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## 2025 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 designed to help our dealers effectively advertise their businesses in local markets, while receiving exclusive benefits to help close sales at the kitchen table with their homeowners.

Are you new to the HVAC marketing world, or a seasoned marketer? We are here to help both!

We recognize that dealers often juggle multiple roles in running their businesses, which may leave them with limited time or resources to master marketing. We also acknowledge that some dealers are more marketing-savvy and have experience managing their advertising plan. With the CAP program, you can find tactics to help kick start your advertising journey or enhance the activities you are currently completing on your own.



# HOW CAN CAP HELP ME GROW MY BUSINESS?

Lennox has teamed up with Strategic America (SA) to give our dealers a team of advertising experts, while saving time and resources, to implement customized marketing strategies to help strengthen and grow their businesses.

You will be provided with a dedicated agency advisor to help you create the most effective advertising strategy for your business - with agency fees covered by Lennox. In addition, you will get financial benefits, like Consumer Rebates, SPIF, and Co-Op Marketing Funds.

## Your CAP Agency

### **Strategic America**

As a Lennox trusted partner for more than 40 years, Strategic America (SA) is your dependable partner for your tailored marketing and advertising needs. With fully integrated, personalized strategies and data-driven results, SA is here to support your unique goals and drive your business forward. Here is what you receive by partnering with SA.

- Partnership with Strategic America – Agency Fees covered by Lennox
- Lennox pays for most of Strategic America agency services, so your investment in the CAP program goes entirely towards advertising your business in your local market. Strategic America also offers completely objective and unbiased media strategies and recommendations.

Agency services include the following:

- 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.
- 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 know and remember your brand when they see it, hear about it, or think about it in everyday life. Incorporating brand awareness tactics to your marketing plan is key to your success and growth.

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 is the process of attracting and identifying potential consumers who are looking to install or repair HVAC equipment. The goal is to turn these leads into paying customers by nurturing and guiding them through the sales process.

### 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 filling out a contact form or signing up for a consultation.

**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.

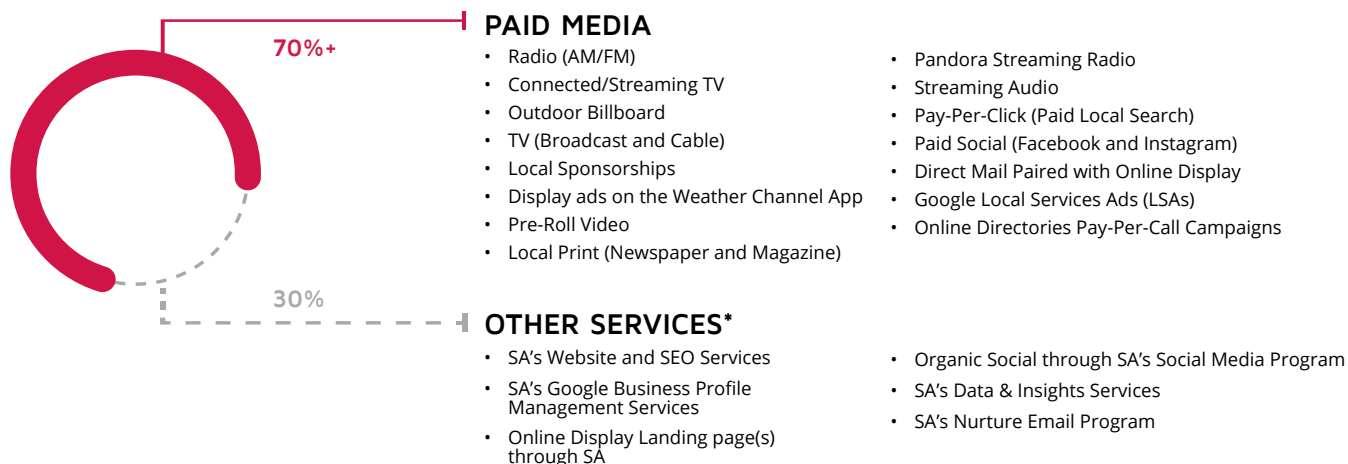
# CAP MEDIA OPTIONS

## 2025 CAP Media Options

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

For more detailed descriptions of each tactic, visit the Resources section of [LennoxDealerMarketing.com](https://www.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.

Full Service dealers have the option to use a portion of their CAP investment for other agency services. 70% of their base package investment must be used on Paid Media.



\*Up to 30% of a dealer's CAP investment can be used on other services listed above. Anything above this amount, will be an add on to their CAP investment. Please connect with your CAP agency advisor to learn more.



# CAP BENEFIT OVERVIEW

## Overview of Benefits

As a CAP dealer you get access to exclusive benefits to help you close sales with homeowners at the kitchen table.

- **Easy Monthly Billing**
  - 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 2023, the website received nearly 5.1 million site visits, generated 260,000 dealer searches, and sent 121,000 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, accrued based on your Lennox purchases. The funds are kept in an account that you can use to help pay for certain activities up to 60%. Activities include but are not limited to:
    - > Your CAP package investment
    - > Other advertising and marketing efforts outside of the CAP program
    - > Approved training courses and programs
    - > Lennox-branded apparel or signage
  - **Please refer to the Co-op Guidelines for more details on eligible items.**
- **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.
- **Access to Comfort Advisor Sales Performance Incentive Fund (SPIF) 100% Lennox funded**
  - Reward your comfort advisors for selling eligible equipment through the SPIF program.

