

2018 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.)*

1. 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
2. No competitive items/brands (includes IAQ, controls and Panasonic duct free splits).
3. Advertising must run during the 2018 calendar year (2018 funds cannot roll-over into 2019).
4. All claims must be received by January 15, 2019.
5. Co-Op Funds are the property of Airefco until “claimed” by the dealer.
6. Credit/financing offers must use wording provided by the lender.
7. Use of the words “free” or “bonus” in any advertising must receive prior approval.
8. Follow all factory guidelines and requirements (found in the current Carrier Ad Kit) when advertising rebates, product claims and warranty offers.
9. 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. Please note that websites can take up to one month.
- 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 & membership renewal fees. **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. **Co-op** **Non-Metro**
- **Exclusions:** Cleaning Services, Rental Programs & Shipping (i.e. uniform cleaning services). Uniforms & Patches can now only be purchased Carrier National Provider.
- **Carrier Approved Vendors:** Shilling Sales, Cintas Uniform Program, Shu-Bee

BILLBOARDS, JOB SIGNS/YARD SIGNS

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

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. **Co-op** **Non-Metro**
- **Exclusions:** Sign pole; Maintenance
- **Carrier Approved Vendor:** Federal Health Company

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). **Co-op** **Non-Metro**
- **Carrier Approved Vendors:** EB&L Marketing, uCreate

EQUIPMENT DISPLAYS

- **What qualifies:** Equipment (at 50% of value) and signage for permanent displays in dealer home shows, retail store kiosks 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. **Co-op** **Non-Metro**
- **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

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, SiteLink (note, same advertising standards apply). Includes website development & associated support such as hosting, copy writing & content management fees. **Co-op** **Non-Metro**
- **Carrier Approved Vendor:** Sequoia Technologies, Select On Site, SiteLink, MTA360

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. **Co-op** **Non-Metro**
- **Exclusions:** Production of specialty literature; Climate Master literature
- **Carrier Approved Vendors:** Metropolitan Printing Group

MERCHANDISING

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

PHONE ON-HOLD & CALL TRACKING

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

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. **Co-op** **Non-Metro**
- **Exclusions:** Anything not specifically mentioned as allowable above. Training not sponsored by Airefco; Training supporting products that compete with Carrier; Cancellation/no-show penalties

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 only, tax is not eligible) 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.). **Co-op** **Non-Metro**
- **Exclusions:** Gas; Meals; Hotel incidentals; Anything not specifically mentioned as allowable above

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. **Co-op** **Non-Metro**
- **Exclusions:** Repairs; Painting costs (labor fees and supplies)
- **Carrier Approved Vendor:** TKO Graphix

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 2018 CLAIM FORM FOR CLAIMING REQUIREMENTS