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DENSPLY IMPLANTS



DENTSPLY Implants
NAm National Sales Meeting

John Voskuil

VP/GM

Welcome

- Chris Clark - President & CFO
- Lars Henrikson - Group Vice President
- Matthias Kuehner - Group Vice President, Sales
- Mikael Sander - Vice President, Digital Implant Solutions
- Anders Holmen - Senior Advisor
- Magnus Larsson - Market Development Director
- Ulrika Petersson - Senior Manager, Global Scientific Management

2015 Overview

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2015 NAm Financial Performance

	Performance to Budget	Performance to Prior Year
Sales	-4.4%	+0.1%
Gross Profit	-6.9%	-0.5%
Expenses	-7.3%	-5.6%
Income from Operations	-6.5%	+6.7%

North America 2015 Goals

Category – Implant Units

1. Implant unit growth is a minimum of 5% = **1.69%**
2. Close 3 Key GETs/DM by EOY = **2.80**
3. Each DM gets a minimum of 1 new EV Profile customer/month = **0.19**
4. Complete SFE KPI's for 2015 – Clinical Team = **Good Progress**

Category - ATLANTIS

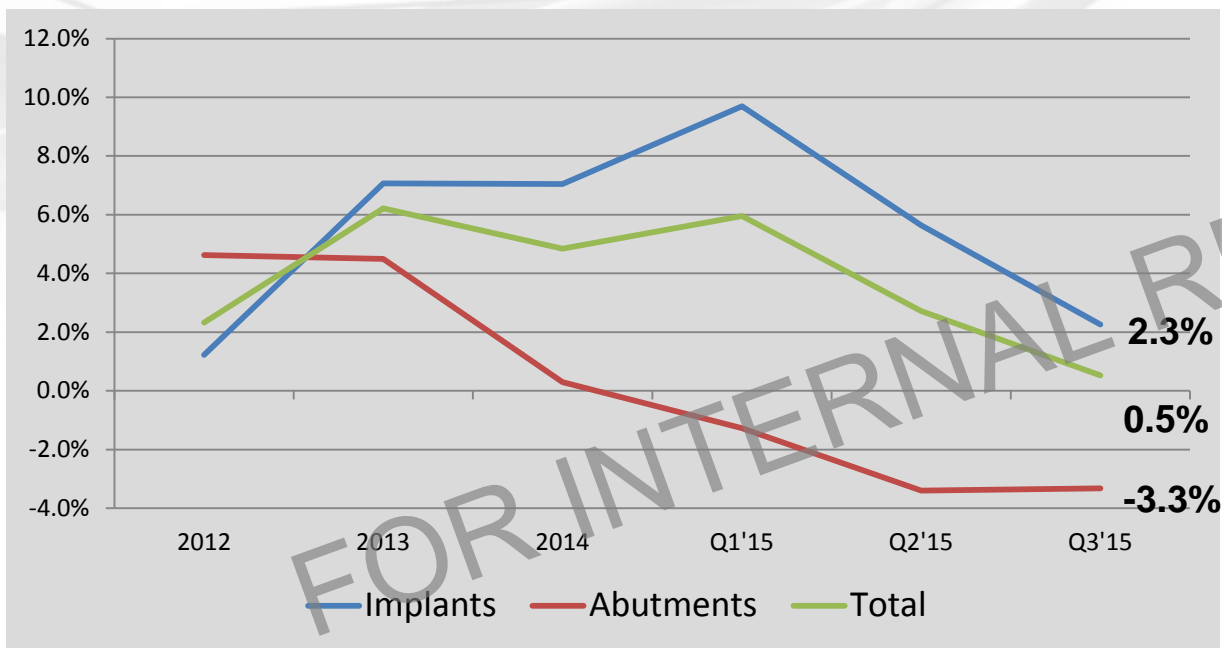
5. Track ATLANTIS lab pricing deals with volume commitments and report monthly on results = **Good Progress**
6. Conus – Unit Growth to Budget = **44%**

