



North America Region

Investor Day – June 2, 2016

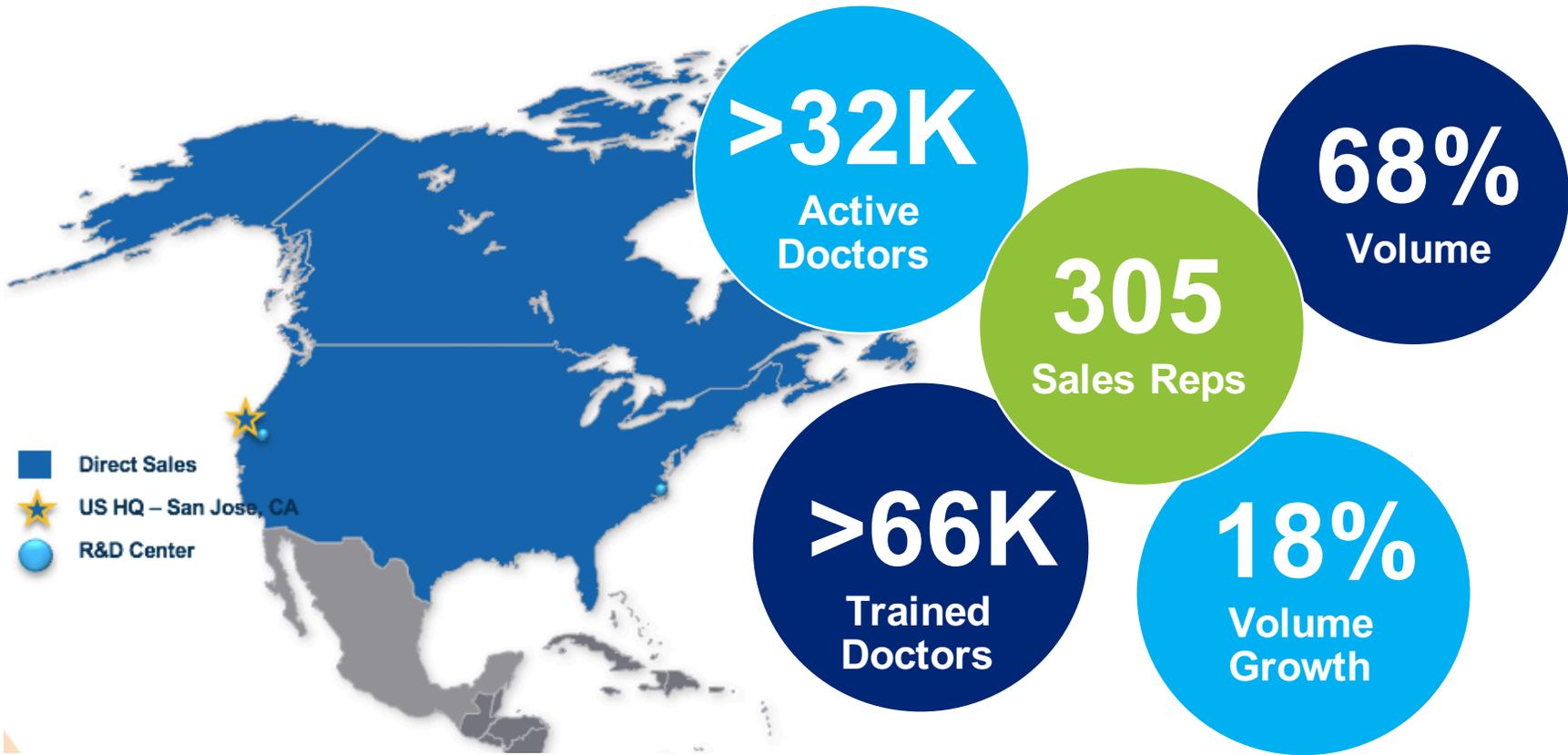
Chris Puco

Vice President, North America

Forward Looking Statement

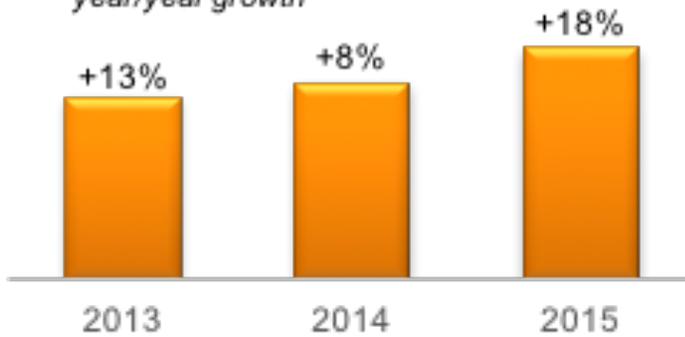
During this presentation and corresponding commentary we may make forward-looking statements, including statements regarding Align's strategy for future growth, plans related to global expansion of operational presence, our expectations regarding our ability to develop and commercialize new products, planned geographic expansion and anticipated impact on our growth, our expectations related to sales force coverage on, among other things, customer adoption, as well as statements related to Align's business outlook for 2016 and beyond. Any such forward-looking statements contained in this presentation and corresponding commentary are based upon information available to Align as of the date hereof. These forward-looking statements are only predictions and are subject to risks, uncertainties and assumptions that are difficult to predict. As a result, actual results may differ materially and adversely from those expressed in any forward-looking statement. Factors that may cause such a difference include, but are not limited to, the factors that are discussed in more detail in Align Technology's Forms 10-K and 10-Q, as well as in other reports and documents filed from time to time with the Securities and Exchange Commission. Align undertakes no obligation to revise or update publicly any forward-looking statements for any reason.

