



The four-generation workforce is breaking old leadership playbooks

The new results and relationships paradigm

Read more: [Pivotal Leadership CUTF Resource Page](#)

April 21, 2026

With:  PIVOTAL
LEADERSHIP[™]

and **Lisa Haydon**

What made you want to attend this session?

Helping to understand how we bridge the gaps

Interested in how I can engage better

Interesting in perspectives of other generations so we can work together effectively and effectively.

Want to hear about leadership changes now and near future

Always something to learn with leadership. The different generations are a challenge!

We should always seek to challenge our leadership skills... yes, even us GenX crowd

Wanted to learn how I can better support all generations.

It's a very interesting challenge!

Always looking for leadership tips

My team grew recently. For the first time in my career I lead across 4 generations, including a group of tenured employees doing the same tasks every day for years. I want to drive change effectively

Learn to deal with different generations

The four-generation workforce is breaking old leadership playbooks

Lisa Haydon

Objective: What's happening in your workforce and how leadership playbooks are changing



AGENDA

1

Intro & Pause

2

The Generational Shift

3

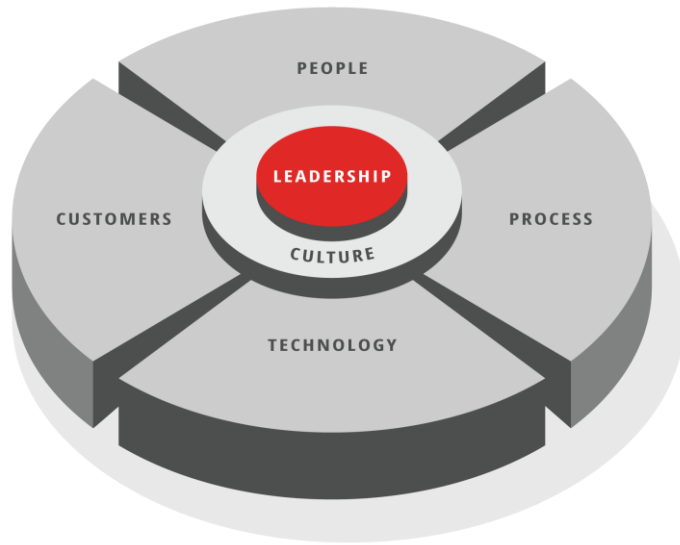
The Modern Leader

4

Your Leadership Playbook Shifts

5

What's Next



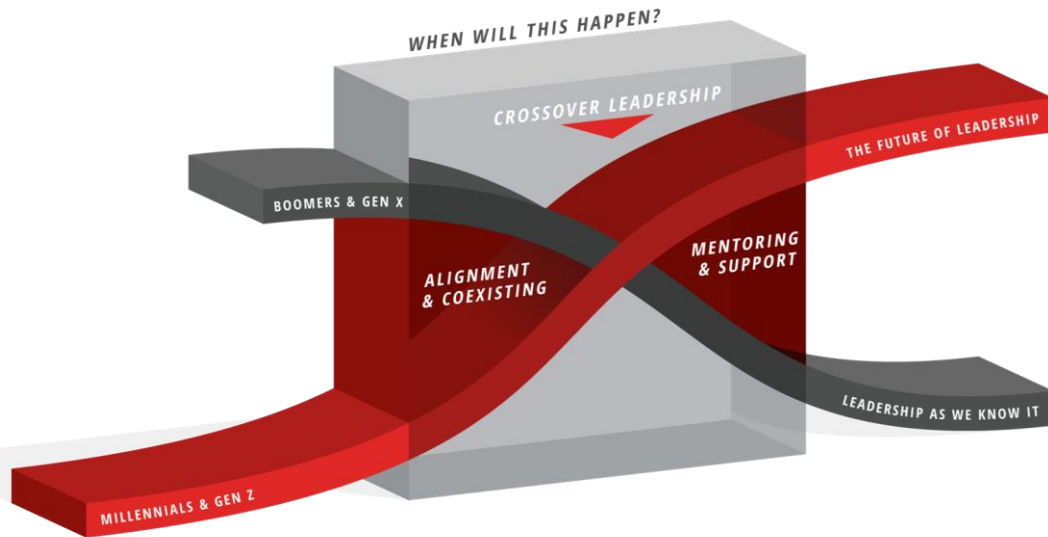
Culture is the soil.
Leadership is the gardener.
Without leadership, nothing takes root.

