

A decorative border made of stained glass in red, yellow, and black segments, surrounding a central white panel.

Where Everybody Knows Your Name

Becoming the Partner Brokers
Ask For — Not Just Know Of

ocozzio

Who Is This Guy Anyway?

Zach Swenson:

Healthcare. Growth. Self-Funded Benefits.

Professional

- 20+ years in healthcare
- 12 years working with SF industry leaders
- Focus on growth, strategy, broker engagement & complex communication

Personal

- Husband
 - Father of 4 (1 on the way!)
 - Musician
 - Dog person
-

I spend most of my time thinking about why people choose one company over another when everyone appears to do the same thing.

Why I Care About This Conversation

Zach Swenson:

Health & Care. Grew Up. Beneficial.

Professional

- 4+ years working with developmentally delayed adults
- 4+ years in CV-PACU
- 12 Years at Ocozzio
- Wouldn't have guessed I'd be in this field

Personal

- Interested in healthcare and marketing as a kid
 - Love my wife a lot... like a lot, a lot. My kids are a close second.
 - Can't imagine ever having a cat but see myself buying one the minute my daughters ask me to.
-

Clear communication is more than a marketing advantage.
It's a trust advantage.

Get To Know The Real Me

Zach Swenson:

Caring. Growing. Benefitting.

Professional

- Got into HC marketing after illness took patient care off the table
- Changed the direction of my professional life on faith
- Trusted in the strengths others saw in me

Personal

- Chronic illnesses shaped my life
 - Convinced a woman way out of my league to marry me 15 yrs ago and she's birthed 4 of my spawn
 - Fell in love with communication watching my dad teach and write
 - Fell in love with music playing with my family
-

You learned way more about me from this slide than from the professional bio.



Cheers' Welcome

Less about the bar.

More about what happens
when someone walks in.

Goals: What We're Here to Do

BE UNDERSTOOD, REMEMBERED & RECOMMENDED.

The Three Environments

- What machines understand about you
 - What brokers understand about you
 - What people experience from you
-

The Practical Goal

- Be easy for brokers to explain
- Be useful before there is an opportunity
- Be trusted before the first meeting

Technology can help people find you.
Relationships make them comfortable recommending you.

THE PROBLEM:

Sounding the Same

GENERIC

Innovative solutions

Seamless integration

Client-centric approach

Best-in-class service

Proven track record

SPECIFIC

Who you serve best

What problem you solve

How you are different
operationally

What outcomes you can prove

When a broker should call you

The Familiarity Effect

The first name that comes to mind usually wins the deal

- Top-of-mind recall is earned through repeated, relevant exposure.
- Brokers recommend partners they know and trust, not just partners they've met.
- Familiarity reduces perceived risk.
- The goal isn't to be on the short list. It's to be the first call.

67%

of B2B Buyers Prefer
a Rep-Free
Experience

Source: Gartner B2B Buyer Study

Norm!

That's the **position** you want
in this market.



01.

SECTION

AI is Already in the Room

Cheery Definitions

SEO

- Makes your website findable in search engines
 - Helps your pages appear for relevant queries
 - Focuses on visibility and access
-

AEO

- Helps AI systems understand what you do
 - Helps AI summarize and recommend you accurately
 - Focuses on clear answers, context and credibility
-

UX

- Helps people understand, trust and act
- Shapes how information is experienced
- Focuses on clarity, ease and confidence

The AI Background Check

The Modern Research Process

Before reaching out, **they ask ChatGPT.**

01

AI Prompt

"Who are the best TPAs for self-funded small groups in the Southeast?"

02

AI Synthesis

Pulls from websites, articles, LinkedIn, reviews, industry forums — summarized instantly.

03

Quick Vetting

Broker checks your website, Google profile, and LinkedIn in under 90 seconds.

04

Shortlist Formed

You're either in consideration or eliminated — before a single conversation.

AI can
introduce you.
It cannot build
the relationship.



How Others Build & Lose Confidence in You

Strong Signals

- Consistent, specific claims backed by evidence
- Named outcomes: cost reduction %, member engagement rates
- Client testimonials with employer/industry detail
- Third-party mentions: publications, awards, directories

Your 'Norm!' moment

Supporting Signals

- Thought leadership content (articles, webinars, guides)
- LinkedIn presence and engagement of principals
- Case study depth and recency
- Association memberships and industry participation

Foundational Signals

- Generic service descriptions without specifics
- Logos on homepage without context
- Outdated content (2+ years old)
- Press releases with no editorial placement

So, What Good Looks Like?

Answerable. Specific. Human.

01 Niche-Named Website

Above the fold, visitors know who you serve and what outcomes you deliver. No guessing.

02 Outcome-Led Copy

Real numbers, real situations and real context beat adjectives.

03 Visible People

Principals and experts are findable, credible and active.

04 Fresh Proof

Recent case studies, testimonials, bylines, events and industry references within the past 18 months

05 Answerable Content

FAQ pages, articles and service descriptions that answer the questions brokers and employers are asking.

06 Third-Party Validation

Evidence you did not write yourself: Industry awards, speaking credits, publication bylines, association roles.