North America Overview 2015

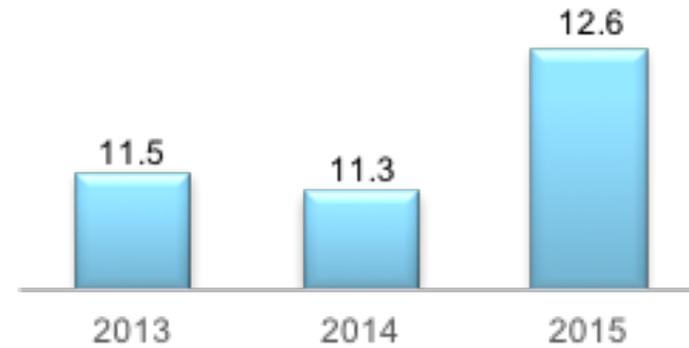


North America Highlights

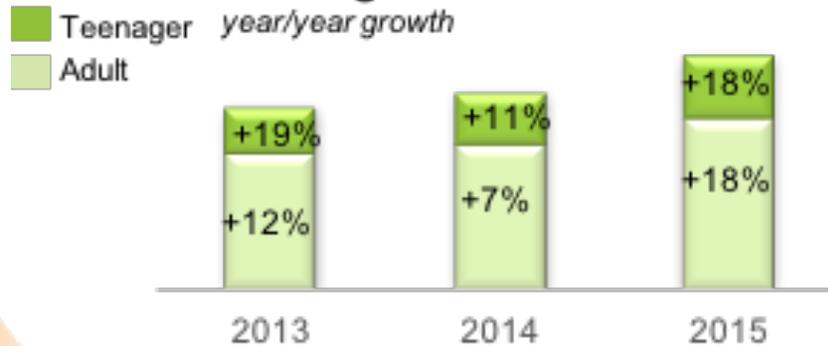
Invisalign Volume
year/year growth



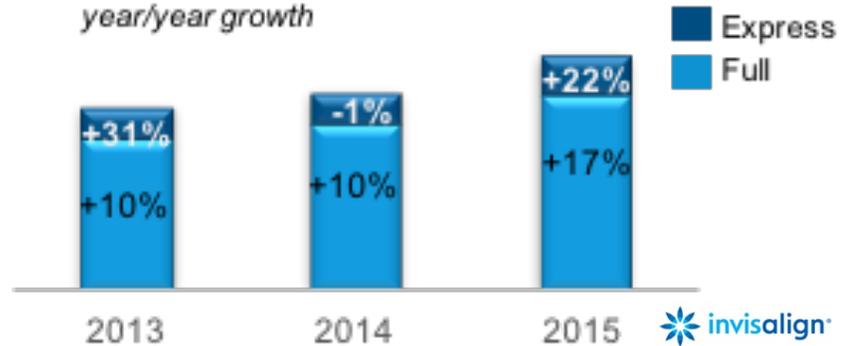
Cases/Doctor



Teenager vs. Adult
year/year growth

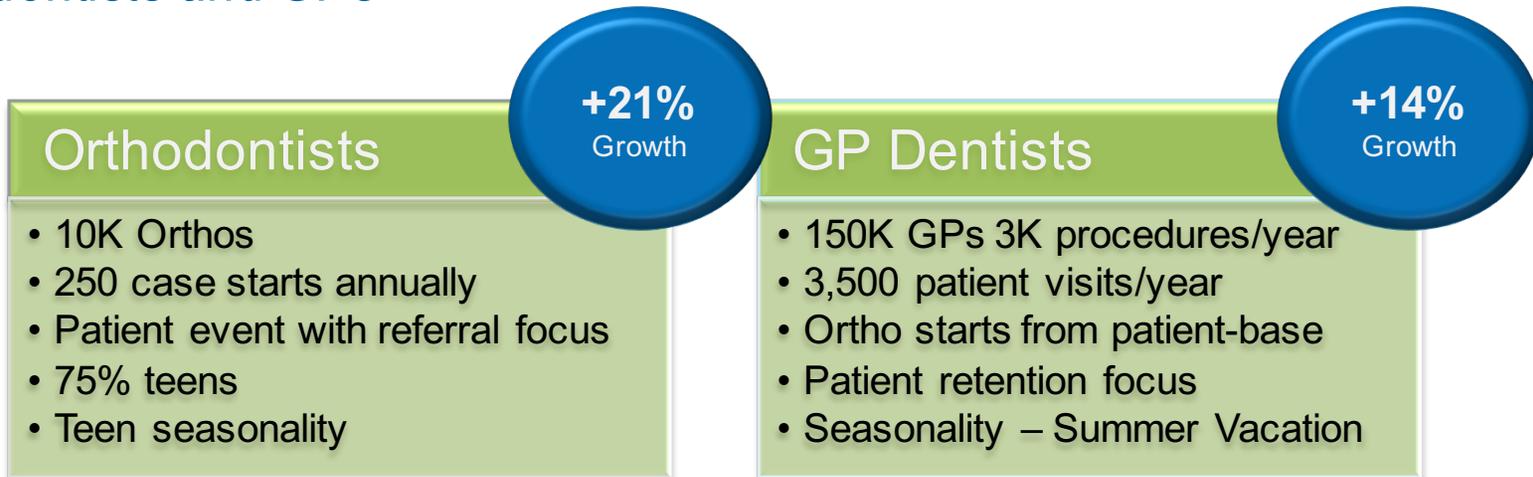


Full vs. Express
year/year growth



