

NORTH AMERICA SALES STRATEGY

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VP NORTH AMERICA SALES

FORWARD LOOKING STATEMENT

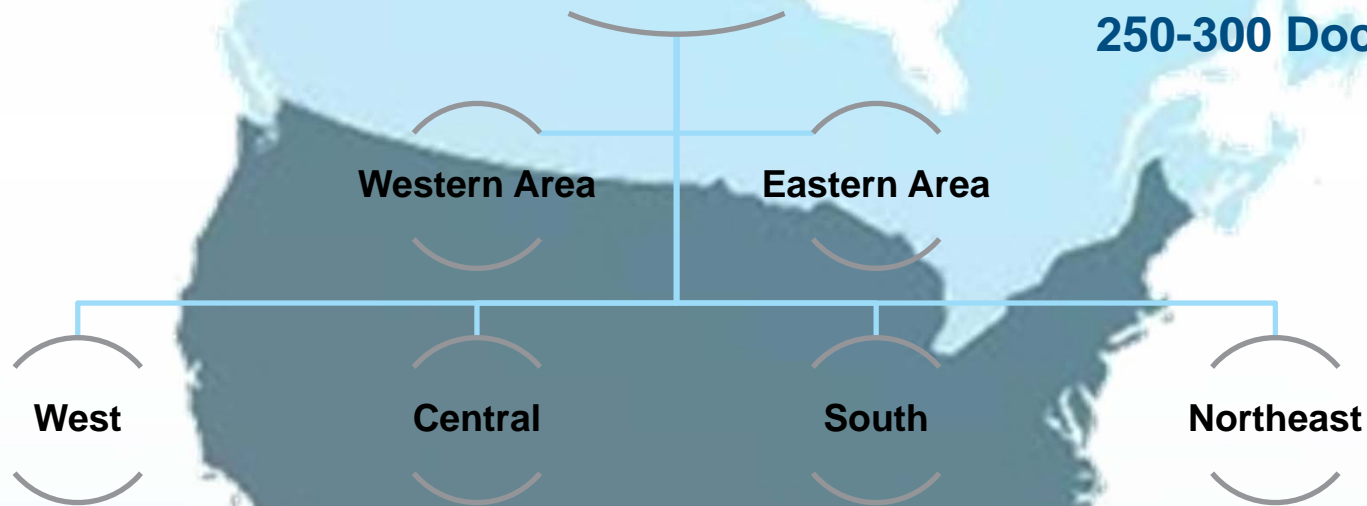
During this presentation and corresponding commentary we may make forward-looking statements, including statements regarding Align's strategy for future growth, the anticipated impact of product innovation, consumer demand generation, geographic expansion and sales force productivity on, among other things, customer adoption, as well as statements related to Align's business outlook. 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 SALES ORGANIZATION

18 iTERO
SALES REPS

2 REGIONAL AREAS
24 REGIONS

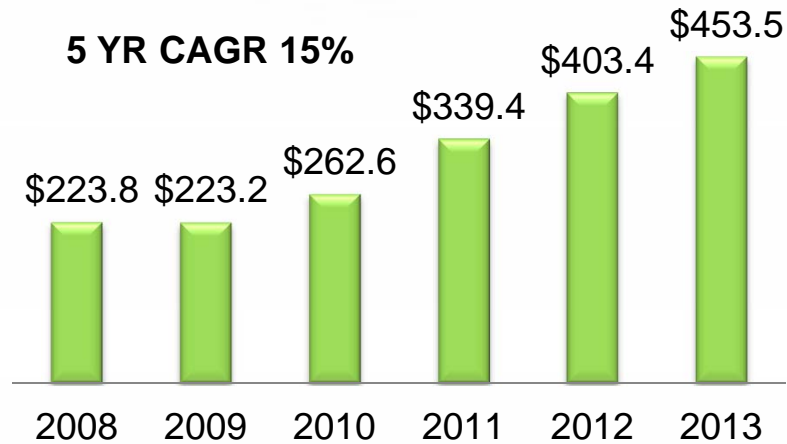
205 INVISALIGN
SALES REPS
250-300 Doctors/Rep



