



PARTNERS

*University of St. Augustine
for Health Sciences
Brand Development*

January 15, 2015

Agenda

Introductions
Goals
Branding Overview
The Challenge
Situation
Brand Development
Promise Statement/Support
Personality
Next Steps/Implications

A business climate of volatile change

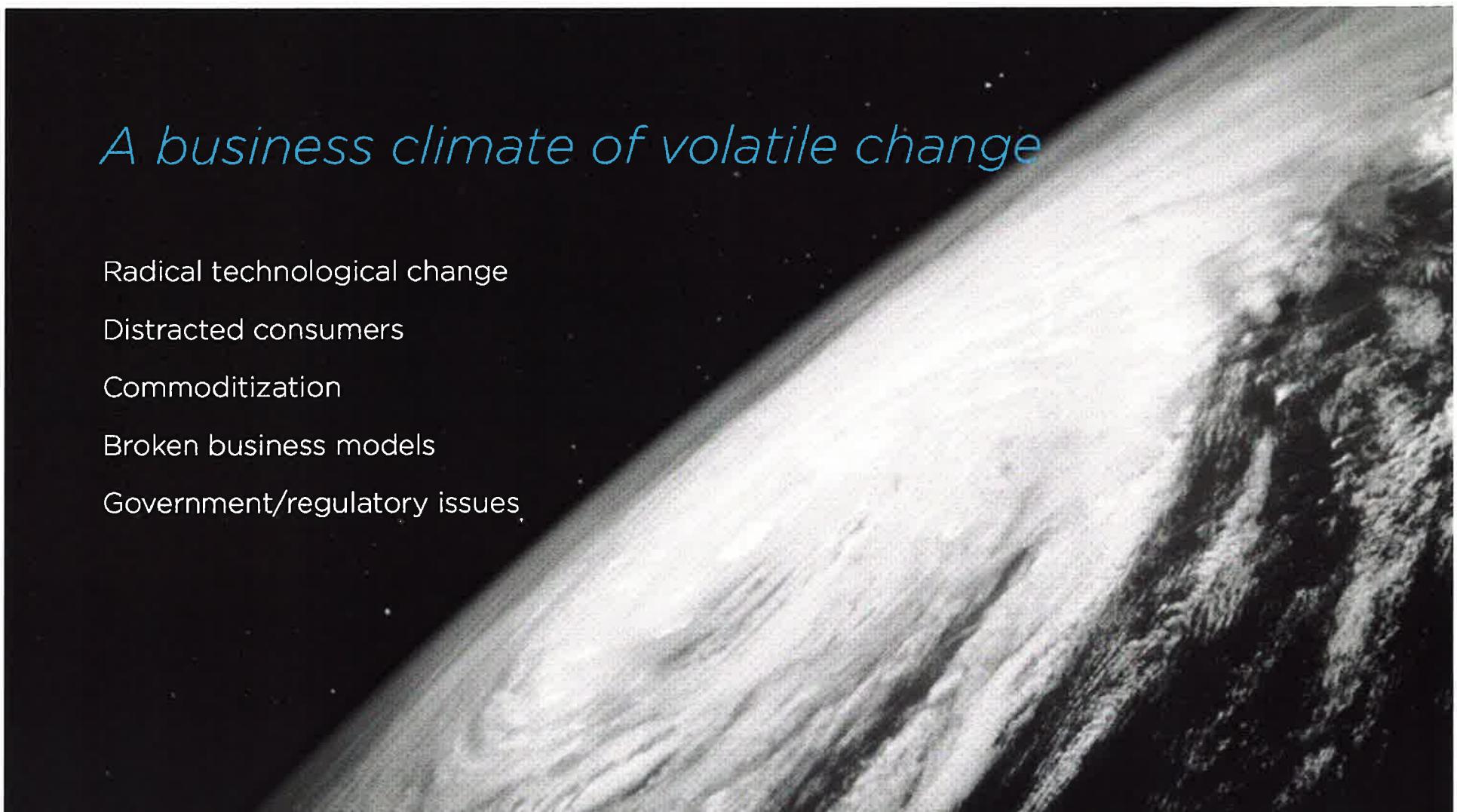
Radical technological change

Distracted consumers

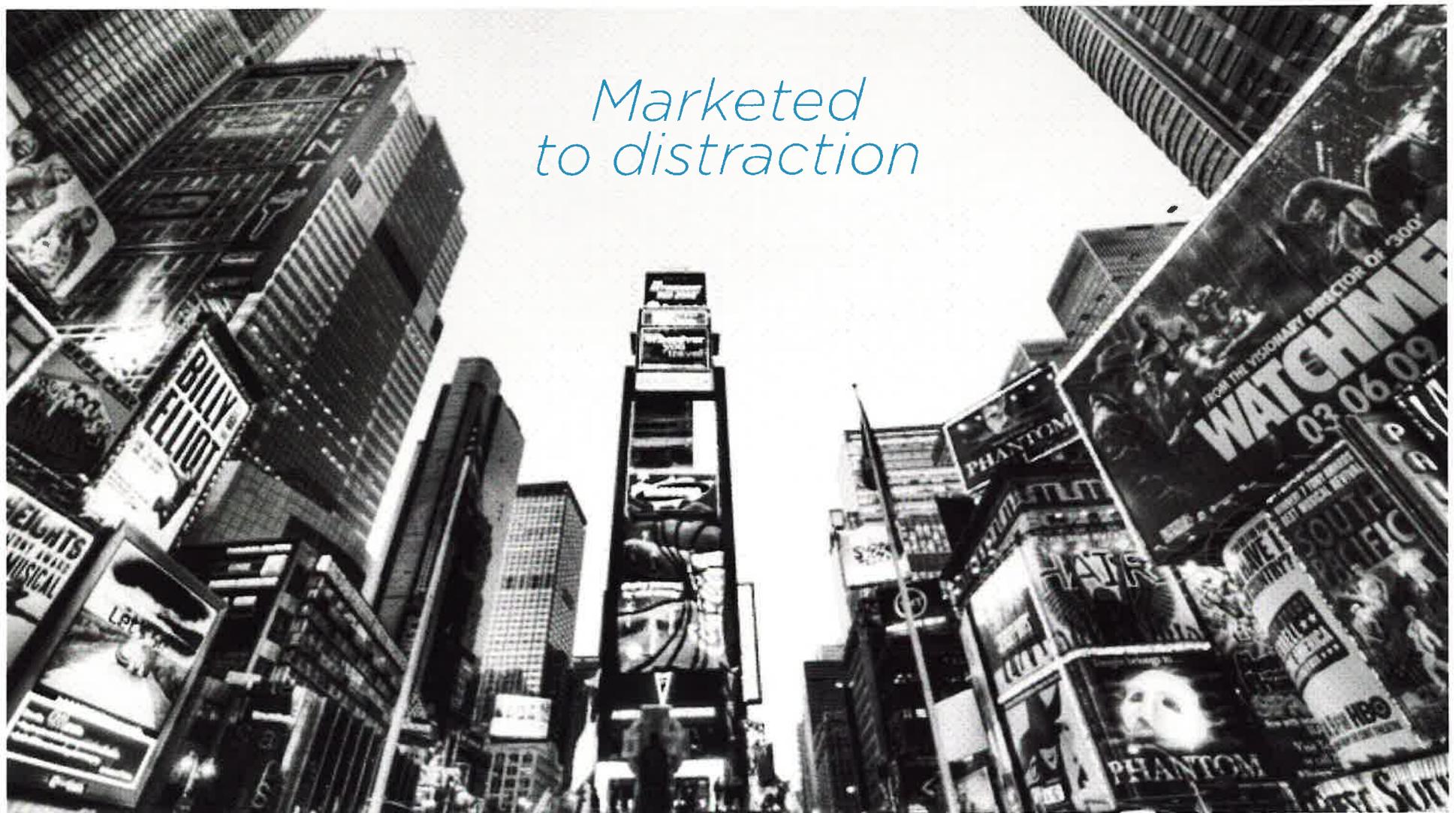
Commoditization

Broken business models

Government/regulatory issues



Marketing
to distraction



Multiple connections



Convening, not controlling



It's all about talk value

What's a brand?

The expression of values

The articulation of the relationship
between the USA and its key
audiences

Constituent needs &
expectations

BRAND

What the organization
promises and consistently
delivers

Personality and style

More than a logo



A powerful brand:

- Clearly differentiates the University from others
- Creates clarity and relevance
- Builds preference, support and advocacy
- Stimulates transactions
- Aligns culture to organization goals and objectives
- Adds to the tangible valuation of the University

Where do we begin?

Trade on lasting positive values and attributes

Be appropriately disruptive

The Challenge

How to create a brand for the University of St. Augustine for Health Sciences (USA) that leverages its leadership position in PT/OT into emerging growth areas?

