



# North America Region

Investor Day – June 2, 2016

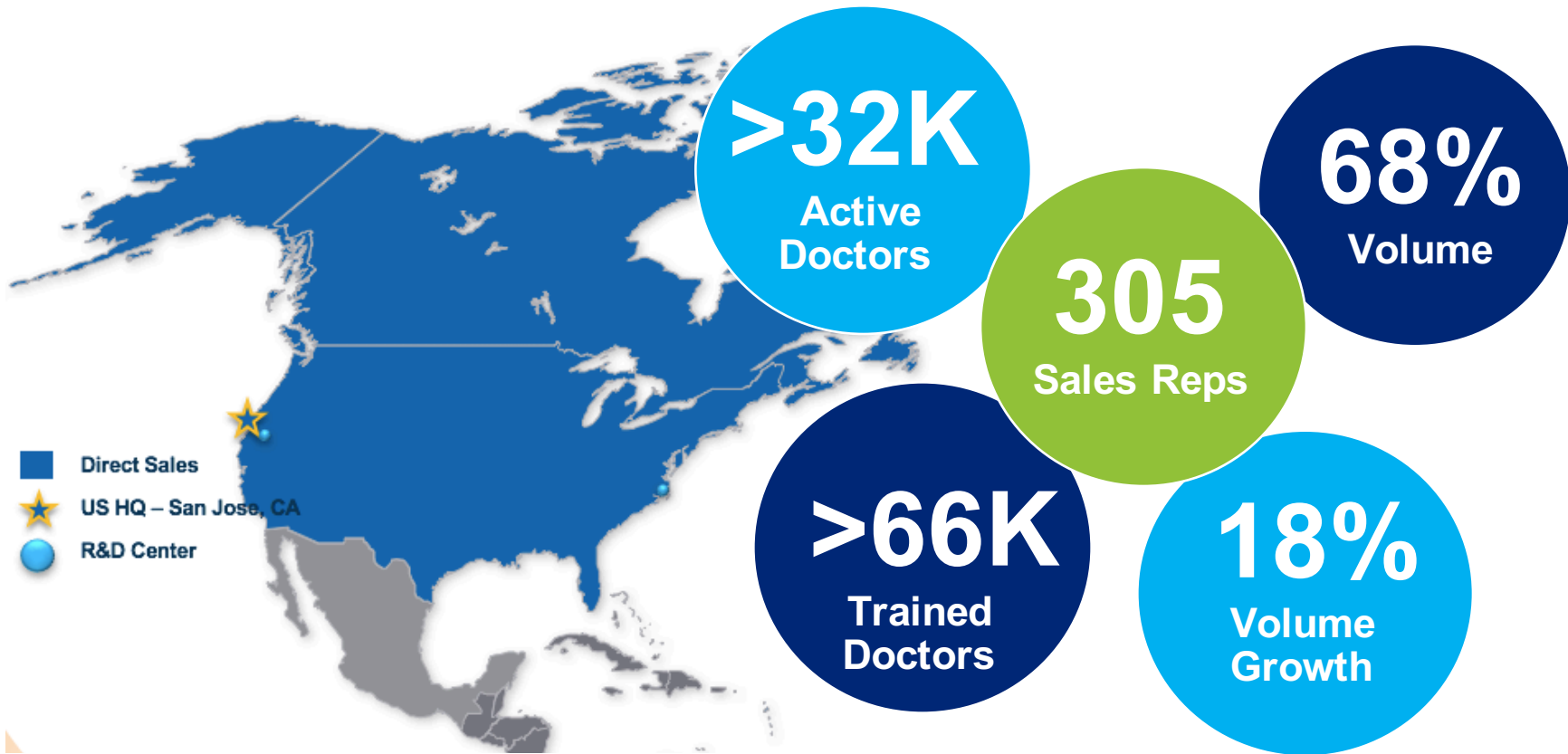
**Chris Puco**

Vice President, North America

# Forward Looking Statement

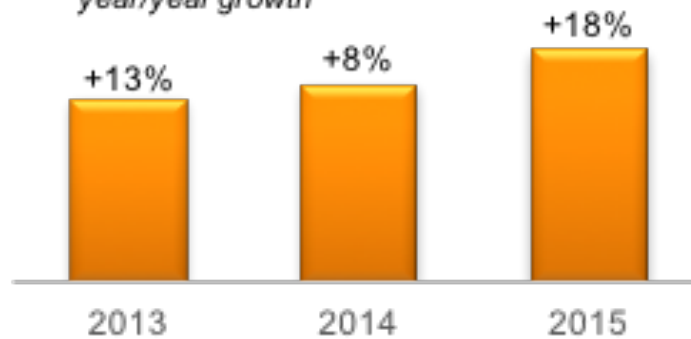
During this presentation and corresponding commentary we may make forward-looking statements, including statements regarding Align's strategy for future growth, plans related to global expansion of operational presence, our expectations regarding our ability to develop and commercialize new products, 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