LARGEST DIRECT DENTAL SPECIALTIES TEAM

NORTH AMERICA HIGHLIGHTS

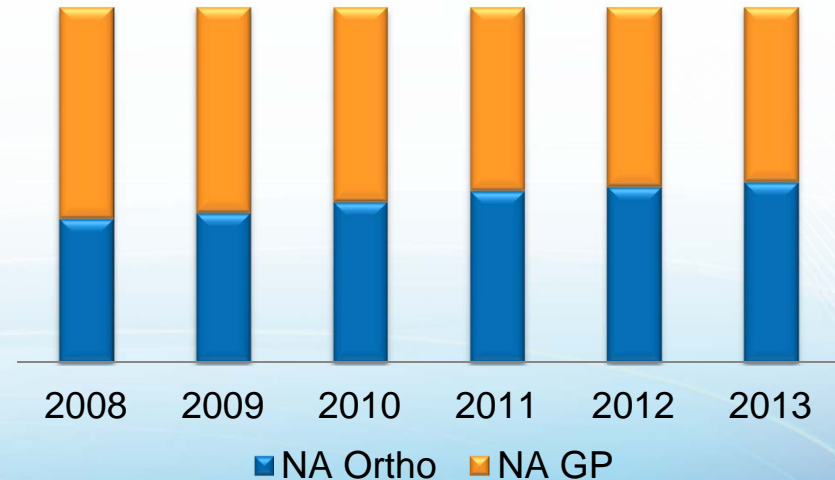
North America Revenue (\$M)



Clear Aligner Product Mix



Clear Aligner Doctor Mix



Full = Invisalign Full, Invisalign Teen and Invisalign Assist. Express = Invisalign Express, Invisalign Lite and Invisalign i7.

NORTH AMERICAN CUSTOMER DYNAMICS

ORTHODONTISTS

- Specialists in straightening teeth
- Orthodontic practices ~ 250 case starts annually
- Know how to sell to and close patients

TEENS

75% of practice

SEASONALITY

teens - adults

GP DENTISTS

- Wide range of procedures with 3,330 patient visits/year
- Seek orthodontic starts from patient-base
- Not comfortable selling high value procedures

