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Rich Donovan:

I thank you, ODEN, for hosting me today and allowing me to speak to all of you..

Today we're going to try to talk about disability. You walked in today thinking that disability was in the corporate environment, and I'm going to give you concrete facts and figures too because I think we will all agree that we are not quite where we want to be yet. There's a lot of work to do.

There's a quote somewhere that says, well, if it's not broken, don't fix it. The idea of that is often true. But if it's broken, first you have to declare it broken, and then you have to figure out how to fix it. I think today we will say the system is broken. It is not working. We are not getting the results that we want to get. So how do we fix it? Let's take a look at that.

So this is what I call the magic number one slide because I am a firm believer that everyday business is derived from numbers. So what is disability? What are we actually looking at globally? This is not a social issue in a boardroom. This is a business issue. If you look at it with a social mindset, you are dead on arrival. We have to look at this in cold statistics. So here you see the macro statistics. How big is the population? Globally, persons with disabilities represent 1.1 billion people, roughly the size of China. Now, you tell me the CEO that doesn't want to be in China, I will tell you the CEO that is going to be fired. What do we talk about when we talk about income? We are talking about roughly 4 billion dollars. Most of this is through transfers, money transferred to persons with disabilities. Roughly 540 billion dollars is disposable income. So that's roughly the same amount that the U.S.'s population was 50 years ago. And we all know what happened in the U.S. In Canada we are looking at an income bracket about the size of the GTA. Now, again, if you went to the CEO of Bell and said, ignore the GTA, he would probably look at you sideways and say, what the hell are you talking about? So there's a lot to tap into there, but they just don't understand that yet. That's not their fault. That's our fault. It's our job to help them understand the opportunity.

Now the bottom two lines of this chart show what I call a sink hole. So for each person with a disability, there are two or three people, family or friends, who are emotionally invested in those people. That represents an additional 2 billion people globally or 8.1 trillion dollars, and that's disposable income, folks. From a marketing perspective, it doesn't get more of a strong bond emotionally than disability. So if you are trying to grab a mother who has a kid with CP or a mother who has a kid with ADD and you can tap into that emotion and you can tap into that, it's the Holy Grail market. So I don't want to be seen as taking advantage of persons of disabilities, people say. I look at him sideways and his primary market is women. So I say, do you find you're taking advantage of women when you tap into their market? He says, no. It's part of business. That's the same thing here. It's part of doing business. Next slide, please.

What does this look like from an ecosystem point of view? How do you fit together what we are looking at from a perspective of the marketplace of people with disabilities is interacting with the corporate community. When I say corporate community it can be the mom and pop shop on Main Street. So you can see in the VENN diagram, people with disabilities on the left and

employers on the right. How do these interact, and how as a service provider should you be looking at this?

Well, I'm betting that today you look at this as simply getting people a job. Pretty simple, right? That's how we have all thought of it. It ain't that. The thing is you cannot get the job until you sell the idea.. The way you sell the idea to a corporation is simply one word, "revenue." Until they bring in revenue, they are not going to hire us. They are just not. We have seen globally governments trying to mandate this stuff, in Europe, in South America, and in Canada. It doesn't work. It doesn't happen that way. If you go back to the '60s and '70s and the Women's Movement in the U.S. and Canada, jobs didn't come until the '80s. You had years of circulating ideas and the marketplace and changing how the marketplace works and then 15 years later, somebody got invited and said, oh, yeah, we should hire these guys. Yeah, let's do that.

And all the laws that were there, they didn't really move the needle. What moved the needle was corporation's self-interest, it makes these folks more powerful consumers. And that is what will happen in disability today. Here's the good news. I will take half as long as it would if we did it through employment first. Employment first will probably take 30 years. This will take 10 to 15. That's the good news. Next slide, please.

So how do we actually do that? I think you have all heard the market has design, the market has need. We have all been hearing that for 10 years. What does that mean? What does that actually look like when you get into the boardroom? Because if it's not part of the corporate plan, if it doesn't have a budget and somebody's butt isn't on the line for results, it's going to go precisely nowhere. So corporations need a plan to get this done. And what we have done is developed a framework where companies in all kinds of different industries are actually going to do this. I have looked at global disabilities support specifically in the areas of employment, and they are all pretty much the same. It starts to become, okay, how much do I have to spend to get over the law to equal the fine that I have to pay? Simple math. Every good corporation will do the same thing because they don't have a framework to use to say, okay, how do I turn these 1 billion people, these two billion people into additional revenue? One guy just looked at me and said, Okay. Show me how. And nobody knows exactly how yet. That's the work we have ahead. So this is the first step.