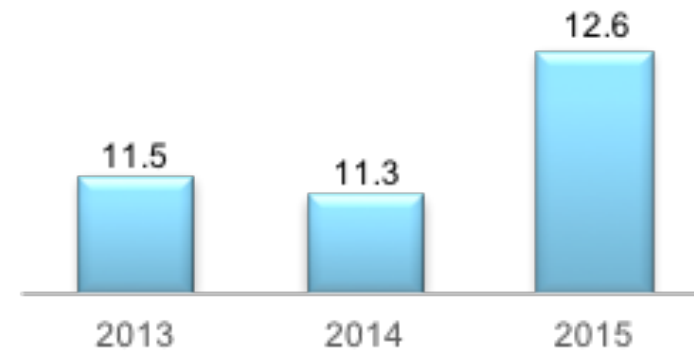


# North America Highlights

**Invisalign Volume**  
year/year growth



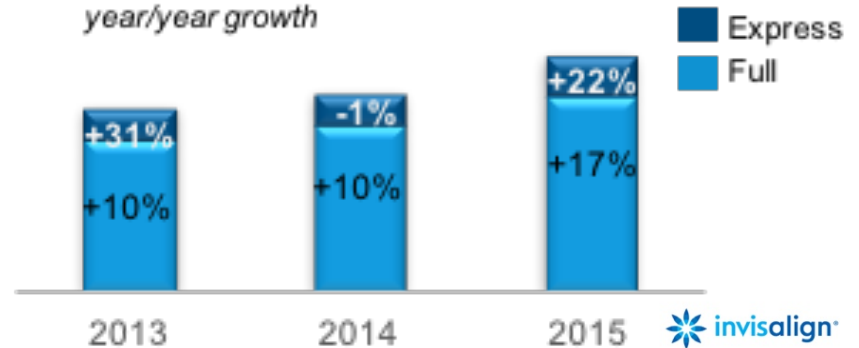
**Cases/Doctor**



**Teenager vs. Adult**  
year/year growth