Goals

A new USA brand will help:

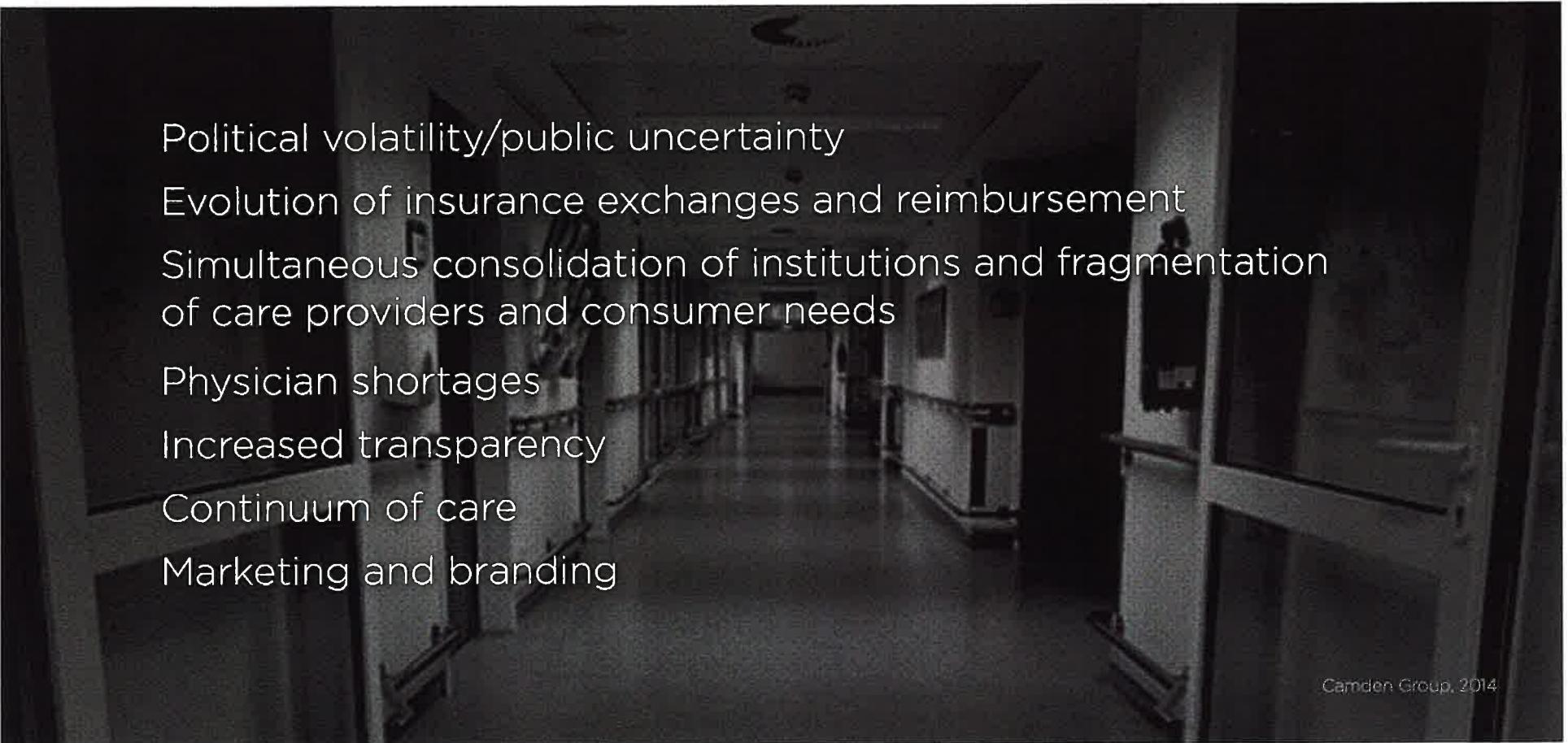
- Clearly differentiate the University from competitors
- Define and deliver a consistent branded experience throughout every interaction
- Motivate its diverse base of constituents
- Align and motivate employees to achieve the USA's goals
- Establish a motivating and defensible position regardless of unforeseen changes in technology, demographics, consumer behavior, market needs, government and regulation
- Reward the decision to choose or support the USA over alternatives

The Situation

*A period of relentless
and profound change*



An industry in revolution

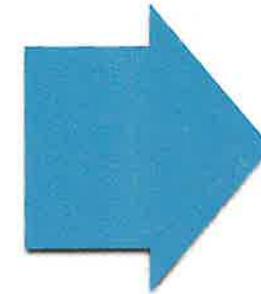


- Political volatility/public uncertainty
- Evolution of insurance exchanges and reimbursement
- Simultaneous consolidation of institutions and fragmentation of care providers and consumer needs
- Physician shortages
- Increased transparency
- Continuum of care
- Marketing and branding

Healthcare delivery reimagined

From:

Primary care physicians
Hospitals
Appointments
Episodic treatment
Firewalled data



To:

“Health coaches”
Telemedicine, home care
Constant monitoring
Continuum of care
Open, secure platforms



The future healthcare worker

Beyond expertise and clinical excellence

Lifelong learner
Change agent
Technologist
Networker

USA Snapshot: Extraordinary Success

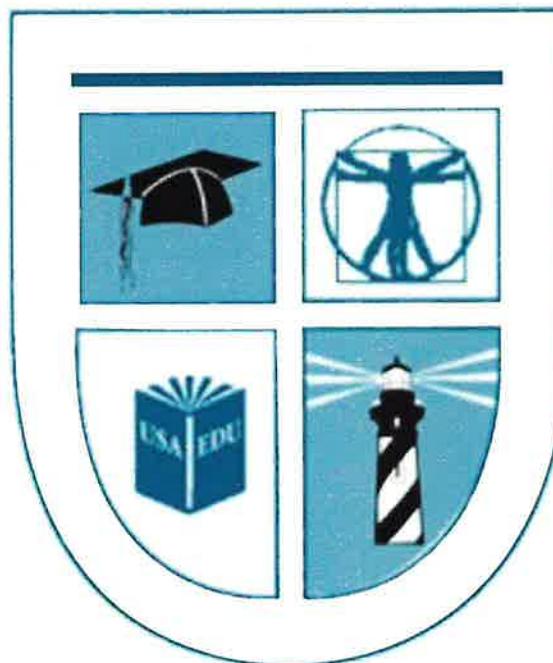
Innovative leader in PT/OT education

- Invented/perfected manual therapy
- First dual PT/OT program
- 3 intakes, faster graduation, time to market

Positive student outcomes

- 95% retention rates
- 84% combined program graduation rate
- 90%+ employment rate
- <1% loan default rate
- 50% of new students come to USA via referral
- 86% overall student satisfaction rate

Highly profitable +35% EBITDA



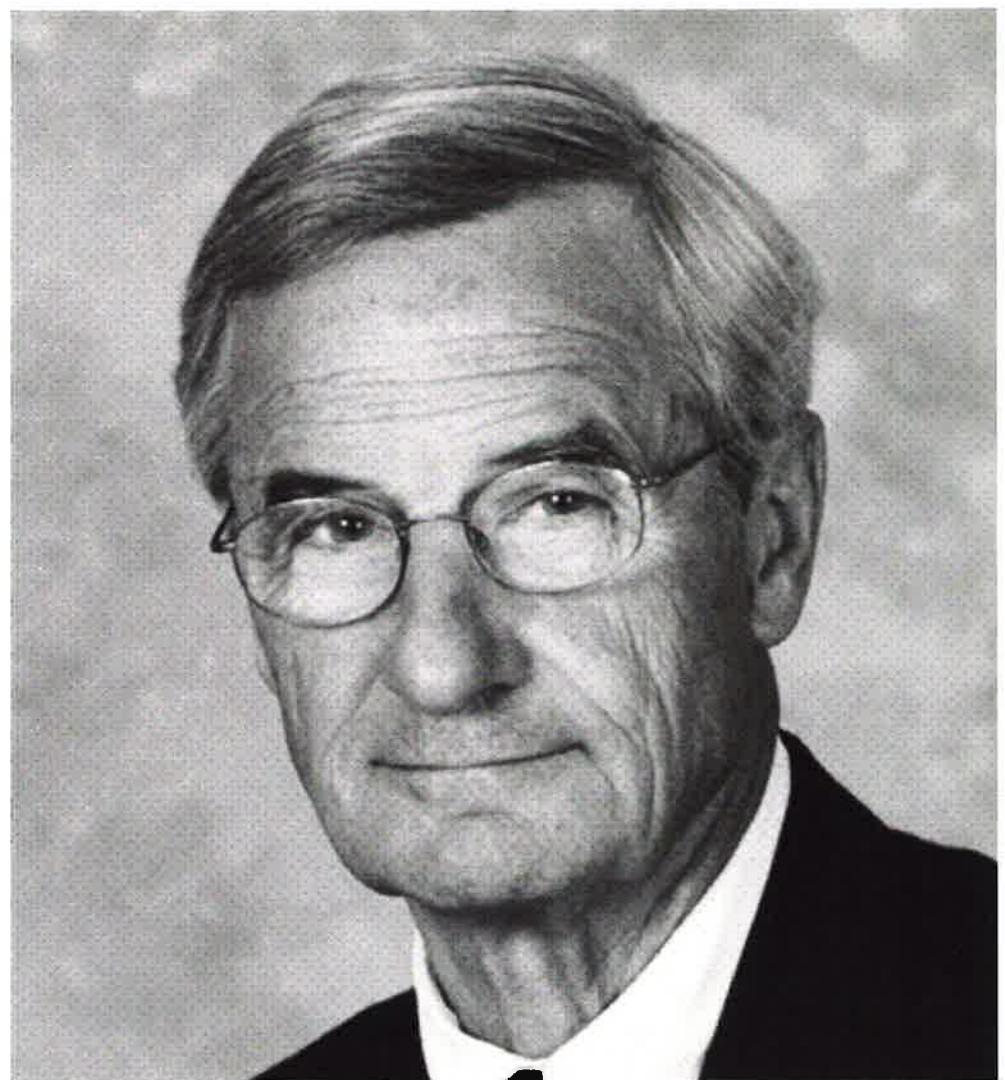
At a crossroads

“What this is really about is that the core was built by thinking narrowly. The future is going to happen by thinking broadly.

“Going forward requires us to think in ways that are antithetical to what built the empire.”

Issue 1: Translating leadership to new categories

“...we’re going to invest heavily not only in the brand but also in redesigning the programs. We need to add quality faculty, add programs we don’t necessarily have expertise in, so we may have to do some acquisitions.”

