



# 2017 GeoElite Program

February 2017

2/8/2017

International  
Builder's Show  
2017



Trilogy Series –  
Best of IBS Awards  
Finalist, Best Energy  
Efficient Product

# AGENDA



- 2017 GeoElite Program -
  - What's Changing
  - Criteria
  - Benefits
- Signing up
- Marketing materials
- 100% Satisfaction Guarantee & Claim Process
- Additional Benefits
- Training Changes
- Q & A

# GeoElite Dealers



- Who make the best GeoElite® dealers?
  - Those willing to invest in growth
- What's in it for the dealer?
  - Top Listing on the ClimateMaster Dealer Locator
  - Priority lead referral
  - Option to earn up to 5% Co-op
  - 100% Satisfaction Guarantee
  - Expedited Delivery of Warranty Parts
  - ClimateMaster trip for top dealers
- Requirements:
  - Get trained
  - Sell 10 units
  - Sign Agreement & Pay annual fee through distributor
  - Be ClimateMaster brand loyal



# What's changing?



- We will have two tiers for 2017 – **Standard** and **Premium**
- All benefits are the same except for coop fund accrual and annual fee
- Both have access to the Trilogy as long as training requirements are met
- GeoElite Standard
  - No annual fee
  - 2% coop funds
- GeoElite Premium
  - \$1500 annual fee
  - 5% coop funds
- There will be a nominal fee for training courses. This fee is a coop-able expense



# GeoElite CRITERIA



## Minimum Sales Volume

- Dealer sold 10 geothermal heat pumps in 2016
- Potential to sell >10 in 2017



## Product Training

- Dealer must have taken (i) CM 202 Service Installation Class and (ii) Trilogy Training Class since January 2015.
- The Trilogy Training Class must be taken by the dealer's installing technician and not the business owner.
- The distributor that the dealer is affiliated to must have at least one technician on staff that attended the Train The Trainer class since January 2015.



## Exclusivity

- Must sell only ClimateMaster Geothermal products, where available
- Cannot display competitor's geothermal brands on their website



## Agreement and Fees

- Distributor to verify and ensure that he will sell Trilogy systems only to dealers that meet the necessary training criteria as established above
- Dealer signs the "2017 GeoElite Program Participation Agreement"
- Distributor pays annual fee on dealer's behalf

# GeoElite DEALER BENEFITS



## Benefits

- Top listing on Dealer Locator
- More Co-Op dollars (for GeoElite Premium)
- Priority Lead Referral
- 100% Satisfaction Guarantee
- Expedited Delivery of Warranty Parts
- Exclusive Marketing Materials (direct mailers, customizable ads, trade show materials)
- FREE Vehicle Signage for new dealers
- ClimateMaster sponsored trip for top dealers



# SETTING UP DEALERS



GeoElite dealers MUST have purchased minimum 10 units in 2016 to qualify

Sign up **NEW**  
Dealers at any time!

Existing dealers have until  
March 31, 2017 to renew  
their GeoElite status

<b>March 2017</b>						
<b>SUN</b>	<b>MON</b>	<b>TUE</b>	<b>WED</b>	<b>THU</b>	<b>FRI</b>	<b>SAT</b>
			<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>
<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>
<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>
<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>	<b>31</b>	