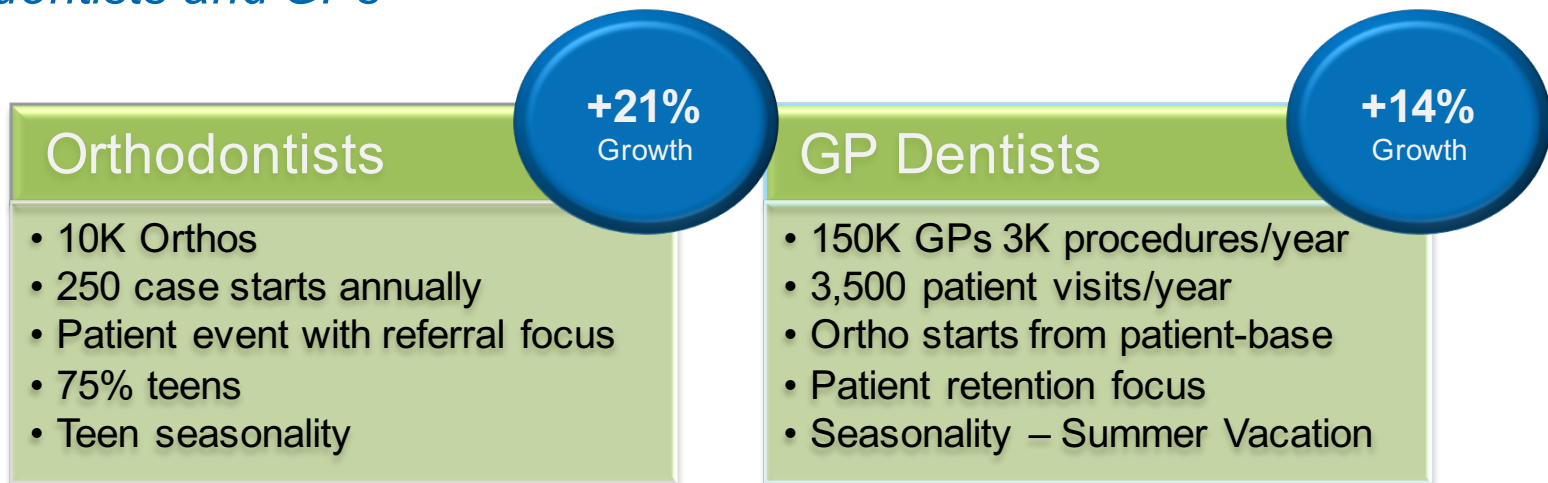
**Full vs. Express**  
year/year growth





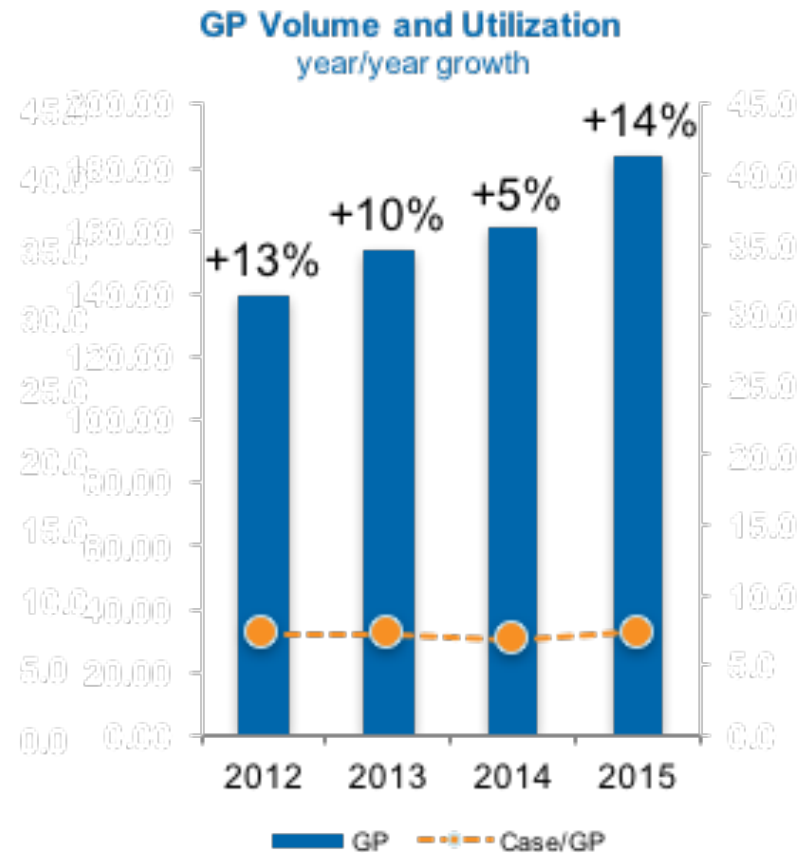
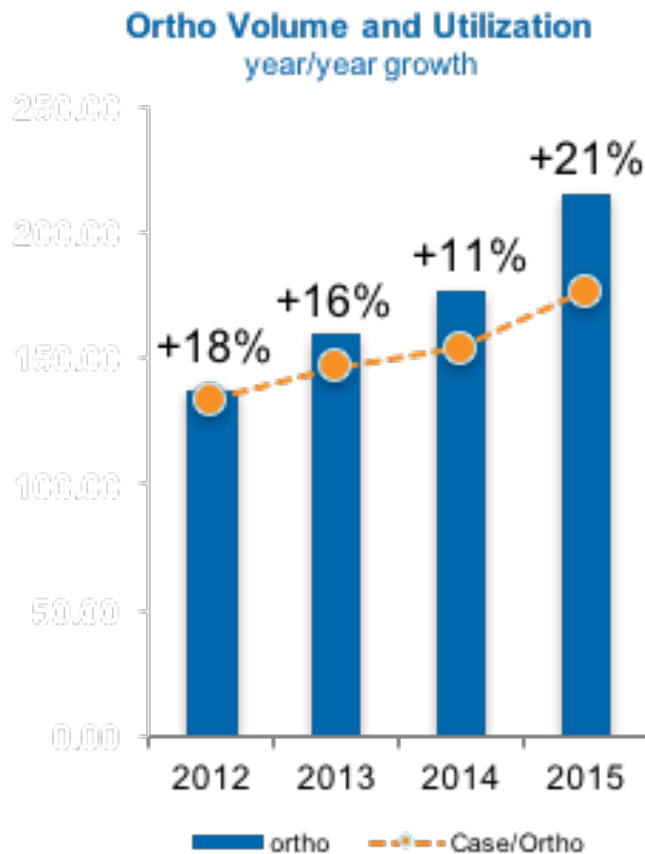
# Large Opportunity in Core Customer Channel