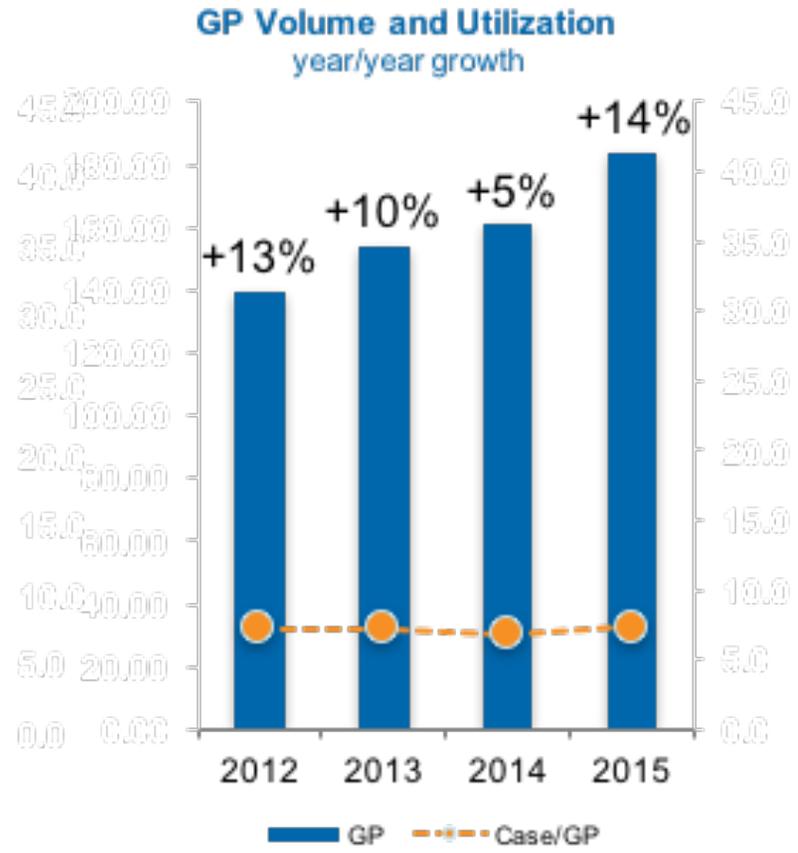
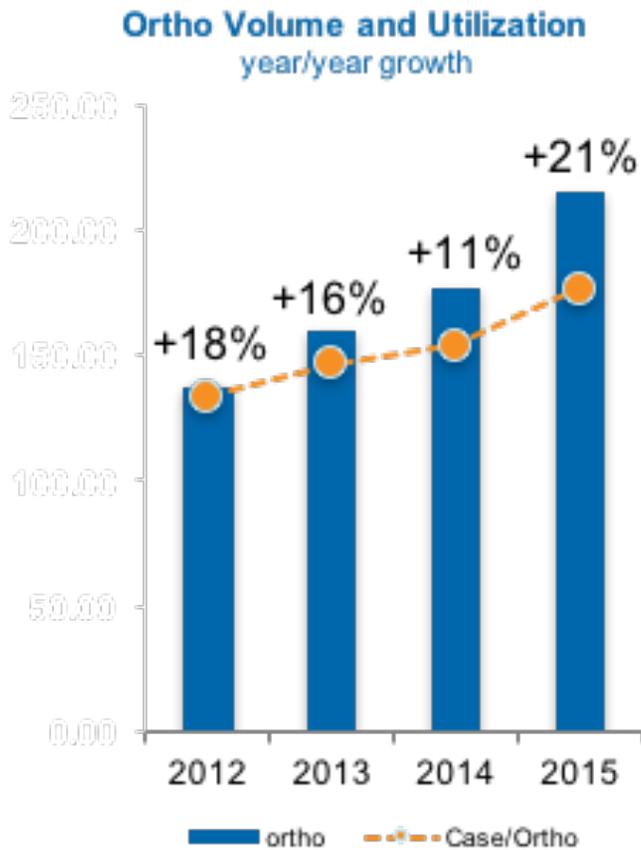
Large Opportunity in Core Customer Channel

Orthodontists and GPs



- Identify the highest potential opportunities for growth
- Develop future product and service opportunities
- Position the brand to succeed with the target doctors
- Focus sales force efforts on higher value activities

Investments Driving Continued Progress



DSO – Highest Growth Channel in Dentistry

Dental Service Organizations (DSOs)

DSOs



OPPORTUNITY

- More than double average per clinic revenue
- Already “squeezed out” most efficiencies
- Actively seeking top-line revenue growth
- Large growth & mid-market consolidation

2015-2020 Ave. Annual Growth:

18.5% vs. 2.4%



ALIGN TECHNOLOGY, INC.