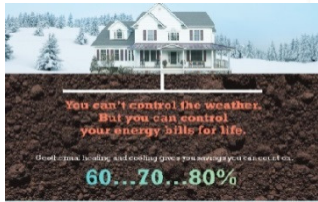
# SETTING UP DEALERS



1. Submission by CM Distributor to CM District Manager:
  - a. For GeoElite Premium, place an order on the CM business center for Part Number: **"GEOELITE"** . The price per dealer is \$1,500 for the full year.
  - b. For GeoElite Standard, place an order on the CM business center for Part Number: **"RESGEOELITENOFEE"** . The price per dealer is \$0 for the full year.
  - c. Insert the dealer(s) name in the "order notes" section of the business center check out screen.
  - d. Submit signed "2017 GeoElite® Program Participation Agreement" for each dealer to the program administrator at ([GeoEliteDealer@climateMaster.com](mailto:GeoEliteDealer@climateMaster.com) )
  - e. Along with the participation agreement please also submit the Distributor's ClimateMaster equipment sales to the dealer for the full year of 2017 to the program administrator at([GeoEliteDealer@climateMaster.com](mailto:GeoEliteDealer@climateMaster.com) ) (If converting a new dealer please estimate sales)
2. Approval: Once reviewed by CM District Manager and audited by CM marketing, the dealers will be designated ClimateMaster GeoElite® and CM Distributor will be invoiced the dealer fee of \$1,500 X # of approved GeoElite® Premium dealers.
3. Once approved, dealers will be:
  - a. Assigned special designation on the CM dealer locator
  - b. Added to lead generation sheet to give preferential treatment
  - c. Mailed 100% Home Owner Satisfaction Registration Forms



# Customizable Marketing Materials



- Marketing/Advertising materials EXCLUSIVE to GeoElite dealers
- Targeted messaging to the consumer educating them on the benefits of geothermal and directing them to you
- All Ads and Direct Mail materials are customizable
  - TV ads
  - Magazine ads
  - Newspaper ads
  - Direct Mail
  - Yard Signs
  - FREE Vehicle Wraps for new dealers
  - Trade Show Banners

# FREE Vehicle Wraps



## Vehicle Wraps are FREE for new dealers

ClimateMaster and GeoElite® vehicle decals available at **NO COST** to new GeoElite® dealers

<http://www.climatemaster.com/geothermal-dealer/geothermal-marketing-materials/vehicle-graphics/>

**E-mail request to**

[GeoEliteDealer@climateMaster.com](mailto:GeoEliteDealer@climateMaster.com)  
with GeoElite® dealer information

# 100% Satisfaction Guarantee



- 100% Satisfaction Guarantee provides your customers the peace of mind when investing in a ClimateMaster System
- Simply complete the Homeowner Registration form and submit to ClimateMaster\*
  - Form is available on the Business Center under download → GeoElite section
  - Send completed forms to: [satisfactionclaims@climatemaster.com](mailto:satisfactionclaims@climatemaster.com)

The screenshot shows the ClimateMaster website interface. The browser address bar displays the URL: <https://www.climatemaster.com/scart/customer/home.php?cat=861>. The website header includes navigation tabs for Home, Ordering, Business Services, Account Information, Find Orders, CLM Tools, and Help. A search bar is located below the navigation. The main content area displays a list of files under the heading "Price Lists" and "GeoElite® Dealer Program". A red box highlights the file "100% Satisfaction Guarantee Claiming Process and Form" in the second table.

File Name	File Type	Size	Last Updated
Residential Price Book	Acrobat	4.6 MB	9/15
Residential Price Book	Excel	10.0 MB	9/15
Price List - Units with Description	Excel	305 KB	4/15
Price List - Parts	Excel	3 MB	1/15

File Name	File Type	Size	Last Updated
Trilogy® Personal Use Program Form	PDF	750 KB	7/15
GeoElite® Brochure	PDF	376 KB	12/14
2015 GeoElite® Program Distributor Guidelines, Claiming Process and Form	PDF	324 KB	12/14
100% Satisfaction Guarantee Claiming Process and Form	PDF	274 KB	1/15
December 15, 2014 GeoElite® Program Launch Video	W4V	65 MB	12/14
Powerpoint presentation from Dec. 15, 2014 GeoElite 2015 webcast	PowerPoint	1.2 MB	12/14

\* Forms must be submitted and received by ClimateMaster to submit 100% Satisfaction claims