## *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

Dental clinics under single/corporate ownership

Centralized operations

Established business processes

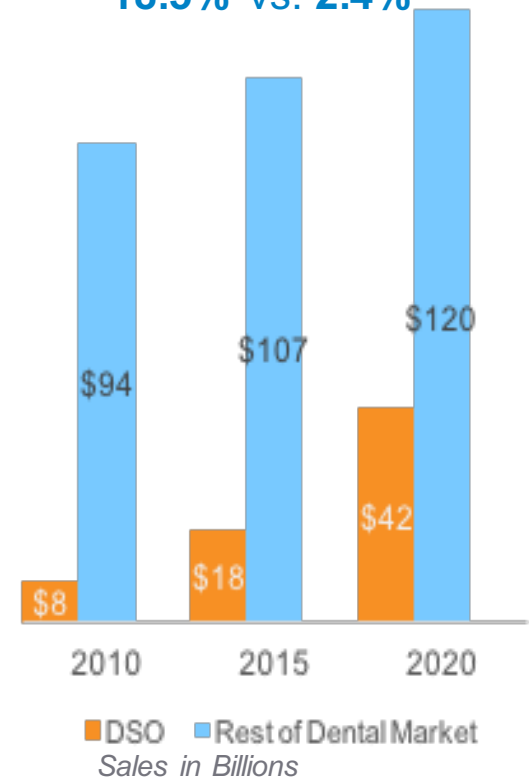
Clinical leadership

## 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

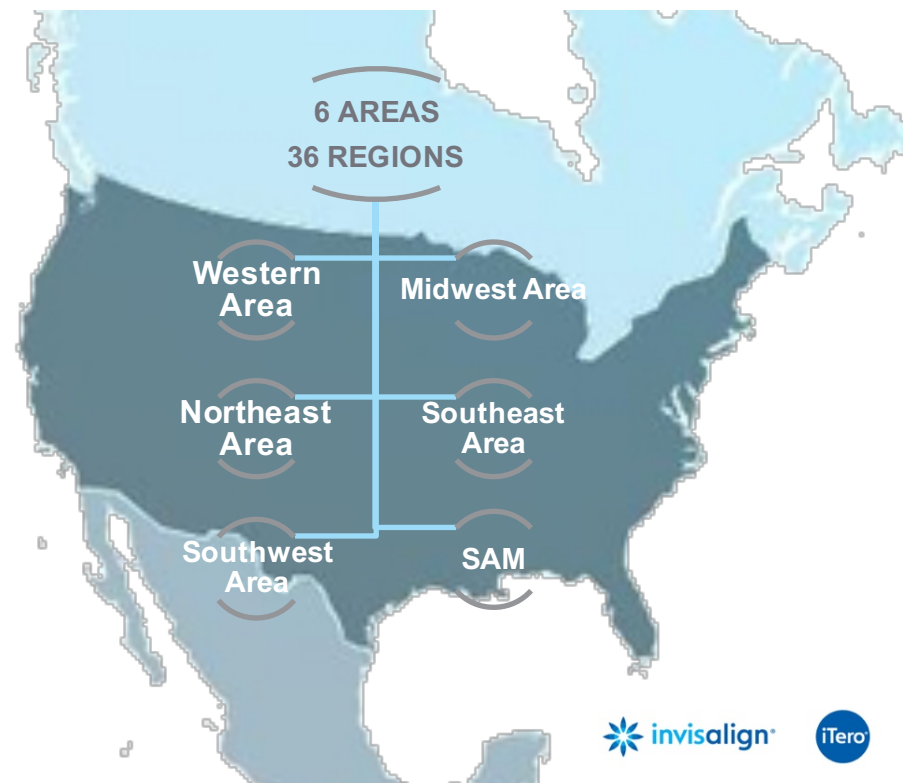
Customer  
Advocacy

