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

Presented by: Lisa Mulcahy, Owner and Principal Consultant,
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Meet the Speaker

Lisa Mulcahy

Title: Owner and Principal Consultant

Organization: Mulcahy Consulting LLC

Extensive career in the bio-pharmaceutical industry, 17 years 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.



Disclaimer and Disclosures

- *The views and opinions expressed in this presentation are those of the author(s) and do not necessarily reflect the official policy or position of CDISC.*
- *The author(s) have no real or apparent conflicts of interest to report.*

Motivation for this Discussion Topic

My own biases and experiences

Standard Operating Procedure (SOP)

SOP Header Edit this text with the SOP name for this process	1. Process Diagram
1. Purpose Edit this text with the description of the purpose for this process.	
2. Scope Edit this text to list the scope for this process.	
3. Deliverables Edit this text to list deliverables for this process.	
4. Responsibilities Edit this text to describe who is responsible for what.	

Excel 2021 Basic

The Excel 2021 Program Screen

Keyboard Shortcuts General

Getting Started

- Choose a Workbook: Click the File tab and select New or press Ctrl+N. Double-click a workbook.
- Open a Workbook: Click the File tab and select Open or press Ctrl+O. Select a recent file or navigate to the location where the file is saved.
- Print and Print a Workbook: Click the File tab and select Print or press Ctrl+P. Click the Print button on the Quick Access Toolbar.
- Save or Save As: Click the File tab on the Quick Access Toolbar. The button label is labeled "Save" if everything has been re-saved.
- Select an Entire Workbook: Click the top-left corner of the worksheet grid.
- Select All: Click the top-left corner of the worksheet grid.
- Select Non-Adjacent Cells: Click the top-left corner of the first cell, hold down the Ctrl key, and select any non-adjacent cells.
- Cell Address: Cells are referred to by the coordinates made from the column letter and row number, such as A1, B2, etc.
- Jump to a Cell: Click in the Name Box. Type the cell address you want.



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. Persons in a generation can be blends.

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

Let's Review the 5 Latest Global 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 1965-1980 (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 1981-1996 – 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 1997-2012 (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.

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?



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.

Factors at Play

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

Are there any other factors 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

Learning Preferences /TMF Management



Generation X Born 1965-1980

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

Learning Preferences /TMF Management



Millennials (Generation Y) Born 1981-1996

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.

Learning Preferences /TMF Management



Generation Z Born 1997-2012

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 visual 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 mgmt process..

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.

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?

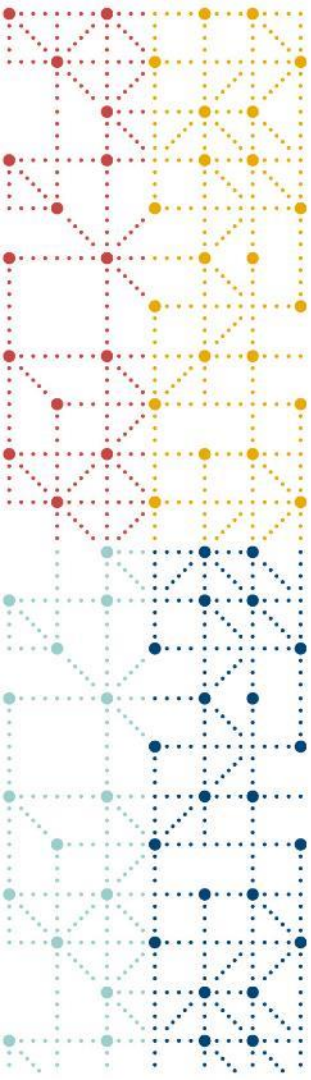
Do you schedule in-person or virtual lunch and learn sessions?

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... tailoring the message and delivery depending on our TMF customers.



Thank You!

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