



# **2018 Porsche Dealer Marketing Covenant & PDMS Guidelines**

Porsche Cars North America, Inc.



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Porsche Dealer Partners,

Porsche has always been a unique company and brand with strong ideals. Our values and philosophies permeate everything we do to ensure that we always remain true to our core principles. These efforts are reflected through all communications at the national, regional, and dealer level with the objective of supporting Porsche as the most aspirational brand.

Enclosed within this document is the 2018 Marketing Covenant and PDMS Guidelines. The language included within it serves as a comprehensive guide and agreement between Porsche Cars North America and our dealer partners to support these collective brand ideals as well as our business model as a whole. Compliance with the standards in this document is a requirement in the 2018 Annual Business Plan document.

In order for dealers to qualify to participate in the 2018 PDMS Co-op Reimbursement program, dealers must submit their 2018 Annual Marketing Plan to their respective Area Marketing Manager or PDMS Representative, as well as link their respective PorscheDealer.com website's Google AdWords Account with the Google Analytics property accessible to our website provider platform by January 29, 2018.

Additionally, dealers are expected to fully adopt the new Porsche Corporate Identity in all communications by April 1, 2018.

We hope that this document and the related services provide our dealer partners with the framework to successfully support both the brand and your retail efforts. Please contact your Area Marketing Manager or PDMS Representative with any questions you may have regarding this document or your local Porsche marketing efforts.

Best Regards,

Joseph Hancock  
Dealer & Retention Marketing Manager  
Porsche Cars North America, Inc.

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# I. Introduction

Porsche has always been a unique company and brand with strong ideals. Our values and philosophies permeate everything we do to ensure that we always remain true to our core principles. We constantly strive to meet our own demanding goals, know who we are, and how we approach things. As a result, despite what others may be doing, we at Porsche continually seek to improve the value of our brand through all touchpoints, including our marketing communications. These efforts are reflected through all communications at the national, regional, and dealer level with the objective of supporting Porsche as the most aspirational brand.

Porsche Cars North America aims to work collaboratively with our dealer partners to further establish a comprehensive retail advertising and marketing platform at the local and regional level. The overall goal of these efforts is to establish a program that assists dealers in growing their business while building and strengthening the Porsche brand. To achieve this goal, all Porsche communications and messages must be designed and executed in a manner that reflects the values associated with the Porsche marque.

The tonality and messaging in all communications must support the Porsche brand while being respectful of Porsche customers and enthusiasts, the Porsche brand, and the Porsche dealer network.

This document, and the language included within it, serves as a comprehensive guide and agreement between Porsche Cars North America and the dealer partners to support these collective ideals as well as our business model as a whole. When a violation of these guidelines occurs, a dealer will be contacted directly by a Porsche Cars North America representative. For details regarding dealer penalties related to this document, dealers should contact their respective Area Marketing Manager.



## II.

# Advertising Guidelines

### **A.) Dealer Advertising Standards**

These advertising standards must be adhered to when advertising Porsche models within the United States. These standards apply to all advertising media including, but not limited to, print, radio, television, outdoor, point-of-sale materials, direct mail, experiential activities, website properties, online advertising, search engine marketing, social media, and promotional display properties.

### **B.) Advertising Language Supporting Price Premium**

The language used in advertising must focus on the unique attributes of the Porsche brand. Given our mission to position Porsche as the most aspirational brand, dealer advertising is more effective when it highlights excellent quality, e.g., design, workmanship, performance and value; specific product features and benefits; and other product attributes.

### **C.) Porsche Advertising Standards**

It is the responsibility of each individual dealer to ensure that all Porsche Corporate Identity (CI) and Trademark Guidelines are adhered to in all advertising. PCNA released a new Corporate Identity in August 2017 with the expectation that all dealers transition all creative assets over by the end of Q1 2018. These standards and advertising templates can be found on the Porsche Dealer Marketing Services website found via PPN.

1. It is required that if consumer pricing is utilized it must be MSRP for new vehicles, or Market Pricing for CPO vehicles. Advertising new vehicle pricing below MSRP is prohibited.
2. All language, including the words and numbers in the lease box, must be used in exactly the same style as that contained in national or PFS lease program advertising samples.
3. The disclaimer date in the ad must correspond to the lease program that is being offered. Additionally, the font size and proportion of the words and numbers in the lease box must be identical to the Porsche-provided ads.
4. Ads may be resized only if the integrity of the ad is not compromised; i.e., the content of the ad is not distorted or made too small.
5. Any use of the Porsche Trademark in advertising demands exclusivity and exclusivity can only be achieved through the use of clear separation. Clear separation is defined as a border or rule that separates two or more brands in an advertisement. In all magazine and newspaper advertising, there must be a clear separation between the Porsche trademark and any other brands on the same page. The portions of the ad dedicated to Porsche products must be fully CI compliant, promote an exclusive and premium image, and have their own key elements (e.g., headline, copy, high resolution images, disclaimer information, and dealership location).

