

Carrier® Co-op Advertising Guidelines

Jan 2021

Please note that that we have a new Carrier brand logo. If you are creating new advertising and marketing materials, you must use this new logo to qualify for co-op.

The Carrier® logotype, brand name and associated trademarks are valuable assets. They help consumers identify our products and services. They stand for innovation, quality, reliability, value and trust. In short, they help build sales.

We've developed advertising materials designed to build awareness for both you and the brand. The use of consistent imagery and themes depicting happy, comfortable homeowners with messages of comfort and efficiency support the Carrier brand promise and are found throughout the ad kit.

Auditing

In order to receive co-op reimbursement you must be enrolled in a co-op program with Habegger, and adhere to certain brand guidelines and obtain prior approvals when called for. This is especially true of any locally produced advertisements. However, no prior approval is necessary when a dealer uses (with allowable modifications only) any materials published in the current Carrier Ad Kit.

If you choose to create your own materials locally and intend to seek co-op funds, you must receive authorization via the Habegger online co-op claiming portal, prior to running the ad.

Allowable Expenses

In general, nearly any media that strongly identifies the dealer with the brand is allowed. The term "media" refers to costs to broadcast, replicate and distribute print materials or purchase space. Media commissions are allowed only for media planning and other activities directly related to the placement of TV, radio and online media.

Qualified Expenses

- Costs for creative writing, design or other production costs associated with the creation of advertisements or TV and radio tags for broadcast
- Website development fees including SEO efforts and annual support costs such as hosting
- All Surefire Local and MTA 360 costs
- Online banner ads, pay per click and other SEM media including agency fees for media buying support
- Search Engine Marketing (SEM)
 - SEM includes online banner ads, pay per click and other SEM media including agency fees for media buying support
- Email marketing programs
- Mobile advertising and coupons including agency management fees and media costs

- Text message marketing including agency management fees
- Internet Power Listings (such as)
 - Angie's List® program and advertising costs
 - Yahoo® Local
 - Yelp®
 - Google® my Business
 - Google® local service ads
- Social media fees
- Broadcast or cable television
- Sponsorship of local TV or radio shows
- Radio advertising
- Print advertising such as local magazine, newspaper or newspaper inserts (FSIs)
- Dealer direct mail, including printing and postage
- Door hanger advertising
- Custom dealer marketing tools, such as yard signs, stickers, magnets
- Print and online yellow pages advertising
- Billboards
- Public bus billboards and ads
- Public bench ads
- Stadium or arena signage
- Phone-on-hold messaging that includes the Carrier name and tagline

Also Qualified:

Many types of merchandising that include the approved logo and identify Habegger and/or dealer with Carrier brand also qualifies.

- The purchase of Carrier produced consumer literature
- The purchase of dealer designed consumer literature using the custom literature tool
- Dealer truck decals
- Jobsite signs
- Dealer business signage
- Dealer identification items, such as Carrier branded casual wear used in normal business operations and business/service decals
- Dealer uniforms, including branded patches when purchased from the Carrier national provider (excluding rentals or cleaning services on purchased uniforms)
- Dealer home shows, retail store kiosks and shopping mall kiosks featuring Carrier products prominently displayed. Includes booth cost, equipment cost at 50% of value, and brochure printing costs all of which must clearly identify the brand
- Youth sports sponsorships

Non-qualified advertising items:

- Any materials that violate any of the advertising standards, distributor advertising requirements, name and logotype use guidelines, and/or advertising copy guidelines as outlined in this Carrier, current year advertising guide
- Costs of offering rebates, credit and promotions
- Any advertisements or merchandising that displays competitive items, equipment, brand names, etc. This includes mentions of any non-Carrier IAQ and control products

- Any online efforts directed to a landing page or website home page displaying competitive products
- Association dues and publication subscription or contribution expenses
- Items not associated with the promotion of the brand

Marketing Fund Co-op Advertising Guidelines

Definitions of Carrier Logo and Tagline.

