

# 2013 Market Development Funds Co-op Claim Form



Date: \_\_\_\_\_ Claim Description (for credit reference): \_\_\_\_\_

Company: \_\_\_\_\_ Contact: \_\_\_\_\_

Account Number – Location Number: \_\_\_\_\_ – \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**TYPE OF CLAIM:** **Commercial** **Residential**  
 Buildings  Combustion  
 Combustion  Homes

Claim		Total \$ Spent	Reimbursement Requested
<b>Print Materials-100%</b> (attach printed piece, net invoices)	<b>Print Materials</b> include newspaper or magazine advertising, monthly flyers, literature and catalogs. Print materials must feature and promote the sale of Honeywell products. The Honeywell logo must also be present and printed in accordance with Honeywell corporate identity standards. <a href="http://www.honeywell.com/sites/brandM/logolibrary.htm">http://www.honeywell.com/sites/brandM/logolibrary.htm</a>		
<b>Web Sites-\$125/Product</b>	<b>Web Sites</b> featuring and promoting the sale of Honeywell products are eligible for 100% reimbursement (space dedicated to Honeywell), or \$125 per product, per year, per site.		
<b>Direct Mail Advertising-100%</b> (attach original copy, net invoices)	<b>Direct Mail Advertising</b> including postcards, flyers or newsletters. Direct mail must feature and promote the sale of Honeywell products. The Honeywell logo must also be present and printed in accordance with Honeywell corporate identity standards.		
<b>Training Programs-100%</b> (attach course info such as brochure, flyer, etc and receipts)	<b>Training</b> taught by Honeywell salespeople or Honeywell approved product experts designed to provide technical or sales training to your sales staff or dealer customers on Honeywell product. Includes Honeywell product for customer-built demo boards, or demo boards provided by Honeywell. <u>Marketing pre-approval needed for customer-built demo boards.</u> <b>Food and Beverage</b> only when ordered in conjunction with a Honeywell training program or event. Alcohol is not reimbursed. <b>Space/AV Rental</b> only when needed/used for a Honeywell training program or event.		
<b>Trade Shows-100%</b> (attach photo, net invoices)	<b>Trade Shows</b> designed to feature and promote the sale of Honeywell products. Reimbursement must include a photo of the show space.		
<b>Open House Fees-100% or 50%</b> (attach flyer, net invoices)	<b>Open House Fees</b> reimbursement is 100% when staffed by Honeywell sales person; otherwise reimbursement is 50%.		
<b>Honeywell Literature-100%</b>	<b>All literature ordered</b> on <a href="http://www.literature.honeywell.com">www.literature.honeywell.com</a> is eligible for 100% reimbursement.		
<b>Point-Of-Purchase Displays and Demos-100%</b> (attach net invoices)	<b>Honeywell P.O.P and Demo boards</b> created by Honeywell are available in catalogs and <a href="http://www.displayarts.com/honeywell">www.displayarts.com/honeywell</a> . Demos must be displayed at the distributor/contractor location.		
<b>Sales Promotion Program Pre-approval required</b> (attach promo, proof of purchases, net invoices)	<b>Sales Promotion Programs</b> designed to increase the sale or drive growth of Honeywell products over a limited period of time. Pre-approval by marketing is required. <ul style="list-style-type: none"> <li>Promotional merchandise must be ordered in conjunction with sales promotion programs</li> <li>Promotional expenses should not exceed 5% of the Low Wholesale Net cost of the products being promoted</li> <li>Reimbursed at 100% if merchandise is purchased from Honeywell's authorized merchandise companies. Reimbursed at 25% if merchandise is purchased from a company other than one of the authorized merchandise companies listed below.</li> <li>Proof of product sale or purchase report for each participating individual must be included in reimbursement request</li> </ul> <ul style="list-style-type: none"> <li>Staples Promotional Marketing 800-432-8118, Kiristi Kiernat <a href="http://honeywell.promocollection.com">http://honeywell.promocollection.com</a></li> <li>Barker Speciality 800-227-5377, Jennifer DiStasio <a href="mailto:jennifer@barkerspecialty.com">jennifer@barkerspecialty.com</a> <a href="http://www.honeywellpromotionalproducts.com">www.honeywellpromotionalproducts.com</a></li> </ul>		

Please submit the completed form and proper documentation to your local Honeywell Sales Representative.

