

From Spreadsheets and a Disparate Sales Process to an **Effective and Established Single Source of Truth**

How a leading TPA centralized its sales efforts to generate leads, nurture relationships, and drive revenue with HubSpot Sales Enterprise and Ocozzio.



The Client

A nationally leading Third Party Administrator with:

- ✓ 20+ Offices
- ✓ Diverse Product Lines
- ✓ Nationwide Service



The Problem

The TPA's main issue was an insufficient pipeline management approach, with inconsistent processes and tech stacks across offices. This fragmentation caused inefficiencies in managing prospects, leads, deals, and renewals, limiting leadership's access to operational insights.

The Solution

Key reasons why the TPA adopted HubSpot Sales Enterprise:

- ✓ Marketing data and contacts were already stored and managed in HubSpot Marketing Hub
- ✓ ZoomInfo, one of their preferred lead-sourcing tools, could be seamlessly integrated
- ✓ HubSpot's new sensitive data feature allowed them to store and manage HIPAA and PHI
- ✓ Custom objects and pipeline segmentation streamlines sales processes and collaboration across teams and offices
- ✓ HubSpot's user-friendly software was ideal for the sales team to quickly adopt before their busiest quarter

To ensure a seamless implementation from their existing spreadsheets to HubSpot, Ocozzio executed the following solutions with hands-on support, guidance, and portal strategy.

- ✓ Conducted extensive discovery and iteration to define a standardized sales process
- ✓ Developed and executed a strategy using HubSpot's custom objects to manage groups, agencies, plans, and employers
- ✓ Extensive data cleanup to improve accuracy, optimize automation, and enhance segmentation for targeted outreach
- ✓ Implemented detailed product tracking to improve forecasting and revenue projections
- ✓ Provided comprehensive leadership and team training for managing and fully adopting Sales Hub
- ✓ Developed detailed documentation of processes and portal setup to ensure team consistency, efficient onboarding, and scalable operations with a standardized sales approach

Results

In phase 1 of the implementation, two offices were onboarded onto HubSpot Sales Enterprise, including 38 sales representatives in just three months. **The new process has already proved to be effective.**

- + The sales team has a single portal to manage leads and new business
- + Better management of group renewals, leading to higher retention
- + Leadership has full visibility into company-wide activity with brokers, avoiding miscommunication
- + The team is excited about HubSpot, eager further to establish it as the single source of truth, and proactively integrating technology into their sales process

Next Steps and Opportunities for Enhancement

Implement Across the Remaining Offices

With a fully set up portal, established process, and comprehensive documentation, onboarding the rest of the offices and team members can be accomplished in just two months

Group Renewals and Management

Further establish pipeline, process, and automations to improve renewal probability, including setup, data clean up and migration, reports to manage groups, and more

Platform Integration to Drive Revenue Growth

Several key platforms critical to the TPA's operation will be integrated to provide accurate plan and group information and drastically reduce the manual maintenance

RevOps Admin Support

Ocozzio offers RevOps services that provide hands-on strategic guidance, execution of necessary tasks, and tailored support to drive revenue growth

“Ocozzio’s HubSpot team was **proactive, quick to offer solutions, delivered effective training and support, and were easy to work with making the implementation process an enjoyable experience.”**

CEO, TPA

Unlock Your Revenue Growth with HubSpot and Ocozzio

With in-house, HubSpot experts and a deep knowledge of the self-funded industry, Ocozzio has the expertise and proven success to implement and fully optimize HubSpot to meet your goals.

Whether you're just starting your HubSpot journey or seeking to optimize your existing portal, we have the perfect solution for you.

Ready to Get Started?



Let's connect to assess your goals and tailor a HubSpot solution that addresses your challenges and boosts growth.