

FROM

Typical to Top-of-Class



THE SITUATION

A third party administrator with 15,000 lives wanted to expand outside of their local market. They were working with a small advertising agency but their impact was surface level. In the process of developing a new website with the existing agency, they felt that their vision wasn't being conveyed even after substantial conference calls and in-person meetings. They needed a partner that understood the industry and could make strategic recommendations to take them to the next level. **According to the CEO, to truly grow they were going to need help beyond the current firm's capabilities.**

After meeting at a summer self-funding conference, the CEO and COO decided that it was time to develop a partnership with Ocozzio.

THE SOLUTION

Within two weeks of the onboarding, a competitive analysis was performed and target audiences were identified. Targeted email communication was executed to both current and prospective brokers and the TPA began seeing progress. Ocozzio developed a marketing strategy with the TPA's leadership team to grow number of lives by retaining existing customers and gaining the opportunity to quote for the upcoming January 1st effective date groups in a three state market area.

Initiatives of the original plan included:

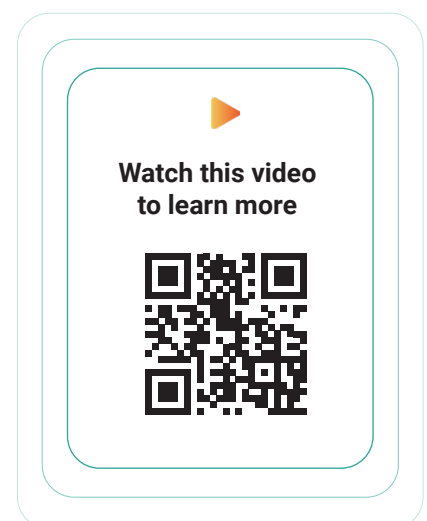
- Strategic marketing plan with tactics and timeline
- Industry research and conference recommendations
- Brand design
- Audience targeted outreach and communication efforts
- Website development, programming and graphic
- Complete set of marketing collateral and sales materials

The Results

Ocozzio delivered a strategic marketing plan backed by industry expertise with a full-scale creative campaign resulting in their expansion into several states, dramatically increasing their number of lives.

In one year with Ocozzio, the client signed an additional **30,000 LIVES**

Additionally, Ocozzio assisted client through targeted marketing of a state school system. Ocozzio developed collateral, conference material and a communication plan that led to client winning the business and securing sole partnership as the premier benefits provider.



"Since joining the Ocozzio team our overall brand and image has been elevated to the ranks of best in class."

- President, TPA Client

Contact us today.

Zach Swenson | zswenson@ocozzio.com | 706-922-1912