interest to report.*

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Motivation for this Discussion Topic

My own biases and experiences

How We Think, Act, Live

There are 7 generations based on their birth years. Their attitudes and beliefs were shaped by their times and experiences.

As of 2023, there are five generations in the workplace: traditionalists (silent), Baby Boomers, Generation X, millennials, and Generation Z per the Bureau of Labor Statistics.

However, it is important to note that this presentation will provide generalizations, and not all members of each generation would exhibit noted characteristics.

This presentation will not review the traditionalist generation but will provide insight about the upcoming generation, Alpha.

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Let's Review the 5 Latest US Generations

Baby Boomer Generation
- **Born 1946-1964 (59-77 years old)**
- Influenced by values and desires for normalcy; family values, television and mass advertising.

Generation X
- **Born 1965-1979 (44-58 years old)**
- Influenced by shifting societal and cultural changes, independence because women in the workforce (latch-key), technology on the rise.

Millennials
- **Born 1980-1994 – previously Gen Y (29-43 years old)**
- Influenced by being children of Baby Boomers, social media, known peers, opinion leaders and experts.

Generation Z
- **Born 1995-2012 (13-28 years old)**
- Influenced by the digital age and social networks, 24/7 connectivity, climate anxiety, a shifting financial landscape, and COVID-19.

Generation Alpha
- **Born 2013-2025** – *the future TMF Record Owner/TMF Professional*
- Influenced by climate, inclusivity, and by typically being children of Millennials whose habitual use of social media means that much of Generation Alpha will be online from birth.

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The Never-Ending Quest of the TMF Professional

We, as TMF **professionals**, are never satisfied with how we engage our customers to ensure they have the training and tools to assist them in the management of their TMF records. We use the following methods:

Formal process documents – SOPs, Work instructions, Guidances, Forms	Training videos of virtual training sessions	Quick guides, reference documents, process flows	Departmental meeting presentations
Virtual and in-person desk-side support	Help desk hour	Formal classroom training sessions, even with enticement of food	Lunch and Learns
On-demand training videos	Data provided through metrics and reports	Pop-up tips on our web pages	Others?

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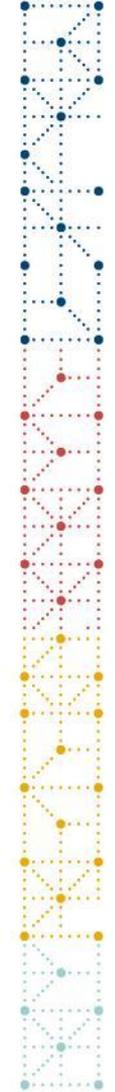
TMF Management is not Static

- As TMF professionals, we are constantly adjusting how we, day in and day out, manage the TMF and engage (including teach) others to do the same.

- Some of the challenges are
    - TMFs do not follow the same exact pattern – modifiable TMF Index, TMF Plan, etc.
    - Studies do not have the same "players" – different team members, vendors, etc.
    - Each functional area has different cultural approaches for or opinions about the TMF
    - Study and TMF management teams vary across studies.
    - Technologies are different – not outlandish for a TMF professional or a study team member, and their allocation to multiple studies, to use 2-3 different eTMF systems depending on outsourcing strategy and CRO's eTMF system,
    - Technology gets updated and new features released and utilized so constantly evolving and being integrated into work process.

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Factors at Play

So why is it that our efforts work for some of our customers and not others?

Are there any other factors are at play that influence what and how we create training and the supportive tools and how our customers consume them and successfully perform job duties?

The answer is YES!

This also includes our own personal influences.

Learning Preferences/TMF Management

Baby Boomers
Born 1946-1964

Learning Preference

- Personally-focused learning structure.
- Classroom lectures continues to be an effective setting with in-class participation, reflection, and feedback to bring them more directly into the process.
- Respond best to verbal instruction and face-to-face communication.
- Value team- and relationship-building.

TMF Management

- Structure, clear goals, and specific deadlines will keep baby boomers advancing toward objectives. They're ambitious — and although they don't need a lot of back-and-forth from their teams
- They appreciate the recognition of their work.
- Use of tools created to outline process but if the tools have been reviewed in a training environment
- Values to "TMF Help" deskside support
- Builds relationship with TMF Team

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Learning Preferences /TMF Management

Generation X
Born 1965-1979

Learning Preference

- Self-directed educational opportunities.
- Learning programs such as eLearning format is acceptable sometimes that enable them to learn on their own schedule; structure and feedback.
- Will respond well to real-world problem solving tasks and case studies and challenges which can be incorporated into training.
- Still favor traditional development methods such as workshops, seminars and training courses

TMF Management

- They're independent and adaptable. They engage with immediate and clear feedback and prefer efficiency over form — phone calls, face-to-face communication, or email all work.
- Libraries of topics to learn about either in person or eLearning
- Prefer working through case studies to solve real life examples of problems
- Still needs structure, so process flows and metrics/data will be welcomed

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Learning Preferences /TMF Management

Millennials (Generation Y)
Born 1980-1994

Learning Preference

- Favors highly personalized training on a self-directed schedule.
- Prefers to access information on-demand, whenever and wherever they may happen to want it.
- Attention span is short they need training material that is interesting and engaging.
- Visual and auditory learners so implement gamification techniques.

TMF Management

- Flexibility and work-life balance are often large parts of the millennial work style.
- Freedom to manage their schedules, pursue remote work opportunities.
- eLearning on their schedule at the location of their choice.
- Short trainings that are very topic specific.
- Love a game component to training, not to mistaken with quiz on the training as this is not as welcomed.