## What Should I Expect?

- **Enrollment:** Visit [LennoxDealerMarketing.com](http://LennoxDealerMarketing.com) to enroll and pick 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 SA advisor will reach out to you with a welcome email and to schedule a discovery call. During this call, the advisor will ask questions gain a deeper understanding of your business, your marketing efforts outside of the CAP program, your marketing goals for the upcoming year, and your previous marketing performance and effectiveness.
- **Media Strategy and Recommendation:** After the discovery call, your SA advisor will use the insights gathered to develop an advertising strategy with recommendations. They will then share this with you for feedback and approval.
- **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 page 13 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 Fund Updates:** Your agency advisor will email monthly updates regarding your CAP funds, 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 advisor.

## Helpful Tips

Successful 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](mailto:lennoxproofs@strategicamerica.com) with instructions to visit [LennoxDealerMarketing.com](http://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.
- **Measure Marketing Effectiveness:** For certain digital tactics, SA will need your assistance to install a tracking code on your company website. For some traditional tactics, call tracking numbers may be recommended. These measures will enable effective campaign reporting and give you visibility into the campaign's performance.



# 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.

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**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.

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**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.

# Frequently Asked Questions

## How do I enroll?

1) Visit [LennoxDealerMarketing.com](https://LennoxDealerMarketing.com)

2) If it's your first time on the site, click on the New User link, which will prompt you to enter your email address and 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 an "We are unable to find a user based on the information entered" message, please email us directly at [CAPProgram@Lennox.com](mailto:CAPProgram@Lennox.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 month, i.e. February will be sent at the end of January, and the invoice will be paid in February.

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](mailto: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](mailto:CAPProgram@Lennox.com).

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

There are deadlines throughout the year for when media plans need to be finalized with SA. These deadlines will be communicated to Full Service dealers by email as well as posted to the Resources section of [LennoxDealerMarketing.com](https://LennoxDealerMarketing.com). We want you to be able to utilize all of the media types available, so please take note of the media deadlines and work directly with your advisor to make arrangements ahead of the deadlines.

Every September, there's a final deadline for new media plans/approvals using CAP funds. A few exceptions may be made when possible after the final deadline date; however, all funds MUST be allocated toward an advertising plan with SA no later than November 15, 2025. After November 15, any unallocated CAP package funds will be forfeited and not refunded back to you.

A dealer has the option to cancel out of the CAP program at any time throughout the year and can do so by notifying their Lennox Territory Manager and their SA advisor in writing. At that point all CAP program benefits will terminate. SA will work to cancel any upcoming planned

## Frequently Asked Questions (cont.)

media to the best of their ability. As of the termination date, dealer will forfeit any amounts remaining of the total annual investment amount which have been paid to Lennox.

Lennox reserves the right to cancel a dealer's CAP package at any point if the relationship or account status changes.

### **What is the difference between CAP funds and Co-Op Marketing Funds?**

CAP funds are a dealer's CAP investment, i.e., what the dealer is choosing to invest in the CAP program to be spent on co-branded advertising efforts in their local market.

Co-Op Marketing Funds, on the other hand, are dollars earned through a dealer's Lennox purchases. Dealers can submit claims in the Co-Op portal to receive reimbursement up to 60% of the cost of the co-branded activity using these accrued funds. Dealers can submit claims throughout the year in a variety of ways, including, but not limited to, co-branded advertising, approved training courses and programs, Lennox-branded vehicle wraps, and Lennox-branded apparel and signage. If the dealer elects to do so, Lennox will submit a dealer's monthly CAP invoice as a claim, to get this reimbursed up to 60% if the funds are available.

Visit [LennoxPros.com/Coop-Account-Launch](http://LennoxPros.com/Coop-Account-Launch) for more information about the Co-Op program and to access your earnings dashboard. If you would like to start/stop Lennox from submitting your monthly CAP invoice on your behalf for Co-Op reimbursement, please email us directly at [CAPProgram@Lennox.com](mailto: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. SA can work with the dealer and their local marketing team to determine how to best use the dealer's CAP funds to complement their existing marketing plan.

### **Can I enroll in a Full Service package if I have my own media rep and/or pre-negotiated contract?**

If you have a pre-negotiated rate or schedule with a particular media outlet, be sure to tell your agency advisor during the initial discovery/planning phase. As long as the contract or schedule is for traditional media efforts, all CAP program requirements are met and SA is informed before the media is officially purchased, the agency can work directly with your media outlet rep to finalize the schedule using your CAP funds. Digital media, however, needs to be set up and executed by SA. Full Service CAP package funds cannot be used for digital campaigns executed and managed outside of SA.

# LENNOX MARKETING AND BRAND ASSETS

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.



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# 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](http://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](http://LennoxDealerMarketing.com) for details





# CAP 2025 PACKAGE OPTIONS

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

\*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

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

## LENNOX CORPORATE MARKETING

PROGRAM	MAILBOX	PROGRAM MANAGER
CAP program and billing	CAPProgram@Lennox.com	Lizet.Lopez@Lennox.com
Co-op Marketing Funds program	LnxMktPromote@Lennoxind.com	Shanee.Meeks@Lennox.com
Consumer Promotions and SPIF program	Consumer.Promotions@Lennoxind.com	Lynn.Shepherd@Lennox.com
Comfort Shield	ComfortShield@Lennoxintl.com	Kandice.Hines@Lennox.com
Premier Dealer program	PremierDealer@Lennoxind.com	Rachel.Hicks@Lennox.com

## SERVICE FINANCE

877-661-6793 or [info@svcfm.com](mailto:info@svcfm.com)

## DEALER PROGRAM SUPPORT

Consumer promotion and comfort advisor SPIF claims: [ContactUs@MyLennoxSPIF.com](mailto:ContactUs@MyLennoxSPIF.com) or 1-800-941-1379

Co-op claim submissions outside of CAP: [lennoxind@360incentives.com](mailto:lennoxind@360incentives.com) or 877-316-8890