

No Worries. It's a **LENNOX**



2027 CONSUMER ADVERTISING AND PROMOTIONS (CAP) PROGRAM GUIDEBOOK



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WHAT IS CAP AND HOW DOES IT WORK?

Purpose

The Consumer Advertising and Promotions (CAP) program was created to help dealers drive local awareness and generate leads while offering exclusive benefits that help close sales with homeowners.

Whether you are new to the HVAC marketing world or a seasoned marketer, we are here to help!

What is it?

There are two main components to CAP. Through a commitment to co-branded advertising, CAP dealers unlock exclusive benefits designed to drive business growth and improve sales performance.

1. Investment in co-branded advertising

A Full Service CAP package allows you to partner with Strategic America, a long-term Lennox partner and professional marketing agency. Whether you are just getting started or are a seasoned marketer, your agency partner will develop a plan that is right for you!

(see page 4 & 5 for more detail)

A Self Service package is designed for select dealers with strong Lennox relationships, who have consistently demonstrated the ability to advertise effectively on their own. This package type must be approved by Lennox Corporate Marketing and the District Manager.

2. Access to exclusive benefits that become unlocked as a result of enrollment

- Agency Services covered by Lennox (Full Service Only!)
- CAP investment financed and invoiced over 10 months (Full Service Only!)
- Lennox.com Dealer Locator Listing and Lennox Leads
- Financing Buydown
- Consumer Promotions and Rebate Funding
- Comfort Advisor SPIF
- Earned Co-Op Marketing Funds

(see page 7 for more)

HOW CAN CAP HELP ME GROW MY BUSINESS?

The Consumer Advertising and Promotions (CAP) Program was designed with dealers like you in mind. The resources and benefits that are offered exclusively to CAP dealers will help you increase brand awareness, generate leads, and of course, close sales with homeowners.

Strengthen Your Relationship with Lennox

CAP dealers are typically extremely engaged and communicate heavily with their Territory Manager, which has a positive impact on their business.

- 15% more likely to sell Dave Lennox Signature Collection
- 32% increase in average purchase value by CAP dealers
- 5% average growth year over year for CAP enrolled dealers

Borrow Brand Equity from Lennox

Homeowners know the Lennox brand and associate it with a rich history, quality, and reliability. Through co-branded marketing you combine your own valuable brand equity with Lennox's in order to increase trust with homeowners.

Increased Visibility with Homeowners

Dealer visibility is increased through both co-branded advertising and being listed on the Lennox.com dealer locator (exclusive benefit of CAP).

Improve Close Rates

As a CAP dealer, you get exclusive access to financing, promotional pricing, homeowner rebates, and sales incentives for your team! These CAP benefits will help boost conversations, build urgency, and win more business!

Lessen the Burden Of Marketing

Running a business often means balancing multiple roles and competing priorities. Whether marketing feels overwhelming due to the time required or the strategic knowledge needed to be successful, our trusted agency partner, Strategic America, can provide the expertise and support needed to lighten the load.

YOUR TEAM BEHIND THE SCENES

Lennox has partnered with Strategic America (SA) to provide Full Service CAP participants with customized local marketing support designed to help dealers promote their business and connect with more homeowners.

As a participant, you'll have access to a dedicated marketing advisor, a wide range of advertising solutions, and valuable program benefits, including Consumer Rebates, SPIFs, and Co-Op Marketing Funds. With agency fees covered by Lennox, Full Service CAP makes it easier to implement marketing strategies while staying focused on running your business.

Your CAP Agency

As a trusted Lennox marketing partner for more than 45 years, Strategic America (SA) has helped dealers increase visibility, generate demand, and maximize the value of their marketing investment. Backed by decades of home services expertise, data-driven insights, and customized local strategies, SA helps dealers navigate an evolving marketing landscape with confidence. As a Full Service CAP participant, you'll work with a dedicated marketing advisor who understands your business, your market, and your goals, providing personalized guidance and strategic recommendations tailored to your needs.

As a Full Service CAP participant, Strategic America helps you:

- Develop a customized marketing strategy tailored to your goals and local market
- Make informed decisions about how to allocate your CAP investment for maximum impact
- Access a full suite of traditional, digital, and website solutions
- Create professional, Lennox-approved advertising customized with your dealership's branding, business information, and custom photography (if provided)
- Reach more homeowners through strategic media planning and buying
- Monitor campaign performance and identify opportunities for improvement
- Leverage home services industry expertise, insights, and best practices gained from supporting clients nationwide
- Simplify marketing execution by working with a single, dedicated agency partner

Lennox covers agency fees so that your entire CAP investment goes towards advertising your business in your local market.