# 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



# Key Success Factors in Driving Growth

Sales Force  
Coverage  
&  
Effectiveness

Education  
&  
Support

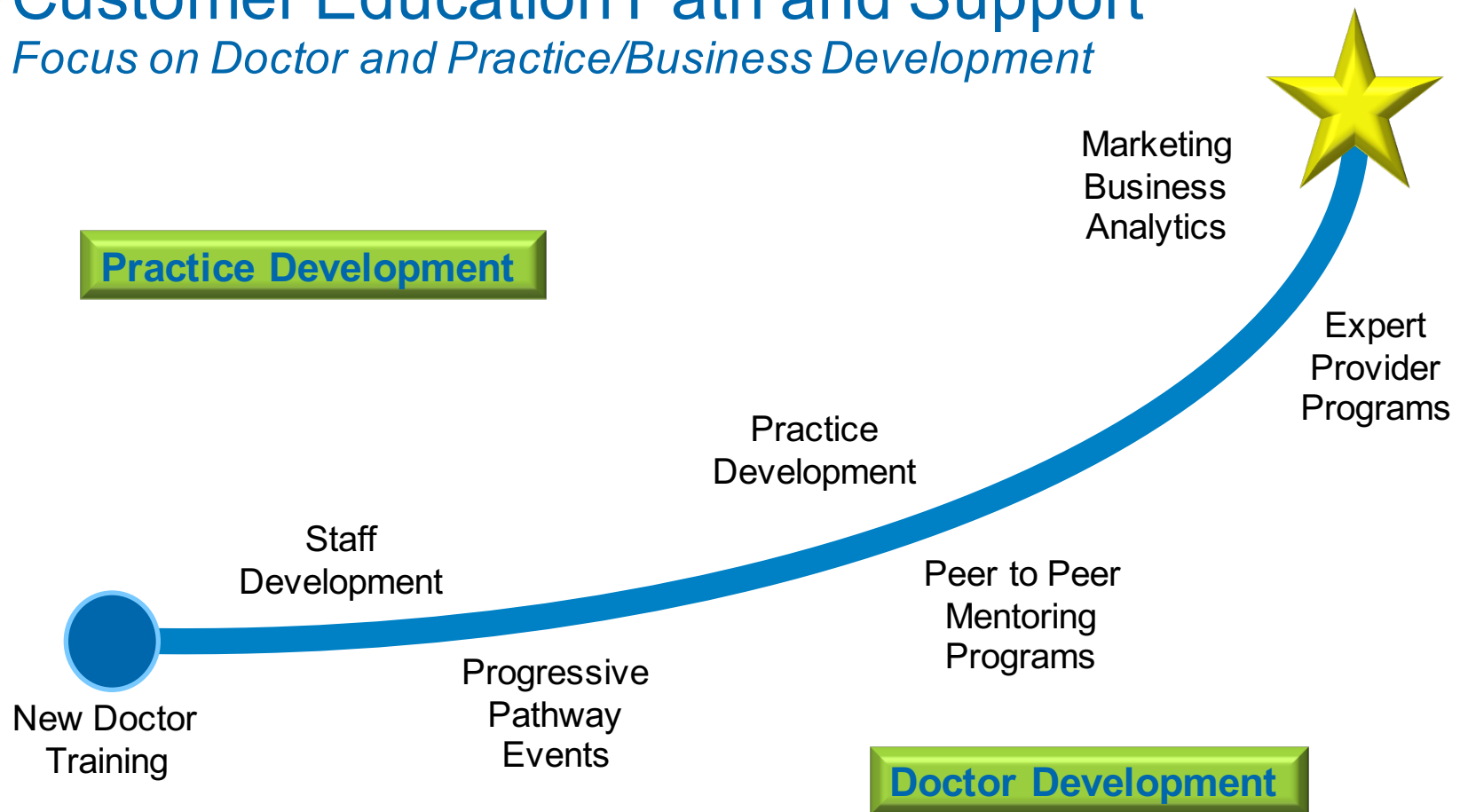
Consumer  
Demand  
&  
Conversion

Product  
Innovation

Customer  
Advocacy

# 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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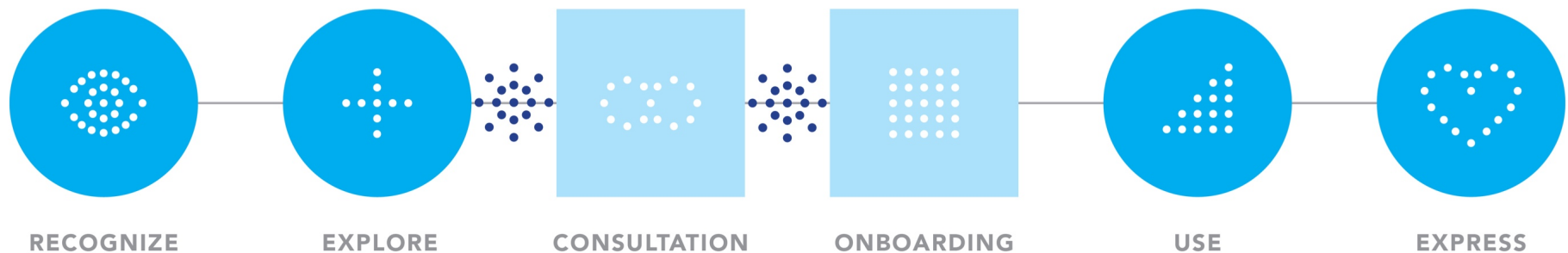
Consumer  