TEENS

refer to ortho

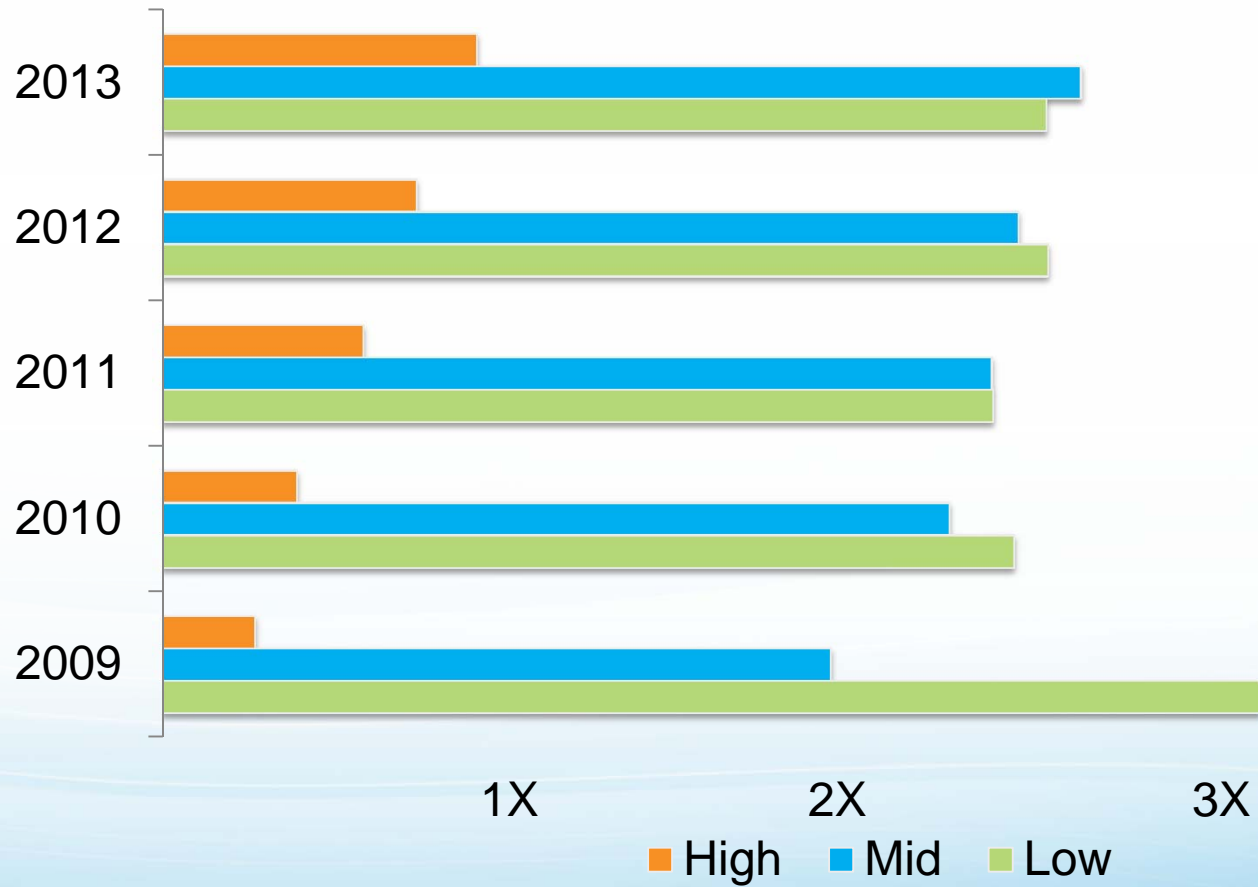
SEASONALITY

summer

ADOPTION AND UTILIZATION GROWTH

Increasing Share of Chair - NA Orthodontists

NA Ortho Doctors by Segment



25% OF ORTHOS

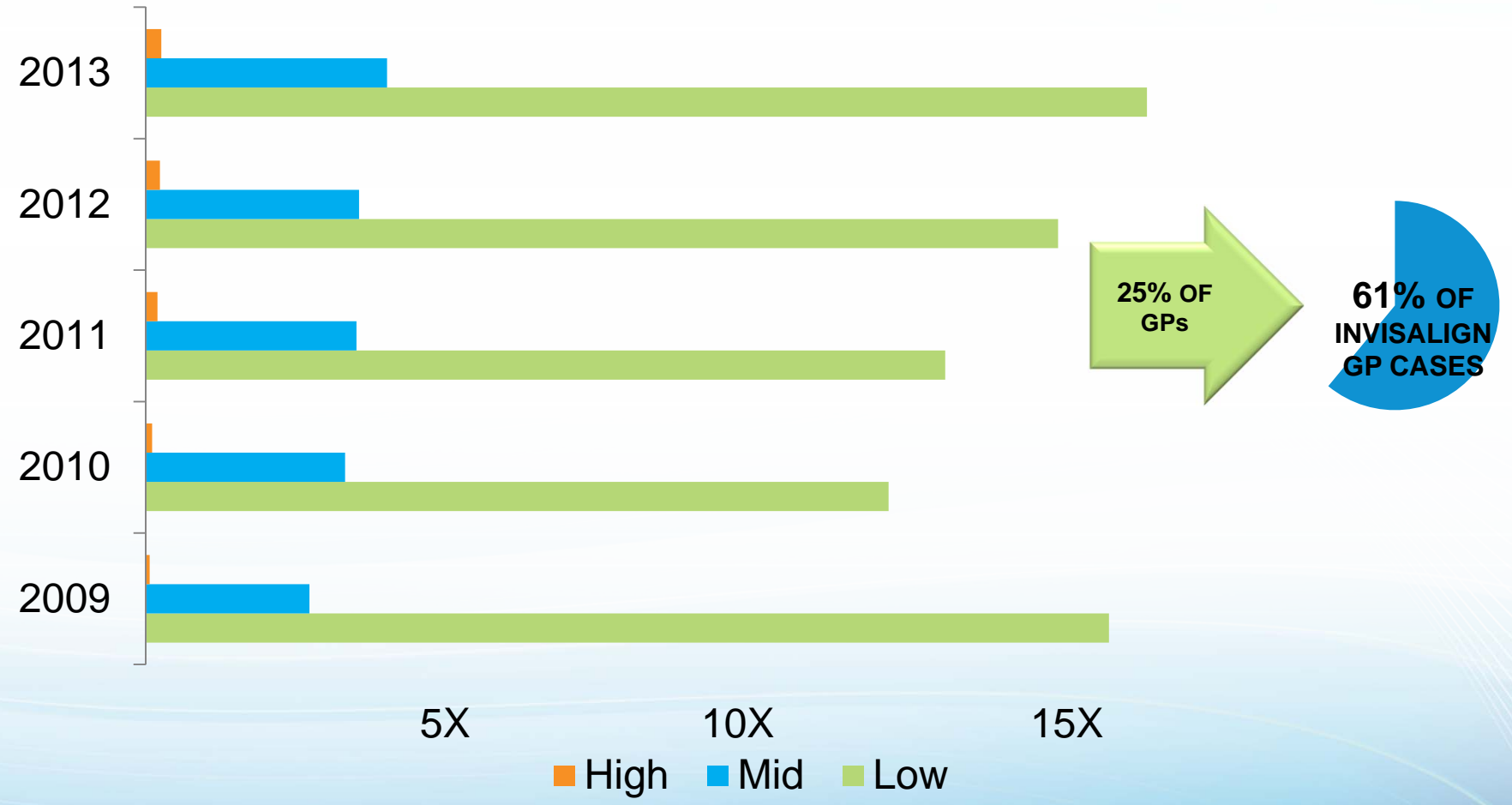
68% OF INVISALIGN ORTHO CASES

High 49+, Mid 10-49, Low 1-9 Invisalign cases per year

ADOPTION AND UTILIZATION GROWTH

Expanding Base and Increasing Use – NA GP Dentists

NA GP Doctors by Segment



High 49+, Mid 10-49, Low 1-9 Invisalign cases per year

NORTH AMERICAN GO-TO-MARKET STRATEGY



INCREASING SALES EFFECTIVENESS AND MANAGING FOR CONTINUED GROWTH



CLINICAL EDUCATION AND SUPPORT

- Best in class new customer onboarding solution
- Reengagement programming
- Educational pathways
- New fundamentals training
- Enhanced efforts on clinical scope and predictability



- Welcome Back Program
- 250+ hours of videos
- 500+ CE events
- 29,000 visitors

- 200% more programming
- Efforts engage dental teams
- Channel-specific progressive learning