## II.

# Advertising Guidelines

### C.) Porsche Advertising Standards (continued)

6. If a dealership group advertises multiple brands as one group, the Porsche portion of the advertisement must appear on its own and be clearly separated from any other automotive brands. The Porsche marque or logotype must appear at least ½ the width of the logo or image distance from any competing brand logos or imagery.
7. Dealers must utilize their official DBA (Doing Business As) name as the primary dealership name in all marketing materials and website properties.
8. For all dealer websites provided via PorscheDealer.com or the Porsche Dealer Digital Program, the DBA name must be the primary dealership name appearing on the website and as the URL address.
9. Any URL used for Porsche advertising included in the PDMS co-op program must direct only to the PorscheDealer.com or the Porsche Dealer Digital Program domain.
10. Dealers must not advertise new vehicle inventory in national print publications or outside their marketing area with corporate supported programs.
11. Dealers must respect trademark law. Trademarked or copyrighted material not owned or licensed by Porsche AG or Porsche Cars North America, Inc. should never be used unless written proof of permission is provided. This extends to music and video properties. PCNA recommends dealers consult their own legal counsel as needed.
12. Images need to be Porsche-approved marketing materials – any exception must be approved through the Area Marketing Manager or PDMS Representative.

## II.

# Advertising Guidelines

### D.) Pricing

1. Dealers may advertise their own price reference on new Porsche vehicles as long as it does not appear to be distressed in nature. PCNA Area Marketing Managers will make the ultimate determination of distressed price messages. Claims such as "best price," "cheaper," "discounted," "sale," or the inclusion of market support or consumer dollars are prohibited.
2. Porsche Cars North America requires that all new vehicle pricing conveyed to consumer be at MSRP.
3. Dealer must not advertise new vehicles pricing below base MSRP.
4. When advertising consumer pricing within CPO, Market Pricing should be utilized.
5. Promotion of specific discounts or factory-to-dealer incentives subtracted from the MSRP is strictly prohibited.
6. The word "price" must be avoided in all advertising, whenever possible: the acronym "MSRP" or the phrase "Manufacturer's Suggested Retail Price" is more accurate.
7. Advertisements featuring offers including a customer down payment in excess of 15% of the vehicle's MSRP are prohibited in all advertising.
8. When advertising monthly lease rates, dealers must not use "teaser" tactics. This includes using unrealistic lease terms that are deceptive to the reader, e.g., a \$100/month lease payment based on 100 months or \$100/month with \$10,000 down.

# II. Advertising Guidelines

## E.) Advertising Language & Tone

Advertising that highlights "low prices" degrades the Porsche brand and does not support the Porsche brand principle of exclusivity. Porsche should not be perceived as a product which is sold on the basis of price alone. Distressed advertising deflects attention away from the distinguishing features of Porsche models and creates an image inconsistent with the Porsche brand. Porsche vehicles are engineered for performance and the design and engineering that are incorporated into every model represents our core brand values. The advertising message should reflect this position.

1. Dealers must not engage in distressed advertising or use language that is demeaning to the brand image.
2. Porsche Cars North America prohibits dealers from engaging in non-factual or derogatory competitive comparisons in advertising. Any competitive comparisons must be done in a completely factual manner, with all comparative points substantiated.
3. Superlatives such as "biggest," "best," "largest," "first," "safest," "only," and other such phrases require significant disclaimers.
4. Dealers must not engage in either comparative or disparaging communications regarding other Porsche dealers. This includes dealers singling out other Porsche dealers and engaging in comparative communications regarding price, service, selection, or any other aspect of the customer purchase and ownership experience.
5. Non-compliant examples include, but are not limited to, the following terms and phrases that must be avoided:
  - Special Purchase, Special Allocation, Factory-to-Dealer Incentives, Overstocked, Close-out, Clearance, Outlet Sales, Liquidation, Inventory Reduction, Factory Lease Return Center
6. Advertising language promoting nationwide delivery, including but not limited to phrases such as "We ship anywhere", is not permitted.

## II.

# Advertising Guidelines

## F.) Geographic Market Areas

Dealers are to place their marketing, irrespective of the message, only within their Primary Area of Responsibility (PAR). A dealer's media buy must comply with the following parameters, defined by geography and media type.

Media purchased must reflect a strong reach within a dealer's PAR. Compliance varies by medium and by geography. Porsche Cars North America expects dealers to employ non-predatory marketing practices, regardless of the message, by focusing their efforts within their PAR. Should a dealer's PAR be modified as a result of a new dealer point being added, or the PAR boundaries changed by PCNA, the existing dealer has 90 days to pull their marketing from the PAR of the new dealer point, or until the existing media contract expires.

1. Metro Areas: A dealer's media buy must meet the following guidelines. Deviation from these marketing placement guidelines must be pre-approved by your PCNA Area Marketing Manager.

