





2017 GeoElite Program

February 2017





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

2/8/2017

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

GEOELITE® CLIMATEMASTER DEALER

- Who make the best GeoElite[®] dealers?
 - Those willing to invest in growth
- What's in it for the dealer?

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- 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



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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



- 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



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DEALER

CLIMATE MASTER

SETTING UP DEALERS



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

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their GeoElite status

March 2017						
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SETTING UP DEALERS

GEOELITE® CLIMATEMASTER DEALER

- 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 (<u>GeoEliteDealer@climateMaster.com</u>)
 - 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(<u>GeoEliteDealer@climateMaster.com</u>) (If converting a new dealer please estimate sales)
- 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

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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-

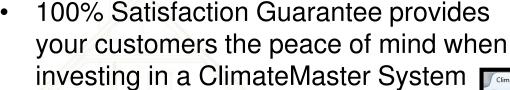
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E-mail request to

<u>GeoEliteDealer@climateMaster.com</u> with GeoElite[®] dealer information



100% Satisfaction Guarantee



- 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: <u>satisfactionclaims@climatemaster.com</u>

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

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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
- If resolution can not be arrived at, distributor submits 100% Satisfaction Claim form, Start-up form, Troubleshooting form and service history documents to <u>satisfactionclaims@climatemaster.com</u>
- 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.

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CUMATEMASTER DEALER

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

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- 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









Thank you for participating!