Claims are processed ONLY when submitted by a Honeywell Sales Representative as their approval is required; we ask that you do not send directly to Honeywell.

<b>Total</b>	
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# 2013 Market Development Funds

## Terms, conditions and additional program information



### Goal of the Program

The Market Development Fund (MDF) program was designed by Honeywell to put funds into the local market with partnering distributors to significantly grow Honeywell product sales. Market Development Funds are available to all Honeywell Distributor partners based on purchases from the previous funding year (July 1, 2011- June 30, 2012). Honeywell treats this money as its own and requires a return-on-investment. Honeywell provides these funds to distributors based on distributor growth performance and sales.

When requesting pre-approval, channel marketing will require:

- An overview of the proposed program
- Timing - Duration of promo
- Account YOY Sales Growth (+/-)
- Honeywell share in the product category of the proposed promotion
- Expected revenue growth, source of growth, and/or risk aversion metrics:

#### *Examples include:*

- Displacement of competition
- Whether MDF may be paid retroactively i.e. at the completion of the program once sales goals have been achieved.
- Product expansion i.e. the addition of a new thermostat
- Line expansion, i.e. the addition of a new line like Humidifiers

### Terms and Conditions

- All eligible activities will be reimbursed at the rate of one-hundred percent (100%) of Honeywell content except where noted.
- Co-op reimbursements will be issued as a credit to the qualifying Distributor's Honeywell account according to their billing address. Additional notes on credit memos and/or checks is not possible.
- Qualifying Distributors must be in compliance with existing Honeywell purchase agreements and must be current with their credit.
- If your request is outside these guidelines, please obtain pre-approval from Honeywell Marketing. See pre-approval guidelines.
- MDF may be lost if advertised prices are below Honeywell's Minimum Advertised Pricing (MAP).

### Claim Submittal

1. All requests must be submitted by a Honeywell Sales Representative
2. Include proper documentation such as: printed piece, sales promotion program specifics, or photo of trade show / open house space. At least one supporting document must be submitted with each submittal. Please note that the claim form alone does not qualify as proper documentation.
3. Copies of invoices and/or receipts clearly showing the date and cost of the activity are required.

4. Include proof of sale or purchase report for each participating individual (if a sales promotion program).
5. All reimbursements will be issued as a credit memo to the Distributors account. Please allow 30 business days for your request to be processed and your credit to be issued.
6. All requests for reimbursement must be filed within 60 days of the activity or the invoice date. Requests for reimbursement of funds must be submitted no later than January 30 for the previous calendar year.
7. Previous year's remaining balances may not be applied towards the current year's activities.

### Program Management

Honeywell reserves the right to deny any request for reimbursement. Unspent funds, which exist at the end of the calendar year, will not be rolled into subsequent Market Development fund programs, if any.

If 50% of the total annual beginning MDF balance has not been submitted or committed for co-op reimbursement before June 30th of the calendar year, 50% of the remaining balance will be eliminated. All commitments must be submitted through salesforce.com. by June 30th. Submission will reserve funds for the remainder of the year, but it does not guarantee that the midyear activities themselves are approved. The remaining balance is available for the rest of the year (July – December).

### Non-eligible Reimbursements Without Pre-approval by Marketing:

- Transportation, travel or trips including airfare, vehicle rental, hotel sleeping rooms, taxi fares, gas, gratuity, etc.
- Food and beverage for business meetings or customer entertainment (unless specified above)
- Envelopes and postage for direct mail (see above)
- Conceptual or production development costs from outside vendors
- Cash awards, gift cards or gift certificates
- Product or product installation (except where noted above in Honeywell Training Programs Section)
- Sponsorship

**NOTE:** If seeking funding for activities like tradeshow, direct mail or advertising, which may include the promotion of other manufacturer/ competitive products or logos, Honeywell will only reimburse 50% of the percentage of the piece in which Honeywell is represented. For example, if Honeywell is represented on one page of a four-page flyer (the other pages being other manufacturers) and the flyer cost is \$1000, Honeywell will pay 50% of the one page, or \$125.