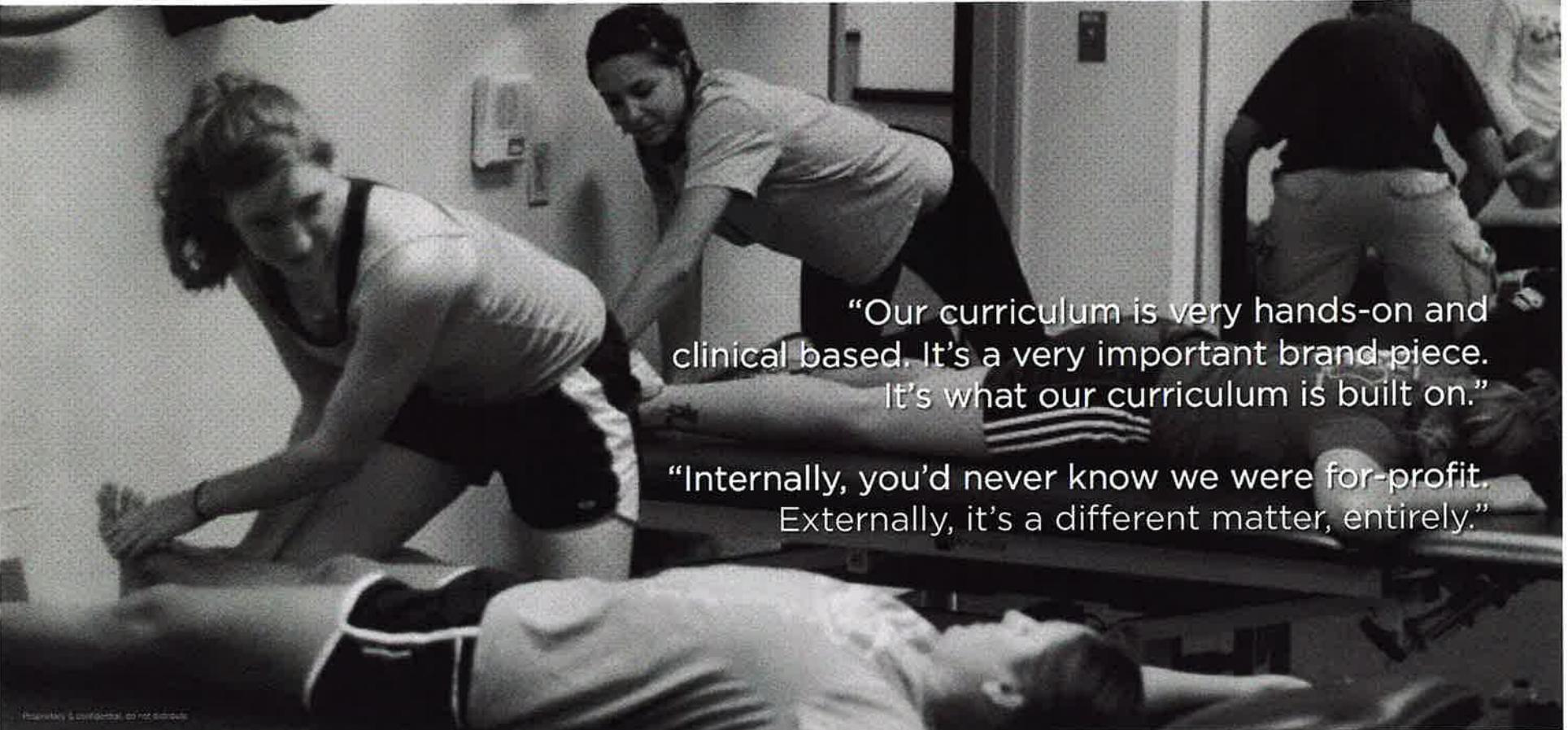


Issue 2: Bridging USA and Laureate cultures

“People are so passionate about what they do, they may be closed off to other opinions. One of the big differences is the pace. Corporate moves faster. Pace is much slower at the university.”



Issue 3: Attracting top talent in adjacent fields



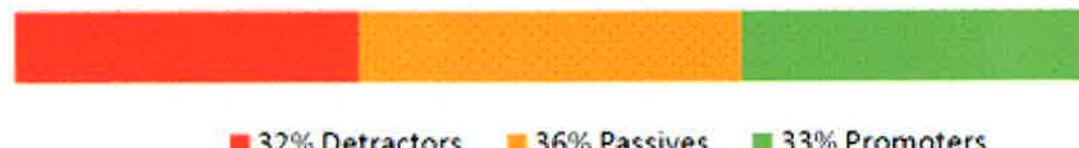
“Our curriculum is very hands-on and clinical based. It’s a very important brand piece. It’s what our curriculum is built on.”

“Internally, you’d never know we were for-profit. Externally, it’s a different matter, entirely.”

Issue 4: 3rd party validation

USA 2014 Net Promoter Score: 1

USA's 2014 Net Promoter Score is 1



Net Promoter Score

1 (33% - 32%)

Detractors (0-6)

146 (32%)

Passives (7-8)

163 (36%)

Promoters (9-10)

150 (33%)

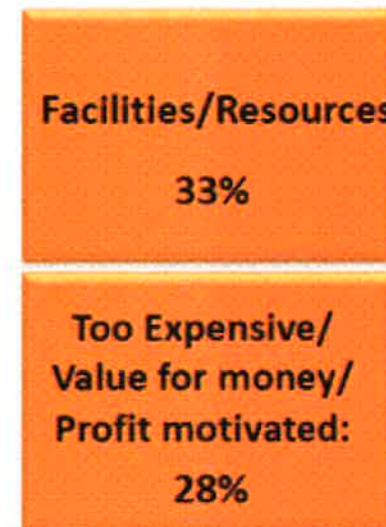


Total Respondents: 459

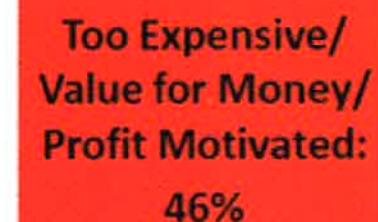
Mixed perceptions



“ I couldn't imagine a better faculty. I truly believe that I am receiving an amazing education from professors who are passionate, educated, and above all leaders in their fields. The campus has been nothing but supportive of my learning and future as a clinician. What I love most is that the professors do not view or treat me as a student, they view me as a future colleague. ”

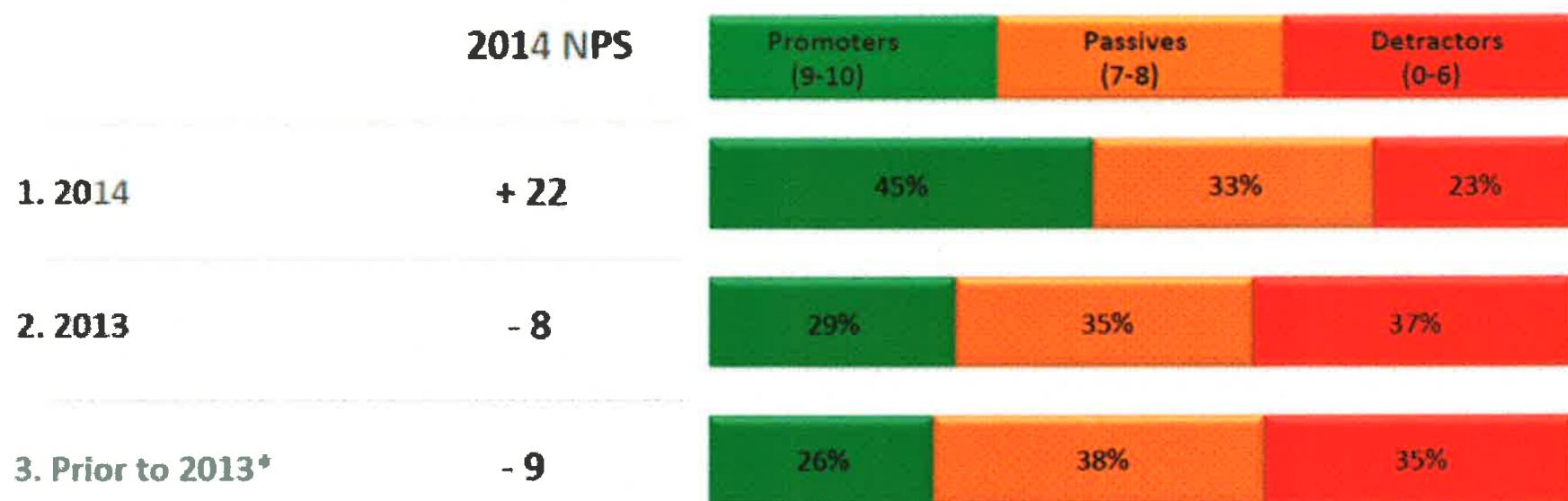


“ Improve the facilities, our tuition keeps going up yet we have broken tables and machines which inhibits our learning...Plus I don't see where that extra money is going when it should be going to better our facilities. ”



“ I feel that the money we pay for this education is not as high or higher quality than what someone else would receive paying much less. The school is far too expensive for what you get... Bottom line, there are a hundred cheaper programs that you'll get more out of for your money. ”

Mixed perceptions



Issue 5: Elite? Exclusive? Scaled Player?

“One of the only propriety schools that has an exclusive model and turns away large numbers of students. It’s a low-volume model. It’s not about quantity, it’s about quality.”

“We’re competing with the rest of the private schools out there for their second choice.”

