



resideo pro PERKS

# PROGRAM OVERVIEW GUIDE

Welcome to the

# **RESIDEO PRO PERKS LOYALTY PROGRAM**

Congratulations on joining Resideo's Pro PERKS loyalty program. We are proud to have you onboard and look forward to your participation and continued success as one of our valued customers!

We are committed to supporting and enabling our professional contractors as we move forward together in the world of the Connected Home.

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# RESIDEO PRO PERKS LOYALTY PROGRAM OVERVIEW

The Resideo Pro PERKS Loyalty Program offers your company the ability to earn even more with every dollar spent on Resideo products along with a collection of benefits that can help you grow your business.

## See how P.E.R.K.S. works for you

P.

### PERFORMANCE

Earn up to 4% back on your Resideo product purchases!

(Tiers: Silver = 2%, Gold = 3%, Platinum = 4%)



E.

### ENABLEMENT

Take advantage of our cutting-edge digital marketing platform and receive marketing support. We'll share tips to help you grow your brand, source new leads, and win new business!



R.

### REWARDS

Redeem your Resideo Pro PERKS points towards Product Certificates, Co-Op marketing activities, promotional merchandise, or employee rewards.



K.

### KNOWLEDGE

Access Resideo's world-class library of training offerings that includes self-paced, online courses and webinars in addition to live, in-person and virtual classroom training.



S.

### SERVICES

Receive the Resideo Pro PERKS monthly newsletter with updates on the latest program benefits, product technical tips, training schedule and much more!