We have broken this down into 7 different areas. On your left is the employee's side. On the right is the revenue side, and right smack dab in the middle is the shareholder and if it doesn't make sense to the shareholder, it's going nowhere. If it is not incremental in value to the shareholder, nobody is going to do it. The big thing on our side is this makes sense, and when I speak to groups like this, usually the question I get is, well, I don't want to wait 5 to 10 years. How do I do this tomorrow? When you figure that out, let me know, because change on this scale takes time. And the unfortunate part is we have been barking up the wrong tree for 40 years. So we got 40 years of trying, working, doing our best and meaning very well, but not moving the needle. In fact, I would say we are actually going backwards. The numbers are actually getting worse.

So there's got to be something like a framework and a way forward for us to help shareholding companies to understand the reason for doing this, and then actually go do it. I think that's the

step that's missing today is I think we have done a pretty good job of making the case over the last 10 years. I think we have done a really poor job of step two. I think we have done a really poor job of planning and landscaping. I think we have to evolve into that.

So on the left side is the employer's role. There's two roles for the employers. One is to recruit. How do I recruit and get these people? And secondly, more importantly, how do I keep them? How do I move them to an organization? How do I take the guy in the wheelchair who can't speak, is deaf, from day one to CEO? How do I get this guy a job? Because that's our language today. How do I make these people incredibly successful? Success is defined differently for different people, whether you're CEO of Bell Canada or working in another area, success is possible for everybody. It's just scaled differently.

So we are looking at diversity recruiting and turning it into disability recruiting. What we tend to do in disability recruiting is trying to fit a round peg in a square hole. Have any of you tried that? It's hard. From the laughs in the room, perhaps some of you have done that too. We need to find what works for people. From a marketing and finance ability, we need to get those folks in the door. That's how they did it in other markets. That's how we have to do that today. The companies who don't do that have a lot of trouble hiring people who are diverse. Companies who try to find this specific role often find they aren't meeting the roles they are looking for.

Second, the process needs to be owned by the business. You will find a lot of these programs, I call them "programs" for people with disabilities have been set out specifically for people with disabilities. They don't work, folks, because nobody in business is invested in them. Nobody cares. I know this guy who was coming in for the program who will hire everybody. We will try that and see if it works. The managers never met the guy. They weren't invested in the guy. So what happens to that individual? He is going to work. He is going to sit off in the corner and do his job well, and then he's going to say, Hey, they aren't investing in me as an employee, and he's going to walk out the door. They will ask, Why am I doing this? The guy just walked out the door of that group. I don't want to do this anymore. It is not successful. So it's key that managers own the employees, otherwise you are doomed to failure. Always recruit where there is success. Don't go to places that you don't usually go. I know that sounds strange, right? I mean, how are you going to find new people if you are going to the old places? There are people with disabilities everywhere. You're just not finding them. So find that right person, go back to where you had success, and keep going back to that wealth. Don't try to reinvent the wheel here. You are going to waste your time, waste your resources, and everybody is going to be frustrated.

I'm going to quickly go through the next point. We all know that what works here is talent first and disability second. I take that to the extreme. I ignore the disability. People with disabilities know how to deal with themselves. They know how to figure out their environments. Leave it up to them. Focus on the job. Focus on success. Don't even talk about disabilities. I go to probably 50 events a year including people with disabilities, and I never once talk about disability. I always talk about being successful. And that's really something -- for someone who has been doing it the same way for 30 years, that may be a challenge, but it works. It works every single time. We all know the guy is disabled. But you don't need to talk about it. Focus on why he's here.

The other point I would say is be honest. This is hard. There is no magic wand here. Companies are going to make mistakes, and that's a good thing. Prepare them for that. If you think it's going to be all wine and roses and it is not wine and roses, it's going to be a tough sell on day two. So keep that always in your minds. So retention. Again, this goes back to first, you always focus on productivity. Everything is about productivity. Not being nice or doing good things, squeezing every ounce of productivity from that resource we can. They do that with every employee on the floor, why not your guy? Why isn't your guy treated exactly the same? Make sure he has the tools to perform. Always focus on the results. It is not about the process. It is not about the accommodation. It's not about finding budgets. It's about delivery. I had a professor in business school where I highly recommend you read his book. I can't remember the name of the book, but Google might find it or you will find it. His 200-page book came down to one word SHIP, that's S-H-I-P, in case you are wondering. Always deliver. No matter what you do, at the end of the day, you always have ship results. And that applies to persons with disabilities too. This isn't about jobs. This is about value. And if the results aren't there, give more.

Career management. I don't know if people ever talked about career management for persons with disabilities. We all focus on getting their butts in the seats. What do you do once they are there and how do you develop? How do you retain? How do you move these folks along? And should you do it as fast as everybody else? I call it career management on steroids. If you find a great person with a disability and he or she is fantastic, move them quickly. Give them more responsibilities quickly. Move them faster than you move anybody else.

