

2017 CARRIER ADVERTISING GUIDELINES & CLAIMING AT-A-GLANCE



REIMBURSEMENT RATES (provided funds are available):

• Non-Metro Fund = 100% reimbursed

• Co-op Fund = 50% reimbursed

GENERAL GUIDELINES & ADVERTISING REQUIREMENTS: *(The guidelines below will be strictly enforced by a third party auditor.)*

- Must use current Carrier logo (w/ leaf) and "turn to the experts" tagline in all advertising (logo & tagline must visually & audibly occur in TV/Radio/theater adv.)
 - TV: Logo and tag clearly and prominently shown, plus audible mention of both brand and tag
 - Radio: Audible mention of brand 2x in 30-sec and 3x in 60-sec spot; tag 1x per spot
 - Print: Carrier logo should be EQUAL in size to the dealer logo
- No competitive items/brands (includes IAQ, controls and Panasonic duct free splits).
- Advertising must run during the 2017 calendar year (2017 funds cannot roll-over into 2018).
- All claims must be received by January 15, 2018.
- Co-Op Funds are the property of Airefco until "claimed" by the dealer.
- Credit/financing offers must use wording provided by the lender.
- Use of the words "free" or "bonus" in any advertising must receive prior approval.
- Follow all factory guidelines and requirements (found in the current Carrier Ad Kit) when advertising rebates, product claims and warranty offers.
- Only net cost to the dealer after deduction of other funding is eligible for reimbursement (i.e. funding from utility company, Energy Trust of Oregon, etc.).

ADVERTISING PRE-APPROVAL: *(Required for any advertising that does not use the current Carrier Ad Kit templates or factory-approved Carrier vendors.)*

- Submit requests to advertising@airefco.com at least two business days prior to the print/production/run date.
- If you are unsure whether an ad/item requires approval, please forward it to your Territory Manager for review.
- Long-term advertising must receive approval each year.
- Modifications to ad kit items of any kind except for ad size (*in same proportions*) must be resubmitted for approval.

GOT THE RIGHT LOGO?



GENERAL EXCLUSIONS:

- Agency fees
- Voice talent fees and design/logo set-up costs
- Installation or production costs
- Costs above standard shipping
- Tax expense

DISALLOWABLE ITEMS:

- Materials from expired ad kits or old Carrier logos
- Items not associated with the Carrier brand,
- Office equipment, cellular phones, award banquets, employee gifts, association dues, publication subscription/contribution expenses

COMMON CLAIM OMISSIONS:

- Invoice
- Notarized script affidavits
- Entire, original tear sheets
- Clear, color photos

AIR ADVICE

- What qualifies:* Air Advice monitors

Co-op Non-Metro

APPAREL

- What qualifies:* Purchase of Carrier-branded casual wear, dealer uniforms, branded patches. All clothing must have the current full color Carrier logo with tagline on left side of chest.
- Exclusions:* Cleaning Services, Rental Programs & Shipping (i.e. uniform cleaning services)
- Carrier Approved Vendors:* Shilling Sales, Cintas Uniform Program, Shu-Bee

Co-op Non-Metro

BILLBOARDS, JOB SIGNS/YARD SIGNS

- What qualifies:* Arena/stadium signage, public bus ads, public benches, billboards, job site signs, and yard signs.
- Exclusions:* Ticket package costs received with stadium or arena signage packages
- Carrier Approved Vendors:* TKO Graphix, uCreate

Co-op Non-Metro

BUILDING SIGNAGE

- What qualifies:* Purchase (including Lease-to-Own) of branded dealer outdoor business building signs including electronic reader boards if attached to a Carrier outdoor sign.
- Exclusions:* Sign pole; Maintenance
- Carrier Approved Vendor:* Federal Heath Company

Co-op Non-Metro

CALL TRACKING

- What qualifies:* Monthly tracking fees.

Co-op Non-Metro

DIRECT MAIL & DOOR HANGERS

- What qualifies:* Consumer-oriented direct mail including coupon services, door hangers and newsletter services (includes printing costs, mail list fees and postage).
- Carrier Approved Vendors:* EB&L Marketing, uCreate

Co-op Non-Metro

EQUIPMENT DISPLAYS

- What qualifies:* Equipment (at 50% of value) and signage for permanent displays in office showrooms provided signage clearly displays the current Carrier logo and tagline next to the equipment.