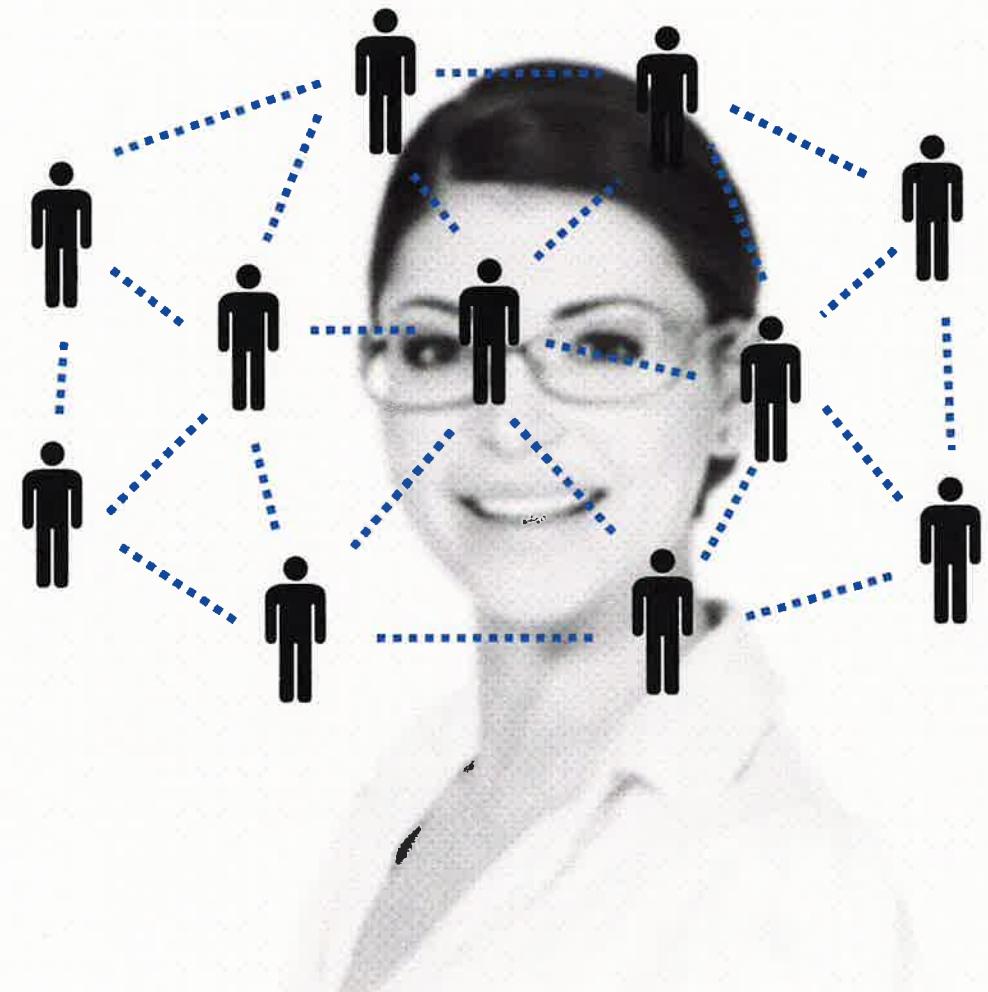
“I’ve never thought of us as ‘elite.’ A lot of people would laugh at that term.”

“... we have the greatest scale within physical therapy. Others graduate 40, we graduate 900.”

Issue 5: Becoming marketing-driven

“We’re extremely vulnerable. Our biggest product is physical therapy so every state university is rushing in. They understand there is a huge opportunity too... we’ll start slugging out for share.”

“When you have this many graduates that know the program they hire themselves. It’s a network hire. But we are not contributing to the network.”



Competitive map (PT/OT)

Practical/Clinical



Competitive map (*Expanded curriculum*)

Practical/Clinical



Research/Publishing

Weak brand differentiation



S

Manual therapy innovator
Dual track/degrees
Faster graduation
+90% placement rate
Professional referral network
Clinical excellence
Negligible default rate
Student/faculty relationship
Well capitalized
Aggressive expansion potential

O

Global category leadership
High quality faculty
Increased innovations/intellectual property
Expanded referral network
Increased clinical cachet
Increased valuation



W

For-profit status
"Puppy mill" perception
Net promoter scores
Value prop: "Expensive"
Low awareness outside of network
US News reviews/ratings
Passive alumni network

T

Regulatory change
Healthcare compensation models
Online penetration vs. bricks and mortar
Price ceilings
Recession

The target constituencies



Not Gen X, Y, Z or Millennials...

It's all about Digital Natives

Digital Natives are:

Generations of people who are born after 1980

“It’s about growing up in a digital country or culture, as opposed to coming to digital technology as an adult.”

“It’s about younger people’s comfort with digital technology, their belief in its ease, in its usefulness and that it’s generally benign”

Marc Prensky, “Deconstructing Digital Natives, 2011

Behavioral Implications

DIGITAL NATIVES

- Visual vs. verbal
- Individualized vs. mass
- Collaborative/networked vs. competitive/exclusive
- Mobile vs. location-based
- Experiential vs. theoretical
- Instant vs. delayed gratification

Branding Implications

The new USA brand must be:

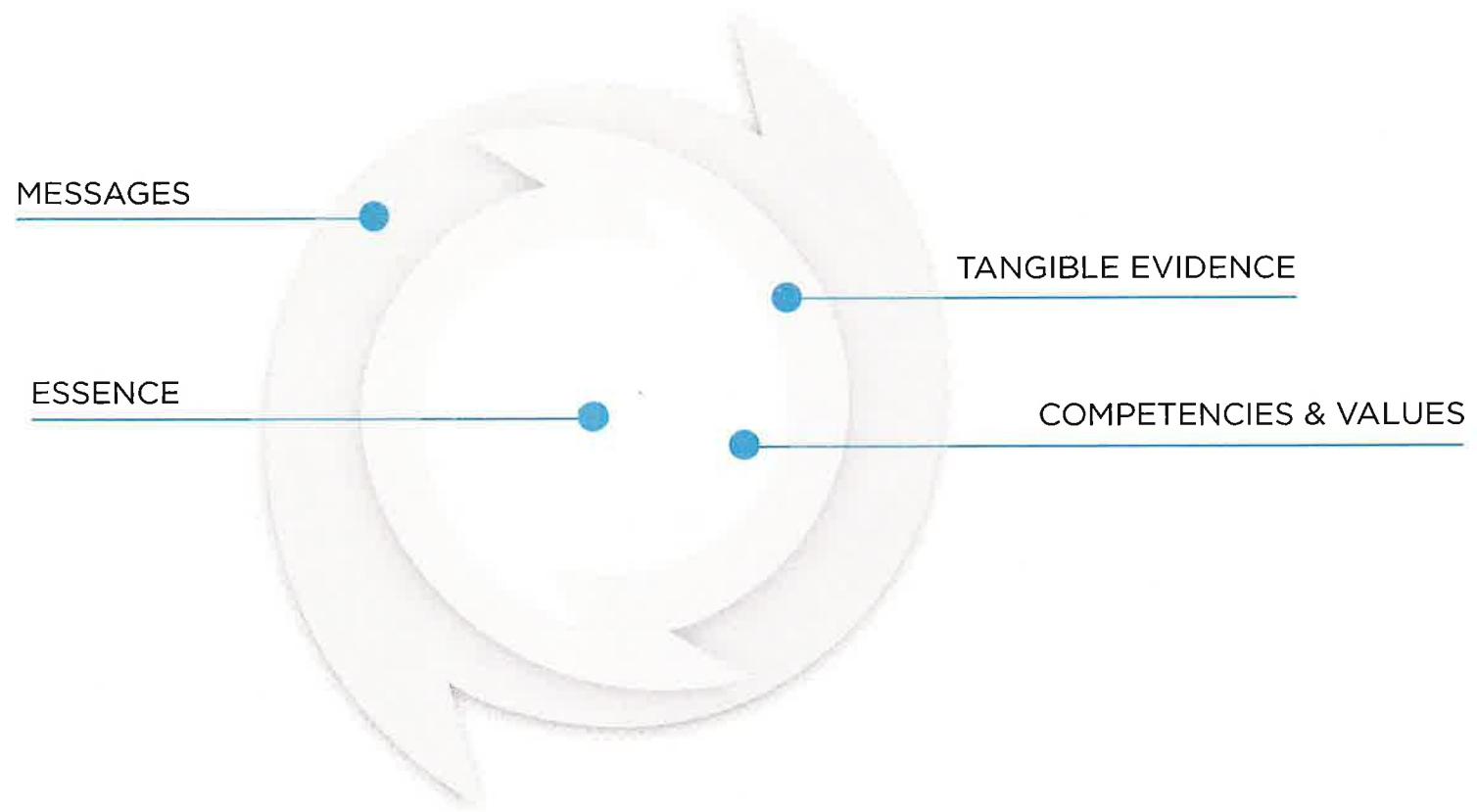
- Built on translatable values, not practice areas
- Relevant, not only to an expanded curriculum and student base, but to emerging technologies and learning behaviors
- Applicable and compelling worldwide

