SUN BELT GENERAC DEALER SERIES · VOL. 2

The Generac Co-op Fund Maximization Playbook

How Sun Belt Dealers Recover $8K–$18K/Year in Unclaimed Co-op — Without Increasing Ad Spend

A 10-page tactical guide for Generac Premier & Pinnacle dealers in FL, TX, GA, NC, SC, LA, AL, and MS

Next Level Enterprise
Independent lead-generation audits for Generac dealers
contact@nlenterpricellc.com · +1 (505) 410-9461
2026 Edition

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Executive Summary — What You'll Learn

Most Generac Premier and Pinnacle dealers in the Sun Belt accrue between **$14,000 and $32,000 per year** in PowerPro co-op funds. Based on 47 dealer interviews and 12 P&L reviews we've conducted, the average dealer uses **only 43% of what they earn**.

> That means **$8K–$18K per year walks back to Generac** because it wasn't claimed, was submitted late, or was rejected for compliance issues.

This playbook shows you:

- The 5 silent leaks that cause 90% of co-op fund waste
- Which ad categories produce the lowest Cost Per Booked Install (CPBI) when co-op is applied
- Compliance rules that get 34% of first-time submissions rejected
- A submission timeline you can copy into your calendar today
- A recovery audit to see how many deadlines you've already missed this year

Read time: 22 minutes. **Implementation:** 90 minutes to set up the process. **Payoff:** an average of $11,400 in recovered spend across our 47-dealer sample.

Chapter 1 — How the Generac Co-op Program Actually Works

The Generac PowerPro Dealer Rewards program allocates co-op advertising funds as a percentage of your **net product purchases** from Generac. The percentage varies by dealer tier:

Dealer Tier	Typical Accrual Rate	Fund Category
Authorized	1.0% of net purchases	Basic
Premier	2.0% of net purchases	Enhanced
Pinnacle / Elite	2.5–3.0% of net purchases	Maximum

Rates and tier names are based on publicly disclosed Generac dealer materials as of 2026. Confirm current values with your Territory Manager — Generac updates the program annually.

> **Example:** A Premier dealer who purchases $850,000 of Generac product in a year accrues approximately **$17,000 in co-op funds**. At a 50% reimbursement rate, that unlocks **$34,000 of gross advertising spend** — if they use it.

What Co-op Does (and Doesn't) Reimburse

Reimbursed at 50% (standard):

- Google Ads / Bing Ads (paid search)
- Facebook and Instagram advertising
- YouTube pre-roll and display ads
- Local newspaper and magazine print
- Radio and terrestrial TV
- Direct mail campaigns
- Yard signs, vehicle wraps, trade-show booth costs
- Branded apparel worn at customer-facing events

Reimbursed at higher rates (varies — check current program docs):

- Some categories (home shows, certain digital placements) may qualify for 65–75% reimbursement in specific quarters
- "Co-op Match" promotions during Q2 and Q3 can boost effective rates temporarily

Not reimbursed:

- Salaries or commissions
- Website development or hosting (with a few exceptions)
- Sponsorships of non-related events (little-league teams, etc.)

- Referral fees or lead-purchase costs (paid lead-gen platforms)
- Any activity that doesn't include the approved Generac logo lockup and required disclaimers

The rules are strict, and they change. Every dealer we interviewed had at least one submission rejected in the last 18 months for a compliance issue.

Chapter 2 — The 5 Silent Leaks

These are the recurring patterns we see when we audit a dealer's co-op history. If you recognize any of these, you have money to recover.

Leak #1 — Submission Timing Failure

The rule: Co-op claims must generally be submitted within **60 days** of the activity's end date (some categories allow 90). Miss the window, and the claim is denied — no exceptions, no appeals.

What we see: 22 of 47 dealers we interviewed had missed at least one deadline in the last 12 months. Average loss per missed deadline: **$1,850**.

The root cause: most dealers submit claims in batches at quarter-end. That works if the batch clears in time. It doesn't when a Q1 activity gets bundled into a "we'll do it in June" pile.

The fix: Set a hard submission cadence of the 5th of every month for all activities that ended the prior month. See the calendar template in Chapter 6.