Before you ever
get a call, **you've
already been
evaluated.**

The Technical Reality

No Magic Plugin. Just Better Signals.

- Make the site crawlable: XML sitemap, clean robots.txt, avoid blocking important pages or relevant crawlers
- Add structured data where appropriate: Organization, person, article, FAQ, event, video, breadcrumbs
- Use Google Search Console, Bing Webmaster Tools and IndexNow to help engines discover updates
- Keep details consistent: company name, leadership, services, geography, specialties and proof points
- Measure what you can: Bing Webmaster Tools now includes AI Performance reporting in preview

02.

SECTION

Sharpen Your Differentiation

The Specificity Gap

FORGETTABLE

We provide innovative cost management solutions for self-funded employers.

Our team brings decades of experience to every client relationship.

We offer comprehensive stop-loss and TPA services.

We're passionate about helping employers control healthcare costs.

MEMORABLE

Helped 47 southeastern manufacturers reduce claim costs by an average of 22% over 3 years.

Our clinical team reviews catastrophic claims over \$50K within 48 hours; not 5 business days.

Specialize in groups of 50–300 lives that are too complex for Fully Insured solutions.

We integrate with your broker's existing tech stack, including Ease, Employee Navigator, and BenAdmin.

Run Every Claim Through This Filter

01

Could your competitor say this exact thing?

If yes, cut it, prove it, or make it specific enough they can't.

02

Can you back it up with a number, a name, or a story?

Proof transforms a claim into a credential. Evidence is the differentiator.

03

Would a broker remember it in 30 days?

If it's not clear enough to repeat, it's not clear enough to guide a decision.

The One-Line Test

Complete This Sentence:

"We're the TPA brokers call when _____."

WEAK ANSWER

"...they need a trusted partner for self-funded employers."

This could describe 400 companies. It creates no memory, no distinction.

STRONG ANSWER

"...the employer is a manufacturer with 75–200 employees and the broker needs fast clinical review and clean reporting."

This is searchable, referable, and memorable.

Pull Up Your Company's Website

Within 10 seconds, can a broker tell:

01

Who you serve and what problem you solve

03

Why they would choose you

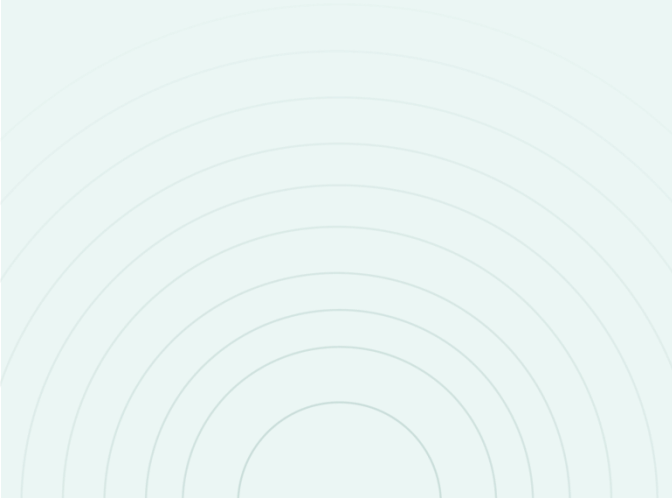
02

What evidence supports that reason

01

Who they would be working with from your company

The Authenticity Advantage



Being Human Is More Valuable Than Ever

Four Ways To Make Expertise Feel Real:

- Have an opinion
 - Tell real stories
 - Put people forward
 - Sound like yourself
-



**Nobody in that bar is
asking, “Wait, who’s
Norm again?”**

03.

SECTION

Communicating Benefits Effectively

Complex Ideas Need Plain Language & Useful Tools

No More Jargon

Specific deductibles, aggregate attachment points, and laser clauses explained in plain language so employers can understand what triggers coverage.

Plain-Language Summaries

Walk through digital SPDs with groups F2F or in video. Employers who understand their plan documents advise their employees more accurately.

Use Visual Aides

Walk clients through how claims flow: from the employer's plan, through the TPA, to stop-loss using visual diagrams and videos.

Proactive Coverage Limits Communications

Benefit maximums, exclusions, and carve-outs should be communicated proactively — before a claim, not during one.

Let Cost Impact & Employee Experience Lead

Explain PPO, reference-based pricing, and direct contracting in terms of actual employer cost impact and employee experience.

Digital Tools That Help

Explainer videos, annotated comparison tables, interactive benefit guides, and FAQ documents hosted online reduce employer confusion and support informed decision-making.

Supporting Employer Decision- Making

Helping Employers **Compare** Plan Structures

The broker's role is to help employers understand the coverage implications of each option, not just the price.

Factor	Fully Insured	Level-Funded	Self-Funded
Premium risk	Insurer	Insurer (capped)	Employer
Claims transparency	None	Limited	Full data access
Cash flow	Fixed monthly	Fixed monthly	Pay-as-incurred
Stop-loss required	No	Yes (bundled)	Yes (separate)
Plan design control	None	Limited	Full flexibility
Best fit	< 50 lives	50–150 lives	100+ lives

Your role: help the employer understand which structure fits their risk tolerance, workforce size, and cash flow before they sign.

