

# Q4 Optimization Checklist

## Website

- ❑ **Seasonal Homepage Banners:** Add HSA/FSA callouts to your site banner  
→ [Banner Copy](#)
- ❑ **Homepage Content Block:** Feature your top HSA/FSA eligible products  
→ [Layout Inspiration](#)
- ❑ **"HSA/FSA Eligible" Product Filters:** Help customers quickly find qualifying items  
→ [Learn How](#)
- ❑ **Blog Posts:** Remind customers of HSA/FSA eligibility and boost SEO to attract qualified customers  
→ [Get a template](#)

## Email Marketing

- ❑ **Open Enrollment (Sept–Nov):** Launch a campaign reminding customers that now is the time to fund their HSA/FSA accounts  
→ [Get Sample Campaign Copy / Designed Templates](#)
- ❑ **Black Friday / Cyber Monday (Nov):** Highlight how customers can stack savings in your BFCM campaigns  
→ [Get Sample Campaign Copy / Designed Templates](#)
- ❑ **End-of-Year (Dec):** Emphasize FSA expiration urgency  
→ [Get Sample Campaign Copy / Designed Templates](#)
- ❑ **New Year, New You (Jan):** Remind customers with New Year's resolutions and freshly replenished HSA/FSA accounts to shop your eligible products  
→ [Get Sample Campaign Copy / Designed Templates](#)
- ❑ **Lifecycle Email Updates:** Add HSA/FSA messaging to your header/footers  
→ [Get Sample Copy](#)  
Update abandoned cart flows with eligibility messaging  
→ [Get Sample Copy](#)

## Ad Campaigns

- ❑ **BFCM Campaigns:** Promote HSA/FSA savings in paid social and search  
→ [Get Designed Ad Templates + Copy](#)
- ❑ **End-of-year FSA Expiration Campaigns:** Drive urgency in final 2 weeks of the year  
→ [Get Designed Ad Templates + Copy](#)

## SMS & Social

- ❑ **SMS Campaign Blocks:** Add HSA/FSA copy to holiday texts  
→ [See Sample Copy](#)
- ❑ **Instagram Story Templates:** Add "HSA/FSA" to your story highlights  
→ [Get Designed Highlight Templates](#)

## Influencer Marketing

- ❑ **Open Enrollment (Sept–Nov)**  
→ [Influencer Script](#)
- ❑ **Black Friday / Cyber Monday (Nov)**  
→ [Influencer Script](#)
- ❑ **FSA Expiration (Dec)**  
→ [Influencer Script](#)
- ❑ **New Year (Jan)**  
→ [Influencer Script](#)

## Webinar & Training

- ❑ **Watch On-Demand: BFCM & EOY Campaign Walkthrough:** Hear from Truemed's Head of CS about best practices for Q4 promotion  
→ [Watch Now](#)