- a. Broadcast: Buy must be within the dealer's DMA, as defined by Nielsen, assuring 51% of the station signal is within the dealer's PAR [See Index Map]. With cable TV, capability exists to purchase at the zip code level; therefore, a dealer should only purchase those cable zones which are inclusive of the zip codes in their PAR.
- b. Print: At least 50% of the paid circulation must be within the dealer's PAR. If the publication can be purchased at the zip code level, the dealer can only purchase zip codes which fall within its PAR.
- c. Out-of-Home (OOH): As a location-based medium, a dealer must purchase within the zip codes identified as its PAR, regardless of the marketing message. Purchasing OOH space adjacent to another Porsche dealership is strictly prohibited.
- d. Online/SEM: This medium offers geo-targeted buying capabilities for display advertising and sponsorships. The dealer must isolate the buy within a geography representative of their PAR.
- e. Direct Mail and Email: Dealer can only target individuals who live within the dealer's PAR, or who are current sales, service, or parts customers of the dealership.

2. Unassigned Areas: Dealers may advertise in unassigned zip codes where there is not an existing Porsche dealership. However, this activity should represent a minor share of the dealer's overall marketing budget, and sufficient resources must be available to service the customers in those markets in a way commensurate with the Porsche marque. Please consult your Porsche Regional Manager regarding zip code assignments.

- a. See Appendix 1 (page 33)

## II.

# Advertising Guidelines

### **G.) Porsche Premier Dealer Marketing**

Dealers are permitted to promote their Porsche Premier Dealer status as long as the status is current and is not used in a manner to undermine other Porsche dealerships. Please reference the Porsche Premier Dealer Marketing Guide for more information.

### **H.) Porsche Exclusive Manufaktur Partner**

Dealers are permitted to promote their Porsche Exclusive Manufaktur Partner status as long as the status is current and is not used in a manner to undermine other Porsche dealerships.

### **I.) The Internet and Social Media**

The Internet offers a powerful communications tool with which to reach prospective customers and to engender loyalty with existing ones. The guidelines and restrictions, which apply to other forms of advertising and communication (refer to CI guidelines appendix), also apply to the Internet. This also includes any activities on behalf of the Porsche brand in social media, such as Facebook, Twitter, Instagram, etc.

All dealer websites promoting the Porsche brand must adhere to all Porsche CI guidelines and contain functionality befitting the brand's exclusive nature. This includes all dealer-maintained sites outside of the PorscheDealer.com or Porsche Dealer Digital Program. The functionality must include content exclusive to Porsche, such as:

- Up-to-date marketing campaign messaging and imagery
- Up-to-date vehicle images and offers
- Up-to-date inventory
- Up-to-date model information
- Vehicle Information Request and dealer contact information

Digital advertising and communications must be maintained on an ongoing basis since, unlike other types of communication which are short-lived, information published on a dealer website remains there until changed or deleted. Consumer interest and confidence in a dealership can be diminished by exposure to expired offers and outdated information on the Internet. Dealers who include inventory listing on their websites must ensure that all information, including features, pricing and availability, etc., are accurate and up-to-date at all times.

## II. Advertising Guidelines

### I.) The Internet and Social Media (continued)

Advertising online must also follow all other Porsche Advertising and Marketing Guidelines, including observing the rules of Geographic Market Areas and Primary Areas of Representation. Dealers are not permitted to purchase search terms or engage in search engine optimization (SEO) tactics that seek to target other Porsche dealers or markets outside a dealership's PAR. Specifically:

- Dealers must not utilize the DBA name of another Porsche dealership in their paid search marketing activity.
- Dealers may purchase search terms which reference general geographic terms (county, metro, or region names) provided those terms do not combine to another dealer's DBA name.
- Dealers must not purchase search terms which utilize the name of a city or town not included in their PAR or that are part of another dealer's PAR.
- In the case that a region or county name when matched with "Porsche" produces another dealer's DBA, the dealer must add "dealers" or "dealerships" to that search term (e.g., "Porsche Dallas Dealerships" or "Porsche Dallas Dealers").
- Dealers must not engage in deceptive or manipulative "black hat" SEO tactics and should adhere to Google's published Webmaster Quality Guidelines.
- Dealers must not engage in partnerships with online services which advertise or provide leads from outside of the dealer's PAR.
- All Google Adword requests for Porsche trademarked terms must be sent to PCNA Marketing & PCNA Legal for review and approval. The Customer ID (CID) for the Porsche dealership must be for the Porsche brand only. PCNA will not approve any Google Adword requests that are not exclusive to a Porsche dealership.

### J.) Sponsorships and Promotions

Dealers must maintain a premium and progressive image in all sponsored or promotional events. Signage should be Porsche brand exclusive and should only feature the dealer's official DBA, not a dealership group name.

Dealers must submit for approval to their respective Regional Manager and Area Marketing Manager to activate a sponsorship or experiential activity outside of their respective PAR.

## II. Advertising Guidelines

### J.) Sponsorship and Promotions (continued)

1. Off-Site Vehicle Displays:
  - a. General Provisions
    - i. Any off-site display must be within the dealer's PAR.
  - b. Un-staffed Static Displays: Displays of Authorized Products in the common areas of such venues as airports, shopping malls, stadiums, etc. are permitted under the following conditions:
    - i. Dealer must have a Monroney label displayed for each vehicle.
    - ii. Dealer may also display a CI compliant creative execution providing brief information as to where a customer may seek additional information, including the name, address, URL, and other contact information for Dealer.
    - iii. Vehicle display space must be exclusive to Porsche; that is, Dealer may not display other line makes near the Porsche display.