- Local Study Clubs
- In-office Lunch & Learns
- Forums and Expos

ALIGN TRAINING AND EDUCATIONAL GOALS

- Improve percentage of submitting doctors
- Reengage inactive and low submitting doctors online
- Establish an educational pathway for deepened engagement

aligntech
INSTITUTE



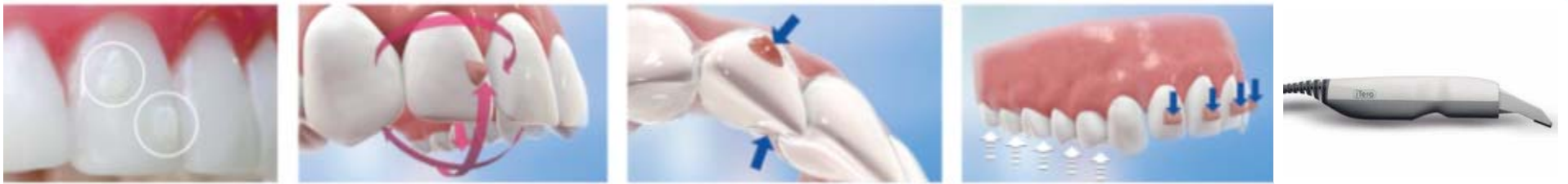
Invisalign Fundamentals Pilot Results – Historical vs. 90 Day Pilot –

Average % Submitters	57% vs. 77%
Overall Average Submissions per New Providers	1.6 vs. 2.9
Average Submissions per Submitter	2.7 vs. 3.8

PRODUCT AND CUSTOMER INNOVATION

Comprehensive End-to-End Solutions

INVISALIGN FULL ● INVISALIGN TEEN ● INVISALIGN EXPRESS ● ITERO



SMARTTRACK ● INVISALIGN G4 ● INVISALIGN G5 ● CLINCHECK PRO ● VIVERA DE-BOND



- Unique Practice Partner
- Consumer Advertising
- Customer Experience
- Product Innovations

DRIVE ADOPTION AND ACCELERATE UTILIZATION OF INVISALIGN IN PRACTICE

New Doctors

New Fundamentals Course
Post-Course Clinical Education Pathway
High TS Touch
Adoption Incentives