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&  
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Product  
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Advocacy

# 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

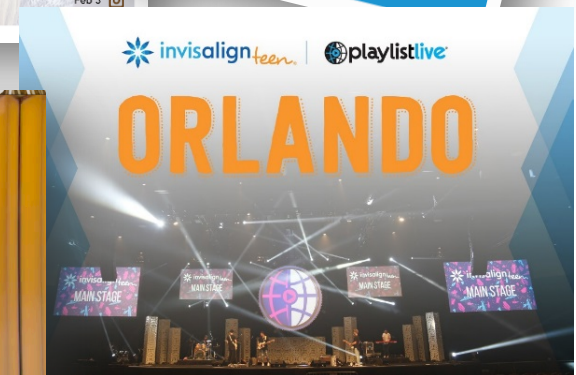
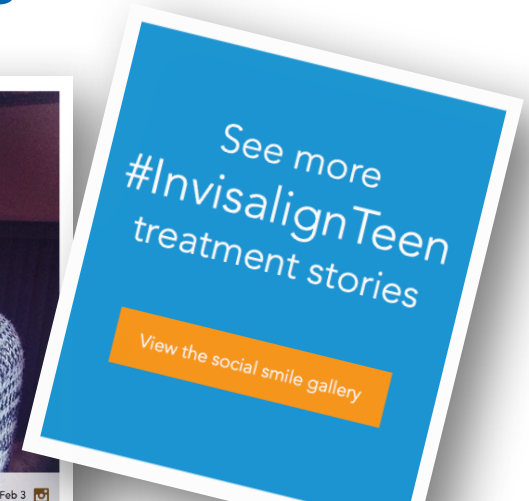
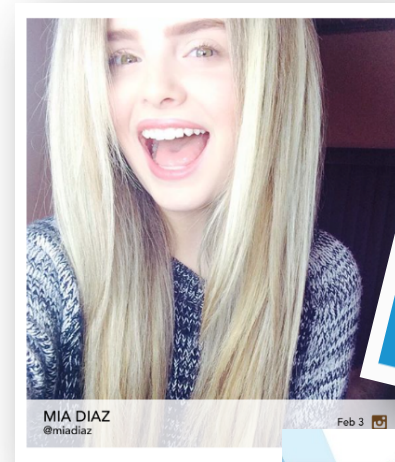