Advertising fees covered include: Agency time for a discovery call, media research and recommendations, media buying and negotiations, creative customization and proofing, campaign reporting and performance reviews, media invoicing and audits, and general dealer communication throughout the year, and where applicable, agency commission on booked media.

CAP MEDIA OPTIONS

Brand Awareness Tactics vs Lead Generation Tactics

Brand Awareness

Brand awareness is how well consumers recognize and remember your business when they see it, hear about it, or think about heating and cooling services. Building brand awareness is an important part of a successful long-term marketing strategy because it helps keep your dealership top of mind when homeowners are ready to buy.

This helps you:

- **Build Recognition:** Make your brand more visible and memorable, so when consumers need heating or cooling services, they think of you first.
- **Increase Trust:** Establish credibility and reliability, which are vital in an industry where customers rely on you for comfort and safety.
- **Boost Customer Loyalty:** Encourage repeat business and positive referrals from satisfied customers who recognize and trust your brand.
- **Have a Competitive Edge:** Stand out from the competition in your area and attract more customers by showcasing your expertise and reliability.

Lead Generation

Lead generation focuses on connecting your business with homeowners who are actively researching, considering, or ready to purchase HVAC products and services. Through targeted marketing strategies, lead generation tactics are designed to drive consumer actions such as phone calls, form submissions, estimate requests, and service appointments.

How They Work Together

Enhanced Efficiency: Brand awareness creates a foundation of trust and recognition, making lead generation efforts more effective. When people recognize and trust your brand, they're more likely to engage with your lead generation tactics, such as placing a phone call, submitting a form, requesting an estimate, or scheduling a service appointment.

Improved Conversion Rates: Leads that come in through brand awareness efforts are often warmer and more qualified because they're already familiar with your company. This familiarity increases the chances of converting leads into paying customers.

Stronger Market Presence: Combining both tactics helps you establish a strong market presence. While brand awareness ensures people know who you are, lead generation focuses on capturing and converting their interest, creating a powerful synergy that drives growth.

CAP MEDIA OPTIONS

2027 CAP Media Options

To maximize the value of your CAP investment, we ask that regardless of your package type, 70% of your co-branded advertising commitment be allocated to tactics within Brand Awareness or Lead Generation. The remaining 30% may be applied to tactics listed under other options.

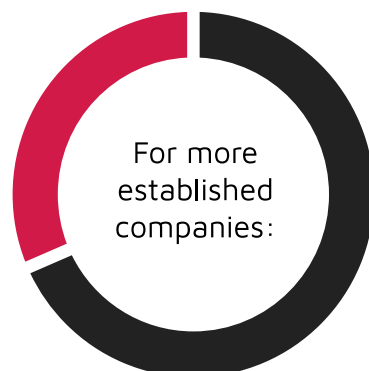
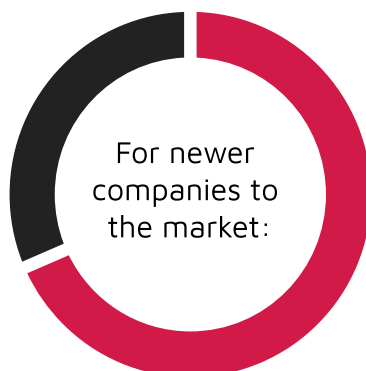
BRAND AWARENESS	LEAD GENERATION
Radio (AM/FM)	Pay-Per-Click (Paid Local Search)
Streaming Audio	Paid Social (Facebook and Instagram)
TV (Broadcast and Cable)	Direct Mail Paired with Online Display
Connected/Streaming TV	Google Local Services Ads (LSAs)
Pre-Roll Video	Online Directories Pay-Per-Call Campaigns
Weather Triggered Display ads	OTHER OPTIONS
Outdoor Billboard	SA's Google Business Profile Management Services
Local Sponsorships	Online Display Landing page(s) through SA
Local Print (Newspaper and Magazine)	Organic Social through SA's Social Media Program
	SA's Data & Insights Services
	SA's Nurture Email Program
	SA's Website & SEO Services

For more detailed descriptions of each tactic, visit the Resources section of [LennoxDealerMarketing.com](https://lennoxdealermarketing.com) where you'll find individual FAQ documents. If you're interested in media options not listed in this guidebook, please contact your agency advisor, as other options may be available.