Carrier logo = Carrier Turn to the Experts logo (shown at right)



Turn to the experts

Requirement Checklist by Media Type		
Media	Actions required BEFORE publication	Documents required for APPROVAL SUBMISSION
Website/Surefire Local/mta360 Allowed: Site development fees, hosting and monthly Surefire Local or mta360 fees	<ol style="list-style-type: none"> 1. Prominently feature Carrier logo with tagline on home page (logos appearing in photos are not considered sufficient) 2. List and show Carrier products exclusively (Exception: website may note all brands serviced) 	<ol style="list-style-type: none"> 1. Vendor contract or invoice 2. URL of website 3. Pre-approval confirmation
Online SEO/SEM and targeted advertising including ad media buy, agency management fees and costs for creative writing, design or other production costs	<ol style="list-style-type: none"> 1. Internet banner ads must prominently display brand logo with tagline. 2. Copy-only based ads must include the use of the Carrier brand name 3. <i>Pre-approval required unless using ad kit materials</i> 	<ol style="list-style-type: none"> 1. Vendor contract or invoice 2. Print out of advertisement 3. URL of landing website 4. Pre-approval confirmation if dealer produced
Mobile Allowed: Ad media buy, agency management fees and costs for creative writing, design or other production costs	<ol style="list-style-type: none"> 1. Visual ads must prominently display brand logo with tagline 2. Copy-only based ads must include the use of the Carrier brand name 3. <i>Pre-approval required unless using ad kit materials</i> 	<ol style="list-style-type: none"> 1. Vendor contract or invoice 2. Print out of advertisement 3. Phone number ad connects to 4. Pre-approval confirmation if dealer produced

<p>Social Media Allowed: Agency management fees and local video production for social media use</p>	<ol style="list-style-type: none"> 1. Twitter and like feeds must mention Carrier name 2. Videos and social media pages must feature Carrier logo with tagline. 3. <i>Videos require preapproval of script and storyboard</i> 	<ol style="list-style-type: none"> 1. Vendor contract or invoice 2. Printout of Facebook or other landing site of the social campaign
<p>TV / Cable Allowed: Ad media buy, agency media commissions and costs for creative writing, design or other production costs</p>	<ol style="list-style-type: none"> 1. All ads must prominently feature Carrier logo with tagline 2. Commercials greater than :15 seconds must also audibly mention brand name and "turn to the experts" tagline 3. Commercials :10 to :15 seconds must also audibly mention brand name 4. Commercials: 10 seconds or less (e.g. Time & Temp ads) do not require audible mention of brand or tagline but must prominently feature brand logo with tagline. 5. For commercials with no voiceover Carrier products must be shown along with prominently displaying the Carrier logo with tagline 6. <i>Pre-approval of script required unless using ad kit materials</i> 	<ol style="list-style-type: none"> 1. Month end invoice from the station 2. Script including Notarized Affidavit and matching to invoice - may reference ad ID#. 3. Pre-approval confirmation if dealer produced Media commissions must be on invoice from media vendor and must be a separate line item. Creative development and production fees cannot be funded with media commissions. Media commissions should not exceed 17% of the total media cost for reimbursement
<p>Radio Allowed: Ad media buy, agency media commissions and costs for creative writing, design or other production costs</p>	<ol style="list-style-type: none"> 1. Spots greater than :15 seconds must mention brand name with "turn to the experts" tagline 2. Spots:15 seconds or less must audibly mention Carrier 3. <i>Pre-approval of script required unless using ad kit materials</i> 	<ol style="list-style-type: none"> 1. Month end invoice from the station 2. Script including Notarized Affidavit and matching to invoice - may reference ad ID#. 3. Pre-approval confirmation if dealer produced Media commissions must be on invoice from media vendor and must be a separate line item. 4. Creative development and production fees cannot be funded with media commissions. Media commissions should not

		exceed 17% of the total media cost for reimbursement
<p>TV and radio program sponsorships Allowed: sponsorship and product costs</p>	<ol style="list-style-type: none"> 1. Carrier brand name must be prominently mentioned 2. Any visual materials featuring dealer must include the Carrier logo with tagline 	<ol style="list-style-type: none"> 1. Month end invoice from the station 2. Script including Notarized Affidavit and matching to invoice - may reference ad ID#. 3. Pre-approval confirmation if dealer produced 4. Media commissions must be on invoice from media vendor and must be a separate line item. Creative development and production fees cannot be funded with media commissions. Media commissions should not exceed 17% of the total media cost for reimbursement
<p>Printed advertisements Allowed: Purchase of media and costs for creative writing, design or other production costs</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. Logo must be equal to the size of the dealer's logo and no less than 1 inch in width (logos appearing in photos are not considered sufficient) 2. <i>Pre-approval required unless using ad kit</i> 	<ol style="list-style-type: none"> 1. Original tear sheets (showing name of publication and date) 2. Original itemized invoice with brand clearly marked 3. Pre-approval confirmation if dealer produced
<p>Direct Mail and Door Hangers Allowed: Costs of printing, mailing/distribution and costs for creative writing, design or other production costs</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. Logo must equal to the size of dealer's logo and no less than 1 inch in width (logos appearing in photos are not considered sufficient) 2. <i>Pre-approval required unless using ad kit</i> 	<ol style="list-style-type: none"> 1. Vendor invoices for printing and postage for direct mail 2. Original itemized invoice with brand clearly marked 3. A sample of item (original, faxed or emailed) 4. Pre-approval confirmation if dealer produced
<p>Billboards Allowed: Costs of billboard space rental and costs for creative writing, design or other production costs</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. Logo must be at minimum 50% of dealer's logo. (logos appearing in photos are not considered 	<ol style="list-style-type: none"> 1. Vendor contract or original invoice. Invoices need to show posting dates, location and ad ID# 2. Photograph of the billboard

