

From Fragmented Reporting to Scalable Execution

Automating Renewal Reports Cut Preparation Time by 75%



The Situation

A leading third-party administrator relied on detailed renewal reports to support client conversations. Each report required pulling data from multiple sources, managing complex Excel formulas and working within a single, unstructured spreadsheet.

The process took up to four hours per report. It was manual, difficult to scale and introduced risk through unprotected formulas, hidden logic and human error. The final output also lacked the level of polish expected in executive-level discussions.

The initial request was to improve the presentation. The underlying need was a more efficient and reliable process.



The Solution

Ocozzio evaluated how data was sourced, calculated and used, then rebuilt the process within the client's Marketing Center.

- + Designed a clean, branded report aligned to client expectations
- + Replaced Excel formulas with custom-coded calculations to create a single source of truth
- + Developed a simplified interface to streamline data entry and reduce errors
- + Implemented a structured data management system with controlled editing and historical access



The Results

Report preparation time was reduced from four hours to less than one hour, improving efficiency by more than 75%.

The team now has access to over 360 historical and active reports in one centralized system, enabling consistency, easier collaboration and faster turnaround.

What began as a design update became a more scalable, secure and effective process that supports stronger client conversations and long-term retention.



Ready to simplify your workflows and deliver polished, on-brand materials with the Marketing Center? **Let's Talk.**