Depending on how long you've been in business, your advertising budget should have a balance between short-term lead generation tactics and long-run brand awareness tactics.

30%
LEAD
GENERATION

70%
BRAND
AWARENESS



30%
BRAND
AWARENESS

70%
LEAD
GENERATION

CAP BENEFIT OVERVIEW

Overview of Benefits

Through your commitment to co-branded advertising within CAP, you unlock access to exclusive benefits to help close sales.

- **Easy Monthly Billing for Full Service Dealers**

- No need to pay for your investment up front! Lennox will finance it interest-free over 10 months. Your CAP package investment will be broken out into 10 equal monthly invoices from February to November.

- **Member Only Listing on Lennox.com Dealer Locator**

- Millions of homeowners are looking for a qualified local dealer on [Lennox.com](https://www.lennox.com)
- In 2025, the website received 9 million site visits, generated 502,000 dealer searches, and sent more than 151,000 calls to dealers through the dealer locator.
- Additionally, you can opt-in to receive leads directly from the locator and manage them (as well as enter your own) online through Lennox Leads. For more information, visit [LennoxPros.com/news/web-leads-1804](https://www.LennoxPros.com/news/web-leads-1804).

- **Earned Co-Op Marketing Funds (Funds provided by Lennox)**

- Earn Co-Op Marketing Funds, as a percentage back on your qualified Lennox Purchases. The funds are kept in an account that you can use to reimburse co-branded activities for up to 60%. Activities include but are not limited to:
 - > Your CAP package investment
 - > Other advertising and marketing efforts outside of the CAP program
 - > Option to automatically submit your CAP invoices for co-op reimbursement (Full service Only)
 - > Approved training courses and programs
 - > Lennox-branded apparel or signage

Please contact your TERRITORY MANAGER for details on how Co-Op MARKETING FUNDS are earned, Purchase method and calculated percentages are determined by the district.

- **Access to Consumer Promotions + Funding by Lennox**

- Get access to industry-leading consumer promotions for up to 36 weeks of the year. Promotions typically include a rebate and/or special financing when a consumer purchases and installs eligible new Lennox equipment.
- Depending on your CAP package, Lennox pays for up to 70% of the national consumer rebate and up to 100% of the cost of financing promotional plans.

CAP BENEFIT OVERVIEW

- **Access to Comfort Advisor Sales Performance Incentive Fund (SPIF)**

- 100% Lennox funded**

- Reward your comfort advisors with bonuses paid 100% by Lennox. Bonuses are earned by selling eligible Lennox equipment and submitting claims through the SPIF program (www.lennoxpros.com/partner-resources/sales/salesperson-spiffs)

Enrollment and What to Expect from A Full Service CAP Package

- **Enrollment:** Visit LennoxDealerMarketing.com to enroll and select your CAP package. You will receive a confirmation email after this is completed. Please view page 10 for more information on how to enroll.
- **Discovery Call:** Your Strategic America advisor will reach out with a welcome email and schedule an introductory planning session. This conversation is an important first step in developing a marketing strategy tailored to your business. During the call, you'll discuss your business objectives, service area, competitive environment, seasonal priorities, past marketing performance, and any advertising activities outside of the CAP program. Using these insights, your CAP advisor will develop strategic recommendations designed to maximize your visibility, generate leads, and make the most of your CAP investment.
- **Media Strategy and Recommendation:** Using information gathered during your discovery or planning call, combined with market research and performance data, your SA advisor will develop a customized marketing strategy tailored to your business goals, local market data, and CAP investment. Recommendations will be presented for your review and approval before campaigns are launched.
- **Creative Customization:** Once the advertising plan is approved, the SA team will purchase the media and customize the creative materials needed for the schedules. For more details on creative customization, please refer to appendix page 14 of this guidebook.
- **Performance Reports and Discussions:** If the media tactics include tracking and reporting, your agency advisor will review and share the results with you throughout the year. This will help you understand the effectiveness of your marketing and allow for open discussions about any necessary adjustments.
- **Monthly CAP Investment Updates:** Your CAP agency advisor will email monthly updates regarding your CAP investment, so you can keep track of what is left to allocate, as well as appropriately plan for the remainder of the year. This email will also include a link to easily schedule a meeting with your CAP advisor.