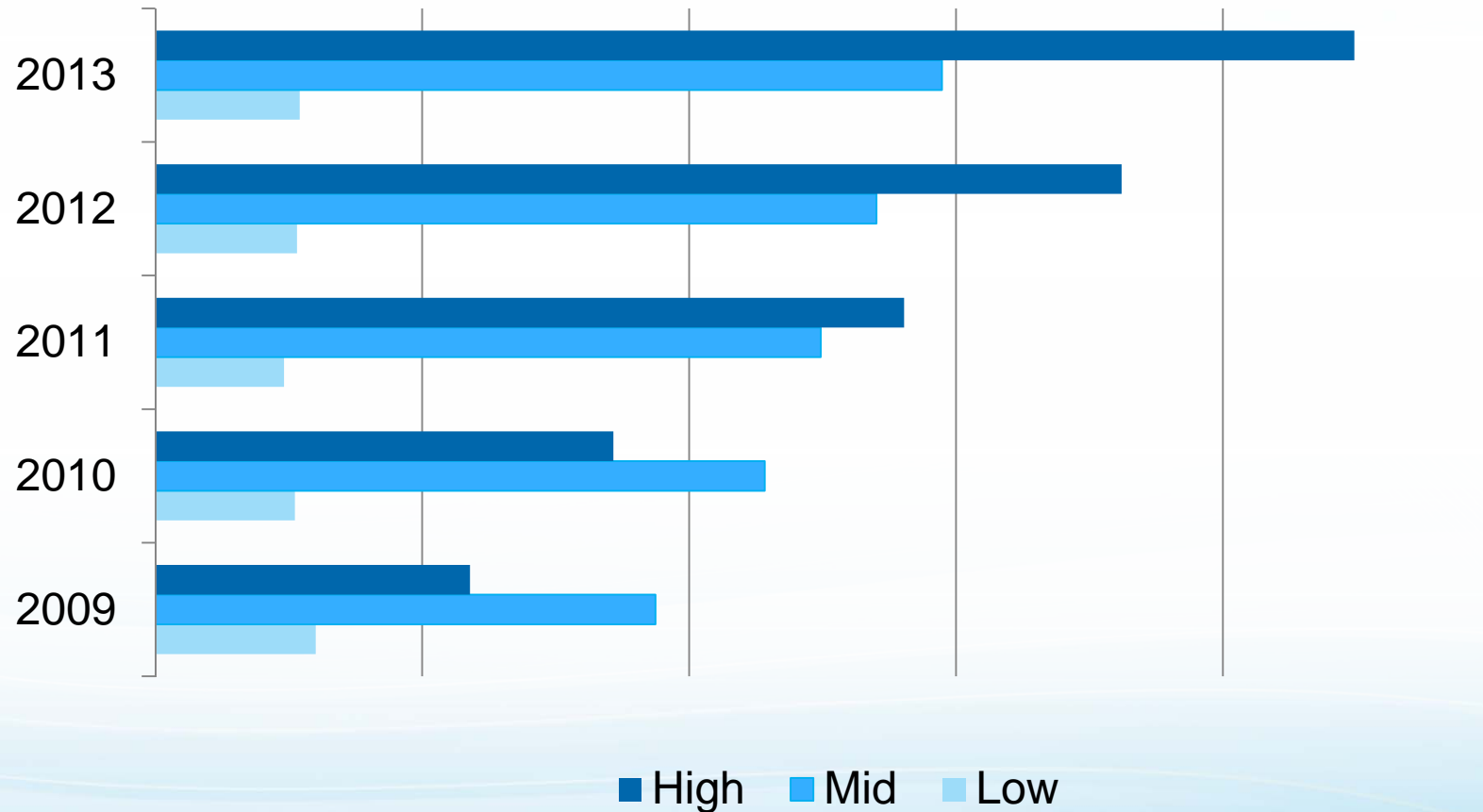
Current Doctors

Practice Development
Channel Specific Approach
Consumer Campaign
Advantage Program