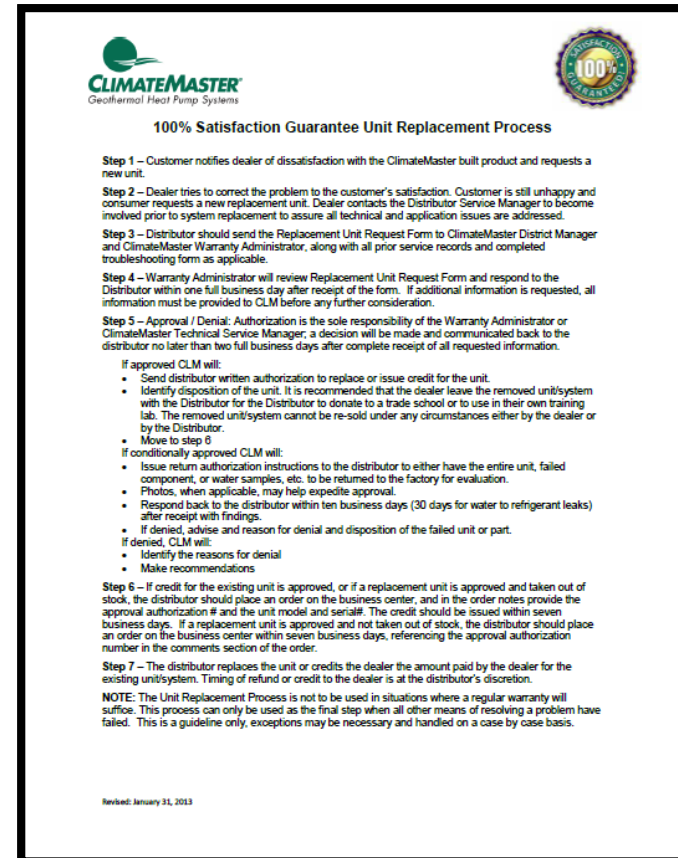
# 100% SATISFACTION GUARANTEE

## Claiming process



### If a consumer has a complaint:

- Dealer and distributor must try to correct the problem first.
- If problem cant be resolved, contact ClimateMaster Technical Services Dept. at [techsupport@climatemaster.com](mailto:techsupport@climatemaster.com)
- If resolution can not be arrived at, distributor submits 100% Satisfaction Claim form, Start-up form, Troubleshooting form and service history documents to [satisfactionclaims@climatemaster.com](mailto:satisfactionclaims@climatemaster.com)
- Once approved, ClimateMaster issues a credit for replacement unit to the distributor
  - Distributor refunds dealer's purchase price
  - Dealer refunds homeowner the equipment cost listed on Homeowner's registration form. Dealer will only be reimbursed the cost of a replacement unit.



# ADDITIONAL PROGRAM BENEFITS



- Expedited Delivery of Warranty Parts:
  - Orders submitted prior to 2pm central standard time will be processed and shipped within 24 hrs based on availability
- Top Listing on Dealer Locator
  - GeoElite dealers are clearly designated on the ClimateMaster dealer locator and will always appear at the top of the dealer locator search results
- Priority Lead Referral
  - GeoElite dealers receive every lead from their territory as opposed to being placed in a rotation with other dealers in their territory

# Training Changes



- We want ALL dealers to be trained to on our products regardless of whether they are GeoElite or not
- Going forward, there is a nominal fee for training classes. In accordance with coop policy, this fee is coop-able
  - CM202 Service / Installation Class at distributor location - \$2000 flat fee for distributor. Distributor may recoup cost from dealers.
  - Trilogy Training Class at distributor location - \$3000 flat fee for distributor. Distributor is also responsible for arranging shipment and payment for transporting the Trilogy demo unit. Distributor may recoup cost from dealers.
  - Trilogy Training Class at OKC - \$600 per attendee (includes course materials, tuition, meals and lodging)
  - Train-the-Trainer Class at OKC – no change (\$750 returning student; \$2250 new student) (includes course materials, tuition, meals, lodging and training kit for new students)

# Summary



- Who make the best GeoElite® dealers?
  - Those willing to invest in growth
- What's in it for the dealer?
  - Top Listing on the ClimateMaster Dealer Locator
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# Q & A

Thank you for participating!