CAP BENEFIT OVERVIEW

Helpful Tips

CAP dealers who get the most out of the program and experience the highest satisfaction are those who actively engage with the program and their agency advisor.

Here are some tips for success:

- **Be Responsive:** Your agency advisor is here to support! Please ensure you are connecting with them to get your media approved in a timely manner.
- **Review Creative Proofs Promptly:** Once SA provides a creative proof for your review, you will receive an email alert from lennoxproofs@strategicamerica.com with instructions to visit LennoxDealerMarketing.com to review the proof. You will have five business days from the email's date to approve the proof as is or request changes. If you do not respond by the deadline specified in the email, the creative proof will be deemed approved, and SA will proceed with finalizing the ad as planned. This process ensures that all media schedules begin running on the start date as planned and purchased.
- **Be Aware of Media Deadlines:** Strategic America has media deadlines throughout the year. These deadlines are communicated to full-service dealers by email and are also posted in the Resources section of LennoxDealerMarketing.com. Please be aware of these deadlines so that you are able to fully utilize your CAP investment as planned.
- **Measure Marketing Effectiveness:** To accurately measure campaign performance, SA may recommend tracking solutions such as website tracking codes, call tracking numbers, or other reporting tools, depending on the marketing tactics selected. These solutions help connect marketing activity to customer actions and attribute leads to your advertising efforts, providing the data needed to evaluate performance, optimize campaigns, make informed marketing decisions, and gain greater visibility into return on investment. For dealers with an SA-managed website, tracking is implemented and maintained by our team.

Frequently Asked Questions

How do I enroll?

- 1) Visit LennoxDealerMarketing.com
- 2) If it's your first time on the site, click on "Register New Dealer" link, which will prompt you to enter your Lennox Dealer Number, your email address, and select your District. You'll then create a unique password for yourself.
- 3) Once logged in, click on the CAP Enrollment button to complete the quick enrollment process.
- 4) If you receive a "No dealer found." or "Dealer is already claimed. Please contact the dealer owner or advisor to be sent an invitation." message, please email us directly at lennoxhelp@strategicamerica.com to troubleshoot.

How does the billing work?

Your investment in CAP will be billed directly to your Lennox account in equal payments over 10 months, February through November. You can expect your CAP invoice at the end of the previous month, i.e. February will be sent at the end of January.

If you enroll in a package mid-year, your total investment will be billed in equal payments over the remaining months, between the time of the enrollment and November. If you have any questions, please email us directly at CAPProgram@Lennox.com. Your CAP agency does not handle these invoices.

Can I change my package level or investment during the year?

Yes. Your CAP package level and/or investment can be adjusted throughout the year by contacting your SA advisor, Lennox Territory Manager, or emailing us directly at CAPProgram@Lennox.com.

What are the program's policies for refunds and cancellations?

Dealers may cancel their CAP participation at any time by notifying their agency advisor, TM, or emailing CAPProgram@Lennox.com in writing. At that point all program benefits will terminate. Refunds are not provided when a dealer chooses to end participation. As of the cancellation date, the dealer forfeits any portion of the annual investment that has already been invoiced. Future billing will stop unless additional media has been spent beyond what has been invoiced. If that occurs, the dealer will be billed for the remaining balance before being removed from the program. Lennox reserves the right to cancel a dealer's CAP package at any point if the relationship or account status changes.

What is the latest I can enroll in CAP?

The last day to enroll in a CAP 2027 Package is September 10th, 2027 in order to meet media deadlines. Enrollment for CAP 2028 will open in September 2027 and benefits will begin starting January 2028.

Why are media deadlines important?

The media planning deadlines set throughout the year to ensure you are able to run your selected tactics in your desired time frame. If your CAP investment is not allocated by the final media deadline, any unused funds will be forfeited and cannot be refunded. These deadlines are communicated to full-service dealers by email and are also posted in the resources section of LennoxDealerMarketing.com.

Frequently Asked Questions (cont.)

What is the difference between CAP investment and Co-Op Marketing Funds?