Brand Development

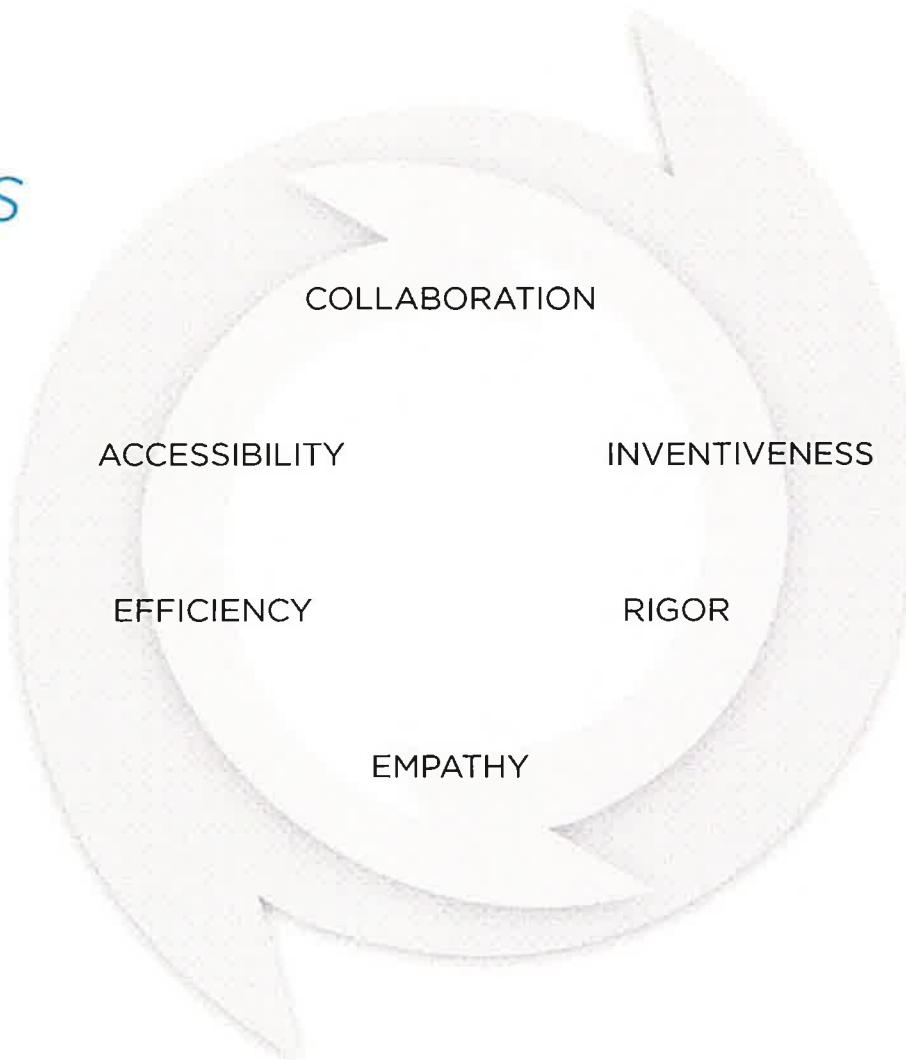
At the core of great brands
is BEHAVIOR



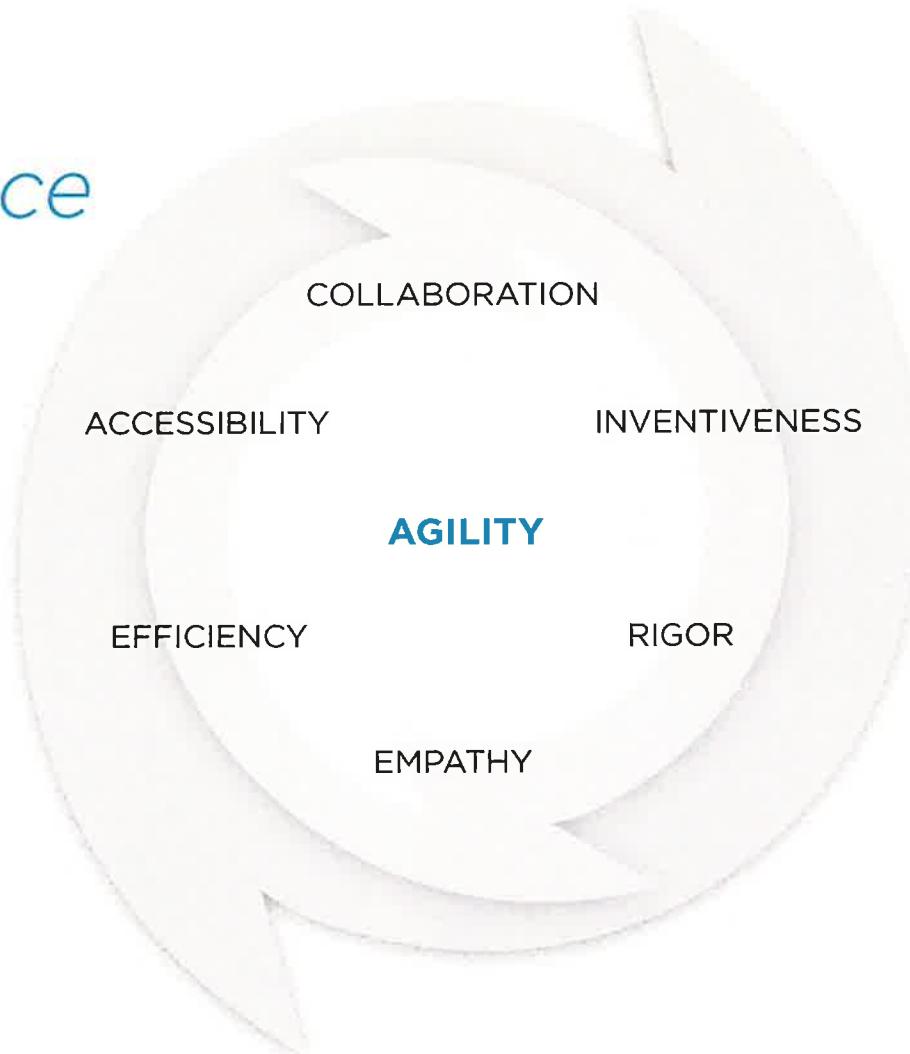
R&R Hurricane



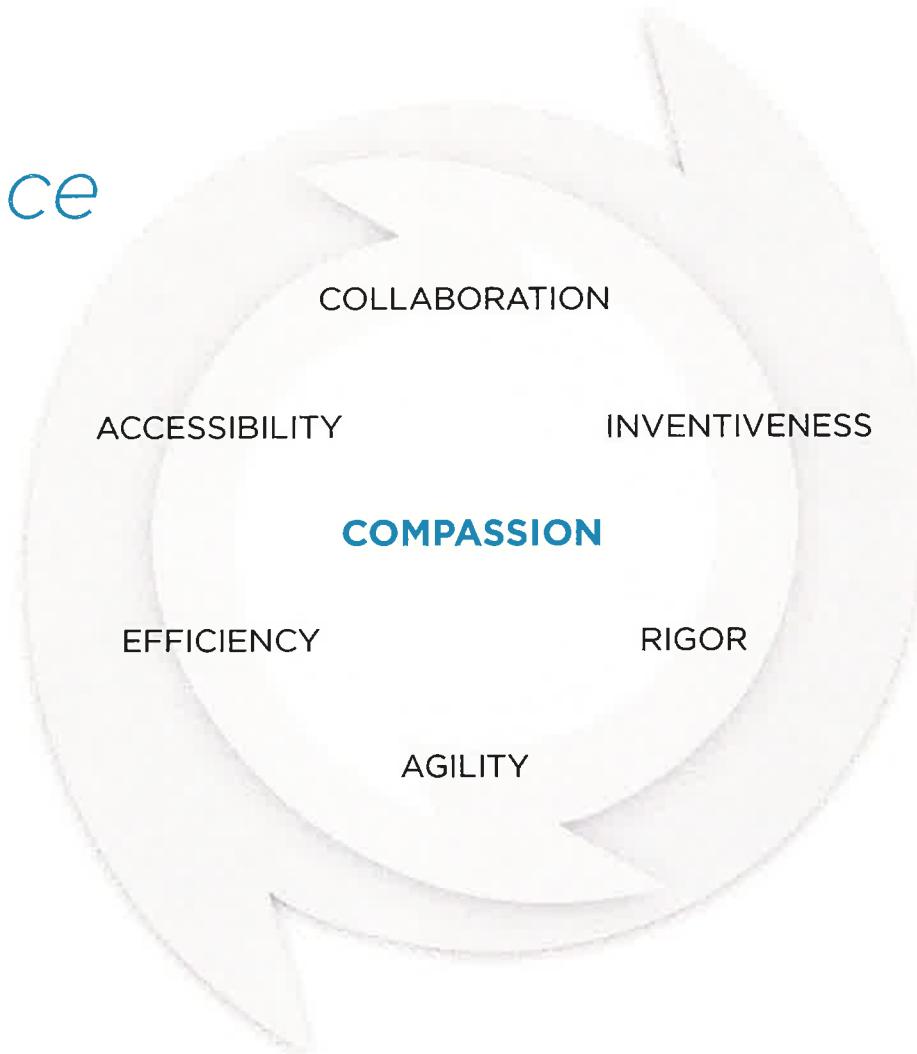
The USA Brand Values



The USA Brand Essence



The USA Brand Essence



Agility means:

The power of moving quickly and easily; nimbleness.

The ability to think and draw conclusions quickly; intellectual acuity.