Category – Education

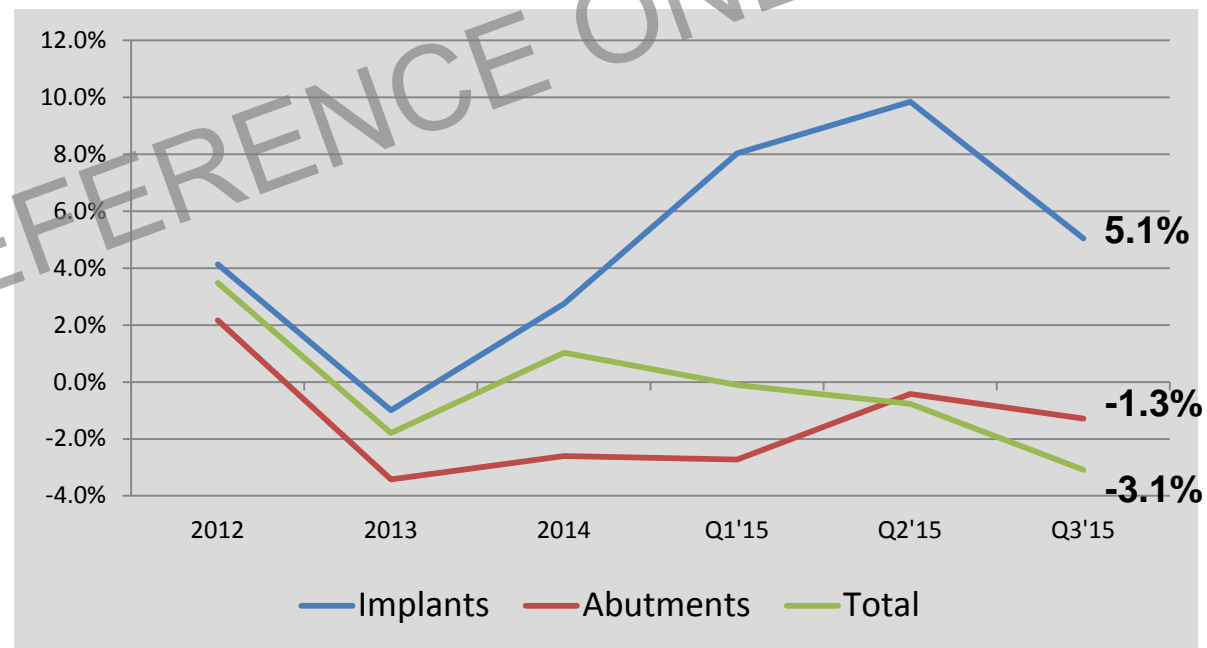
7. Track education events per month = **780 events in 2015**

