

From Losing Ground to Hitting the Ground Running

How a Streamlined Onboarding for Two Subsidiaries Led to Fast Results



The Situation

A TPA and PBM under one parent brand had no internal marketing support and their teams were stretched thin. They needed to further differentiate their brands, but they lacked sales materials and marketing strategy.



The Solution

Their dedicated Ocozzio team conducted a robust onboarding with the client, leveraging industry knowledge to ask insightful questions and fully understand their goals. From that meeting, they delivered a Fast Start Plan outlining key deliverables for the first 30, 60, and 90 days. **Then Ocozzio executed with precision.**

The Results

WITHIN 90 DAYS, OCOZZIO:

- + Implemented and optimized HubSpot Marketing and Sales Professional Hubs
- + Created and launched a new visual brand for the PBM
- + Crafted in-depth messaging documents for both the TPA and the PBM including mission, vision, values, boilerplate, elevator speech, and more
- + Developed LinkedIn Content Calendars and corresponding posts
- + Launched the TPA's MEC product, with supporting materials including a comprehensive Go-to-Market Strategy, landing page, brochure, sales deck, and more
- + Presented and initiated the development of the TPA's targeted Broker Strategy
- + Delivered impressive and effective sales tools including sales decks, product-specific landing pages, and brochures
- + And a whole lot more!

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We can't believe how much we've gotten done together over these first three months. It's both **quality and quantity that make it so **impressive.**”**

PRESIDENT/CHIEF SALES
OFFICER, TPA

Ocozzio is Your Trusted Marketing Partner

We understand the competitive landscape and dynamics of the self-funded industry. That means we always hit the ground running with a laser focus on your strategic priorities.

Contact us today.