Dexterity, Flair, Gumption, Quickness, Wit, Ability, Adroitness, Astuteness, Brains, Calculation, Discernment, Gift, Intelligence, Resourcefulness, Sagacity, Sense, Sharpness, Shrewdness, Skill, Smartness, Talent, Wisdom, Canniness

Agility applied:

Students:

*Better outcomes: Rapid, effective problem-solving for patients.
Flexible thinking vs. dogmatic process borne out of deep
understanding of clinical practice, innovative techniques and a
patient-first empathetic approach.*

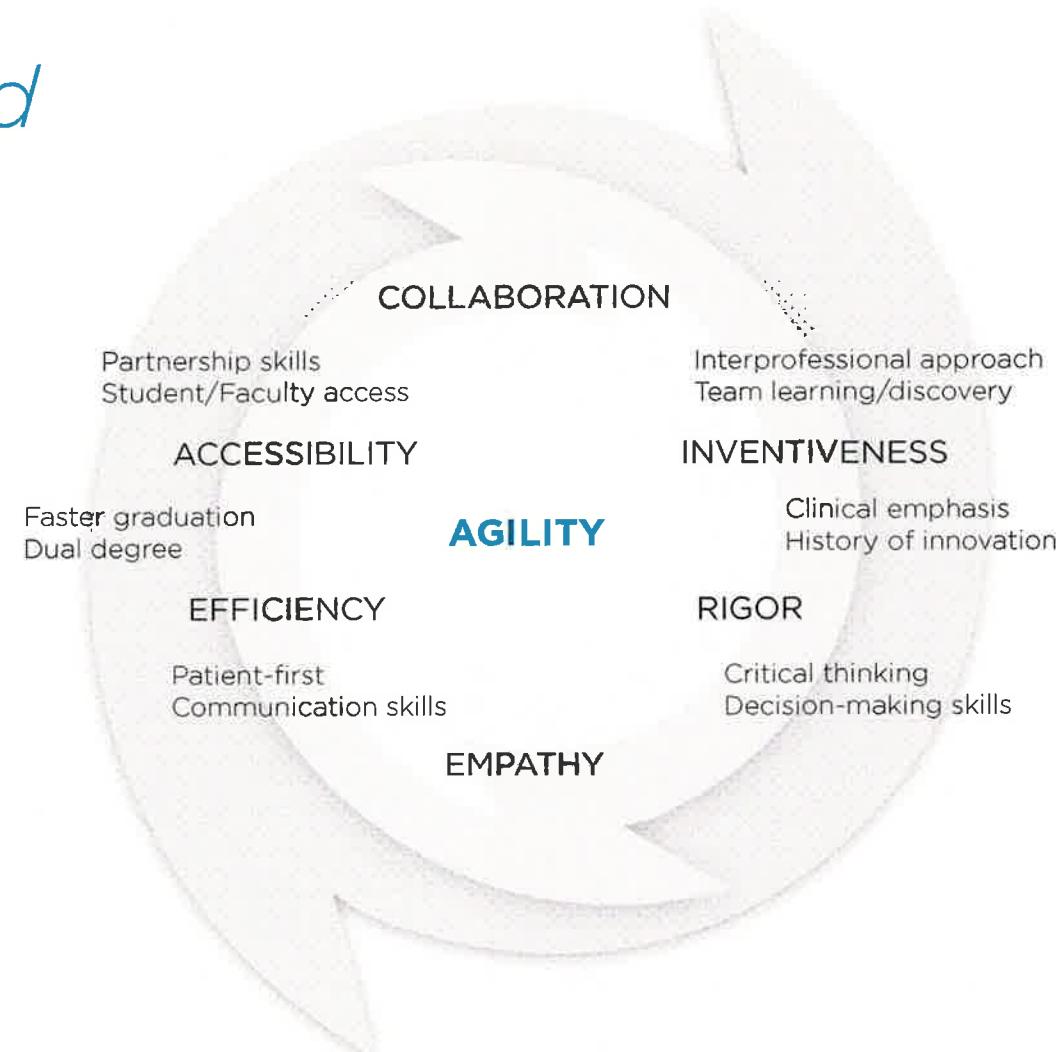
*Lifetime career skill: The ability to anticipate and positively adapt
to – even reinvent myself, in response to the inevitable dramatic
changes in healthcare.*

Agility applied:

Faculty:

More time to think creatively; to innovate, teach and have a more direct, meaningful impact on my students and my chosen field.

USA Brand



Promise statement and supports [Prospective students]

When I choose to attend USA instead of a traditional university, I know I'll be better prepared for a lifetime career of helping my patients live better, stronger and with more vitality because USA empowers me to:

- Deliver consistent levels of clinical excellence
- Finish my training and start my career more quickly than other schools
- Creatively solve problems through a systematic, logical and replicable approach
- Communicate with patients and peers with clarity and compassion
- Recognize and respond effectively to constant and complex changes in PT/OT and the healthcare industry, overall
- Continue to improve my skills as part of a commitment to lifetime learning
- Be part of a community of St. Augustine graduates who are making a difference in peoples' lives

Promise statement and supports [Prospective students]

When I choose to attend USA instead of a traditional university, I know I made the best possible investment in my future because USA:

- Delivers more than clinical competency, it insists on developing clinical excellence
- Prepares me to positively adapt to the inevitable constant changes in the health care field
- Enables me to finish my training and start my career more quickly than other schools
- Creatively solve problems through a systematic, logical and replicable approach
- Communicate with patients and peers with clarity and compassion
- Continue to improve my skills as part of a commitment to lifetime learning
- Be part of a community of St. Augustine graduates who are making a difference in peoples' lives

Promise statement and supports [Prospective faculty]

When I choose to teach at USA instead of a traditional university, I'll have the freedom to accomplish the things I'm passionate about because USA:

- Emphasizes hands-on practice and clinical excellence rather than publishing
- Has a decades long heritage of independence and innovation
- Puts me in closer contact with students and the practice of PT/OT
- Helps me stay on top of and respond effectively to constant and complex changes in PT/OT and healthcare, overall
- Helps me continue to improve my skills as part of a commitment to lifetime learning
- Helps me shape a community of St. Augustine graduates who are making a difference in peoples' lives

Brand Personality

IS

Empowering
Dynamic
Substantial



IS NOT

Rigid
Ponderous
Academic

Implications

At a crossroads

“What this is really about is that the core was built by thinking narrowly. The future is going to happen by thinking broadly.

“Going forward requires us to think in ways that are antithetical to what built the empire.”