Total Market Growth - Revenue

United States

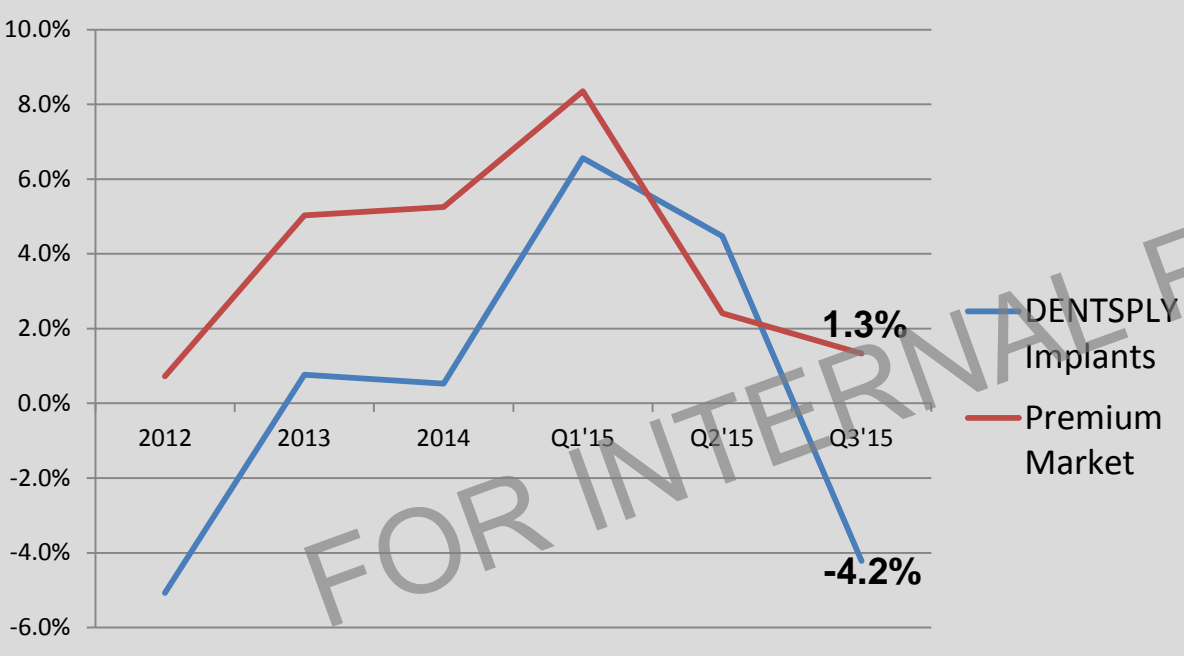


Canada

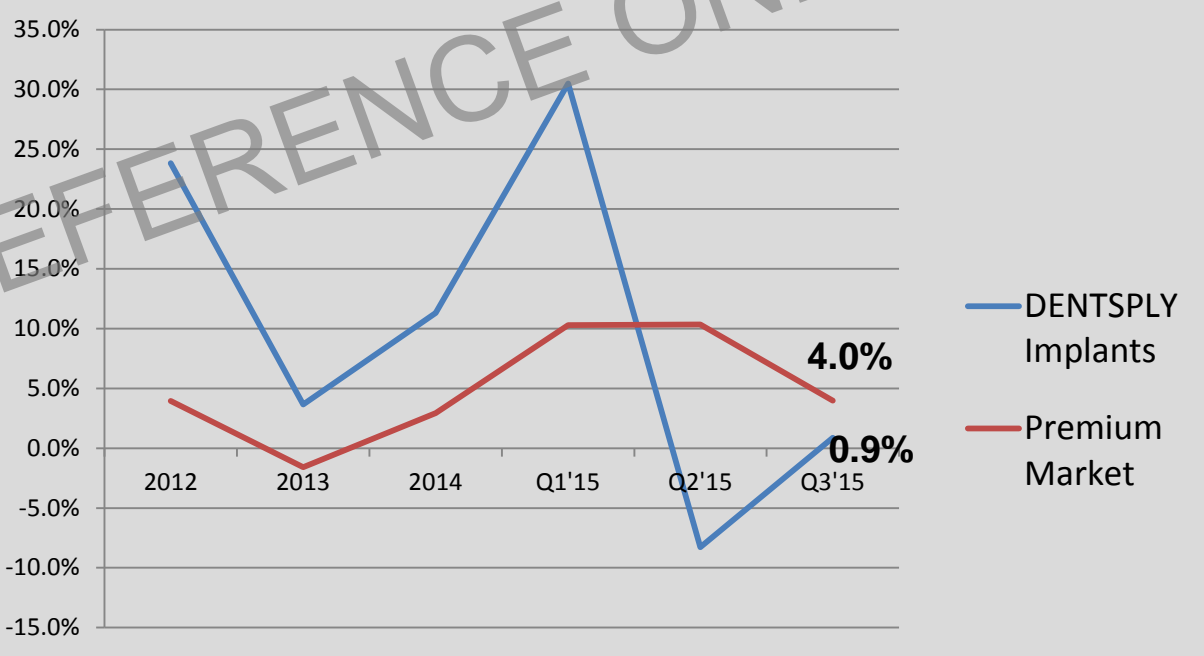


Implant Units Growth

United States

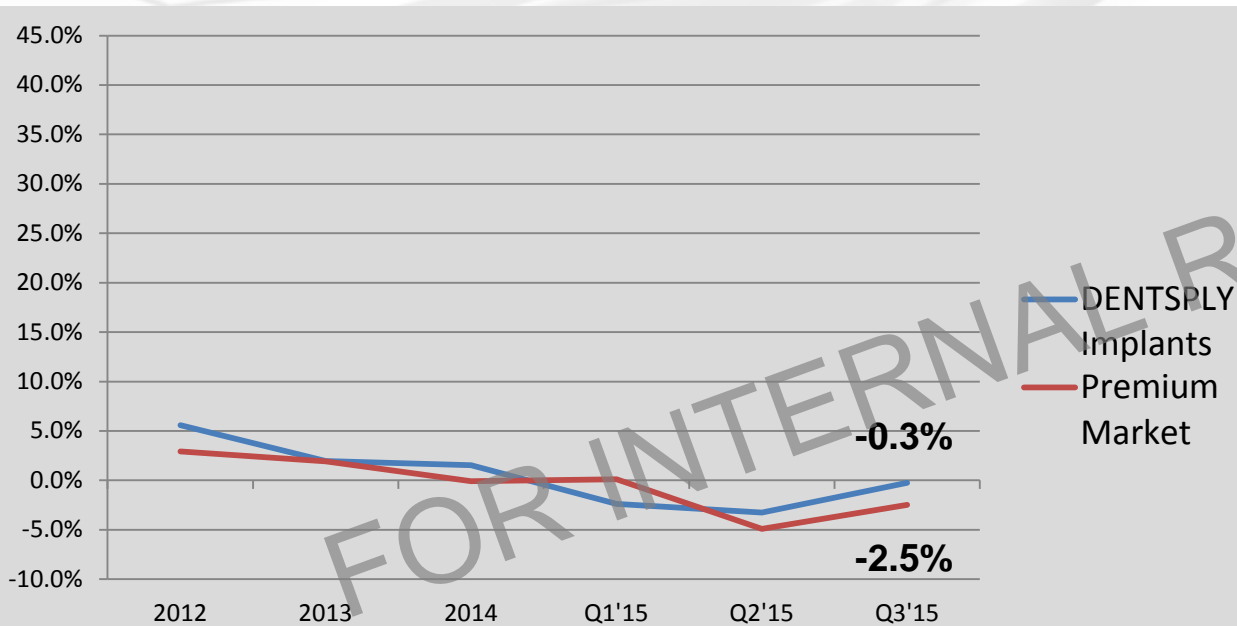


Canada

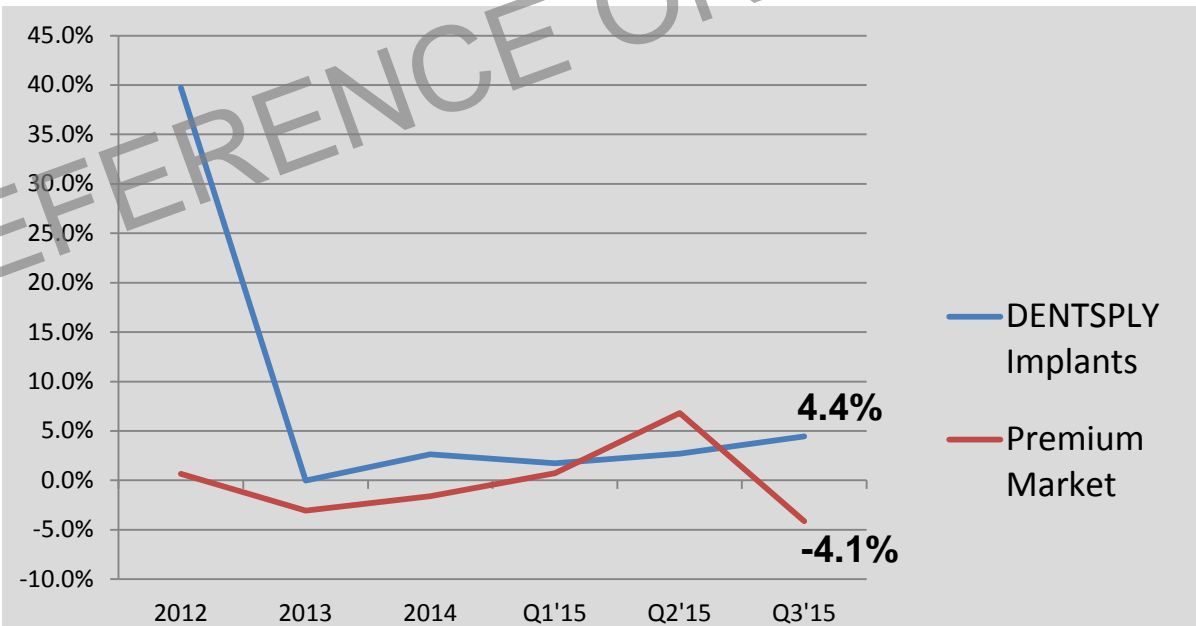


Abutment units growth

United States