# Invisalign Brand Ranked #1 by Orthos

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



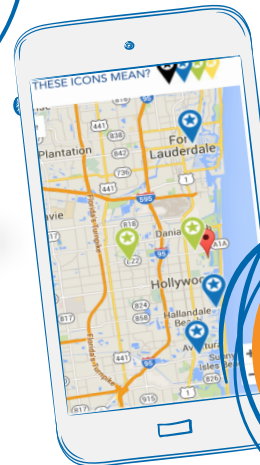
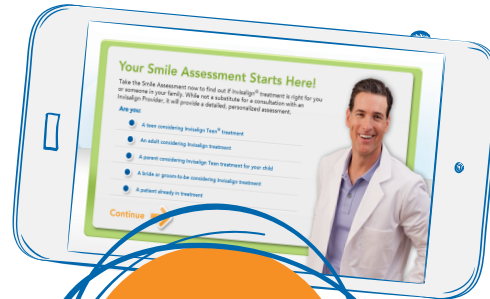
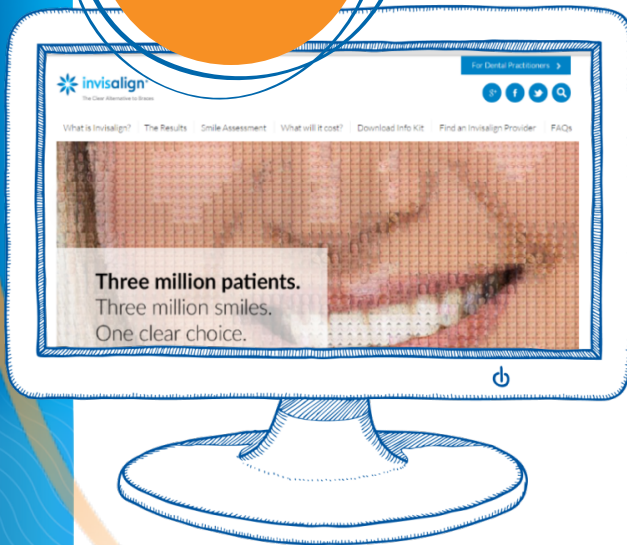
# 2015 Invisalign Consumer Highlights