Total alignment

CONSTITUENT NEEDS

AGILITY

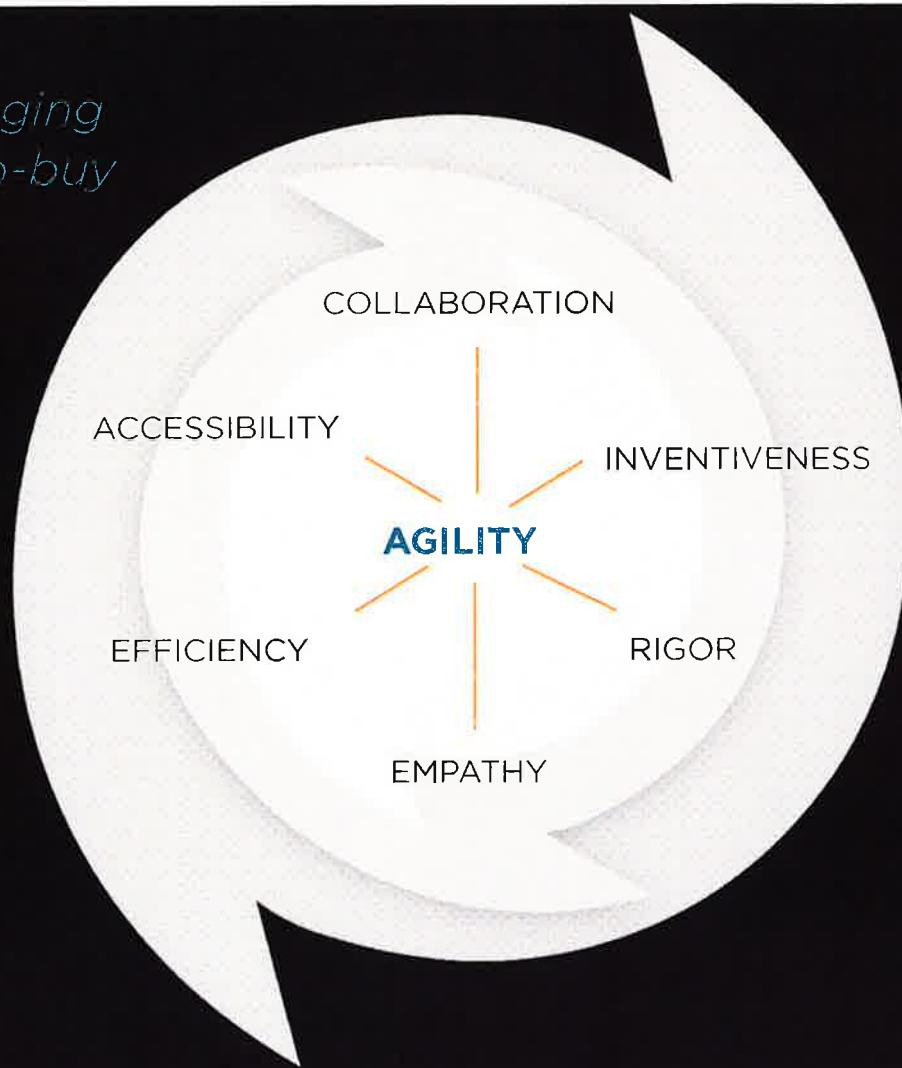
AND COMPANY TRUTH

MEET

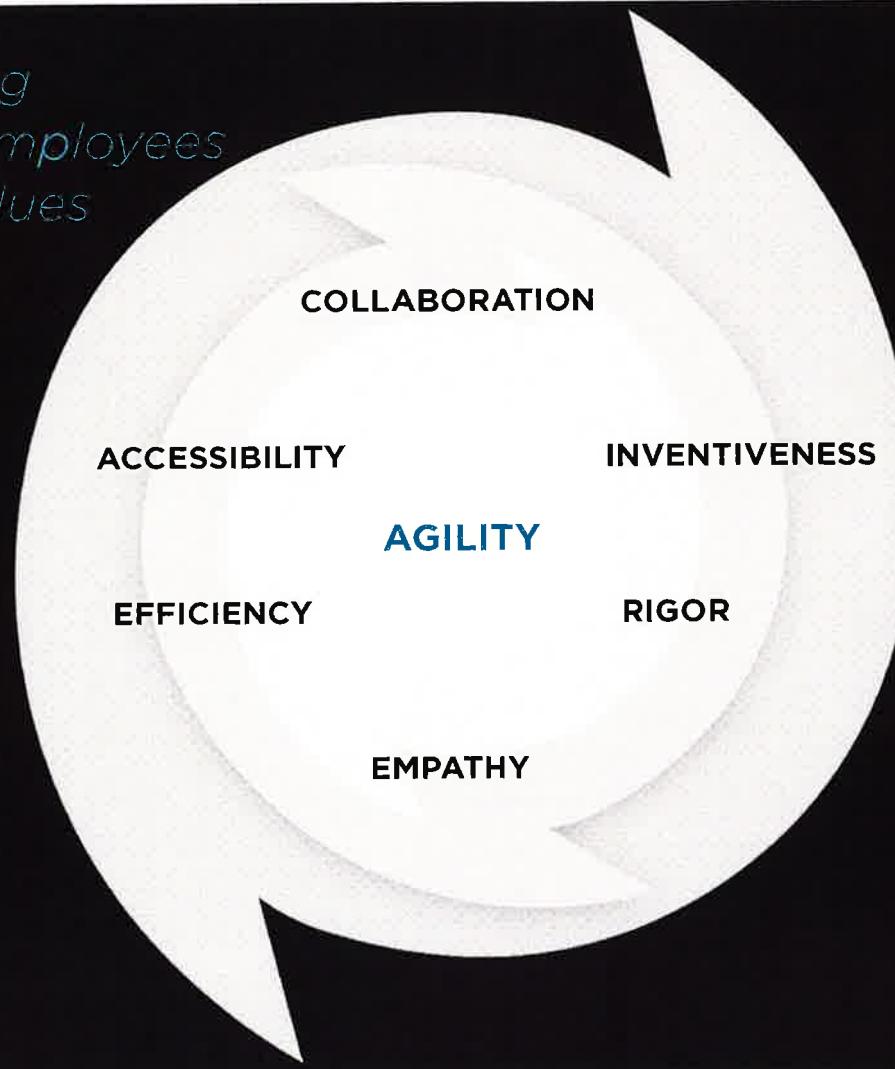
Here's how to use the brand to:

- *Translate leadership into new categories*
- *Align USA and Laureate cultures*
- *Attract and retain top talent*
- *Become a more effective marketing organization*

Differentiate by leveraging
values as a key why-to-buy

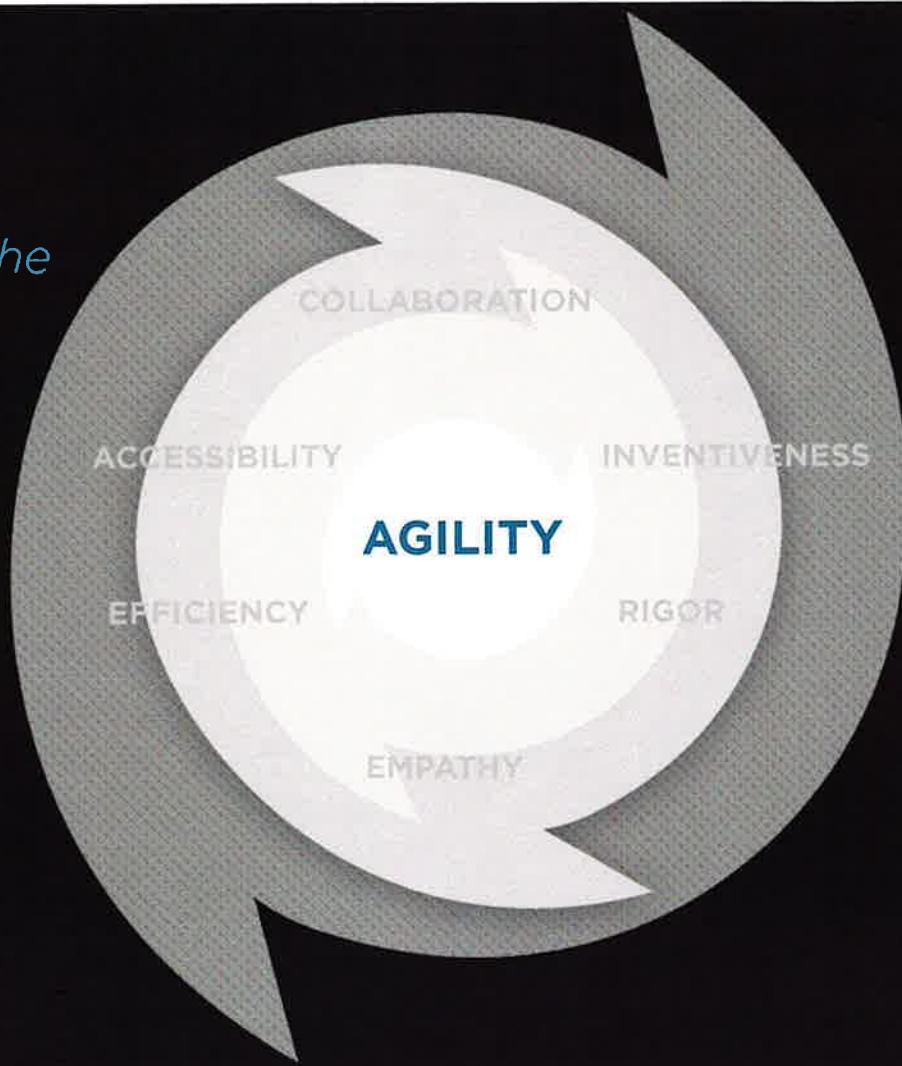


*Align culture by hiring
and compensating employees
according to USA values*

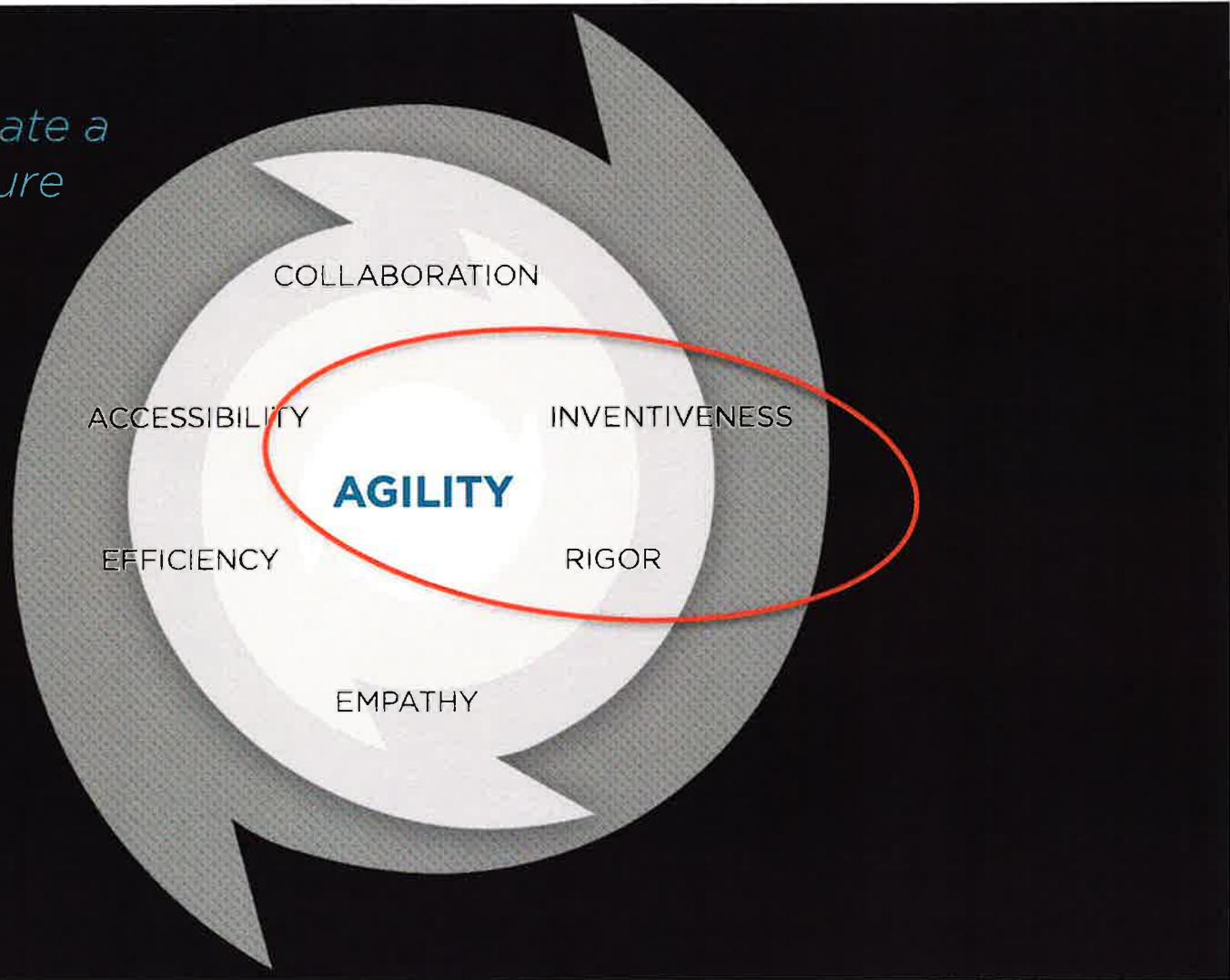


*Attract top talent by
highlighting agility.*

*Use values as part of the
recruiting screening.*



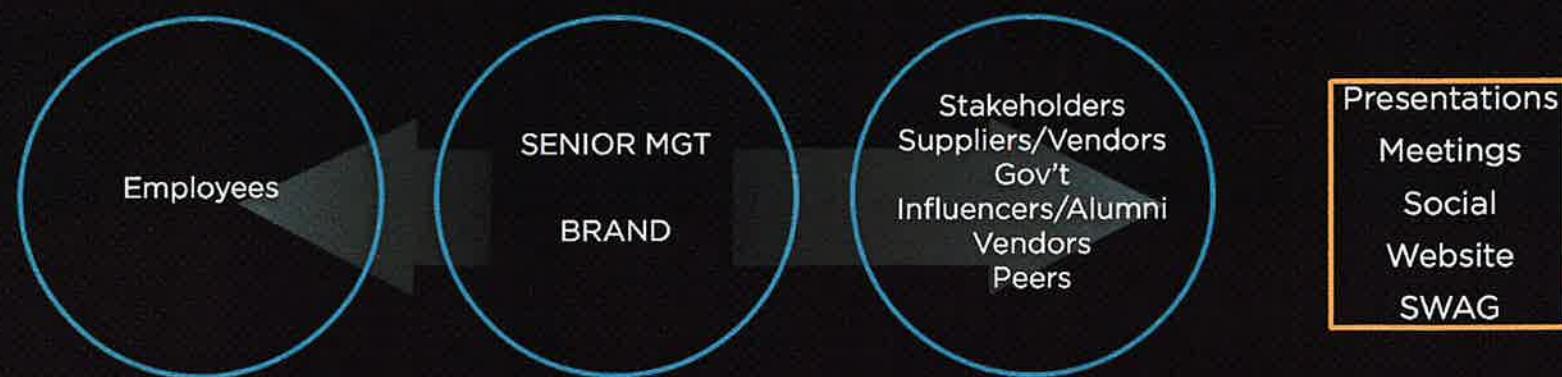
Use the brand to create a messaging architecture