Leak #2 — Proof-of-Performance (POP) Rejection

The rule: Every claim requires POP documentation — the actual creative that ran, plus proof of purchase (invoice), plus proof of placement (tear sheet, screenshot with URL and date, broadcast affidavit, etc.).

What we see: 34% of first-time submissions across our 47-dealer sample were rejected for POP issues. The three most common reasons:

1. **Missing invoice detail** — vendor invoices that don't itemize by campaign or don't show the date range
2. **Screenshots without proof of live placement** — a screenshot of an ad that shows the ad but not the URL or timestamp

3. **Logo compliance failure** — the Generac logo isn't in the approved lockup, is stretched, has been recolored, or isn't accompanied by the required "Authorized Dealer" or "Independently Owned" designation

The fix: Build a POP capture SOP for every campaign. Chapter 7 has a template.

Leak #3 — Category Confusion (Underutilization of High-Value Categories)

The rule: Different categories have different reimbursement rates and different caps. Some categories can effectively double your ad budget when used correctly.

What we see: Most dealers spend the majority of their co-op on print and Facebook — two of the lower-CPBI channels. They **underspend on Google Ads paid search**, which typically produces the lowest CPBI for a Sun Belt Generac dealer.

Based on the 12 dealer P&Ls we reviewed, Sun Belt CPBI by category typically breaks down like this:

Channel	Median CPBI (No Co-op)	Median CPBI (With Co-op Applied)
Google Ads (Search — high-intent)	$340	$170
YouTube Pre-Roll (Retargeting)	$520	$260
Facebook (Interest-based)	$780	$390
Direct Mail (Storm-triggered)	$610	$305
Home Shows	$920	$460
Radio	$1,150	$575
Print (Local Papers)	$1,340	$670

CPBI values are medians from a 12-dealer P&L sample. Your numbers will vary by market and season. See the CPBI Cheatsheet (companion document) for how to calculate your own.

The fix: Shift more of your co-op budget into paid search and YouTube retargeting. These typically produce your lowest CPBI even before co-op is applied — and co-op cuts it in half.

Leak #4 — Non-Stacking (Ignoring Generac National Campaigns)

The rule: Generac runs national brand campaigns (TV, digital, sometimes national radio) at various points in the year. When you run local ads that align with — and cite — the national campaign timing and creative, your click-through and conversion rates typically lift because customers are already primed.

What we see: Most dealers don't align their local push with Generac's national timing. They spend co-op on campaigns that run when Generac isn't doing anything nationally, missing the compound effect.

The fix: Ask your Territory Manager for the Generac national marketing calendar every quarter. Time your co-op-funded local pushes to overlap with national brand pushes and any seasonal storm-preparedness messaging.

Leak #5 — Balance Amnesia

The rule: Co-op balances typically **do not roll over** past year-end (December 31 for most dealers). Any accrued funds you haven't claimed by year-end are forfeited.

What we see: 18 of 47 dealers we interviewed did not know their current co-op balance at the time of the interview. Six of those 18 had already lost balances at prior year-ends.

The fix: Log into the Generac dealer portal on the first business day of every month and screenshot your current balance. If your Q4 balance is above $4,000, plan a December push (email retargeting, YouTube, direct mail into your CRM list) to burn it down before it expires.

Chapter 3 — The Category Playbook

Here's how to think about co-op deployment across categories, ranked by our estimate of impact on CPBI for a typical Sun Belt Premier dealer with $8,000–$15,000 monthly ad spend.

Priority 1 — Google Ads (Paid Search)

Highest-intent traffic on the internet. Someone typing "generac dealer near me" or "whole home generator installation cost" is 60–90 days from a buying decision.

Deploy 40–50% of your co-op budget here if it's not already there. Compliance is straightforward — the ad copy just needs the "Authorized Generac Dealer" designation and cannot use trademarked terms outside the approved list.

Watchouts:

- Bidding on the Generac brand alone (without geo-modifiers or "dealer" qualifiers) may not qualify — Generac reserves brand terms
- Landing page must display the approved Generac Authorized Dealer badge above the fold
- Ad extensions (sitelinks, callouts) also need to be reviewed for compliance

Priority 2 — YouTube Pre-Roll (Retargeting)

Warm audiences — people who visited your website or watched a prior video — retarget cheaply on YouTube. CPBI is often lower than a Facebook prospecting campaign because you're only paying to reach people who have already engaged.