## II. Advertising Guidelines

### J.) Sponsorship and Promotions (continued)

#### 1. Off-Site Vehicle Displays (continued)

- c. Event Displays: Displays at events such as golf tournaments, concerts, races, and charity events are permitted under the following circumstances:
  - i. Porsche brand vehicles and other Authorized Products may be displayed at such events for the duration of the event.
  - ii. The vehicle display space must be exclusive to Porsche, comply with Porsche branding requirements, and may be accompanied by Dealer staff, who may provide information about the models being displayed and the Dealership itself.
  - iii. Any such display of Porsche-brand vehicles or Porsche Driver's Selection, Porsche Tequipment, etc. must adhere to the latest Porsche Dealer Operating Standards as they relate to vehicle display spaces, in terms of vehicle spacing, furniture and finishes (if applicable), and lighting (if applicable). No other vehicle makes may be displayed near the Porsche display.
- d. Violations: Displays that do not conform to these rules and any other rules set out by PCNA will be addressed as a violation of the Porsche Marketing Covenant, and may subject Dealership to loss of PDMS co-op funds. Interpretations of this policy will be at sole discretion of PCNA.

## II. **Advertising Guidelines**

### **K.) U.S. Legal Issues**

Price, lease, and interest rate advertising play an important part in retail advertising, and are among the most regulated areas of advertising law. Lease advertising is stringently defined and regulated by law. Federal Regulations M and Z govern lease and APR advertising, respectively. Every Porsche dealer should be familiar with these regulations as well as their own respective state and local laws. PCNA recommends that dealers consult their local legal counsel with any questions regarding compliance of these or any laws. All communications utilizing Porsche corporate funding, including the PDMS co-op program, must meet Porsche Corporate Identity Guidelines, and all applicable federal, state, and local laws and regulations. Price and other disclaimer language must be in compliance with all regulatory requirements of state(s) in which a dealer's ad appears. Each dealer is ultimately responsible for ensuring that all ads comply with all applicable legal requirements.

### **L.) Summary**

These Guidelines and Standards apply to all dealer advertising, including advertising associations and all content published on the Internet. All advertising must comply with these standards. Porsche Cars North America does not intend any of the standards and guidelines contained in this document to interfere with each dealer's absolute right to sell and market Porsche products in their respective Primary Area of Representation. However, the tonality of that messaging must adhere to the PCNA Marketing Covenant and advertising standards and guidelines.

III.

# PDMS Co-Op Guidelines

## A. Program Overview & Eligibility

The Porsche Dealer Marketing Services (PDMS) program was first established by Porsche Cars North America, Inc. (PCNA) in 2005. The objective of the program is to strengthen local retail advertising and marketing to help dealers grow their business while building and strengthening the Porsche brand. Through PDMS, Porsche Cars North America has made a variety of marketing tools available that ensure a consistent branding message between local and national marketing activity.

This goal can be realized only with complete collaboration between the dealer and Porsche Cars North America. The PDMS co-op reimbursement program, which is fully funded by PCNA, exists to encourage this close cooperation.

This document details the process as well as eligibility and documentation requirements for each form of media eligible for reimbursement in the PDMS co-op reimbursement program.

### **Dealer Eligibility**

To be eligible for PDMS funds, each dealer must first submit an Annual Marketing Plan for the respective year detailing all marketing activity and related spending throughout the year. Please contact your Area Marketing Manager or PDMS Representative for details related to the Annual Marketing Plan. This marketing plan must be submitted to PCNA no later than January 29, 2018.

In addition to submitting an Annual Marketing Plan, each dealer must link their Google AdWords account to allow PCNA to have Read Only access to terms purchased. For more information about this process, or to link your Google AdWords account, please contact The Gary Stock Company at [DealerAccess@porsche.compliance.com](mailto:DealerAccess@porsche.compliance.com). All accounts must be linked by January 31<sup>st</sup>, 2018 in order to be eligible for the 2018 PDMS co-op reimbursement program.

In the spirit of the Porsche PDMS program, PCNA expects each Porsche dealership to achieve a benchmark marketing expenditure of \$1,100 PNVR (excluding PDMS funds) for Porsche advertising, marketing, promotions, and events. Additionally, PCNA recommends a minimum of 10% of the PDMS budget be allocated to dealership Aftersales marketing and an additional 10% to Porsche Approved CPO marketing.

PCNA reserves the right to audit expenditures at the conclusion of the program period, and to administer a chargeback of any funds that the dealership was not eligible to receive.

III.

# PDMS Co-Op Guidelines

## B. Fund Calculation

### **Start-up Funds**

PDMS funds will be coordinated with the RTP process each year. This will allow for timely assignment of funds, more accurate planning, and consistent usage. Estimated PDMS funds are calculated based on each dealer's wholesale RTP targets. Each dealer must use the funds within the calendar year of the fund; there will be no carryover. Funds can be viewed on the PDMS website under My Funding > Account Snapshot.