DSO Customers Accelerating Growth

42
DSOs

growing
30%
year/year

4K
trained

utilization
9+
cases/doc

Key Success Factors in Driving Growth

Sales Force
Coverage
&
Effectiveness

Education
&
Support

Consumer
Demand
&
Conversion

Product
Innovation

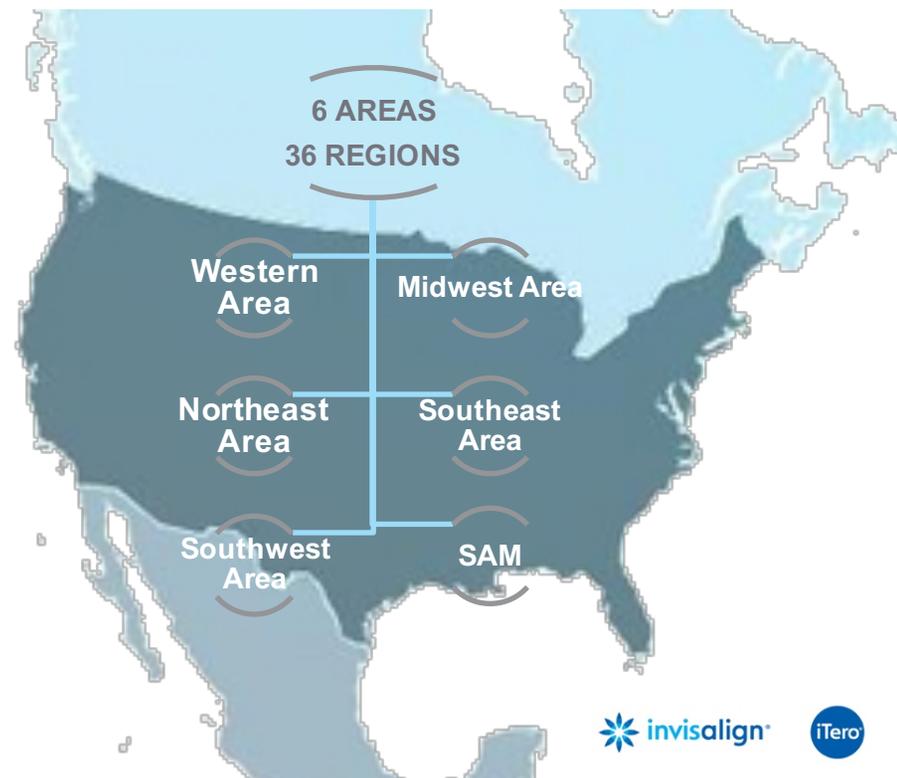
Customer
Advocacy

North America Organization

Salesforce Effectiveness and Coverage

New Coverage Approach in 2015

- Increased coverage 2015 & 2016
 - 2015 ~ 305
 - 2016 ~ 360
- Multilayered levels of coverage
 - SAM, TM, SA, DSO & University Roles
- More effective sales force coverage, allowing for better handoff of accounts and focus



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Customer Education Path and Support

Focus on Doctor and Practice/Business Development



Different Training Approaches

GP Dentists

“Everyday Dentistry”

- ReIngage Program
- Relevancy in established practices
- Drive engagement & restorative
- Focus on hygienists engagement

Orthodontists

Masters Program

- Progressive in nature
- Target specific segments
- Mentor driven and peer support
- Highly integrated with field sales

Invisalign DSO Education Program

Education Key Driver in Growth

- Clinical Leader Development
- Peer-to-Peer Mentoring
- “Ortho First” Focus
- Hygiene Benefits
- Team Development and Competency



Fully Integrated University Programs

Expand partnerships to integrate Invisalign treatment into curricula

- Consistency in curriculum with Invisalign digital modules
- Ensures next generation doctors are Invisalign-ready
- Over time, initial Invisalign training and education happens in schools rather than through Align



*Albert Einstein Medical Center
Case Western Reserve University
Columbia University
Louisiana State University
NYU School of Dentistry
Roseman University
Saint Louis University
The Ohio State University
University of Alabama
University of British Columbia
University of Texas Health Science Center
University of Detroit Mercy
University of Florida
University of Minnesota
University Of North Carolina
University of Rochester
University of the Pacific
UNLV School of Dental Medicine
Western University of Health Sciences*