Deploy 15–20% of your co-op budget here.

Watchouts:

- Video creative must include the approved Generac logo lockup within the first 5 seconds (before skip)
- Any voiceover claims about product performance, warranty length, or savings must match Generac's approved messaging library

Priority 3 — Direct Mail (Storm-Season Triggered)

In the Sun Belt, storm season (June–November) turns direct mail into a high-intent channel because homeowners are actively thinking about power reliability.

Deploy 10–15% of your co-op budget here — timed to your storm season.

Watchouts:

- Mail piece must include the approved logo and disclaimer language
- Save the mail-house invoice AND a physical proof (one mailed piece) as POP
- Track responses with a unique phone number or landing-page URL so you can attribute revenue

Priority 4 — Home Shows

Concentrated, high-intent audience in one place. If you close 3–5 installs per show, home shows can be your best per-day channel.

Deploy 10–15% of your co-op budget here — assuming you have the sales bandwidth to follow up.

Watchouts:

- Booth signage, printed materials, and branded apparel all need to be compliant
- POP for a home show requires: booth invoice, photos of the booth setup, and a lead-capture log

Priority 5 — Facebook / Instagram

Interest-based (cold) prospecting on Facebook has become expensive in most Sun Belt markets. CPBI tends to be 2–3x what paid search produces.

Deploy 5–10% of your co-op budget here — primarily for retargeting and Lead Ads to warm segments.

Watchouts:

- Facebook's ad approval sometimes flags generator content — build in review time
- Lead Ads still require a full POP package (screenshot of the ad, ad account performance report, spend detail)

Priority 6 — Radio and Terrestrial TV

CPBI on broadcast is typically the highest of any measured channel — but broadcast has value for brand recognition in dense metros with well-defined DMAs.

Deploy 5–10% of your co-op budget here, if at all — and only if you can measure lift.

Priority 7 — Print

Print CPBI is typically the highest measurable channel. Deploy sparingly, and only in publications with a documented match to your target demographic.

Deploy 0–5% of your co-op budget here.

Chapter 4 — Compliance Checklist

Copy this list. Give it to whoever runs your marketing. Every creative asset should be reviewed against this list before it goes live.

Logo Compliance

- ☐ Uses the current Generac logo lockup (check the dealer portal for the current version — they update it)
- ☐ Logo is not stretched, skewed, recolored, or placed on a low-contrast background
- ☐ Logo has appropriate clear-space around it (Generac's brand guide specifies minimum clearance)
- ☐ Any "Authorized Dealer" or "Independently Owned and Operated" tagline appears in the required font and size

Copy Compliance

- ☐ Product claims use language from Generac's approved messaging library — no invented statistics
- ☐ Warranty statements match current warranty terms (do not say "lifetime" if the product is 10-year)
- ☐ Pricing claims include applicable disclaimers ("Starting at $X — installation extra — some restrictions apply")
- ☐ No use of trademarks Generac reserves for national campaigns (e.g., specific campaign taglines)

Placement Compliance

- ☐ For digital: landing page displays Generac branding above the fold
- ☐ For video: logo lockup appears within the first 5 seconds
- ☐ For print/mail: dealer name and contact info appear alongside the Generac branding
- ☐ For broadcast: recorded affidavit or run log from the station is captured at time of airing

POP Package (assembled at time of activity, not later)

- ☐ Vendor invoice showing date range and campaign detail
- ☐ Creative asset (the actual ad, in its final form)
- ☐ Proof of placement (screenshot with URL and date, tear sheet, run log, mailed piece photo)
- ☐ Payment confirmation (canceled check, credit card statement, or ACH confirmation)

If any of the above is missing at the time you submit, expect a rejection.

Chapter 5 — POP Templates

Use these templates as-is. They match what the Generac claims team looks for.

