

NO LIMITS TO

Exponential Growth



THE SITUATION

A regional bank implemented an Health Savings Account (HSA) service and needed focused HSA expansion on a national level. They had a high-quality HSA product, but struggled with branding, messaging, and overall marketing efforts. At the time, the current number of accounts sat at 9,800 and growth was stagnant.

They needed a partner well-versed in the employee benefits industry that could quickly develop and implement an enhanced brand strategy and marketing outreach to their members and prospects.

THE SOLUTION

After a comprehensive analysis of their current brand, messaging, and competitors, Ocozzio developed a strategic marketing plan. Starting with a complete rebrand, including a new logo and brand identity, Ocozzio then executed a comprehensive campaign to drive members to open new HSA accounts.

Ocozzio Provided:

- Strategic marketing campaigns with tactics and timelines
- Industry research and conference recommendations
- Brand strategy development and implementation
- Complete set of marketing and sales materials
- Targeted audience outreach
- Website development and launch
- Paid and organic social media campaigns
- Content marketing strategy, including: the development of educational articles and videos

The Results

After partnering with Ocozzio, **their HSA now boasts upwards of 100,000 accounts** and business is rapidly growing.

Following the launch of their latest website and its focused promotion

TRAFFIC INCREASED

300%

40 NEW ACCOUNTS

secured in less than 48 hours

"The team at Ocozzio has catapulted us to a nationally recognized player in the CHDP/HSA arena. When I came on board, we had a small HSA portfolio, a dated and small website, ineffective marketing materials, and no definitive strategy to penetrate the marketplace."

- VP of Sales, HSA Client

Are you ready to contribute to your revenue growth?

Get started today with a full-service B2B marketing partner with 20+ years of experience in the employee benefits industry.