ADOPTION AND UTILIZATION TRENDS

NA Orthos – Mid-High Volume Doctors Accelerating

NA Ortho Cases by Segment

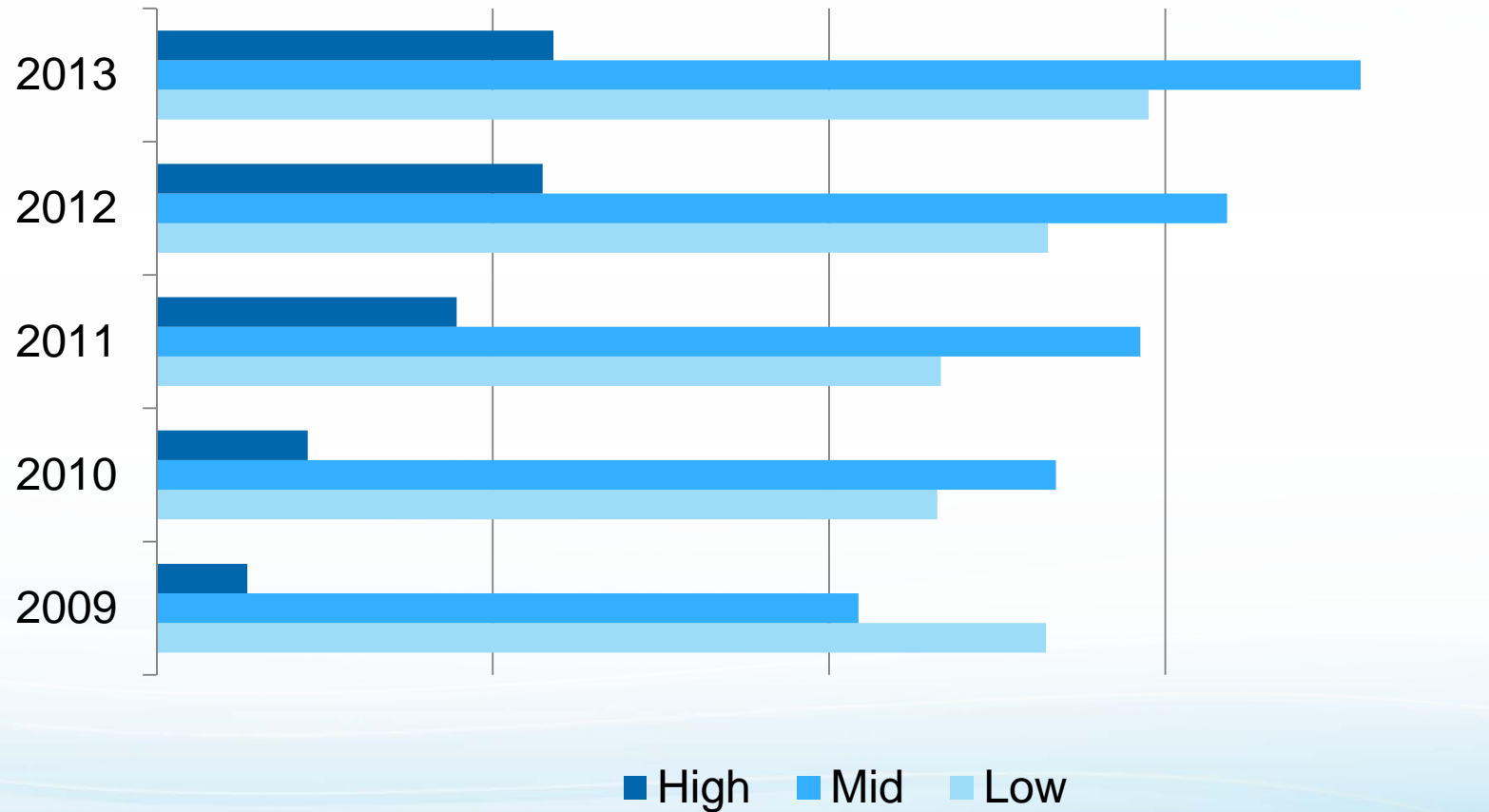


High 49+, Mid 10-49, Low 1-9 Invisalign cases per year

ADOPTION AND UTILIZATION TRENDS

NA GPs – Steady Case Growth Across Segments

NA GP Cases by Segment



High 49+, Mid 10-49, Low 1-9 Invisalign cases per year

Expanding Our Opportunities for the Future

EMERGING TREND IN DENTISTRY

Dental Service Organizations (DSOs)



OPPORTUNITY

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

**20% OF DENTAL
MARKET IN
NORTH AMERICA**

FOCUS AND APPROACH TO DSOs

- Establish partnerships
- Build team, systems and processes
- Train new DSO doctors in 2014
- Challenging selling environment
- Increase utilization per doctor



LONG-TERM GROWTH POTENTIAL WITH EQUIVALENT CONTRIBUTION MARGINS

SUMMARY



Great success story

Plenty of opportunity ahead

Strong strategic plan to drive continued growth and innovation

Expanding innovative opportunities for future