Your CAP investment is what you are committed to spending on co-branded advertising in your local market as a part of the CAP program. This investment unlocks the exclusive benefits of the program, one of which, is eligibility to earn Co-Op marketing funds.

Co-Op Marketing Funds, are dollars earned through a dealer's qualified Lennox purchases. Dealers can submit claims in the Co-Op portal to receive reimbursement for up to 60% of the cost of the co-branded activity using these accrued funds. Dealers can submit claims throughout the year for a variety of activity, including, but not limited to, CAP eligible co-branded activity, approved training courses and programs, Lennox-branded vehicle wraps, and Lennox-branded apparel and signage. As an added benefit of the Full Service program, dealers have the option to enroll in CAP Auto-Submit, enabling Lennox to automatically submit CAP invoices for reimbursement on their behalf.

Visit LennoxPros.com/Coop-Account-Launch for more information about the Co-Op program and to access your earnings dashboard.

What is CAP Auto-Submit?

CAP Auto-Submit is an optional benefit available to Full Service CAP dealers that allows Lennox to automatically submit CAP invoices for Co-Op reimbursement on the dealer's behalf. If sufficient Co-Op Marketing Funds are available, approved credits will be applied to the dealer's Lennox account at month-end. To remain eligible for the Auto-Submit program, dealers must actively place their media through Strategic America. Lennox reserves the right to remove dealers from Auto-Submit if they are not actively placing media with Strategic America.

If you would like to start or stop having Lennox submit your monthly CAP invoices on your behalf, please contact us at CAPProgram@Lennox.com.

What if I already partner with my own local advertising agency or marketing consultant?

We recognize that some dealers have their own marketing team on staff or prefer to work with a local advertising agency. When enrolled in a Full Service CAP package, SA can work collaboratively with a dealer and their local marketing team to determine how to best use the dealer's CAP investment to complement their existing marketing plan. In some cases, the Self Service CAP package may work best. Dealers interested in Self Service must complete an application that will need approval from the District Manager and Lennox corporate. They commit to managing their own co-branded advertising in line with Lennox brand guidelines and submitting proof of performance directly through the Co-Op platform. If you are interested in this package, please contact your Territory Manager.

Can I be in Full Service, but spend my CAP investment through my own media rep or agency?

All CAP investments must be allocated and managed by SA. If you have a pre-negotiated rate or schedule with a media outlet, you are welcome to share that information with your SA advisor during the initial planning phase. However, CAP investments cannot be used for any media, traditional or digital, that is planned or purchased outside of CAP. To ensure compliance with CAP program guidelines and Lennox brand guidelines, all media planning, negotiation, and purchasing

CAP 2027 PACKAGE OPTIONS

BENEFITS	FULL SERVICE STANDARD	FULL SERVICE PREMIUM	SELF SERVICE
Investment Level	Starting at \$9,000	Starting at \$20,000	Commitment of \$20,000 of Co-Branded Advertising completed by the dealer
Agency Services* Covered by Lennox	✓ Valued at \$7,500+*	✓ Valued at \$9,750+*	
Billed Over 10 Months	✓	✓	
Proof of Advertising Required			✓
Lennox.com Dealer Locator Listing and Qualified Leads Management (Lennox Leads)	✓	✓	✓
Weeks of Consumer Promotions†	26 (Sp and F)	36 (W, Sp, Su, F)	36 (W, Sp, Su, F)
Consumer Rebate Funding	50% Lennox 50% Dealer	70% Lennox 30% Dealer	60% Lennox 40% Dealer
Financing Buydown	✓	✓	✓
Comfort Advisor SPIF Program 100% Lennox Funded	✓	✓	✓
Earned Co-Op Marketing Funds Funds provided by Lennox	✓	✓	✓

* This is an estimation for the agency fee that is covered by Lennox in the full service packages. Dealer is not responsible for the this amount. Figure based on standard agency commission (15%) on booked media (where applicable) plus approximately 20 hours of agency resources for a discovery call, media research and recommendations, media buying and negotiations, creative customization and proofing, campaign reporting and performance reviews, media invoicing and audits, and general dealer communication throughout the year. Figure may vary based on the details and elements of a dealer's CAP participation.

†W = Winter
Sp = Spring
Su = Summer
F = Fall

KEY CONTACTS

STRATEGIC AMERICA

800-728-0991

LennoxHelp@StrategicAmerica.com

Follow the prompts to be directly connected to your dedicated advisor.