	<p>sufficient)</p> <ol style="list-style-type: none"> 2. <i>Pre-approval required unless using ad kit</i> 	<ol style="list-style-type: none"> 3. Pre-approval confirmation if dealer produced
<p>Other signage Allowed: cost to purchase business location main signage and banner stands</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. Logo must be at minimum 50% the size of dealer's logo (logos appearing in photos are not considered sufficient) 2. <i>Pre-approval required unless using Carrier designed items through a pre-approved Carrier materials vendor</i> 	<ol style="list-style-type: none"> 1. Vendor contract or original invoice 2. Photograph of the installed sign 3. Pre-approval confirmation (Exception: pre-approved art from a Savings Network vendor)
<p>Phone-on-hold messaging</p>	<ol style="list-style-type: none"> 1. Must mention Carrier brand name and "turn to the experts" tagline 	<ol style="list-style-type: none"> 1. Vendor original invoice 2. Copy of script 3. Pre-approval confirmation if dealer produced
<p>Truck graphics</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. (logos appearing in photos are not considered sufficient) 2. Logo must be at minimum 50% the size of dealer's logo 	<ol style="list-style-type: none"> 1. Vendor original invoice 2. Photos showing all four sides of the vehicle
<p>Merchandise, clothing and uniforms</p>	<ol style="list-style-type: none"> 1. Prominently display brand logo with tagline. Logo must equal to the size of dealer's logo and no less than 1 inch in width 2. Logo must be displayed in Carrier colors or black & white 	<ol style="list-style-type: none"> 1. Vendor original invoice 2. Sample or photo of item
<p>Youth sponsorships- To be eligible, must have branded advertisement or apparel (e.g. sports or clubs)</p>	<ol style="list-style-type: none"> 1. Any visual materials featuring dealer such as uniforms or signage must include the Carrier logo 	<ol style="list-style-type: none"> 1. Invoice for sponsorship 2. Images of apparel, ad or signage

Additional Guidelines

Along with Carrier Marketing Fund Co-op Advertising Guidelines, your ads must also meet legal and corporate requirements. To be eligible for co-op advertising funds, follow these guidelines, always be truthful and avoid miscommunication.

Warranties

All references to warranties must conform to federal, state and local regulations. When a dealer creates its own warranty, it must be clearly stated that warranty responsibility lies with the dealer, not the manufacturer. Because many states now regulate the sale of third-party warranties, and because of the tremendous financial liabilities associated with dealer or third-party issued warranties, Carrier strongly discourages this practice.

Professional Claims

Only Carrier dealers who have fully met the requirements for Factory Authorized Dealer status and have been confirmed through Carrier may claim to be Factory Authorized. Carrier Corp. and your Carrier distributor are required to pursue any false claims in the interest of providing consumers with factual information.

“Free” Offers

The word "free" should be used with extreme caution. Many states regulate or prohibit "free" offers in connection with the sale of goods or services. When "free" or "bonus" or an equivalent are permitted and are used in conjunction with a bonus offer for purchasing equipment, the bonus price cannot be passed on.

Special Offers

When you are advertising a special price, be sure to include the following: "For a limited time only. Call for details." A discount is an additional cost to promote a sale. When advertising discounts and rebates, you cannot raise your price to cover an advertised discount or rebate. Local authorities may elect to prosecute misleading advertising of this nature.

Financing Offers

Extra caution should be exercised when mentioning financing offers in advertisements. It's important to note:

- Approval of materials for co-op funding does not, in any way, imply legal compliance or appropriateness of language related to dealer financing offers
- The advertising dealer is responsible for conforming to Federal, local and financing provider requirements in order to avoid violation of the law
- Dealers and distributors should work closely with their financing vendor to ensure appropriateness of advertising content

Advertising Ethics

When creating your Carrier advertising, you must always display good business ethics—the disparagement of competitors will not be tolerated. Your communications must meet regulations set forth by the Federal Trade Commission (FTC), as well as other required federal, state and local laws. Dealers should promote their businesses in a straightforward, factual fashion just as they would expect from other businesses. The HVAC industry can benefit from such practices.