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Education
&
Support

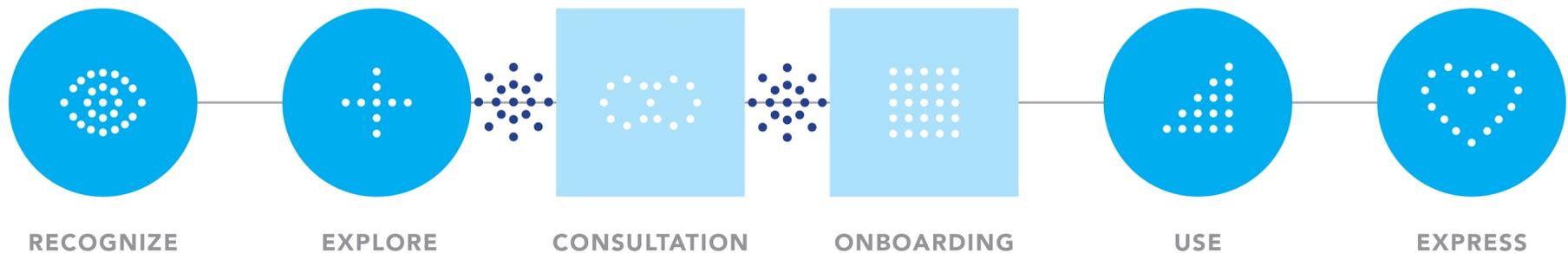
Consumer
Demand
&
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Growing the Market and Driving Patients to Doctors

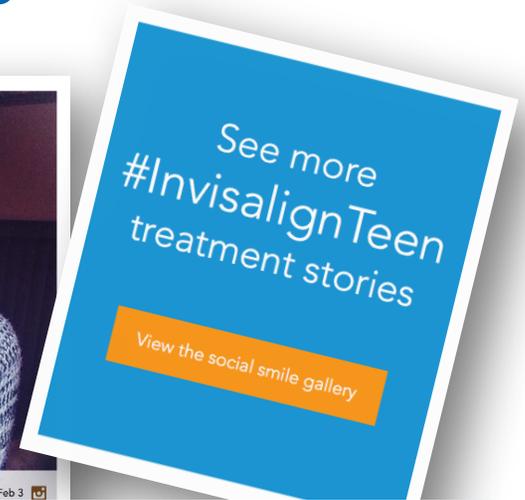
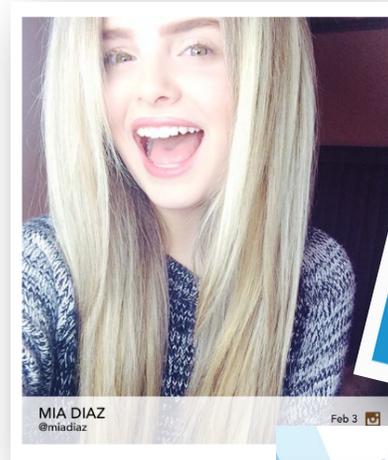
- Holistic support of current path-to-purchase to drive conversion at every stage
- Target adult and teen consumers
- Only orthodontic brand spending millions of dollars annually to drive patient demand



Invisalign Brand Ranked #1 by Orthos

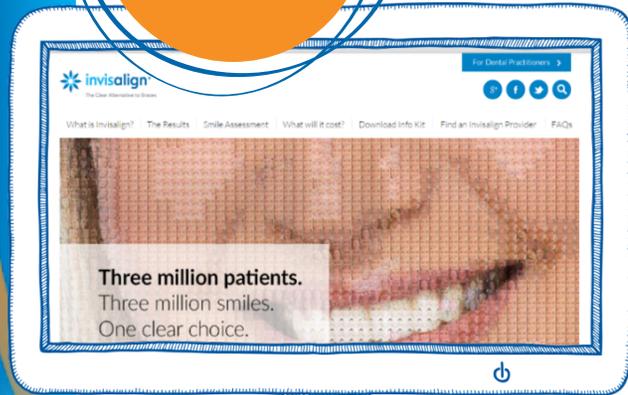
Multi-channel, integrated media approach to reach consumers – *especially teens and moms* – anywhere, anytime based on their interests