Co-op Non-Metro

HOME SHOWS, ETC.

- What qualifies:* Booth or space rental (only Carrier-dedicated portion) and equipment (at 50% of value) featuring Carrier products. All signs, banners and items displayed must use current Carrier logo and tagline.
- Exclusions:* Rental of rugs, furniture, plants, drapes, tablecloths, etc.; Nightly cleaning fees; Other misc. fees related to booth/space display and/or set-up.
- Carrier Approved Vendor:* Skyline, Matrix Imaging

Co-op Non-Metro

INTERNET POWER LISTINGS

- What qualifies:* Angie's List Lead Accelerator Program; magazine and internet advertising, Yahoo Local, Yelp & Google my Business

Co-op Non-Metro

INTERNET ADVERTISING & WEBSITES

- What qualifies:* Online banner ads, search engine marketing (SEM), search engine optimization (SEO), dealer websites and SiteLink (note, same advertising standards apply).
- Carrier Approved Vendor:* Sequoia Technologies, Select On Site, SiteLink, MTA360

Co-op Non-Metro

IPADS

- What qualifies:* iPads purchased to support selling, installing, servicing or training of Carrier products.

Co-op Non-Metro

LEAD GENERATING TOOLS

- What qualifies:* Lead nurturing & Proposal building tools & software/licensing fees (ex. text message marketing, Comfort Builder & Demandforce)

Co-op Non-Metro

LITERATURE

- What qualifies:* Carrier-produced consumer literature.
- Exclusions:* Production of specialty literature; Climate Master literature
- Carrier Approved Vendors:* Metropolitan Printing Group

Co-op Non-Metro

MERCHANDISING

- What qualifies:* Promotional items - pens, magnets, calendars, service stickers, customer appreciation gifts, business cards, etc.
- Exclusions:* Shipping
- Carrier Approved Vendors:* Shilling Sales, To Your Success

Co-op Non-Metro

PHONE ON-HOLD & CALL TRACKING

- What qualifies:* Phone on-hold messaging and call tracking services.
- Carrier Approved Vendor:* Commercials on Hold

Co-op Non-Metro

PRINT & YELLOW PAGES

- What qualifies:* Magazines, newspapers, newspaper inserts, ads in print newsletters, and yellow pages display ads.

Co-op Non-Metro

RADIO, TELEVISION & CABLE

- What qualifies:* Radio, broadcast TV and cable TV advertising including spot commercials, live reads, program sponsorships and online streaming radio ads. Tagline & brand must occur visually & audibly for TV/theater. Media commissions are eligible provided they do not exceed 17% of the total media cost.

Co-op Non-Metro

TRAINING

- What qualifies:* Carrier University, BDR Profit Coach & Service Profit Coach, NATE, Technical Training, Workforce Connection & My Learning Center courses.
- Exclusions:* Anything not specifically mentioned as allowable above. Training not sponsored by Airefco; Training supporting products that compete with Carrier; Cancellation/no-show penalties

Co-op Non-Metro

TRAVEL

- What qualifies:* Travel for Airefco/Carrier sponsored meetings (factory tours, recruit/retention events and FAD annual meeting only). Includes coach airfare, hotel lodging (room and tax only) limited to one night per day of meeting/training, mileage exceeding 100 miles from dealer's place of business to meeting location at current IRS mileage reimbursement rate or alternate transportation costs (taxi, rental car, etc.).
- Exclusions:* Gas; Meals; Hotel incidentals; Anything not specifically mentioned as allowable above

Co-op Non-Metro

VEHICLE IDENTIFICATION

- What qualifies:* Purchase of Carrier vehicle decals, logos and lettering, installation cost/labor fees for decals placement on vehicle, and cost of dealer logo decals or lettering.
- Exclusions:* Repairs; Painting costs (labor fees and supplies)
- Carrier Approved Vendor:* TKO Graphix

Co-op Non-Metro

YOUTUBE & SOCIAL MEDIA

- What qualifies:* MUST have pre-approval (retroactive pre-approvals do not qualify) - Social Media management fees; YouTube video or production fees; videos must follow TV branding guidelines; photos must follow Print branding guidelines; Twitter & like feeds must include Brand mention.

Co-op Non-Metro

REFER TO THE 2017 CLAIM FORM FOR CLAIMING REQUIREMENTS