5.4M+  
Site  
visitors

630K+  
Smile  
assessments

200K+  
Social media  
fans

510K+  
Find a  
doctor  
searches



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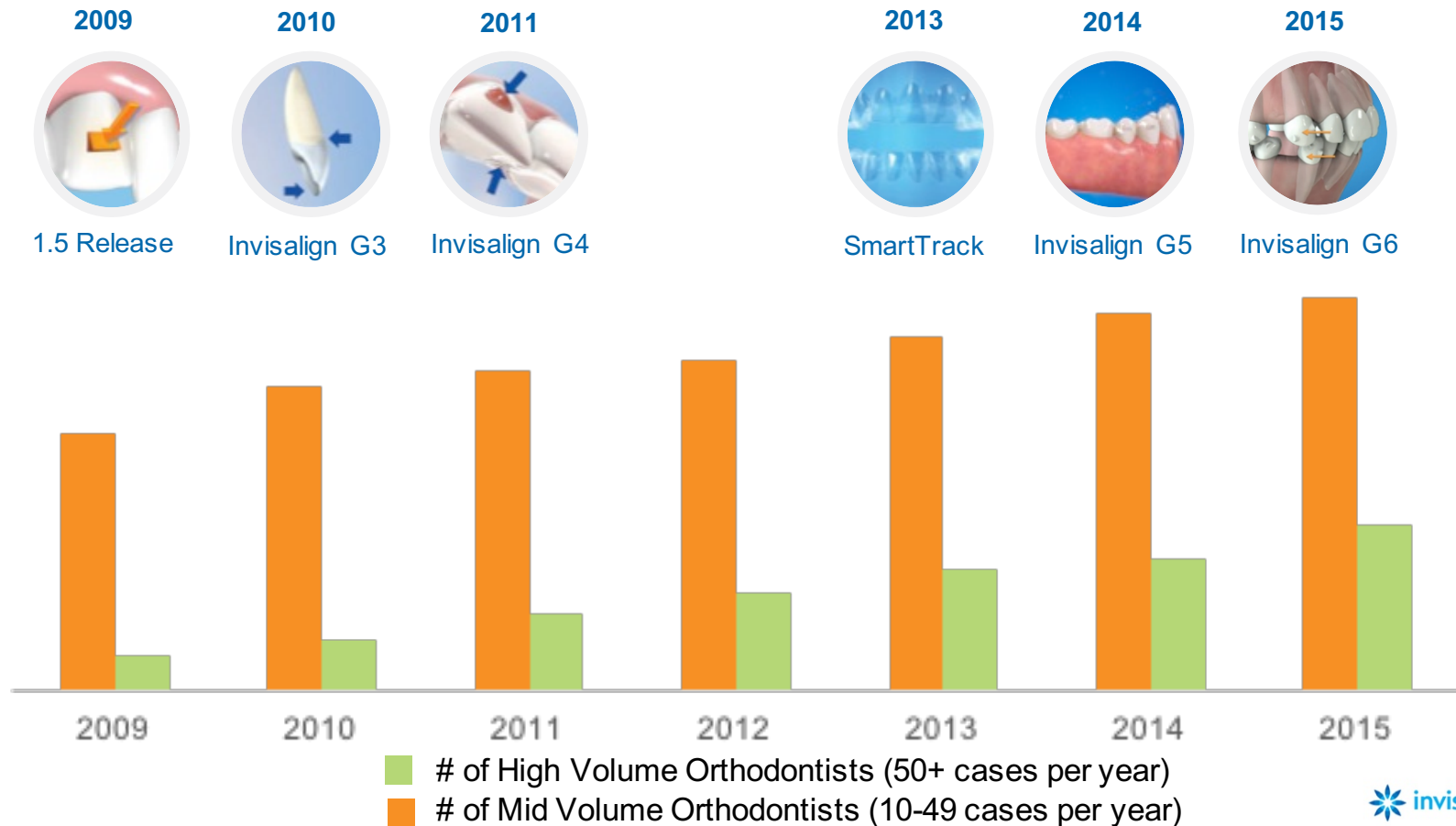
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# Product Innovation Drives Adoption and Utilization



# 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**

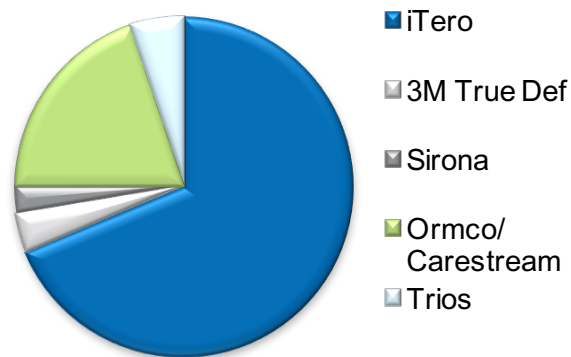
**3D High-Impact  
Visualization**



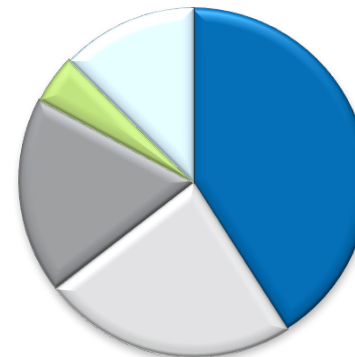
# iTero Scanner Business

## *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®