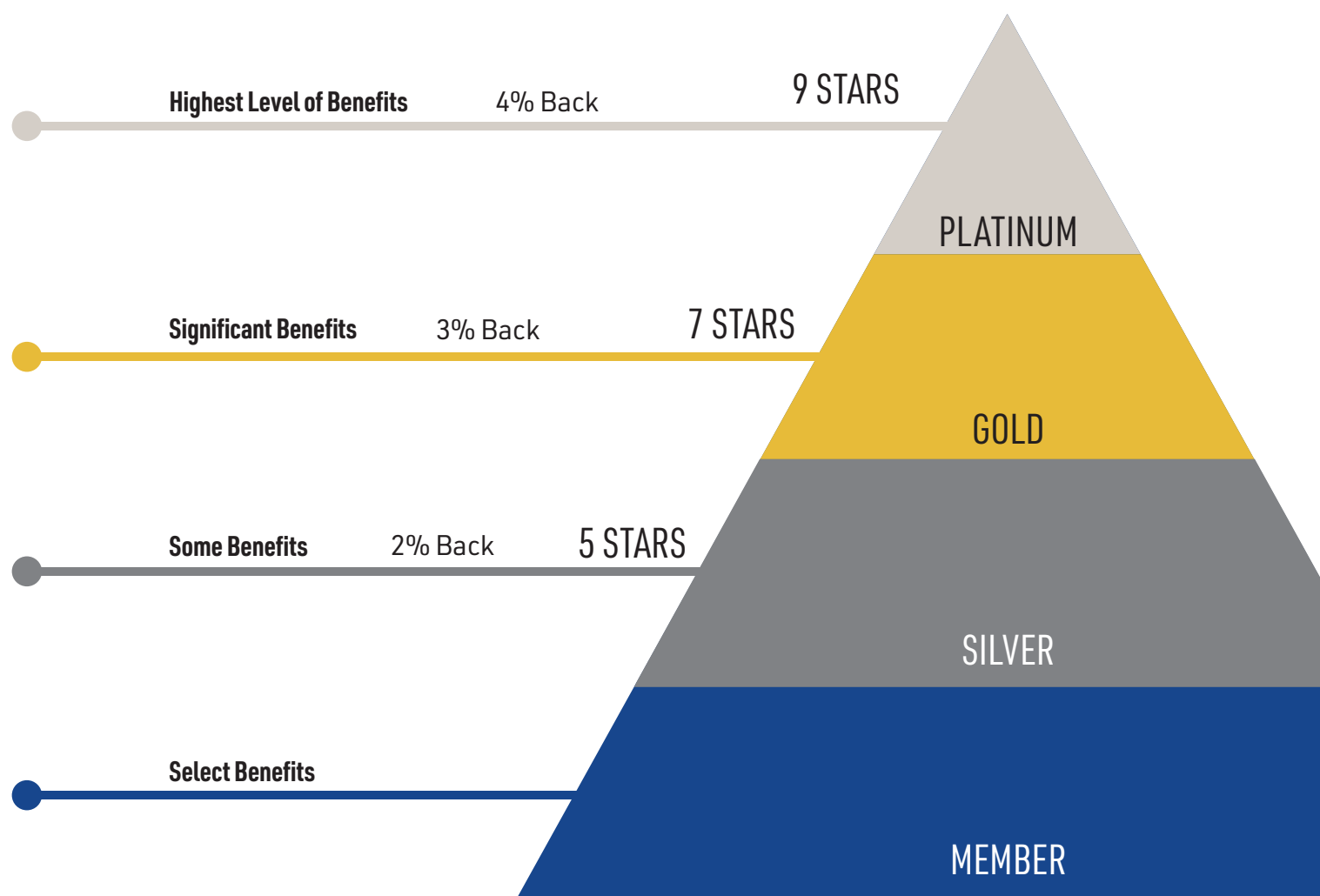
# PROGRAM ELIGIBILITY

The program is open to all contractors in the HVAC, Electrical, and Plumbing industry. Resellers and individual consumers are excluded from the program.

# PROGRAM TIERS

The higher your tier, the more rewards you earn.

Note: detailed tier qualification can be found in the "Tier Qualification Criteria Overview" section of this document.



**NOTE:** Your total star count will determine your tier level for the current year. Accounts are tiered annually.



# TIER QUALIFICATION CRITERIA OVERVIEW

Pro PERKS is a flexible program designed to work for you. Tiers are decided annually based on the total number of stars earned from the previous year's spend using the (4) qualification criteria listed below.

Net purchase volume & eligible purchases disclaimer: All purchases as part of the program are calculated as net of any returns or adjustments. Resideo maintains the authority to retroactively adjust tier status and points earned as returns and adjustments are processed.

Eligible Purchases: Resideo product purchases that are listed on our current **QUALIFYING PRODUCT LIST**, as reported by Resideo distributors, **are eligible** under the program.

## PLEASE NOTE

The current qualifying product list is subject to change without notice

## 1. YEAR-OVER-YEAR GROWTH CRITERIA

Each year, you will be measured on your YoY growth of annual Resideo purchase volume, with the opportunity to earn a maximum of 2 stars.

Year-over-Year Growth	5%	1 Star
	10%	2 Stars = Max

**NOTE:** Your total star count will determine your tier level for the current year. Accounts are tiered annually.

## 2. PRODUCT MIX CRITERIA DETAIL

Each year, you will be measured on your spend across Resideo's product portfolio as a % of your total Resideo spend, with the opportunity to earn a maximum of 4 stars.

Product Mix	Thermostats	35% of total purchase spend	1 Star earned per product mix category achieved
	IAQ	10% of total purchase spend	
	Zoning	5% of total purchase spend	
	RTS	5% of total purchase spend	
	Water	5% of total purchase spend	
	Connected*	30% of total purchase spend	4 Stars = Max

**NOTE:** Thresholds are subject to change each year.

\*Anything that connects to a network

## 3. TRAINING CRITERIA DETAIL

Each year, you will be measured on the number of Resideo training hours completed by you and/or your employees. Training will allow you to earn a maximum of 2 stars.

Training	8 man-hours	1
	16 man-hours	2 = Max

**NOTE:** Thresholds are subject to change each year.

## 4. ANNUAL VOLUME DETAIL

Each year, you will be measured on your total annual Resideo spend. Annual volume detail will allow you to earn a maximum of 4 stars.

Qualifying Purchases	\$10,000	1
	\$50,000	2
	\$125,000+	4 = Max

**NOTE:** Thresholds are subject to change each year.

# How to gain Stars and move up in Tier next year!



### MEET SPECIFIED GROWTH THRESHOLDS

Achieve 5% YOY growth = 1 Star

Achieve 10% YOY growth = 2 Stars

(2 Stars - Max)



### ACHIEVE DIVERSIFIED PRODUCT MIX

Achieve 1 Product Mix category = 1 Star

Achieve 2 Product Mix categories = 2 Stars

Achieve 3 Product Mix categories = 3 Stars

Achieve 4 Product Mix categories = 4 Stars

(4 Stars - Max)



### PARTICIPATE IN QUALIFIED RESIDEO TRAINING

Complete 8-man hrs. of training = 1 Star

Complete 16-man hrs. of training = 2 Stars

(2 Stars - Max)



### MEET SPECIFIED VOLUME THRESHOLDS

Purchase \$10k = 1 Star

Purchase \$50k = 2 Stars

Purchase \$125k = 4 Stars

(4 Stars - Max)

# QUALIFICATION STARS REQUIRED BY TIER

At the end of each year, your total "Qualification Stars" earned for each criterion are added up to decide your tier for the following year.