A focused 90-day roll out plan



A focused 90-day roll out plan



A focused 90-day roll out plan

Advertising
Digital
Social
Collateral
DR



Next steps

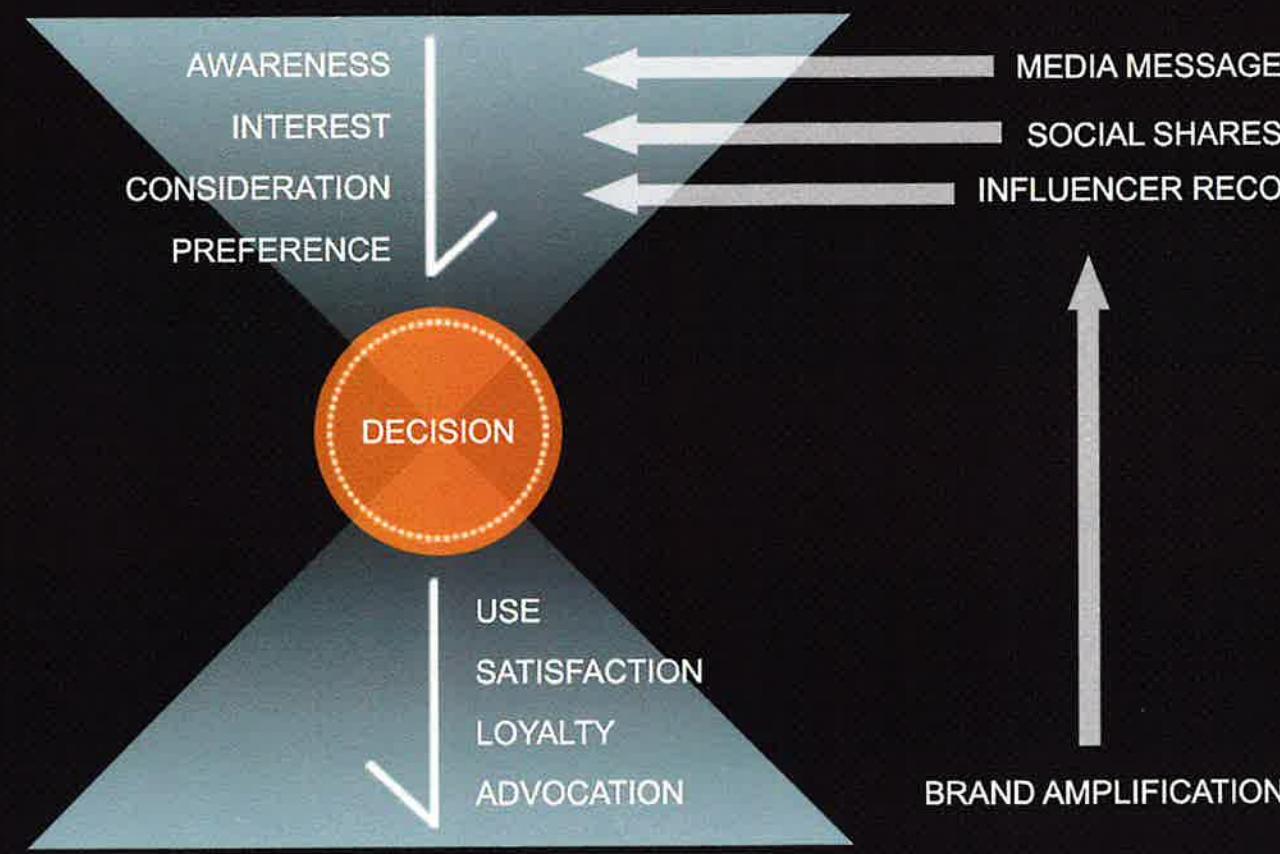
Communications Architecture

The Audience/Messaging Matrix

CLIENT:
DATE:

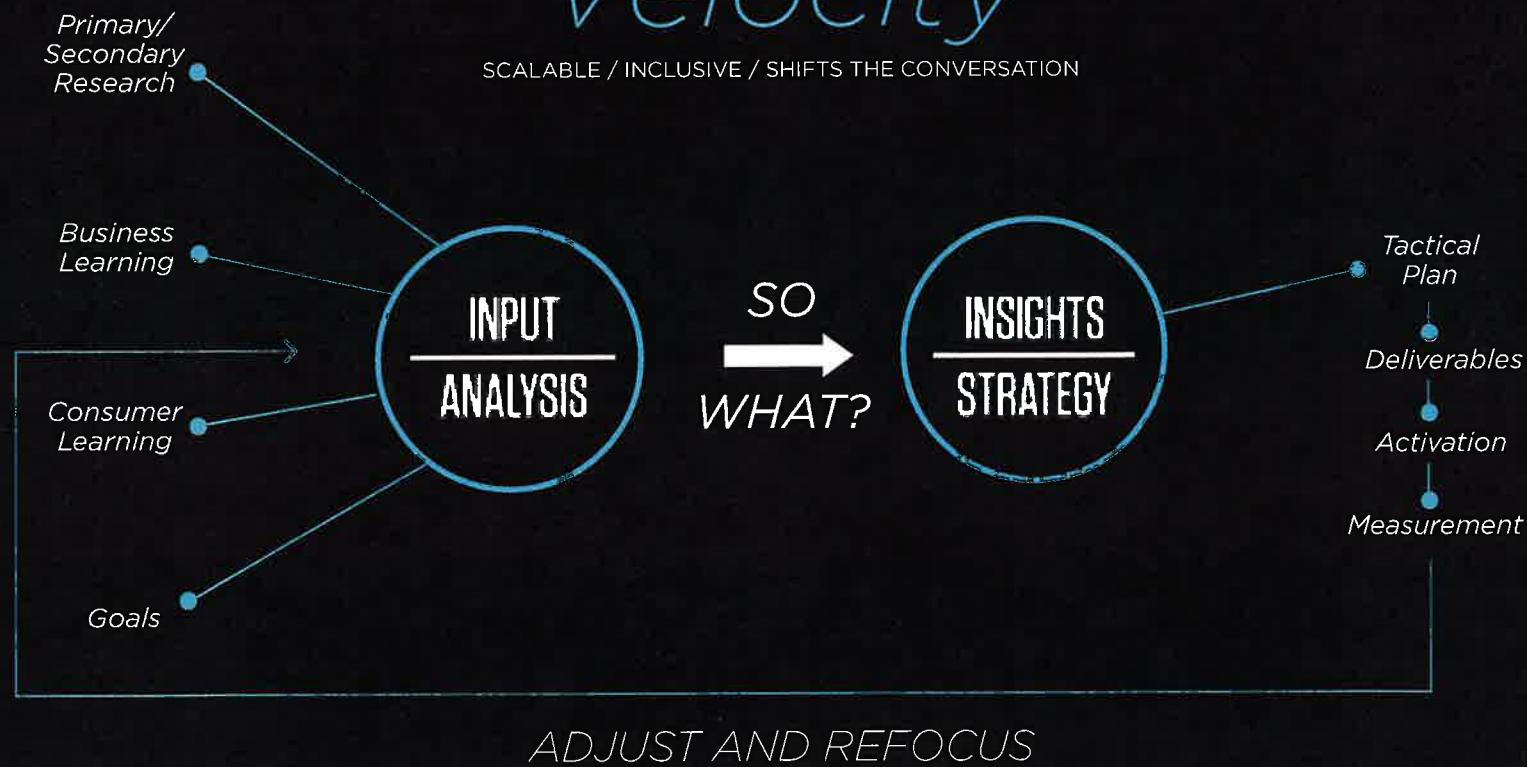
Client Business Goals								
	Communication Goals							
	Tone & Personality							
Audiences	What do we want them to do? Instead of?	What are their current perceptions?	What are the barriers to them taking action?	The Key Insight (what does she/he need?)	What is their reward for new behavior?	The Primary Message	Why should they believe the message?	How do they like to be talked to – preferred channels?
 Bob Employee (quintile)								
 Allie -Current Customer/Emerging Influential (quintile)								
 Michael -Potential Customer/Early Adopter (quintile)								
 Tim -Influence/Blogger (quintile)								
 Oren -Decisive (quintile)								

Tactical planning and metrics



Velocity

SCALABLE / INCLUSIVE / SHIFTS THE CONVERSATION



תודה לך

THANK YOU



January 15, 2015