How are you developing leaders who
will lead your transformation?

PIVOTAL
LEADERSHIP™

Four Generations at Work

Four generations aren't just coexisting, they're redefining firm growth together



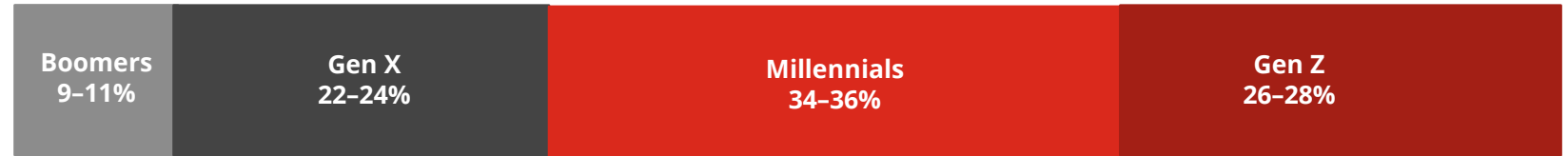
Generation	% of workforce 2026	% of workforce 2028
Traditionalists 81+	<1%	<.5%
Baby Boomers 62-80	9-11%	6-8%
Gen X 46-61	22-24%	20-22%
Millennials 30-45	34-36%	34-37%
Gen Z 13-28	26-28%	29-31%

2030 74% of the workforce will be Millennial and Gen Z dominated

Four Generational Persona

Humans shaped differently in their lived experiences

64%+ of workforce today — growing to 74% by 2030



Generation	Traditionalists 81+	Baby Boomers 62-80	Gen X 46-61	Millennials 30-45	Gen Z 13-28
% of Workforce 2026	<1%	9-11%	22-24%	34-36%	26-28%
% of Workforce 2028	<.5%	6-8%	20-22%	34-37%	29-31%
Common Identity	Stability & duty	Achievement & recognition	Autonomy & results	Purpose & belonging	Freedom & impact
Most Often Striving For	Leaving a Legacy	Being Recognised	Being Self-Reliant	Holding High Self Standards	Being Innovators

What does a multi-generational workforce mean to you and your credit union?



It's 2030, how will credit union leaders be seen and experienced as?

As having a perpetual state of child like curiosity

Guides, not those with the answers

Perhaps a stronger clarity of purpose and commitment to community

Experienced and well versed in engagement

Instinctively member centric.

Open and welcome to change due to the need to engage younger generations.

Modern Leader Persona

What do credit union leaders have that others don't?

The modern leader delivers **results through relationships**, shifting performance from individual output to how effectively they engage, adapt, and execute with their team. They succeed by integrating **purpose, self-awareness, relational intelligence, and execution**, working alongside their teams to deliver sustained performance, adaptability, and growth.

They are **purpose-driven**, using a clear sense of impact to anchor focus, guide decisions, and sustain performance in complex, ambiguous environments.

They lead by **activating and coaching people**, leveraging emotional intelligence, communication, and Flex Capacity to build trust, align teams, and translate engagement into performance momentum.

Their effectiveness is amplified by **engagement, inspiration, and tech agility**, enabling them to influence across teams and deliver in dynamic environments.

At the same time, their performance is constrained by **distractibility, execution inconsistency, and a internal self-criticism**, particularly when purpose and priorities are not clearly anchored.

PGI Future of Leadership Research 2022 - 2025

What's the biggest change you, or your credit union, have to make?

Principles not rules

Keeping up with technology

Emotional intelligence

Differentiation and culture.

peer reviews among senior mgmt

Going paperless!!

focus on serving members!