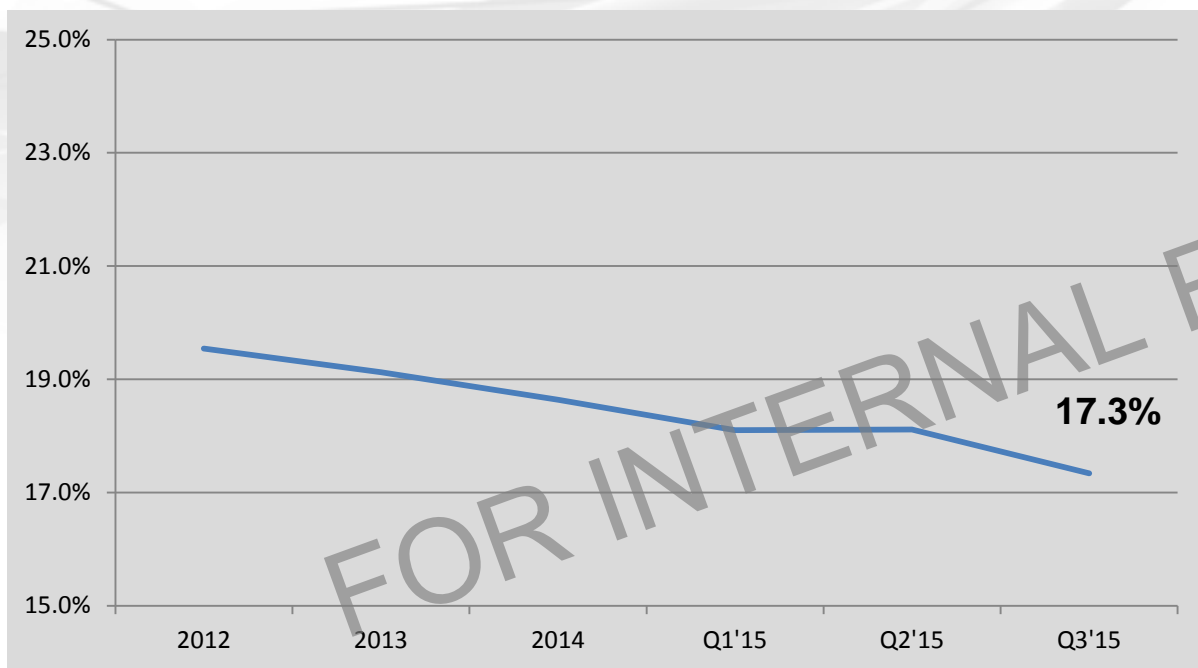


Canada

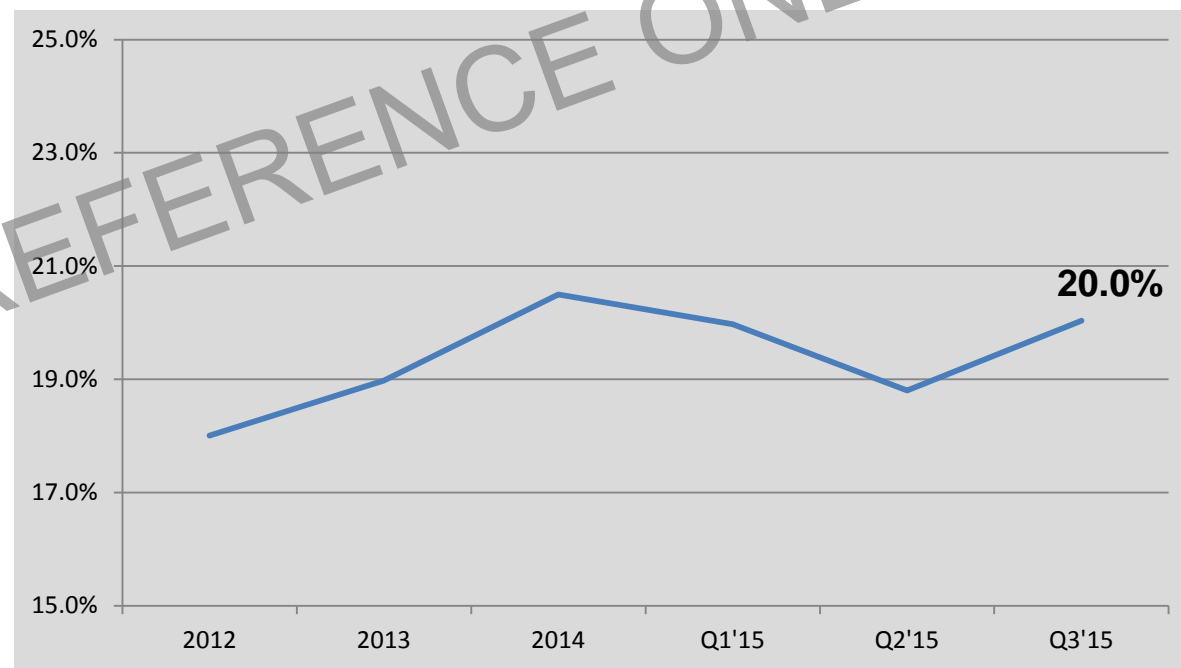


Market Share – Premium Segment Total Rev

United States



Canada



2015 Reflections – Wins and Learnings

- Significant “Wins”
 - Western Dental contract
 - ATLANTIS Unit growth > Market
 - Engagement of CS team
 - Investments in sales training
- Key Learnings
 - Reactive approach slowed potential
 - Lead in messaging – be ahead of competition
 - Focus/Prioritization of initiatives critical to gain momentum
 - Packaged solutions required to support premium position
 - NAm market requires a proportionate voice

