

Energy

Canada

Sector Overview

Executive Summary > Overview

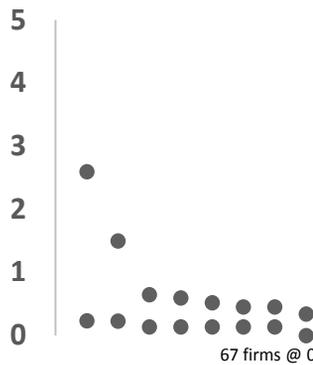
Top 3 Strengths

- Retail efforts process driven
- Some firms meaningfully recruiting
- Advertising pilots exist

Top 3 Weaknesses

- Strong focus on compliance
- No vision to delight customers
- Talent/recruiting not widespread

TABLE A – Energy Sector Peer RoD Results



Executive Summary

There are 82 Energy firms that qualify for our Canadian universe of 301 firms. 7 of these companies rank in the top 50 in Canada.

Those firms acting in disability tend to have a ‘down-stream’ component to their business – facing a retail consumer. There are observable actions by some firms to make pumping gas easier for People with Disabilities (PWD). While most of these efforts are mandated by law, a few firms are more consistent in their efforts both in scope and execution. Large gas retailers have added convenience stores to their revenue mix, and face similar challenges to main-line retail. There are opportunities to re-imagine customer experience driven by insights from PWD to improve satisfaction and reduce cost. A few firms have included people with visible disabilities in their advertising activities.

Upstream firms can leverage PWD to improve safety and understand a process-laden path to get oil from the ground to pump. Those principles that apply in distribution can be applied on a rig or at a refinery. A potential for 20% annual cost savings make this worthy of serious investigation.

With a few exceptions downstream, this sector is not recruiting in disability. Firms are focused on compliance or ‘doing the right thing’. A massive shift to a success-focused message must occur to satisfy customer (government) demands to hire PWD in material numbers. There are 6 firms that have robust talent process, but their reported hiring lags their bank peers.

Overall, opportunity exists to build significant value in PWD markets by reaching out to customers and engaging in activities to reduce costs.

Overall Result



Customer Result



Talent Result



Productivity Result



■ Sector Minimum
■ Sector Average
■ Sector Maximum

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The RoD Model > Capturing Shareholder Value

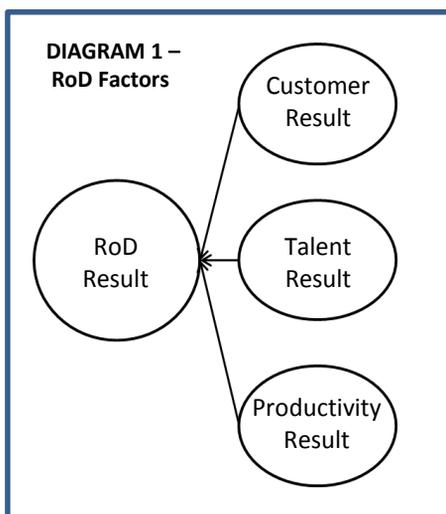
Cambridge Dictionaries defines shareholder value as “the total worth of a company to its shareholders”. Many things can increase shareholder value, such as new products and services, entering a new market, and streamlined operations. The basis of the Return on Disability model is to measure those activities relative to disability that add to shareholder value. Specifically, we identify actions that:

- 1) add to net revenue and/or
- 2) reduce ongoing operational costs

The 20 disability-related KPIs that RoD measures within organizations ultimately impact one of these two fundamental building blocks of value creation. We focus on value for one simple reason: to shift the disability paradigm from ‘added cost and effort’ to ‘added value’ by demonstrating the shareholder value of disability.

Customer – *Delighted Customers Lead to New and Enhanced Revenue Opportunities*

For most established brands, finding a new way to talk to a mature market is the Holy Grail. From a purely demographic point of view, 53% of the entire consumer marketplace is touched by disability. The value-add comes from the ‘halo effect’ of talking about inclusion, empowerment and innovation that comes from a focus on disability. Consumer-facing firms drive top-line growth by leveraging insights from PWD, refining messaging, and incorporating insights from disability to enhance the customer experience.



Talent – *Finding Great People and Keeping Them at Their Best*

The war for talent is real, and PWD represent a new pool to tap as part of the talent acquisition strategy. While the pool is real, it requires some effort to address. Understanding the space and connecting talent to core business goals are good first steps. Diversity recruiting has taught practitioners a few things: a) robust pipelines precede hiring; b) PWD must be attracted to the firm through brand appropriate messaging, and, c) done properly, the firm must be aligned internally on the rationale in hiring PWD. It is critical for companies to open their employee base to PWD in a robust way, which initially will be a high touch effort. Data and experience shows that this approach results in high productivity, higher quality and higher returns.

Productivity – *Leveraging Insights from Disability to Drive Efficiency*

Innovation is born from extreme environments, solving for a set of demands outside the norm. PWD do things in ways that “Joe Average” just does not think about. They are extreme users of technology and infrastructure. If one can solve for ‘extreme users’, one innovates applications for the average user. By empowering a line worker with one hand; who happens to have low vision, to reduce a 100 step process to 23 (simply because it is easier for her), it just became easier for all while removing complexity and cost from the operation. Firms acting in this area today are seeing efficiency gains in the area of 20%. This can also be applied to product development.