- PR, Editorial
- Social Media
- Mom Advisory Board
- Blogger Tour
- Live Events, Red Carpet

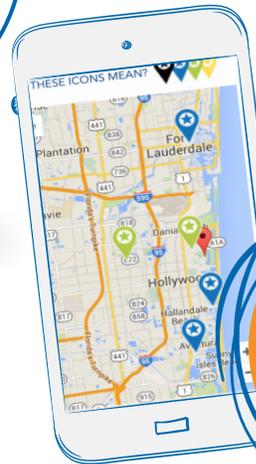


2015 Invisalign Consumer Highlights

5.4M+
Site
visitors



630K+
Smile
assessments



510K+
Find a
doctor
searches



200K+
Social media
fans

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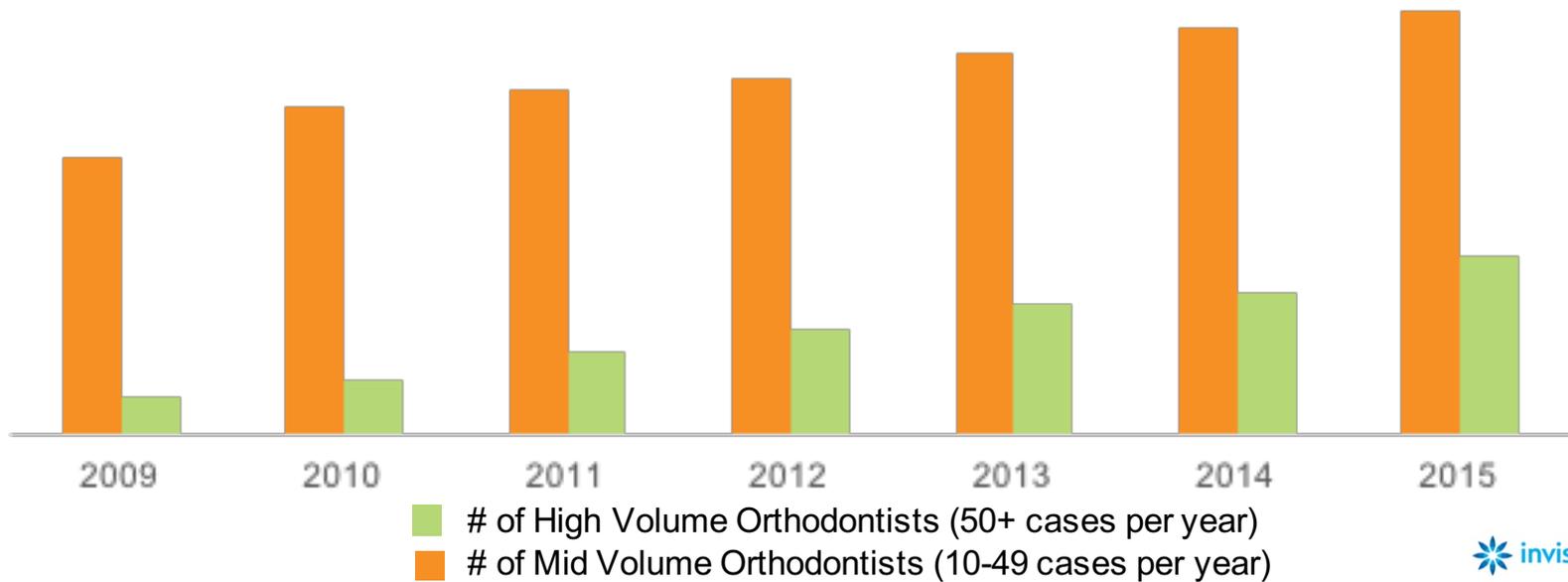
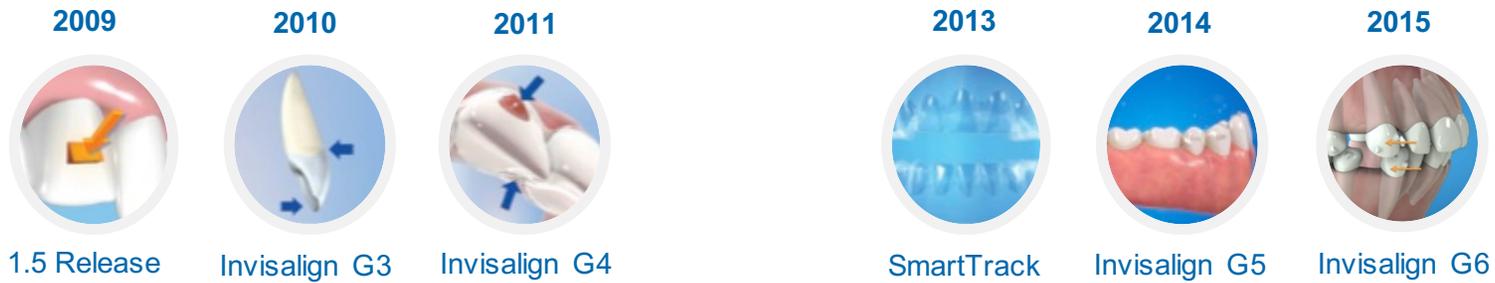
Education
&
Support

