

Strategic Planning Work Team 9
Friday, October 28, 2011~ 2:15- 5:15 pm
Meeting Minutes

Attendees

Sue Chen, Ted Jensen, Sasan Nikoomanesh, David Tiede, Matt Ward, Jeanette Villanueva-Walker, Lynda Fulford, Veronica Guererro, Kellee Roesel, Rachel Ronning-Lindgren, Norbert Tan, Erik Hagen, Melissa Maxwell-Doherty, Christie Harper, Karen Spies, Chris Kimball, Carrie Baez.

Welcome/ Introductions

- Matthew Ward called the meeting to order at 2:15 pm. Matt announced that Christie Harper from Brand Endeavor will be giving a presentation on the topic of brand promise. The members of the Strategic Planning Work Team 9 were present; Matt provided an update on their progress. The group acknowledged Sue Chen for being recognized as one of Fortune's Most Powerful Women of 2011.
- David Tiede asked the group to focus on the following points of the agenda:
 - Defining the phases of brand development and strategic planning.
 - Discussing the validity of "finding purpose" in the Lutheran educational experience.

Enrollment Update

Matt Ward provided an update on enrollment.

- Our enrollment targets were met across the board.
- Traditional Undergraduate enrollment has surged over the last few years.
- We are currently looking into new programs that could be housed at the Woodland Hills campus due to the open capacity.
- How many traditional undergraduate students can we sustain with our facilities?
 - We can accommodate approximately 2400 students without overburdening our physical plant. If the university really stretches, this number may be able to increase slightly.

Defining the Phases of Brand Development and Strategic Planning

Matt Ward gave a brief overview of why our brand promise has been a challenge but most importantly a great opportunity. There have been several great discussions of who we are and how our brand promise relates to our mission. Ultimately, we need to consolidate the brand promise and hold firm to it over a sustained period of time. We currently have an unclear brand promise and messaging platform.

- It is important that we discuss how we phase our brand development so that it is well in line with our strategic plan.
- We need to seriously consider perceptions of CLU in the market place.
- The direction of our brand promise needs to be clear and uniformly understood across the CLU community.
- We must ask the rigorous questions; for example, how do we want to define our middle name? Otherwise, our brand will be defined by others.
- The vocabulary we use is crucial, the words should be applicable to all areas of the

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university.

- The brand framework will continue to be a work in progress. However, our idea has to stay consistent for at least 5-10 years.

Competition

Christie Harper from Brand Endeavor gave a presentation on brand promise. Her presentation included a summary of her findings, competitive brand ideas, the proposed brand platform and a discussion on family brands.

Summary of findings

There is a functional separation that occurs between the large public universities and the small private universities. When a student is weighing a decision between two private institutions, brand positioning becomes more relevant.

- Our studies found that students really value the intimacy, small class sizes and one-on-one attention they get here at CLU.
- The big question is: “What does it mean to be Lutheran?” and how do we talk about it.
- Christie suggested that we focus on the core idea of brand positioning. We have to have words in our vocabulary to describe Lutheran higher education that everyone understands.

Brand Platform and Promise

When looking at our brand platform, we ask the following questions:

- Who are we for?
- What do we do?
- Why we do it?
- How we do it?
- Who are we?

The “why we do it” and “who we are” questions should remain consistent throughout our family brands. The “who are we for”, “what do we do” and “how we do it” can be customized to the audience.

Brand Personality

Our current proposed brand platform:

- Discovering Purpose

Questions/ Challenges:

- This sounds like who we are but when we come up against the competition, is this distinctive enough?
- This message needs to be both true and distinctive. The way that we do this compared to Pepperdine University is very different.
- Our message should have a direct address, this gives it a more distinct feel: “your purpose”.

Identifying Family Brands

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There is a master brand and then there are family brands within that master brand. Within those family brands, there are individual products. For example, CLU is the master brand, the CLU Alumni Association is the family brand and Homecoming is the product.

- There should be a mutual transfer of equity between the master brand and the family brand.
- How do we create families that create mutual transfer of equity?
- What other family brands exist at CLU?
- How should the family brands be organized?
 - By audience?
 - By service/ program?
 - Something else?
- What is the filing system for our products?

The meeting adjourned at 5:20 pm.

Respectfully submitted by Carrie Baez