Financial Services Communication Calendar: Core (UHC and Optum Direct)

Account holder communication activities and timelines are subject to change.

OPTUM Bank®

Communication	Q1	Q2	Q3	Q4	OVERVIEW
B2C marketing campaigns:					
Welcome Educational Series					A series of 3 emails that welcomes and educates new account holders regarding their HSA.
Targeted Account Holder Campaigns					Targeted campaigns are sent throughout the year on an ad hoc basis. Select campaigns apply the Health Finance Journey Model segmentation strategy.
Health Savings Newsletter					Quarterly e-newsletter sent to account holders providing timely and important reminders about HSA updates and features. Newsletters apply the Health Finance Journey Model segmentation strategy.
HSA Webinars					Public webinars feature a 20/20 format with the first 20 minutes dedicated to presentation and the following 20 minutes reserved for live Q&A. Invitations are sent to employers and account holders by email to encourage participation.
Transactional Communications					Includes bank statements, tax statements, etc.

Communication	Q1	Q2	Q3	Q4	OVERVIEW
B2B2C marketing campaigns and resources:					
Two-Minute Answers					A four week employer email campaign that provides resources to distribute to their employees. These communications are designed to support employer's direct efforts to help their employees during open enrollment.
Online resources					HSA, FSA, HRA and Transportation educational resources including videos, flyers, tools, and demos for employers to distribute. These resources can be found online at openenrollment123.com.