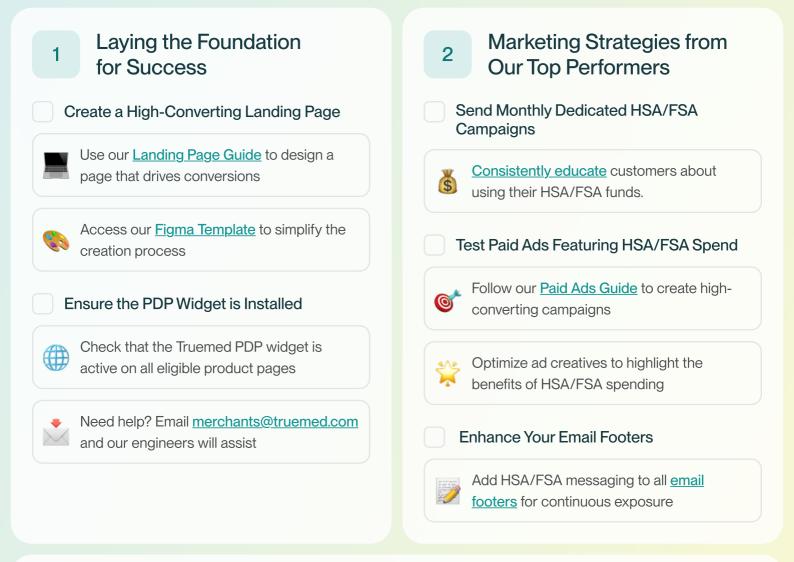
⊕ Truemed.

Step-by-Step Guide to Optimizing Your Truemed Marketing



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 <u>Full Seasonal Email Marketing Guide here</u>

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

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!