Actual PDMS funds will depend on final wholesale purchase; however, for 2018, PDMS funds are accrued at \$300 per wholesale. To help kick-start 2018, we are pre-funding each dealer's PDMS budget at 50% of their estimated full-year funds, according to 2018 RTP baseline targets.

### **Funding**

There will be one PDMS fund per dealer for 2018. Actual PDMS funds will depend on final wholesale purchases. For 2018, PDMS funds are accrued at \$300 per new vehicle wholesale.

As with previous years, all eligible activity will be automatically deducted out of one PDMS fund. Available funds can be viewed on the Account Snapshot under "My Funding."

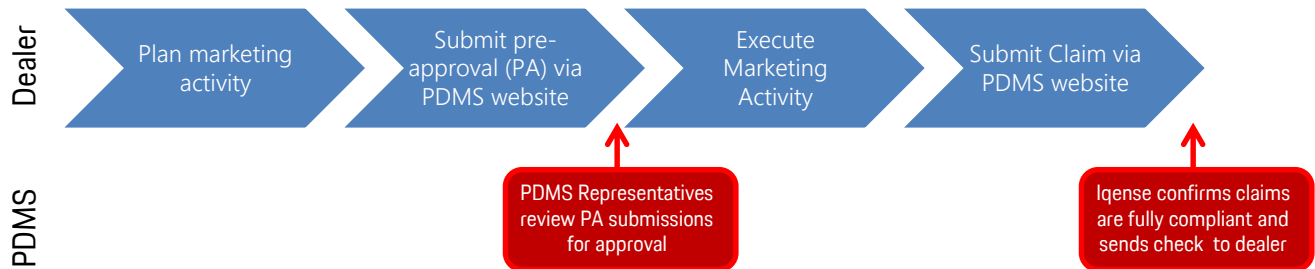
### **Accruals**

Actual PDMS funds will depend on final wholesale purchase. Funds are accrued on a monthly basis and loaded into each dealer's PDMS account the following month.

III.

# PDMS Co-Op Guidelines

## C. PDMS Process & Guidelines



### 1. General Program Guidelines

- A pre-approval for each marketing activity must be entered prior to the activity taking place.
- Events/ads must be consistent with Porsche's quality image and meet all Porsche corporate identity guidelines. The Corporate Identity Standards, Fonts, and Logos can be found under the Learning Resources tab via the PDMS website. Please contact your PDMS Representative for any questions related to CI Guidelines. Porsche highly recommends that every dealer use the Porsche online Creative Builder templates found on the PDMS website via PPN/Online Systems. Creative materials are available under the PDMS Planning, Advertising & Reimbursement Resources tab on the website homepage.
- Ads must include only Porsche products. A clear separation of brands and ad space is required to qualify for reimbursement. Print ads located inside larger ads that are not Porsche CI-compliant, or ads that include non-Porsche products, are not eligible for PDMS co-op reimbursement.
- All communications and activities must appropriately present the product both visually and through written description and adhere to the PCNA Marketing Covenant.
- All imagery used for creative material must be obtained from the PDMS Image Vault or directly through PCNA.
  - Images should not feature cropped vehicles, and no copy or artwork may appear inside the image area unless given consent from PDMS Representative or Area Marketing Manager.
  - Any deviations from this policy must be approved by the respective PDMS Representative or Area Marketing Manager.

III.

# PDMS Co-Op Guidelines

## C. PDMS Process and Guidelines

### 1.) General Program Guidelines (continued)

- Copy language may not mention discount pricing. Terms such as “clearance,” “vehicle discounts,” “blow-out,” etc. are not permitted.
- Advertising or statements implying vehicle pricing discounts below MSRP are not permitted.
- Advertising featuring offers including a customer down payment in excess of 15% of the vehicle's MSRP is prohibited in all advertising.
- Advertising of new or pre-owned vehicles on eBay or other websites that “auction” an item to the highest bidder is not permitted.
- Advertising language promoting nationwide delivery, including but not limited to phrases such as “We ship anywhere”, is not permitted.
- Dealer name, logo, and URL may not include another manufacturer's brand name. Dealers must use their official DBA in all advertising communications. Usage must comply with Corporate Identity guidelines.
- Advertisements and events requiring pre-approval will not be paid unless they run exactly as approved. Dealers must consult their PDMS Representative if any change is made to a pre-approved marketing activity.
- All advertising featuring a website URL, or any dealer-specific online activity, must only feature only the dealer's PorscheDealer.com or Porsche Dealer Digital Program website. No other websites may be featured in any marketing communications or events.

III.

# PDMS Co-Op Guidelines

## C. PDMS Process and Guidelines

### 2.) Pre-Approval Process

A pre-approval for each marketing activity must be entered prior to the activity taking place. All requests for pre-approvals must be submitted to the dealer's PDMS Representative via the PDMS website (PPN>Online Systems>PDMS). Requests should include complete information on the planned activity, including (if applicable) artwork, copy and/or a description of the planned promotion. Full details on estimated costs must be included. Use the notes section while entering a pre-approval for any additional details or clarification. Please allow for a turnaround of two business days for each pre-approval submission.