## PROGRAM BENEFITS

Pro PERKS offers an expansive suite of benefits. The benefits available to you are decided by your tier. The higher the tier, the more benefits you earn. Some benefits will require the use of your earned points, but many are included free of charge just for qualifying for that tier.

	<div> <span>● Included in Tier</span> <span>○ Points Required*</span> </div>			
	Member	Silver	Gold	Platinum
<b>Points per \$1 spend</b>	0 point/\$1	2 point/\$1	3 point/\$1	4 point/\$1
<b>Find A Pro Listing Priority</b>	4th	3rd	2nd	1st
<b>Marketing Assets</b> Emails, Literature Content and Social Media	●	●	●	●
<b>Online Sales/Technical Training</b>	●	●	●	●
<b>Webinars</b>	●	●	●	●
<b>Exclusive Digital Content and Support</b>				●
<b>Co-Op Funds</b>		○	○	○
<b>Resideo Product Certificates</b>		○	○	○
<b>Resideo Branded Merchandise</b>		○	○	○
<b>Luxury Rewards Catalog</b>		○	○	○

\* Points required to redeem these benefits.

### Point Earning Rates

For each dollar spent on Resideo residential products, you earn points. The rate at which you earn points is decided by your tier.



# FINANCIAL BENEFIT DEFINITIONS

You can spend points in a variety of ways:

## RESIDEO PRODUCT CERTIFICATES

Product certificates can be redeemed for Resideo products at qualifying Resideo distributors. Product certificates can be bought (with points) in increments of \$50 and are eligible for use towards the product subtotal amount.<sup>1</sup>

## CO-OP FUNDS

The Co-Op Program applies to a wide variety of campaigns and promotional activities, including advertising, digital marketing, events, printing, promotional (logo wear), signage, and training programs. Co-Op funds can be bought (with points) and used towards an approved marketing activity. Approved claims will be processed as a check back to your business.

## CO-OP PRE-APPROVAL

All Co-Op Marketing initiatives require pre-approval. Please allow up to 2 weeks for approval. Reimbursement for pre-approved activities will be made up to 50% unless otherwise noted.

## CO-OP PROOF OF PURCHASE CRITERIA

Proof of Performance documentation is needed for claim reimbursement, including calculating the return on investment. Please refer to the Co-Op Program Guidelines for specific details.<sup>2</sup>

## RESIDEO BRANDED MERCHANDISE CATALOG

Resideo branded merchandise includes t-shirts, hats, mugs, and more. Resideo Branded merchandise can be bought (with points) through Resideo's Rewards catalog. Merchandise will be shipped directly from the catalog vendor. Any import duties and/or fees will be billed separately and are the responsibility of the contractor.

## LUXURY REWARDS CATALOG

Luxury items include Health & Beauty, House & Garden, Technology items (i.e., TVs, iPads, etc.), Accessories, and Travel Experiences. Luxury items can be bought (using points) through Resideo's Rewards catalog. Items will be shipped directly from the catalog vendor. Any import duties and/or fees will be billed separately and are the responsibility of the Contractor.

## NOTES:

1. Taxes, shipping, and handling fees are ineligible.
2. Co-Op funds must be used towards an activity that occurs within the same calendar year in which the funds were acquired. Any unused funds will expire on the second to last business day of the calendar year in which they were issued (typically on 12/30); they will not carry over into the next calendar year nor can they be applied toward funding an activity that takes place in the following calendar year. The deadline for Pre-Approvals is Dec. 15th of each calendar year.



## EDUCATIONAL BENEFITS DEFINITIONS

### ONLINE TECHNICAL/PRODUCT TRAINING

Unlimited access to the Resideo online LMS with content to enhance technical knowledge (product specifications, installation, maintenance, etc.). Training will be accessible from a desktop computer as well as mobile devices. (e.g., smart-phone, iPad, etc.).

### ONLINE SALES TRAINING

Unlimited access to the Resideo online LMS with content to enhance sales tactics/knowledge (needs assessment, negotiation, overcoming objections, etc.) Training will be accessible from a desktop computer as well as mobile devices (e.g., smart-phone, iPad, etc.).

### WEBINARS

Unlimited access to Resideo's online seminar series. Resideo personnel walk participants through a wide range of topics including industry trends, sales tactics, installation tips, as well as Resideo product offerings (e.g., NPIs (New Product Introductions), industry trends, etc.). Webinars will be posted to the Resideo PERKS website and available for on-demand consumption.