PROGRAM	MAILBOX	PROGRAM MANAGER
CAP Program and Billing	CAPProgram@Lennox.com	Jessie.Calloway@lennox.com
Co-op Marketing Funds Program	LnxBktPromote@Lennoxind.com	Shanee.Meeks@Lennox.com
Consumer Promotions and SPIF Program	Consumer.Promotions@Lennoxind.com	Lourdes.PastorOrdonez@lennox.com
Comfort Shield	ComfortShield@Lennoxintl.com	Kandice.Hines@Lennox.com
Premier Dealer Program	PremierDealer@Lennox.com	Rachel.Hicks@Lennox.com

SERVICE FINANCE

877-661-6793 or info@svcfm.com

DEALER PROGRAM SUPPORT

Consumer promotion and comfort advisor SPIF claims: ContactUs@MyLennoxSPIF.com
or 1-800-941-1379

Co-Op claim submissions outside of CAP: lennoxind@360incentives.com or 877-316-8890

APPENDIX

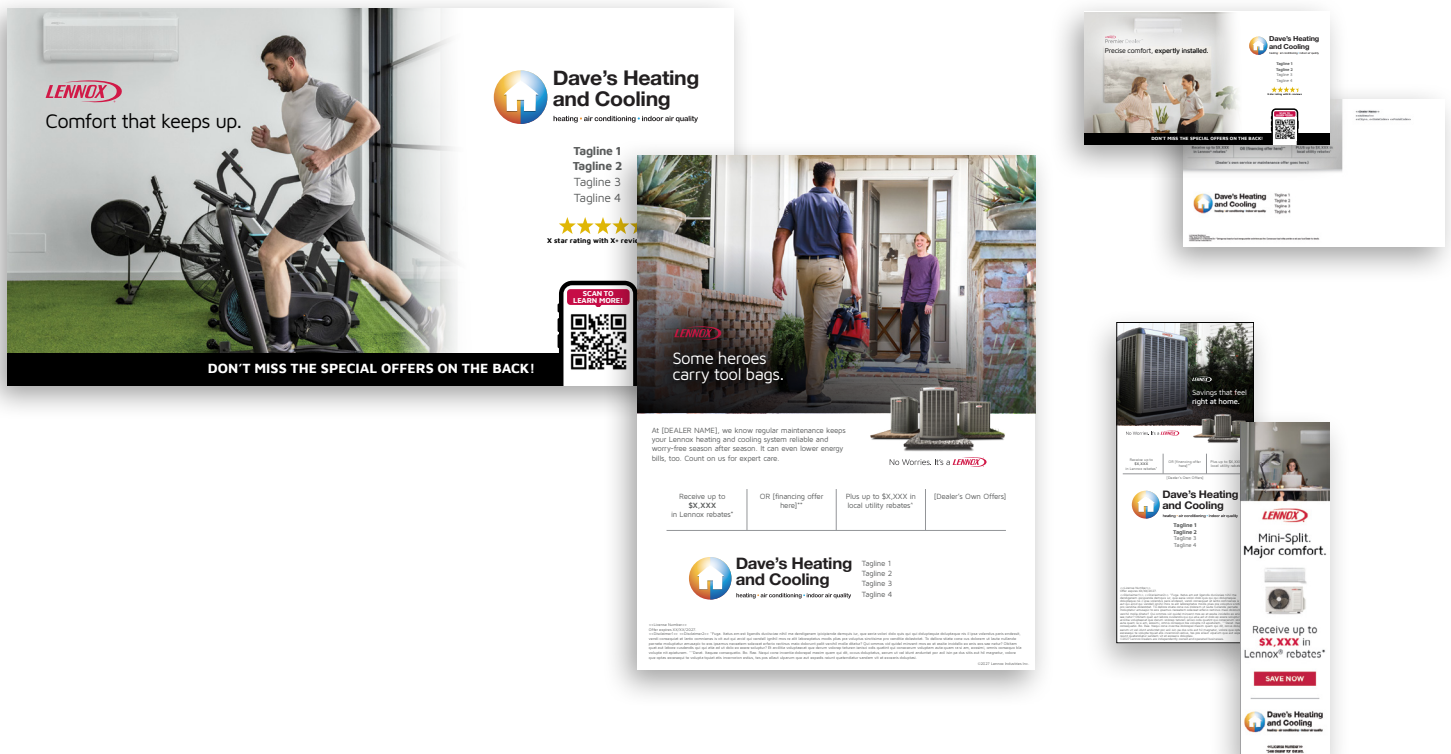
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- CAP Creative Options
- Lennox Marketing and Brand Assets
- Reporting and Tracking

