

Step-by-Step Guide to Optimizing Your Truemed Marketing



1

Laying the Foundation for Success

- Create a High-Converting Landing Page



Use our [Landing Page Guide](#) to design a page that drives conversions



Access our [Figma Template](#) to simplify the creation process

- Ensure the PDP Widget is Installed



Check that the Truemed PDP widget is active on all eligible product pages



Need help? Email merchants@truemed.com and our engineers will assist

2

Marketing Strategies from Our Top Performers

- Send Monthly Dedicated HSA/FSA Campaigns



[Consistently educate](#) customers about using their HSA/FSA funds.

- Test Paid Ads Featuring HSA/FSA Spend



Follow our [Paid Ads Guide](#) to create high-converting campaigns



Optimize ad creatives to highlight the benefits of HSA/FSA spending

- Enhance Your Email Footers



Add HSA/FSA messaging to all [email footers](#) for continuous exposure

3

Seasonal Strategies: Ensure Year-Round HSA/FSA Messaging

Make sure your marketing team incorporates these seasonal talking points into HSA/FSA-focused email campaigns throughout the year. Find our [Full Seasonal Email Marketing Guide here](#)

Q1

- Kickstart the Year



New Year – New You

Promote HSA/FSA spending as part of health resolutions



"Replenished Funds"

Reminder

Notify customers that their HSA/FSA dollars have been refreshed

Q2

- Leverage Tax Season



"Maximize Your Tax Savings" Campaign

Educate customers on how HSA/FSA spending reduces taxable income

Run Email + Paid Campaigns on Savings

Show customers real savings when they use HSA/FSA funds



Feature Customer Testimonials

Highlight real success stories to build trust and encourage conversions

Q3 & Q4

- The Most Critical Time to Convert



. Open Enrollment Guidance

Educate customers on planning their HSA/FSA contributions for the upcoming year



Black Friday "Stack Your Savings" Campaign

Promote the combination of Black Friday deals + HSA/FSA benefits

Ready to Execute? Check off completed steps and watch your Truemed revenue grow!