## SALES & MARKETING BENEFIT DEFINITIONS

### SOCIAL MEDIA "BEST-PRACTICES" AND CONTENT

Social media marketing, best-practices guide, and unlimited access to Resideo's bundled and prepared social media content and campaigns (i.e., social media, literature, sales sheets, images, etc.). Content will be posted from the Resideo Pro PERKS Marketing Tools portal and available for download.

### CO-BRANDED DIGITAL MARKETING MATERIAL

Unlimited access to Resideo branded marketing material to support the sale of Resideo products. This includes turnkey collateral such as email templates and digital flyers. Additionally, high-resolution images will be available for partners to use for websites, catalogs, etc. Content will be posted on the Resideo Pro PERKS Marketing Tools portal and available for download.

### 1:1 MARKETING SUPPORT

For our platinum participants, click on the Marketing Tools link from the Pro PERKS dashboard and select the 1:1 Marketing Support link to set up a time to meet with one of our marketing experts.

### EXCLUSIVE DIGITAL MARKETING ASSETS & SUPPORT

For our platinum participants, we offer very exclusive digital marketing assets and support that includes videos, social media content, co-branded collateral, pre-written and approved email content, and more.

# PUBLIC FACING STATUS GUIDELINES AND POLICIES

Below are the public-facing guidelines for advertising your Pro PERKS tier status:

Tier	Status Guidelines
Platinum	They can use the term Resideo Pro, Resideo Pro Platinum, Resideo Platinum, on any digital or non-digital assets
Gold	They can use the term Resideo Pro, Resideo Pro Gold, Resideo Gold on any digital or non-digital assets
Silver	They can use the term Resideo Pro, Resideo Pro Silver, Resideo Silver on any digital or non-digital assets
Member	They cannot use the term "Resideo Pro" on any digital or non-digital assets

## POINTS EXPIRATION POLICY

All points will expire on a rolling 12-month bases, determined from the date of deposit into your account.

Example: Points awarded February 17, 2021, will expire at midnight on February 17, 2022.

## POINTS RETURN POLICY

Once points have been redeemed towards any reward (i.e., Co-Op funds, product certificates, etc.), they cannot be refunded. Also, any unused funds cannot be converted back into points.

## MID-YEAR REGISTRATION

Customers may register for the program at any point throughout the year. Once registered, you will be placed into the tier you qualify for based on the four (4) criteria above using the previous year's sales history as reported by any participating Distributors. Your tier status will remain in effect until the following year when your account is re-tiered (accounts are tiered on an annual basis). Unfortunately, if no historical sales data is available for us to use to tier your account, then your account will be tiered as "Member" for the rest of that year.

## PROGRAM CHANGES

Resideo retains the authority to change any element of the program, at any time, without advance notice.

# YOUR ACCOUNT

01

## HOW DO I CANCEL OR CLOSE MY ACCOUNT?

You may cancel or close your account at any time by sending written notice of cancellation to [proPERKS@resideo.com](mailto:proPERKS@resideo.com). All unredeemed points, redemption awards, and promotional awards as well as achieved tier status will be lost and may not be reinstated or transferred.

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## HOW CAN I FIND MY PRO PERKS LOYALTY NUMBER?

Your Pro PERKS account number can always be found in the top left corner of your dashboard

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## HOW DO I CHANGE THE COMPANY NAME ON MY ACCOUNT?

To protect your valuable points, name changes must include supporting legal documentation, signature, date, and Pro PERKS account number. All other name changes can be done by the company administrator on their account profile. For further help, please contact [proPERKS@resideo.com](mailto:proPERKS@resideo.com).

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## HOW DOES OUR COMPANY ENSURE WE ARE GETTING OUR POINTS FOR ALL RESIDEO PRODUCT PURCHASES?

You can reach out to [proPERKS@resideo.com](mailto:proPERKS@resideo.com) with any questions regarding distributor purchase reporting.



# RESIDEO PRO PERKS – FAQ'S

## 1. WHAT IS RESIDEO PRO PERKS?

Resideo Pro PERKS is a loyalty program specifically built for our Pros. PERKS is also an acronym for Performance, Enablement, Rewards, Knowledge, and Services.

## 2. WHY RESIDEO PRO PERKS? WHY NOW?

When we became our own entity as Resideo, we wanted to create a world-class loyalty program specifically for our Pros. After listening to our customers, we took the best parts from earlier programs to create the Resideo Pro PERKS Loyalty Program. Our primary goal is to help Pros differentiate themselves in the marketplace through a tiered system that rewards success.

## 3. WHAT CHANGED BESIDE THE NAME FOR THE RESIDEO PRO PERKS PROGRAM?

We have changed to a tiered status program with greater benefits to help you grow your business. The higher your tier status, the more benefits and points you can earn. We also created a [dashboard](#) that delivers everything you need to know in one place, including easy access to Co-Op for advertising/marketing activities, marketing tools, online training, as well as redeeming points for rewards.