CAP CREATIVE OPTIONS

For dealers in a **Full Service** package, there are several creative template options available to you. When you select one of the template options for your CAP advertising schedules, SA will size and customize the ad for you free of charge. Customization may include the addition of a company/staff photo, company logo, contact information and other business taglines, state license number, and up to three promotions or offers of your choice. To view the creative template options available for the current CAP program, please visit the Resources section of LennoxDealerMarketing.com or talk to your SA advisor.

Full Service dealers who choose to not utilize the creative template options mentioned above can design their own creative to be used for their CAP advertising schedules. All creative must be co-branded with Lennox and no other competing manufacturer and comply with the Lennox Brand Guidelines. Full Service package dealers must get approval on the creative from their SA advisor before it is finalized and put in market. You may also visit the Resources section of LennoxDealerMarketing.com for details.



LENNOX MARKETING AND BRAND ASSET

As a CAP dealer, we ask that you have Lennox representation on your website.

Your website must:

- Feature the Lennox Logo (not just copy mentions)
- Feature Lennox Products
- Give prominence to the Lennox brand: representation must be greater than or equal to other manufacturers

If you're looking for Lennox logos, product images, lifestyle photos, videos, and other marketing assets for use on your website and/or marketing and advertising efforts outside of CAP, Lennox has a library of branded assets for dealer use.

Visit [LennoxPros.com/partner-resources/marketing/brand-assets](https://lennoxpros.com/partner-resources/marketing/brand-assets) to view and download. In that same library, you will find the Lennox Brand Guidelines. We strongly encourage you to review the guide and share it with anyone assisting you with your marketing.

The Lennox Brand Guidelines is designed to help ensure consistency of the Lennox brand by providing instructions and proper use of our colors, typefaces, trademarks, photography, and other assets.

REPORTING AND TRACKING

Importance of Tracking Marketing Effectiveness

Measuring the effectiveness of a marketing plan is critical to ensure you are getting a positive return on your investment. You simply cannot effectively measure campaign success without it. It is also important in determining if the campaign goals are being met or if shifts in the plan are needed to reach those goals. Campaign tracking can be accomplished through the CAP program by using a call tracking line for print campaigns or using a Google Tag Manager (GTM) code for digital campaigns.

Most people are familiar with call tracking lines, which provide a unique phone number to be included on collateral for a specific campaign. A call tracking number should be utilized on the ads to help track effectiveness. The consumer dials the call tracking line and is seamlessly transferred to the dealer's business, and we are able to track that call directly back to the marketing campaign. In addition to tracking the effectiveness of your campaign, you will have access to the phone call recordings to assist you with Customer Service Representative (CSR) training, if needed.

The GTM code is a tracking code added to the back end of a website that allows for expanded reporting for a digital campaign as well as for remarketing efforts to be included in the campaign. We will provide you with the GTM code to install on your website.



Common Call Tracking Concerns

CONCERN: My customers know my phone number. I don't want to cause confusion if they don't recognize my phone number.

REPLY: Call tracking lines are used to evaluate marketing efforts with the goal of attracting NEW customers. New customers will not notice the difference between your office phone number and the call tracking line. The benefits gained from utilizing the call tracking line far outweigh the potential confusion.

CONCERN: What if a new customer saves the call tracking line as my phone number in their phone? If I no longer have that call tracking line, they won't be able to reach me.

REPLY: With the ease of access to online search engines, consumers are no longer saving business phone numbers in their phones. Instead, they turn to Google to search for a business phone number at the time it is needed, which is why it is important to maintain a solid online presence.

CONCERN: I have my own call tracking line. Do I have to get one through CAP too?

REPLY: If you already have your own call tracking line established, you do not need to purchase another one through CAP as long as the line you already have isn't being used for other advertising. If the line is being used for other advertising as well, you will not be able to identify which calls are coming from your CAP efforts and which are coming from your other efforts.