Template A — Digital Advertising POP

```
[Dealer Name] — Co-op Claim POP Package
Claim Reference: _____ (add after submission)
Activity Type: Digital Advertising — [Google Ads / Facebook / YouTube]
Activity Date Range: [Start] — [End]
Total Gross Spend: $ _____
Co-op Reimbursement Requested (50%): $ _____

Included:
1. Vendor Invoice — [Filename]
   • Shows: dealer name, activity date range, campaign name, spend detail
2. Ad Creative — [Filename]
   • Screenshot of final approved ad as displayed
3. Placement Proof — [Filename]
   • Live URL screenshot with timestamp OR
   • Ad account performance report (Google Ads / Facebook Ads Manager export)
4. Payment Confirmation — [Filename]
   • Credit card statement, canceled check, or ACH confirmation

Submitted by: _____
Date Submitted: _____
```

Template B — Direct Mail POP

```
[Dealer Name] — Co-op Claim POP Package
Claim Reference: _____
Activity Type: Direct Mail
Activity Date (Drop Date): _____
Total Gross Spend: $ _____
Co-op Reimbursement Requested (50%): $ _____

Included:
1. Mail-House Invoice — [Filename]
   • Shows: dealer name, quantity mailed, drop date, mailing list criteria
2. Mail Piece — [Filename]
   • High-resolution scan of both sides of the actual mailed piece
3. Payment Confirmation — [Filename]

Submitted by: _____
Date Submitted: _____
```

Template C — Home Show POP

```
[Dealer Name] — Co-op Claim POP Package
Claim Reference: _____
Activity Type: Home Show
Event Name: _____
Event Date(s): _____
Total Gross Spend: $ _____
Co-op Reimbursement Requested (50%): $ _____

Included:
1. Event Booth Invoice — [Filename]
2. Booth Setup Photos — [Filenames] (at least 3, showing signage and Generac brandi
3. Materials Used (printed handouts, banners, giveaways) — [Filenames]
4. Lead Capture Log — [Filename] (redacted for privacy — show counts only)
5. Payment Confirmation — [Filename]

Submitted by: _____
Date Submitted: _____
```

Chapter 6 — Submission Timeline Calendar

Copy this schedule into your team calendar. Every month.

Day of Month	Task	Owner
1st business day	Check current co-op balance in Generac dealer portal · Screenshot for records	Marketing lead
3rd business day	Pull all prior-month invoices from ad platforms, mail houses, radio stations, print vendors	Marketing lead
3rd business day	Assemble POP packages using templates from Chapter 5	Marketing lead
5th business day	Submit all prior-month claims through Generac dealer portal	Marketing lead
10th business day	Confirm all submissions show "Under Review" or "Approved" status	Marketing lead
15th business day	Follow up on any submissions still in "Pending" or that received rejection	Marketing lead
Last business day	Review upcoming month's planned activities against remaining balance	Owner + Marketing lead

Quarterly review (last week of March, June, September, December):

- Compare YTD accrual vs. YTD claimed
- Identify any category where you're underspending vs. plan
- If it's December and you have >$4,000 unclaimed, plan a burn-down push before Dec 31

Chapter 7 — Stack Strategy: Combining Co-op with National Campaigns

Generac runs national brand campaigns throughout the year. When you time your local campaigns to overlap, response rates typically improve because customers see multiple brand touches.

How to build the stack:

1. **Request the national marketing calendar** from your Territory Manager every quarter. Generac shares it with dealers who ask.
2. **Identify overlap windows.** When Generac has a national TV or digital campaign running, that's when your local paid search and retargeting should be spending most heavily.
3. **Align your creative.** Use similar imagery, similar language (from the approved library), similar offers. Customers who saw the national spot on TV then see your local ad on Google — the ad feels familiar, click-through improves.
4. **Time storm-preparedness pushes.** Sun Belt storm season (June–November) is when Generac's national storm-prep messaging typically runs. Your co-op should be heaviest in this window.

Example — 12-month stack plan:

Month	Generac National Focus (typical)	Dealer Co-op Push
Jan–Feb	Whole-home reliability messaging	Reduced spend — retargeting only
Mar–May	Spring maintenance + tune-ups	Ramp Google Ads for install season
Jun–Aug	Peak storm-prep messaging	Heaviest spend — search + YouTube + direct mail
Sep–Nov	Continued storm-prep	Sustained spend + home shows
Dec	Winter reliability / holiday themes	Burn-down remaining balance — retargeting + email + direct mail

Chapter 8 — Recovery Audit: Have You Missed Deadlines This Year?

Complete this audit today. It takes 15 minutes.

Step 1 — Log into the Generac dealer portal.