## 4. WHAT ARE THE BENEFITS OF JOINING THE RESIDEO PRO PERKS LOYALTY PROGRAM?

Resideo Pro PERKS provides access to marketing tools, assets, and support to create powerful campaigns that can help you grow your business and strengthen your relationships with your customers. In addition, you have access to our world-class training curriculum to help you train your technicians and sales people.

## 5. HOW DO I JOIN AND ACTIVATE MY RESIDEO PRO ACCOUNT?

[Enroll](#) online as a Resideo [Pro](#) with your email address and create a password. You will then be able to enroll in the Pro PERKS loyalty program. Once you complete your online credentials, you will be able to manage your account information, view your account balance, and access all our great benefits to help you grow your business.

## 6. HOW MUCH DOES IT COST TO JOIN THE RESIDEO PRO PERKS PROGRAM?

Membership is free. Always. Simply complete the [online enrollment form](#) to join.

## 7. I WAS ALREADY TAKING PART IN ANOTHER RESIDEO LOYALTY PROGRAM. (I.E., CONTRACTOR PRO/CPRO). DO I NEED TO SIGN UP FOR THE RESIDEO PRO PERKS PROGRAM?

Yes, as a member of one of our legacy programs, you will need to register for the Resideo Pro PERKS loyalty program via the [online enrollment form](#). This allows you access to all our offerings with a single username and password.

## 8. ARE THERE TIERS OR IS EVERYONE THE SAME?

Starting on March 1, 2021, accounts will be tiered (Platinum, Gold, Silver or Member) based on the four (4) criteria outlined in this document using the previous year's data as reported by your Distributor. Accounts are tiered on an annual basis, so you can move up in tier to earn more benefits.

## 9. HOW WILL I LEARN ABOUT MY CURRENT LEVEL, AND THE CRITERIA SPECIFIC TO REACHING THE NEXT LEVEL? HOW WILL I LEARN HOW MANY CURRENT POINTS ARE AVAILABLE TO US, AND OUR TRAINING STATUS?

When you log into the [Pro PERKS Dashboard](#), you will see your current tier, available points balance, how close you are to the next tier, and how you scored against each category criteria.



# DISTRIBUTOR ACKNOWLEDGEMENT

All participants are advised to tell their Distributors that they are enrolled in the Resideo Pro PERKS Program and to include their purchases on their monthly reports. The company administrator will be able to log In to their dashboard to see the total number of points deposited into their Pro PERKS account based on the Distributors who report for them.

## How many points do I earn?

### Member

Customers in our "Member" tier status do not earn any points per dollar spend

### Silver

"Silver" members will earn 2 points per dollar spent on all qualified Resideo products and services

### Gold

"Gold" members will earn 3 points per dollar spent on all qualified Resideo products and services

### Platinum

"Platinum" members will earn 4 points per dollar spent on all qualified Resideo products and services

All participants are instructed to tell their Distributor that they are enrolled in the Resideo Pro PERKS Program and to include their purchases on their monthly reports.

## NEED MORE INFO?

For more information visit our complete Resideo [Terms and Conditions](#) as well as the [Terms of Participation](#) for Pro PERKS.



# REDEMPTION OF POINTS

## How do I redeem points?

The primary company administrator (the first person that enrolled the company into the Pro PERKS Loyalty Program) will control who in their company can redeem points. The company administrator can transfer points to other team members to allow them to redeem those points for rewards. If you do not know who the administrator for your company is or if you need to change the administrative contact to someone else, please contact your Resideo Sales Rep for help or email [proPERKS@resideo.com](mailto:proPERKS@resideo.com).

### CAN I BUY POINTS?

No, points can only be earned by purchasing Resideo products through participating Distributors who report transactional purchase data to Resideo.

### DO POINTS EXPIRE?

Yes, points will expire at a rolling 12-month pace. For example: Points earned on February 17, 2021, will expire at midnight on February 17, 2022.

### WHAT IF I DO NOT HAVE ENOUGH POINTS TO REDEEM FOR A SPECIFIC ITEM OR ITEMS?

You will need to wait to buy the item until you have enough points in your account.



For any additional questions or assistance  
please email us at [proPERKS@resideo.com](mailto:proPERKS@resideo.com)



**Join now at**  
[pro.resideo.com](https://pro.resideo.com)

**Questions?**  
[proPERKS@resideo.com](mailto:proPERKS@resideo.com)



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**AIR**



**SECURITY**



**WATER**



**ENERGY**