#### How to submit a Pre-Approval

- i. From the PDMS homepage, click on "My Funding" and select "Submit a Pre-Approval".
- ii. You will then need to complete the form by submitting the dates of the activity, the media type, the product focus and the cost. Please use the "Activity Description/ Comments" to further explain the activity.
- iii. You will then need to upload a document that represents the activity being submitted for pre-approval.
- iv. After clicking "Submit" you will receive a confirmation email.
- v. Please allow up to two business days for the pre-approval to be approved.

# III. PDMS Co-Op Guidelines

## C. PDMS Process and Guidelines

### 3.) Claim Submission

All claims for reimbursement must be submitted through the PDMS website with appropriate documentation within 60 days of the last day of the activity. Claims are entered via My Funding tab.

Porsche reserves the right to withhold payment for activities that do not follow these guidelines or have not been appropriately documented.

Every claim form must be submitted with a corresponding pre-approval number. If the pre-approval does not match the claim in terms of dates and activity, the claim will be placed on hold, and risks being rejected.

Claims received without full documentation will be placed on hold by PCNA's co-op administration partner, IQense. The dealer will then be notified of the additional documentation needed via email. If the required documentation is not received within 10 calendar days after notification, the claim will be processed and paid to whatever extent is supported by the documentation on hand.

Approved claims will be paid to the limit of accrual balances at the time of the payment until additional funds are available to pay the remainder of the claim.

III.

# PDMS Co-Op Guidelines

## C. PDMS PROCESS & GUIDELINES

### 3.) Claim Submission/How to submit a Claim

- i. Now that the pre-approval entry has been approved and the activity has taken place, you can submit a claim.
- ii. From the PDMS homepage, click on "My Funding" and select "Submit Claim for Payment"
- iii. To begin completing the claim form, click on "Select" to identify the pre-approval that you are submitting a claim against. Once you select the appropriate approved pre-approval entry, the majority of the form will auto-fill based on the pre-approval entry information.
- iv. Complete any additional fields and adjust any information for accuracy
- v. You will then need to upload all required documentation. Please refer to the Program Guidelines document (page 4) for required documentation. The documentation varies depending on the type of activity.
- vi. You will then receive a confirmation email that your claim has been submitted.

### Payment

PCNA will pay 50% of dealer net out-of-pocket costs for eligible marketing activity, properly documented and approved, not to exceed the balance of accruals available. No administrative fees, taxes, production costs, or agency fees are eligible for PDMS co-op reimbursement.

Payment will be made by check. Remitted by Porsche Dealer Marketing Services, payment will be mailed approximately every two weeks after receipt of proper claim documentation. Checks not cashed within 90 days of the issue date will be voided and will not be reissued.

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation

### Print

#### Magazine

##### General Information

- Pre-approval is required.
- Advertisements must be placed in general-interest paid-circulation magazines.
- Placements in Porsche Club of America monthly newsletters and Porsche Panorama magazine are acceptable.
- All imagery used for creative material must be obtained from the PDMS website Image Vault or directly through PCNA.
- Placement of advertisements must be in the dealer's current Primary of Representation.

##### Reimbursement

- 50% of dealer net out-of-pocket costs for space and color will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Include publisher's unaltered, original invoice detailing all applicable charges and discounts.
- Include a full-page tearsheet for each advertisement showing the date and publication name.
- If the tearsheet does not show the date and the publication title, the entire publication must be submitted.
- If any doubt exists as to whether or not the publication name and date are properly referenced on the tearsheet, please attach the entire publication with the ad clearly marked.
- Samples of the creative execution must be included in the claim submission.

# III. PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Print

#### Newspaper

##### General Information

- Pre-approval is required.
- Only ads in paid-circulation papers will be reimbursed.
- All imagery used for creative material must be obtained from the PDMS site Image Vault or directly through PCNA.
- The PDMS Creative Builder reference number must be included on the claim sheet.

##### Reimbursement

- 50% of dealer net out-of-pocket costs for space and color will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Include publisher's unaltered, original invoice detailing all applicable charges and discounts.
- Include a full-page tearsheet for each advertisement showing the date and publication name.
- Samples of the creative execution must be included in the claim submission.

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### **Direct Mail**

#### General Information

- Pre-approval is required.
- Placement of advertisements must be in the dealer's Primary Area of Representation.
- Be sure to measure activity results for use in future marketing plans.

#### Reimbursement

- 50% of dealer net out-of-pocket costs for printing, postage, and packaging will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

#### Documentation Requirements

- Printer's unaltered original invoices
- Postage receipts if not included on printer's invoice
- Other original invoices (e.g., purchased Experian lead lists)
- Samples of the creative execution must be included in the claim submission.

# III. PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### **Out of Home/Billboard**

#### General Information

- Pre-approval is required.
- Only OOH billboards and pre-approved outdoor signage are acceptable.
- All imagery used for creative material must be obtained from the PDMS site Image Vault or directly through PCNA.
- Placement of advertisements must be in dealer's current Primary Area of Representation.