Changing our approach. Adapt. Accept.
Potentially lower expectations

Effective use of AI for efficiency

Develop a personal service level that
fully leverages the vastness of
technology and AI

Enhanced agility, ability, and willingness
to accept the variations that exist
between the different generations
(members and staff)

Giving more autonomy to staff

Automatization of operations

Keeping rooted in who we are and why
we exist - while remaining relevant to
that purpose

Moving forward in Technology - Open
banking, AI. Engage younger
generations in discussions.

FUTURE OF LEADERSHIP RESEARCH

Applied. Validated. Performance-Linked. Measured.



One of the most comprehensive leadership intelligence engines in North America. Data validated by leaders and organizations across 9 industries.

56

APPLIED COHORT

Enterprise-sponsored high-performing leaders across 4 cohorts and provinces. Multi-phase diagnostic, experiential & 1:1 coaching.

65+

LEADERSHIP DIMENSIONS

200+ data points linking persona, presence and execution to real performance outcomes, quantitatively and qualitatively.

10 yrs

DATA & EXPERIENCE

Diagnostic + experiential + coach-confirmed insights. A decade of applied leadership development work.

Insights connected data to person to modern performance demands. We validated the modern leader persona. We can measure whether development worked.

PIVOTAL
LEADERSHIP™ THE MODERN LEADER IMPACT CHECKLIST

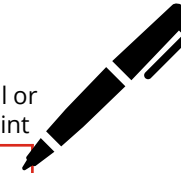
Leadership Focuses that Drive Measurable Impact

What's your company's leadership profile for achieving results?

Strength

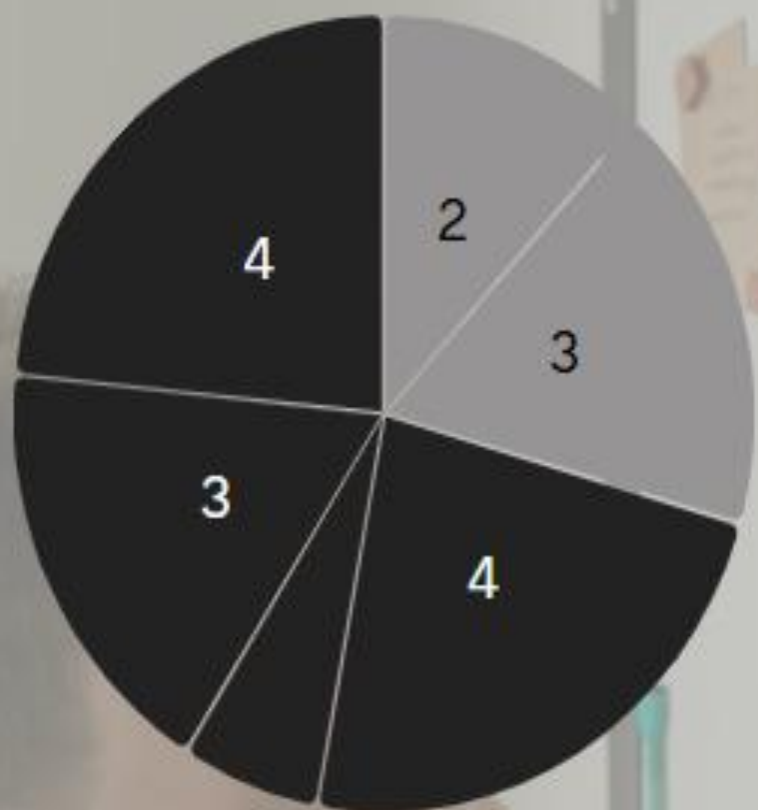
Potential or
constraint

1	Persona	Mindset matters		
2	Persona	Self leadership as a cornerstone		
3	Presence	Grounded action orientation		
4	Presence	Energized by work and team		
5	Presence	Being adaptive optimizes every day		
6	Presence	Effectively saying what needs to be said		
7	Impact	Outcomes are owned by a mobilized team		