Next slide, please. So now we look at the right side of our Matrix which is the customer side. And I think this is more important than the employee side. I think this is the most important side. When we develop this market as a viable marketplace and figure out how to speak to them not like they are tokens, but figure out what makes them tick as consumers. Figure out what pushes their buttons. Figure out how they evolved themselves from buying decisions to buying to consumption, then we will have a much different conversation. Today we are having a conversation about doing what is right. And, man, going to bed at night, that's got to make you feel good, that you're doing what is right. But I guarantee you there's always those words at the back of your brain going, you know what? Is this actually right? Is this actually going to get me to where I want to go? Is this actually going to unlock the potential of these individuals? I will leave that for you to decide. I can't answer that question for you. This is the way you do this.

So on the left, you see this picture and what you can't see, is this guy is an amateur martial arts fighter and he wears a hearing aid and it says, because life is inversely proportional to what you can hear. Because this guy was knocked out in the ring, his hearing aid is gone. That is how people with disabilities are seeing themselves. They aren't seeing themselves as a charity case. They aren't seeing themselves as this body of people with disabilities. They are starting to be empowered. And when that happens, companies can tap into that. The thought goes from, isn't that nice? To, wow, isn't that cool? That's the conversation we have to have.

In the middle you see this rather trendy lady. And it's very forward. I don't know if you can see it, but it's very sexy. And we all know sex sells. I guarantee you, you did not think I would be talking about disability and sexy, did you? That's where this is going because we know that sex sells. We need to start incorporating that into the world disability market as well. Taboos need to

go out the window. How do you see yourself as an individual? You're sitting on the couch as a double amputee. Now your brand is this woman with two wooden legs that are gorgeous. That's your brand today. And probably all of you have seen the brand Iteel which are cool economic kitchen tools. This was created by a woman with disabilities who wanted to continue cooking. Now Iteel doesn't market to that community. Their main marketplace is 22 to 28. They just think it's cool. So that's an example where the development needs to go. Use disability as an inspiration and make it cool. That's where this is going in the next 5 to 10 years. Some of my clients are already starting to do that. And what you're going to see in the next 3 years is going to blow your mind and you're going to say one day, I wonder if that was inspired by people with disabilities. And it will be.

Next slide, please. Digital, I feel compelled to put this slide in there for digital because the reality is there is no store front anymore. Your company is known by the worldwide web. For one in 44 don't use fliers anymore. They don't use the newspaper. They get everything online. In the older age bracket, I think the statistic was 70% baby boomers had made more online purchases in the last 35 days. So even baby boomers are getting on board with this idea. So being digital is critical and the idea of using social network and using digital Delivery effectively for a corporation, disabilities need to be part of this. And this is where the innovation becomes really powerful because if a guy uses his hand to navigate a website, he can do it and it just became easier for everybody else. So I spend a lot of time with these techno geeks that talk about stuff and I only pretend to understand, but they now say, "How would A person with disability do it so I can incorporate that and leverage it."

So the three questions that companies need to ask are, "Can customers access your sites and communicate with you? Can they access your products? Can they access your messages and play with them?" If they can do those three things, you are free to go. And nobody can do those three things yet, but we will get there eventually. How do you do this? How do you as a company go home today and actually start to do some of this stuff? This is the solution in the box slide. The questions are always how. You may understand the why, but you don't understand the how. The how not to do this is comply with the law. That is how most companies are approaching this today. I will comply with the law and do what the government tells me and I'm done. Yeah, well, your competition is going to kick your butt because they are looking at this as an important marketplace.

So first what you have to do is figure out where disability meets its strategic objective. The strategic objective for one company is not the same as another like TD Bank. TD Bank is a consumer based company that has to focus on marketing strategies and customer service standards. A company like Alcan has to look at things like product innovation, how to make their processes better and their products better around this idea of accessibility integration. So for each company, it is not one size fits all. You can't go in with one thought for everybody. You have to focus on the strategic niche of the individual company. Build the team. Who is going to be accountable for results? Nobody is doing this for us today. There are some companies doing it as a platform. They have that figured out, but there's no accountability for this stuff, there's no budgets or no little concrete activity going on. There are probably in North America out of 1,000 companies, 5 that do this. 5. Define your audience and gather insights. What does this market want? How do you make things accessible, for example, for a person who is blind? Many

people don't know the answers because they don't ask the question. So there needs to be a process of real rigorous strategic planning that goes into this stuff. And it's hard. It takes time. It takes money. It takes risk.