#### Reimbursement

- 50% of dealer net out-of-pocket costs for space will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

#### Documentation Requirements

- Invoice from out of home/billboard company
- Photos of placement and location as proof of performance

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Digital/Online

#### Display & Web Banners

##### General Information

- Pre-approval of creative and media placement is required.
- Advertisement must link to the dealer's PorscheDealer.com Certified Program website.
- Execution must remain within brand standards; please consult a PDMS Representative with questions.

##### Reimbursement

- PCNA will pay 50% of dealer net out-of-pocket costs for:
  - Paid Media/Advertising impressions
  - Purchased email lists
  - Vehicle listings
- No administrative fees, taxes, production costs, or agency fees will be paid

##### Documentation Requirements

- Please include the vendor's unaltered original invoice including:
  - All applicable discounts
  - Beginning and ending dates of online activity
- When dated electronic tearsheets are unavailable, screenshots of the ad/listing are required when running ads on a third-party website.
- Vehicle listing result reports by model must be directly submitted from the vendor (e.g., Google, AutoTrader.com, Cars.com) to Porsche Dealer Marketing Services, and should be included in the claim documentation.
- Please include the completed claim form with all appropriate materials and pre-approval number.
- Co-op invoices will be accepted only from approved third-party providers including: AutoTrader.com, Cars.com, Edmunds.com, KBB.com, Google.com, Bing.com, and Yahoo.com.

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Digital/Online

#### Vehicle Listings

##### General Information

- Pre-approval of creative and media placement is required.
- Advertisement must link to the dealer's PorscheDealer.com or Porsche Dealer Digital Program website.
- Execution must remain within brand standards; please consult a PDMS Representative with questions.

##### Reimbursement

- PCNA will automatically pay 50% of dealer net out-of-pocket costs for PCNA approved Co-Op Programs from the following vendors:
  - AutoTrader.com and KBB.com (Cox Automotive)
  - Edmunds.com
  - Cars.com
- At this time, no other online listing vendors will be approved for PDMS co-op.

##### Documentation Requirements

- Please include the vendor's unaltered original invoice including:
  - All applicable discounts
  - Beginning and ending dates of online activity
- When dated electronic tearsheets are unavailable, screenshots of the ad/listing are required when running ads on a third-party website.
- Vehicle listing result reports by model must be directly submitted from the to Porsche Dealer Marketing Services, and should be included in the claim documentation.

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Digital/Online

#### Search Engine Marketing (SEM)

##### General Information

- Pre-approval is required.
- Placement of advertisements must be in the dealer's current Primary Area of Representation.
- Use of other Porsche dealers' names within SEM buys is strictly prohibited. Please reference the PCNA Marketing Covenant document for specific rules and regulations related to SEM.
- All SEM activity must link to the dealer's PorscheDealer.com or Porsche Dealer Digital Program website.

##### Reimbursement

- 50% of dealer net out-of-pocket costs for SEM buys will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Please include the vendor's unaltered original invoice including:
  - All applicable discounts
  - Beginning and ending dates of online activity
- When dated electronic tearsheets are unavailable, screenshots of the ad/listing are required when running ads on a third-party website.
- SEM result reports must be directly submitted from the vendor (e.g., Google) to Porsche Dealer Marketing Services, and should be included in the claim documentation.

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### **Paid Social Media**

#### **Social Media Advertising (Facebook & Instagram)**

##### General Information

- Approval from your PDMS Representative or Area Marketing Manager is required prior to any paid social activity.
- Facebook and Instagram are the only approved vendors for social media advertising in the co-op program.
- Pre-approval of creative and media placement is required.
- Social Post or Advertisement must link to the dealer's PorscheDealer.com or Porsche Dealer Digital Program website.
- Execution must remain within brand standards; please consult a PDMS Representative with questions.

##### Reimbursement

- PCNA will pay 50% of dealer net out-of-pocket costs for placement on Facebook or Instagram.
- No administrative fees, taxes, production costs, or agency fees will be paid
- Boosting of organic social posts is not co-op eligible

##### Documentation Requirements

- Co-op invoices will only be accepted from Facebook or Instagram.
- Please include the vendor's unaltered original invoice including:
  - All applicable discounts
  - Beginning and ending dates of online activity
- When dated electronic tearsheets are unavailable, screenshots of the ad/listing are required when running ads.
- Please include the completed claim form with all appropriate materials and pre-approval number.

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### **Broadcast**

#### **Television/Cable**

##### General Information

- Pre-approval is required.
- Ads may run on radio, TV stations, and/or cable systems only in the dealer's current Primary Area of Representation.
- All TV ads or running footage must be sourced directly from PCNA or its creative agency, Cramer-Krasselt.

##### Reimbursement

- 50% of dealer net out-of-pocket costs for media buys will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Please include original, unaltered station invoice and a notarized/certified RAB, TVB, or CAB script; TV spots produced and provided to the dealer by Porsche will be sent with a Script Notarization page that must be notarized and submitted with the claim.
- Commercials must have the script attached to the pre-approval entry.
- Please include the completed claim form with the pre-approval number.

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### **Broadcast**

#### **Radio**

##### General Information

- Pre-approval of the radio script is required.
- Ads may run on radio stations only in the dealer's current Primary Area of Representation.