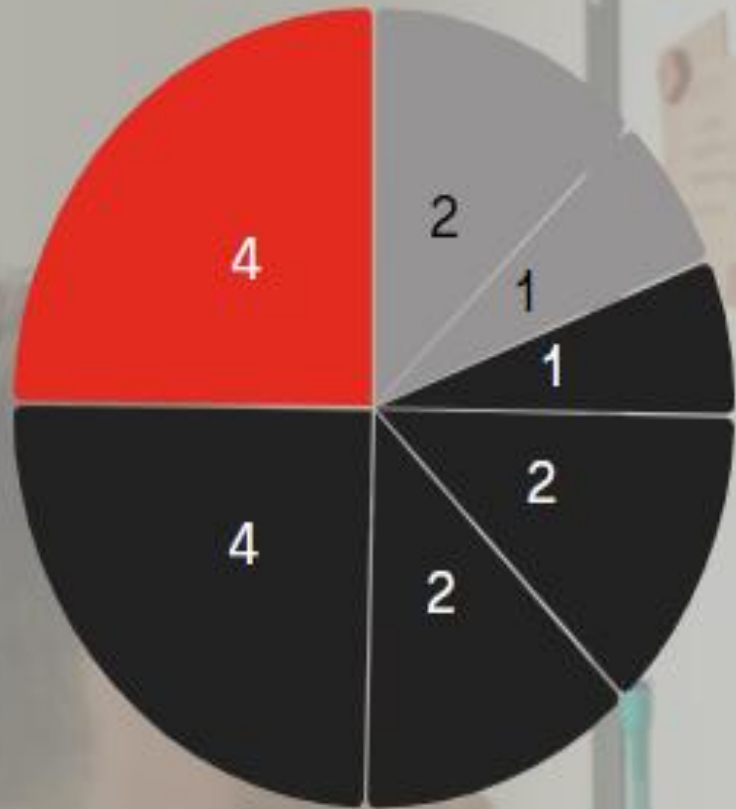
Do you have the insights you need on these important areas of leadership?

What's your strength for achieving results?



- 2 1. Mindset matters
- 3 2. Self leadership as a cornerstone
- 4 3. Grounded action oriented
- 1 4. Energized by work and team
- 3 5. Being adaptive wins everyday
- 4 6. Effectively saying what needs to be said
- 0 7. Outcomes are owned by a mobilized team

What's a constraint to your achieving results?