Consumer
Demand
&
Conversion

Product
Innovation

Customer
Advocacy

Product Innovation Drives Adoption and Utilization



iTero Element – Taking the Market by Storm

- Best scanner on the market
 - iOSim / Invisalign / lab integration
- Restorative launched in NA in April
- Highly marketable with incredible patient satisfaction

**40% Smaller and
Lighter Wand**

**Captures 6,000
Frames per
Second**

**20X Faster
Scan Speed**

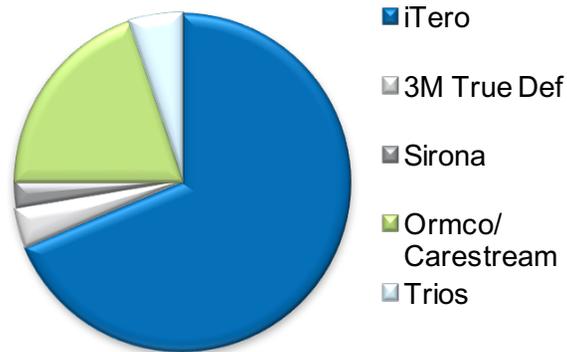
**3D High-Impact
Visualization**



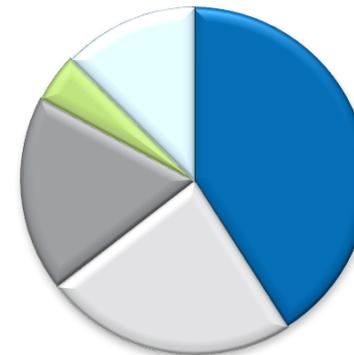
iTero Scanner Business

North America Adoption and Utilization

Orthodontic Practices



GP Practices



- Over 7,300 units installed worldwide
- Digitally submitted Invisalign cases now more than 43%*
- Leverage iTero as an enabler to increased Invisalign adoption and customer loyalty
- Establish a position as strong competitor in restorative / labs
- Leverage installed-base for service

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Continuous Improvements in Customer Advocacy

- **TFM for North America**
 - Focused effort on key customer segment
 - 90 Day high touch program
 - Surrounded by sales, clinical and support teams
- **Regional Treat Team Model**
 - Formed of clinicians and technicians
 - Direct line of communication between field sales, customer service and the treat team
 - Reducing lead times and improving overall customer support experience



Summary

Great progress and momentum

Large opportunity remains across all customers

Focus on increasing share of teenagers and adults

DSOs accelerating adoption of Invisalign

Strong strategic plan to drive continued growth



invisalign®