##### Reimbursement

- 50% of dealer net out-of-pocket costs for media buys will be paid.
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Please include the original, unaltered station invoice and a notarized/certified RAB, TVB or CAB script.
- Radio commercials that are not produced by Porsche must have the script attached to the pre-approval entry.
- Please include a completed claim form with the pre-approval number.

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Events and Sponsorships

#### Dealer Events

##### General Information

- Pre-approval of each event or sponsorship is required.
- Each event or sponsorship must be considered brand-appropriate consistent with Porsche brand standards.
- Event displays must include only Porsche products.
- Professional-grade photos of the event are required to receive reimbursement.
- If attendees are charged for participation, the event is not eligible for reimbursement.

##### Reimbursement

- PCNA will pay 50% of dealer net out-of-pocket costs for:
  - Invitation printing and postage
  - Event coordination such as union labor, Czarnowski and auto show contractors
  - Professionally catered food and beverages (professional beverage service is not required, but is recommended). Please ensure that all refreshments are served in a brand-appropriate manner.
  - Professional photos documenting the event
  - Space or venue rental
  - Transport costs for display vehicles
  - Hole-in-One insurance
  - Rental equipment (tent, tables, chairs, etc.)
  - Entertainment (official invoice required; no handwritten invoices will be accepted)
  - Decoration and signage approved by PCNA (banners, flags, etc.)
  - Dealer Marketing Materials or Porsche Driver's Selection items used as customer giveaways (PDS items are reimbursable only at the published dealer rate).

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Events and Sponsorships

#### Dealer Events

##### Reimbursement (continued)

- PCNA will pay 75% of dealer net out-of-pocket costs for:
  - Productions Plus product specialists' fees and travel expenses.
  - Porsche Sport Driving School (PSDS) Instructors' fees and travel expenses (Note: For driving events, use of non-Porsche Sport Driving School Instructors is prohibited, and the associated costs are not eligible for reimbursement)
  - Czarnowski event properties used for eligible event activations
- No administrative fees, taxes, production costs, or agency fees will be paid.

##### Documentation Requirements

- Please include supporting invoices (itemized and pre-tax) for approved costs; submit only final invoices (cost estimates and approvals will not be accepted).
- Professional-grade photos of the event are required to receive reimbursement.
- Attach supporting creative materials to the pre-approval entry if an ad does not use a Creative Builder template.

### III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation

### Events and Sponsorships

#### Porsche Experience Center Events

Events and activities related to the Porsche Experience Center facilities will follow the “Events and Sponsorships” general information guidelines and reimbursement qualifications. The following are the only two PEC-related items that are eligible for PDMS co-op reimbursement:

- Porsche Experience Center gift vouchers that are given away at a customer event (e.g., auction items, raffle, etc.).
- A dealer-hosted event held at a Porsche Experience Center facility. The event must be personally hosted by a dealer representative and the number of customers who attend the event must be six or greater. Only direct event costs assumed at the Porsche Experience Center are eligible for PDMS co-op reimbursement. Airfare, hotel, and other travel costs are not eligible for PDMS co-op reimbursement.

#### Auto Shows

##### General Information

- Pre-approval of auto show participation is required.
- Professional-grade photos of the event are required to receive reimbursement.

##### Reimbursement Qualifications

- To receive PDMS reimbursement for auto show participation, the following Porsche Corporate Identity standards must be met:
  - Vehicle display must be Porsche-exclusive.
  - The minimum acceptable display must have a core dealer kit as provided by Czarnowski.
  - No more than one vehicle displayed per 350 sq. ft.
  - When choice of carpet color is available, it must be gray.
- Dealers will NOT receive reimbursement if any of the following is used for your display:
  - A draped table with folding chairs
  - Any non-Porsche-approved properties (approvals granted by PDMS Representative)

III.

# PDMS Co-Op Guidelines

## D. Eligible Media and Required Documentation (continued)

### Events and Sponsorships

#### Auto Shows (continued)

##### Reimbursement Qualifications

- PCNA will pay 50% of dealer net out-of-pocket costs for:
  - Space or venue rental
  - Carpet, if not included in space cost
  - Insurance
  - Rental equipment
  - Porsche-approved decoration and signage (banners, flags, etc.)
  - Dealer Marketing Materials or Porsche Driver's Selection items used as customer giveaways (PDS items are reimbursable only at the published dealer rate)
  - Local labor costs for set-up/dismantle
  - Electrical costs
  - Drayage costs
  - Other on-site costs (detailing, floral, phone, etc.)
  - Shipping and handling costs for enhancement properties
- PCNA will reimburse at 75% of net out-of-pocket costs for:
  - Productions Plus product specialists' fees and travel expenses.
  - Czarnowski event properties
  - Porsche Sport Driving School instructors
  - Note: Use of non-Productions Plus product specialists is prohibited and associated costs are not eligible for PDMS co-op reimbursement.

# IV. Appendix I

## Nielsen DMA Map

Please contact your Area Marketing Manager or PDMS Representative for a full Nielsen map for your area.