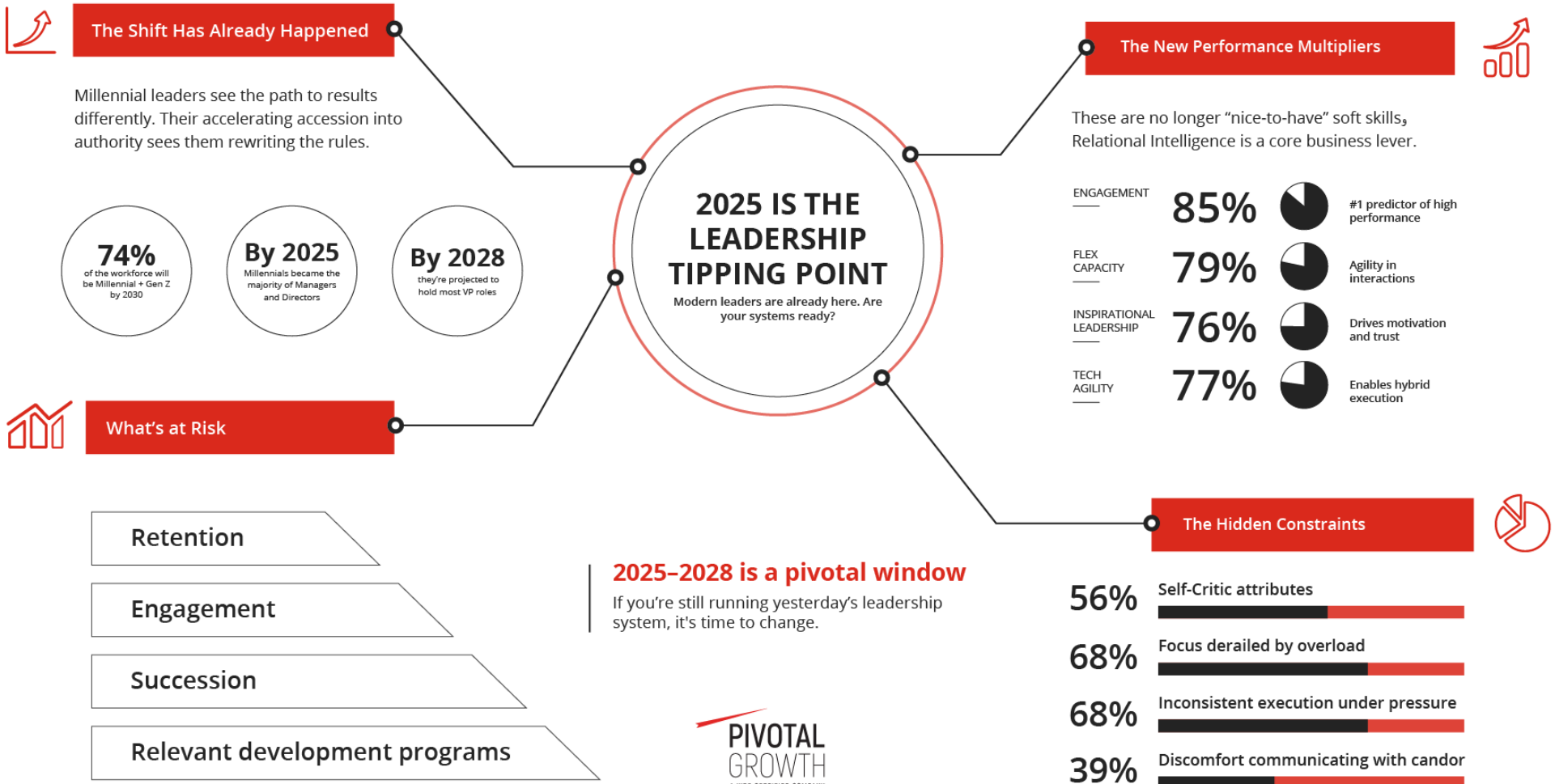


- 2 1. Mindset matters
- 1 2. Self leadership as a cornerstone
- 1 3. Grounded action oriented
- 2 4. Energized by work and team
- 2 5. Being adaptive wins everyday
- 4 6. Effectively saying what needs to be said
- 4 7. Outcomes are owned by a mobilized team