Step 2 — Pull your co-op accrual report YTD. Note the total accrued as of today.

Step 3 — Pull your co-op claims report YTD. Note the total claimed and approved as of today.

Step 4 — Calculate your utilization rate:

```
Utilization Rate = (Total Claimed ÷ Total Accrued) × 100
```

Interpretation:

Utilization Rate	Assessment	Action
85–100%	Excellent — you're capturing what you earn	Focus on category optimization from Chapter 3
65–84%	Above average — some leakage	Audit last 12 months of activities against POP templates
40–64%	Typical dealer — significant leakage	Implement monthly cadence from Chapter 6 immediately
Under 40%	Critical leakage — recovering funds is your top ROI action	Full audit needed — see below

Step 5 — If utilization is under 65%, review your last 12 months of activity:

- Which categories did you spend on where you didn't submit a claim?
- Which submissions were rejected — and did you resubmit?
- Which activities are approaching the 60-day submission window right now?

Every activity you can still submit in the current window is **recoverable revenue**. Every activity outside the window is a forfeited loss you can learn from.

Chapter 9 — Your Next 30 Days

If you implement only three things from this playbook, do these:

Week 1 — Set the process.

1. Add the calendar cadence from Chapter 6 to your team calendar as recurring monthly events.
2. Print the compliance checklist from Chapter 4 and post it above your marketing team's desk (or in your team wiki).
3. Copy the POP templates from Chapter 5 into whatever tool you use to track submissions.

Week 2 — Audit your history.

1. Complete the Recovery Audit from Chapter 8. Note your utilization rate.
2. Identify every activity from the last 60 days that hasn't been submitted.
3. Assemble POP packages and submit those claims by end of week.

Week 3 — Reallocate by category.

1. Review your current-month planned spend against the Category Playbook in Chapter 3.
2. Shift at least 10% of budget from print/broadcast to paid search or YouTube retargeting.
3. Request Generac's national marketing calendar from your Territory Manager.

Week 4 — Set up quarterly reviews.

1. Schedule a 30-minute recurring meeting for the last Friday of each quarter.
2. On the calendar invite, attach a template: "Quarterly Co-op Review."
3. Include: YTD accrual, YTD claimed, utilization rate, top 3 category CPBI numbers, planned adjustments for next quarter.

> If you do just those four weeks of work, our estimate — based on the 47 dealers we've interviewed — is that you will recover between **$6,800 and $14,200** in the current fiscal year that would otherwise have been forfeited.

What Comes Next — When You've Squeezed Everything from Co-op

Co-op fund maximization is one lever. It stops adding leverage once you're at 90%+ utilization and running the right category mix. At that point, the next leverage point is **Cost Per Booked Install (CPBI)** across all channels — measuring what each dollar of ad spend actually produces in confirmed installations, not just leads.

If you'd like an outside diagnostic on where your CPBI can be tightened, we run a paid audit that covers:

- Google Ads waste analysis (average dealer finds 22–37% of spend in single-search-term dead zones)
- CRM lead-to-install conversion audit (typical dealers lose 40% of qualified leads to follow-up gaps)
- Metro competitive analysis (who's outbidding you and on what terms)
- Co-op utilization deep review (validate against your dealer portal data)

Book Your Discovery Call

Pricing: $1,500 flat.
Founding cohort: $750 through November 30, 2026 (limit 1 dealer per metro).

Book a 15-minute discovery call at:
audit.nlenterpricellc.com/generac-quiz-book

Or email **contact@nlenterpricellc.com** with your metro, your current monthly ad spend, and your rough co-op utilization rate.

Sources & Methodology

Dealer P&L sample: 12 Sun Belt Generac dealers (FL, TX, GA, NC, SC), 2024–2025 fiscal years, reviewed under NDA. CPBI ranges reflect median values.

Dealer interviews: 47 Sun Belt Generac Premier and Pinnacle dealers, conducted 2024–2026. Interview scope: co-op utilization, submission history, category deployment, compliance experience.

Generac program details: Publicly disclosed dealer program materials as of 2026. Current dealer program terms should always be confirmed with your Territory Manager — Generac updates program specifics annually.

Compliance requirements: Based on Generac's published brand guidelines as of 2026 and dealer-reported rejection reasons from interview sample.

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