Year-Round Client Communication

Q1 Jan-Mar

- Confirm plan documents & SPD updates
- Employee ID card & network access follow-up
- Initial utilization data review with employer

Q2 Apr-Jun

- Mid-year claims & cost trend report
- Address coverage questions from employees
- Review any plan design adjustment options

Q3 Jul-Sep

- Renewal prep: stop-loss re-pricing begins
- Benchmark employer against industry peers
- Present coverage option comparisons

Q4 Oct-Dec

- Open enrollment communication support
- Deliver plan comparison materials to employees
- Confirm regulatory filings & compliance deadlines

Consistent, proactive communication throughout the plan year is how confidence compounds.

More Than Halfway.

Broker Enablement Check

Earn The Recommendation

A Broker Rarely Recommends What They Cannot Explain

04

Be Relevant: Identify the brokers / consultants whose business fits yours

03

Be Useful: Teach them something they can use with clients

02

Be Easy to Explain: Give them language, evidence and tools

01

Help Them Educate the Employer: Do not make the broker carry the whole story

BROKER ENABLEMENT CHECK

Are You Helping The Broker Sell?

After your meeting, can the broker leave with something that helps them:

Explain the concept

Compare options

Answer employer objections

Explain the economics

Tell your story

Prove the outcome

Bring you into the next conversation

Not swag. Useful explanation.

04.

SECTION

Strengthening Recall

Memory Is Earned, Not Given

5–7

brand exposures needed
before a prospect
remembers your name

3×

more likely to be
recommended
if you've shared useful
content recently

90 sec

is how long a broker spends
vetting your digital presence
before deciding

When brokers can clearly explain your plans, employer trust increases. And that trust is what drives recall, referrals and long-term relationships.

A Single Great Meeting Creates Awareness. Not Recall.

Repeated. Relevant. Consistent. Human.



Recall requires a pattern of presence.



Brokers remember the partners who show up consistently: in their inbox, feed, events and useful client conversations.



Every touchpoint either deposits into or withdraws from your familiarity account.



When brokers can clearly explain your plans, employer trust increases.

Build From The Bottom Up

04

Top of Mind

Your name comes up first when a trusted partner is needed

03

Active Recall

Broker can name you specifically when asked

02

Recognition

Broker knows the name when they hear it

01

Awareness

Broker has seen your name at least once

Visibility That Compounds

Machine Readable.
Human-Memorable.

Tactics That Move You **Up the Stack**

Digital Content

- Monthly email: 1 insight, 1 stat, 1 case reference — not a newsletter
- LinkedIn posts with your named niche (manufacturers, 50–200 lives, Southeast)
- Stories, opinions, personal posts, behind-the-scenes perspectives

Relationships

- Annual broker check-ins with a reason to meet instead of just 'catching up'
- Referral asks that are specific: Do you know a broker in [city] who works with [type]?

Expertise

- Speak at 1 event per quarter: make your niche explicit in the title/abstract
- Leave behind one memorable artifact: a benchmark, a calculator, a comparison guide



"Who do I trust here?"

**Ideally,
you're Norm.**

05.

SECTION

Recognition Drives Revenue

The Cycle of Trust & Understanding

Specific Differentiation

Your niche is clear, credible, provable and easy for brokers to explain.

Consistent Visibility

Every touchpoint reinforces how brokers position you.

Broker Recall

Your name surfaces first when brokers need a partner they can trust.

Referrals & Inbound Calls

Brokers bring you into conversations earlier.

Evidence & Proof Points

Clear outcomes build trust and make brokers more confident recommending you.

Your 90-Day Action Plan

Days 1–30: Get Clear

- Define who you are best for
- Write your One-Line Test and get internal agreement on it
- Identify your 3 most compelling proof points (outcomes with numbers)
- Ask 5 brokers how they would describe you
- Audit your website for clarity

Days 31–60: Become Useful

- Create one broker education resource
- Publish one real problem/client story
- Answer the 10 questions brokers ask you the most
- Update leadership profiles
- Add appropriate schema / structured data

Days 61–90: Become Visible

- Meet with 5-10 priority relationships
- Share useful expertise consistently
- Earn one third-party speaking or publication opportunity
- Ask for specific testimonials
- Measure search, website and AI visibility

Three Things to Take Away

01

Be Specific

If everyone can say it, it is not your differentiator

02

Be Useful

Teach brokers something that makes them better with their clients

03

Be Human

Technology can make you discoverable. Relationships make you recommendable.

It's not about everyone knowing
your name.

**It's about the right
people knowing
exactly why they
should call you.**

**Thank
You**



Questions?

A decorative stained glass sign with a central white panel featuring the word "Questions?" in a black, ornate, cursive font. The sign is framed by a border of red, yellow, and green glass segments, set within a dark wood frame.

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COURSE EVALUATION

Please complete the course evaluation form before you leave. Your feedback helps us improve this program and confirms your participation for CE credit purposes.



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