MODERN LEADERS

HIGH PERFORMANCE REDEFINED

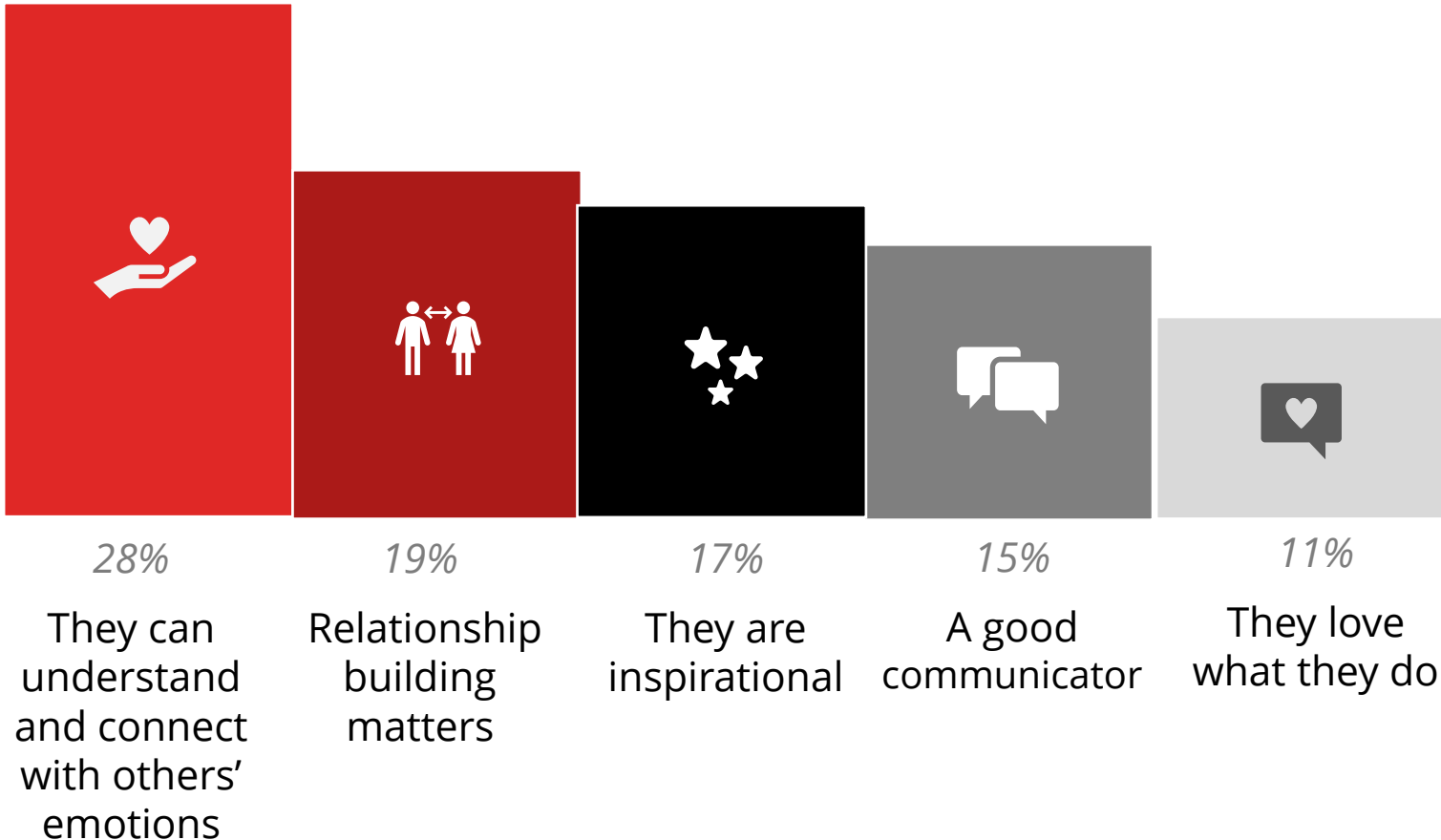
We've developed a next-generation leadership system powered by human insight, technology, and AI. It's built to assess, activate, and optimize leadership performance so organizations can retain top talent, accelerate growth, and deliver measurable results. Below is a brief summary of the key insights and focuses that matter most.



'What Makes You Connect With Someone You Work With?'

Here's what millennials told us:

Top 5 Responses



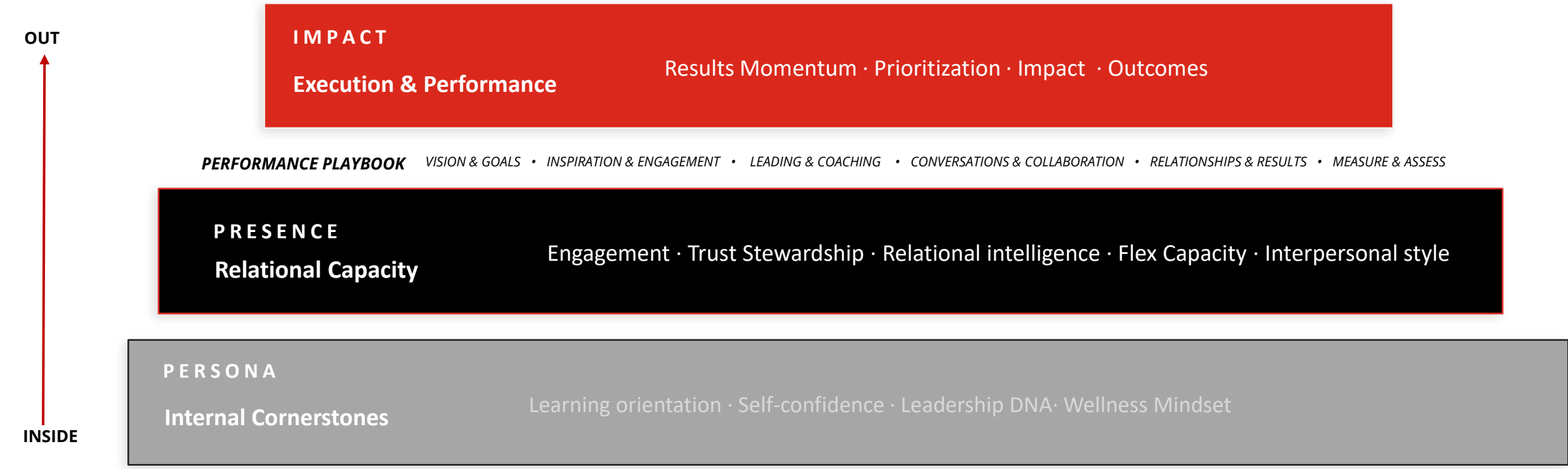
Best ways to engage with Millennials

1. Connect emotionally, help them understand you
2. Build authentic relationships
3. Inspire and motivate them
4. Provide context, listen and create dialogue
5. Enthusiasm is contagious

Source: Pivotal Growth's Future of Leadership Research

TURNING YOUR LEADERSHIP INTO RESULTS

Leadership impact is created when persona and presence work together



Modern leaders are purpose-driven, resilient, and relationship-focused; they deliver results through engagement, adaptability, and trust, not hierarchy.

7 Leadership Impact Checklist

1 MINDSET MATTERS
2 SELF LEADERSHIP AS A CORNERSTONE

3 GROUNDED ACTION ORIENTATION 5 BEING ADAPTIVE EVERYDAY
4 ENERGIZED BY WORK AND TEAM 6 EFFECTIVELY SAYING WHAT NEEDS TO BE SAID

7 OUTCOMES OWNED BY A MOBILIZED TEAM HOLD

PERFORMANCE PLAYBOOK VISION & GOALS • INSPIRATION & ENGAGEMENT • LEADING & COACHING • CONVERSATIONS & COLLABORATION • RELATIONSHIPS & RESULTS • MEASURE & ASSESS

KNOW WHO YOU ARE PERSONA

The attitude and attributes that are uniquely you and used to step in to do leadership work with.

- A wide, global perspective
- Consistent learning agility
- Sustained resilience
- △ • Stable self-confidence
- △ • Stepping in to decisively lead
- Manages distractions
- Makes wellness matter

KNOW HOW YOU SHOW UP PRESENCE

A leader's energy and confidence to connect, engage, and inspire team members.

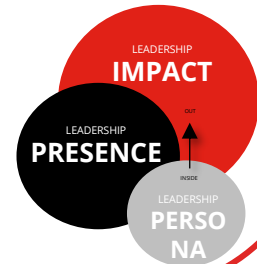


- ✦ • High personal engagement
- ✦ • Adaptive way of connecting with others
- ✦ • Inspirationally sparks others
- Duality interaction style of relationship and results

LEADERSHIP IN ACTION IMPACT

Essential competencies that drive execution, performance and results for today's leadership mandate.

- ✦ • Embraces technology adoption
- Shares ownership to mobilize outcomes
- △ • Has personal systems that drive consistent momentum



The Leadership Playbook Shift

How the four-generation workforce is forcing leaders to change

INSIDE



OUT

	OLD PLAYBOOK	THE SHIFT	NEW PLAYBOOK
	Role Defines the Leader	<i>From role certainty → to growth curiosity</i>	Mindset, Learning Agility, and Wellness
	Confidence Through Stability	<i>From stability → to resilience and stepping in</i>	Lead Self to Lead Others
	Authority as Credibility	<i>From authority → to relationships</i>	Connection for Relationships
	Earn Trust Through Time	<i>From compliance → to transparency</i>	Extend Trust Through Clarity
	Activate to Deliver	<i>From delivering → to inspiring</i>	Inspire for Action and Momentum
	Feedback as Correction	<i>From avoiding → to saying what needs to be said</i>	Courageous Feedback as Development
	Direct & Drive People	<i>From directing → to enabling</i>	Mobilize Teams
	Manage and Correct	<i>From managing → to coaching</i>	Coach and Develop People

Persona — Who You Are

Presence — How You Show Up

Impact — Leadership in Action

WHERE ARE YOU?