Fourth, craft the strategy. Well, obviously, people who don't do step three probably don't do step 4, right. They might tell you they are. They might tell you they have a disability strategy, but they probably sat in a room with 12 To 15 people who have a disability who know nothing about business. That's a strategy for failure. Just because they have a disability doesn't make them smart enough to figure this stuff out. So you need to get your best people in the room as you would with any other marketplace to come up with this strategy. That has not happened to compare yet.

And fifth, develop and test a hypothesis. Some of this is going on. Pepsi Co. did a commercial for Super Bowl a couple years ago. They had a hypothesis. They said let's throw in this ad and see if it works. They spent \$15,000 to develop the ad, and \$3 million for the ad space, and they generated the biggest buzz of any Super Bowl commercial they have ever done, and they are still getting buzz out of it for a \$15,000 initial investment. So they did it with Jim Mac (ph.) and he's the one who threw all those free throws and was a YouTube sensation. They get \$3.5 million YouTube hits which is the largest YouTube campaign ever. Why? Because thousands of kids with autism all clambered to this site wanting to see what was going on. And guess what? They aren't drinking Coke anymore. So it was a valuable business decision to do that. All they did was refocus the aim of the marketplace and understand that this stuff has impact. That's a big jump from number 1 to number 5. And what you will find is the really good companies, the guys who take the risk, they will start at number 5 and work their way backwards. That's hard, though. The better way to do it is start at number 1 and work your way through.

Next slide, please. So finally, and I'm happy to announce this is the first time that these numbers are being seen anywhere in Canada or the U.S. for that matter so you're getting a sneak peek at this stuff. How do you measure shareholder investment? How do you measure what this means to a company's bottom line? Because at the end of the day, as I said before, that's all that matters. All of this other stuff we talked about, it's all noise. It's all a consultant standing up here making a good story, but if it doesn't make money, it doesn't matter.

So let's see what happens when the companies who do disability well but have not gone through the entire S&P/TSX composite in Canada. Every company needs to be tested. That's difficult because you're testing them all on the same criteria. In Canada, about 16% of firms show any kind of business related mention of disability. Of these 237 firms, 7.2% have meaningful external representation of interest in the disability space. And when I say representation, I don't mean charities or thing like that. I mean hard core business opportunities. In the States, there are 500 companies that show representation of disability and of those 500, 5.2% of companies do anything meaningful around disabilities, things like marketing campaigns, diversity outreach in a meaningful way. And it's nice that you hire everybody, but do you actually hire everybody? That's what we have to talk about. So when you take those companies and you analyse their stock prices over the last 5 and 3 and 1 year and what do you get?

Next slide, please. You get improved performance,

that's what you get. So over the last 5 years in Canada, you get a performance of 600 to 400 base points for companies that do disability well. In the U.S., that range is between 900 and 200 base points for companies who do disability well. The economic rationale is simple. If you do disability well, you will likely have a better customer responsiveness process than your competition. If you are in tune with what's going on in the marketplace, you probably opened new markets. You are probably going to have a process that is better than your competition. And oh, by the way, in the next 15 years, watch those numbers go up because all of these customers are going to flock to the leaders. This has just started to become part of our mainstream conversation. We all have been talking about this for years because we are in the industry. But when this tips, this will be on CNN, this will be on CTV and on BBC. This will be part of our mainstream culture and these numbers will get even bigger. The companies who are doing this well are in danger because they have done well.

But if we talk about this in terms of a hockey game, we are in the 7th minute of the first period. We are just beginning. We are probably just scratching the surface of what can be done. The good news for this room is the opportunity is there. The upside is there. I know I sound like a downer, a down person when I talk about service providers, but you guys have very big opportunities ahead of you. Because the penetration is so low today, if you feel like companies are going to get on this band wagon which I assume they are going to, you are going to be the experts. You have to figure out how to translate that expertise into value for your client. And if you think your clients are people with disabilities, come talk to me. I would like to convince you otherwise, because your clients are not the employers. Your clients are the people they are going to hire. Because I have never met a man or women able to sell a glass of water in a reservoir. But take that glass of water to a desert, the price is going to go way up.

You have to get ready for that. You have to change your business to be ready for those changes. That's my message for you. Take what you know today, what you think you know about the next 5 to 10 years. Things have changed a lot in the last 2 years. What about the next 5 to 10? That's your job today as ODEN is to figure out how to position yourself for that change because I tell you, there are companies out there today, and they are the best companies out there today in disability who are avoiding service providers because they are not getting what they want. That's a tough question to hear in this room. How are you going to evolve your product to deliver for your customer? And, again, your customer is not people with disabilities. That's your product. Your customers are the people who are going to hire those people. That's the bottom line. So I will leave you with that statement. I would be happy to take questions now or after. It's going to be challenging, but it's an exciting challenge and it's going to be a great 10 years. Good luck. Thank you. (applause)