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Learning Preferences /TMF Management

Generation Z
Born 1995-2012

Learning Preference

- Prefers active personalized learning environments that allow them to interact with others and implement. their knowledge in a hands-on manner.
- Prefers learning new skills by watching short-duration helpful visuals videos.
- Prefers to learn in collaborative environments, whether online or offline.
- Practical, on-the-spot learning that supports collaboration and exchange of ideas.

TMF Management

- Non-traditional work schedules and flexible, remote work opportunities. They need technology that supports this method of work.
- Will appreciate short specific videos
- Prefer video calls, 1:1 meetings, and social activities that build stronger interpersonal relationships.
- Personalized yet community learning types of training – Focused Lunch and Learns/Workshops
- Ask their feedback on aspects of TMF mgment process..

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Learning Preferences /TMF Management

Generation Alpha (iGeneration) Born 2013-2025
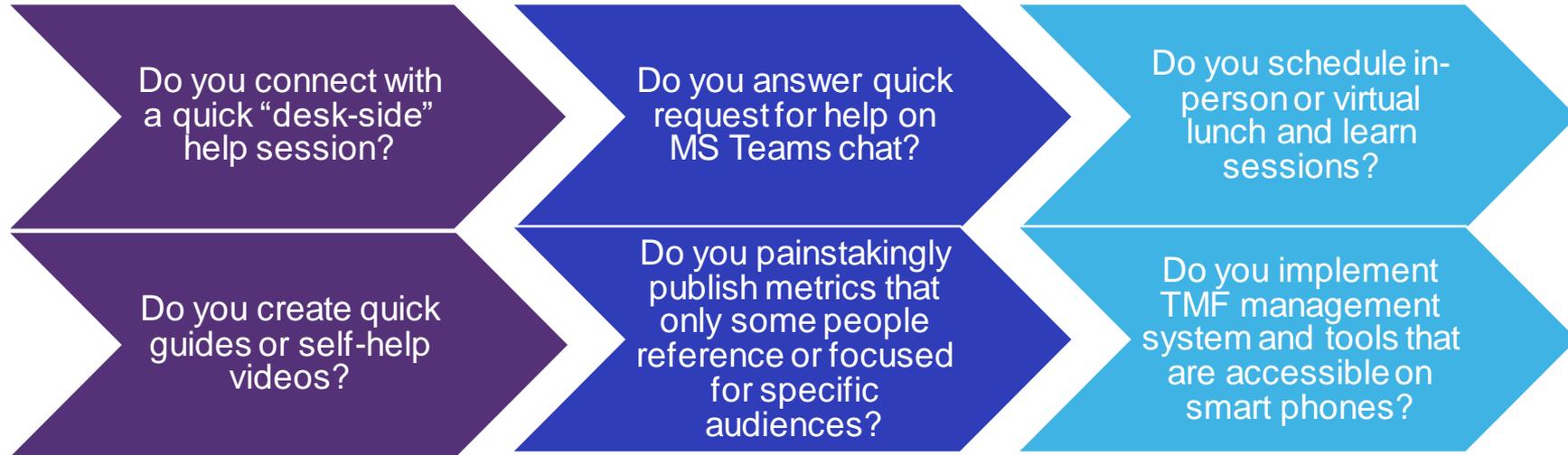
Learning Preference

- Prefers visual and interactive learning
- More likely to engage with educational content that is presented in an entertaining and interactive way.
- Accustomed to the seamless and inextricable integration of technology into their lives.
- Highly personalized and targeted learning experiences are critical.
- The lecture will not work with them; video content remains supreme.

TMF Management
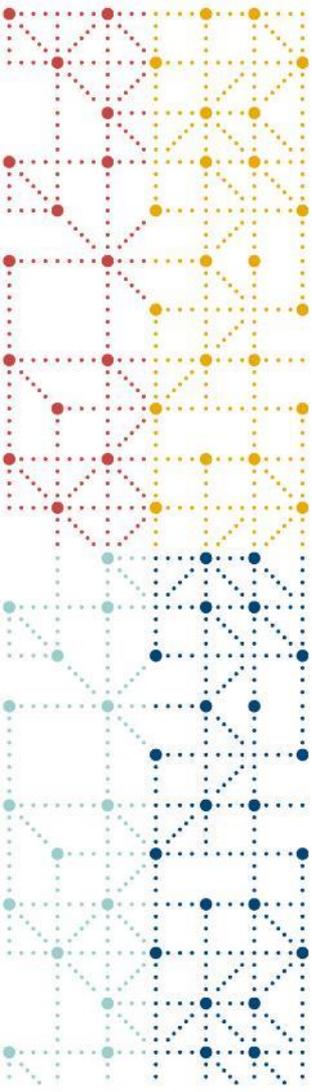
- Will be comfortable with Automated Intelligence (AI) being integrated into the process for management of the TMF
- Will not tolerate inefficiency of technologies
- Will want highly focused short video tools that are geared towards their learning.
- Data presentation needs to be on-spot and quickly relevant to them.
- Videos should be entertaining and have component of test/game.

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Knowing this, What is a TMF Professional to do?

When engaging a person to perform or learn any component of the TMF management process, consider the following:

Do you connect with a quick "desk-side" help session?

Do you answer quick request for help on MS Teams chat?

Do you schedule in-person or virtual lunch and learn sessions?

Do you create quick guides or self-help videos?

Do you painstakingly publish metrics that only some people reference or focused for specific audiences?

Do you implement TMF management system and tools that are accessible on smart phones?

We have to consider all of these and more depending on our TMF customers.

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Thank You!

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