Who Holds the Key to Mobilizing Team Performance



*The leadership playbook is breaking.
The question is whether you're working on the
next one fast enough.*

- Pivotal Growth Inc.

For Leaders: How To Lead A Multi-generational Workforce

Millennials and Gen Z reject command-and-control in favour of trust-based, emotionally intelligent leadership

We've prioritized how you can embark on your journey of adapting your leadership style for today's multi-generational workforce

01 Share what matters to you

02 Value wellness and well-being

03 Have visible and consistent personal engagement

04 Be adaptive in your interaction style

05 Use feedback to be a teacher and learner

06 Mobilize teams through shared ownership

The greatest risk to transformation execution is rarely visible in the project plan. It lives in the team's leadership, trust, behaviour, and alignment.

- Pivotal Growth Inc.

NOT CHANGE MANAGEMENT. CHANGE LEADERSHIP.

How do you build leadership alignment and capacity to deliver the change?

Traditional Program

Measures change readiness

Focuses on competency gaps

Produces individual reports

Report-driven deliverable

Addresses change in general

Modern Program

Measures team strengths and capacity

Prioritizes high impact performance drivers

Produces team alignment + work style transparency

Coach-enabled activation

Architected for your organization, project and team

Scale comes from technology. Alignment comes from leadership. Momentum comes from mobilized teams.

What are you going to **do** with your learnings and insights?

What are you going to do with your learnings and insights?

Reinforcement my approach will remain effective, when I keep adjusting

Transition will be difficult

Looking at ways to build better relationships, to understand staff capabilities and enable them in a way that makes sense for them

It's telling me I'm on the right path

It reinforces some of the internal evolution that is underway... with much more to follow

Importance of connection Change leadership-changing how we approach projects. Team and buy in

Coaching, coaching, coaching

share with the next gen

Reassess our organization leadership team approach with younger members, how to better optimize their contributions.

Will revisit the generations of the team to consider how best to coach

Reflect on how we're prepared for and preparing our future leaders

Focus more on involving the younger generation. Learn from millennials and Gen Z.

"Coaching" vs telling them what to do.

3 IMPORTANT LEADERSHIP PLAYBOOK THEMES

1

THE CROSSOVER

**The millennial
dominated
leadership table is
under way**

2

THE SHIFT

**You're adapting
your leadership
playbook and
your workforce
wants more**

3

THE 7 IMPACT CHECKLIST

**Focus on
leadership
enablers that
unlock capacity to
achieve important
goals**

PATHWAY TO TRANSFORMATION PROGRAM

**Most organizations assess project readiness.
Few assess leadership readiness.**

That gap is where transformations quietly fail. The gap is not because of the plan, but because leadership alignment, energy, and mobilization were never made part of the planning and work.

WHAT YOUR LEADERS WALK AWAY WITH

Pathway to Transformation closes the gap.

Every participant leaves with more than insight, they leave with a plan playbook.

Personal Diagnostic Report

Persona, Presence & Impact across 11 validated dimensions with performance bands and multipliers.

Validated Action Plan

Coach-facilitated debrief confirms data-backed priorities. Underused vs. overused strengths identified. Tensions points made visible.

Shared Leadership Agreements

Explicit team norms for decisions, communication, and accountability, built together, not handed down.

Change Leadership Statement

A co-created statement of how the team will lead the transformation, grounded through their own collective voice and data.

NOT CHANGE MANAGEMENT. CHANGE LEADERSHIP.

Typical Program

Measures change readiness

Focuses on competency gaps

Report-driven deliverable

Addresses change in general

Pathway to Transformation

→ **Measures leadership strengths and capacity**

→ **Prioritizes high-impact performance drivers**

→ **Coach-enabled activation**

→ **Architected for your organization and project**

Scale comes from technology. **Alignment comes from leadership.** Momentum comes from mobilized teams.

[Let's map this for your team](#) →



Q & A

Read more: [Pivotal Leadership CUTF Resource Page](#)