2016 Strategic Focus

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Vision

Implant dentistry is the choice for enhanced patient quality of life—for a world where everyone eats, speaks and smiles with confidence.

Strategic Focus – 2015 to 2016

- Core deployment strategy is solid
 - Clear focus on larger accounts
 - Leverage referral base to support large accounts
- GET, GROW, KEEP
 - Good progress on GET/GROW
 - Additional need to reduce churn on KEEP
- Clinical Education
 - Continue to build on what has been a core strategy



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“

A true champion can adapt to anything”

”

-Floyd Mayweather, Jr.-

Strategic Focus – 2016 Fast Start

- Winning breeds winning
 - Aggressive incentive program to build excitement
 - Getting out quickly builds momentum and belief
- Supportive CE and Marketing
 - Additional CE support moved in H1
 - Comprehensive Q1 Marketing program publish
 - Tight new product launch plans w/ SF input

Strategic Focus – SOAR Framework



Strengths, Opportunities, Aspirations and Results

Aspirations

Industry BEST Customer service
inspire
Persistent
Faster
Happy Innovator
Integrity
Leader
collaborative
open-minded
Successful
Rewarding
Competitive
Authentic
for life
Ethical
Trust
Genuine + Authentic
Balanced
TOMORROW NEVER COMES

TODAY
PATIENT solutions provider
Digital Leader
UNIQUE motivated
Amazing
IMPACT
Family Open Minded
Fun change dentistry
passionate
LEADER
BOLD
Disruptive
Pride
Joy
TEAMWORK
CARING
Inspiring
role model
instilling confidence
CUSTOMER FOCUS

OWNERS SELF-LESS
Innovative
EXCELLENCE
Efficient
Winning Team
TOGETHER
Humble
genuine
Assertive
Respected
Delight
Thought Leader
World class
Inspired
BENCHMARK
WIN
Employer of Choice
Create Value
Family
Inspiring
Make a difference
Industry leader
Visionaries

OUR Aspiration:

“To be the **LEADER** through **INNOVATION/ TEAMWORK** in order to **MAKE A DIFFERENCE/ QUALITY OF LIFE** for **PATIENTS, CUSTOMERS** and **OURSELVES.**”

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WHAT:

- LEADER ✓✓✓✓✓
- MARKET LEADER ✓✓✓
- WORLD CLASS ✓✓✓✓
- BEST CUSTOMER SERV. ✓✓✓

LEADER

HOW:

- TEAMWORK ✓✓✓✓✓
- INNOVATION ✓✓✓✓✓
- BRAVE ✓✓✓✓✓
- PASSION ✓✓✓✓✓
- ETHICAL ✓✓
- SELFLESS ✓✓
- INSPIRING ✓✓✓✓
- GENUINE ✓✓

WHY:

- MAKE A DIFFERENCE ✓✓✓✓✓
- QUALITY OF LIFE ✓✓✓✓✓
- TO INSPIRE ✓✓✓✓
- TO WIN ✓✓✓✓✓
- FUN ✓
- SPREAD INTEGRITY ✓
- DESIRED PARTNER ✓✓
- EMPLOYER OF CHOICE ✓✓
- INSTIL TRUST ✓
- REWARDING ✓
- SHAREHOLDER VALUE ✓✓✓
- PATIENTS SOLUTIONS ✓✓✓✓
- CUSTOMERS ✓✓✓

What do we want to be? : **Leader**

How will we get there?: **Innovation / Teamwork**

Why do we want this?: **Make a Difference / Quality of life**





Who do we want to touch?:

- **Better life for others**
- **Patients**
- **Customers**
- **Ourselves**

FOR WHO:

- OTHERS BETTER LIFE
- PATIENTS
- CUSTOMERS
- OURSELVES

DENTSPLY Implant Strategic Direction

 <p>Optimizing Customer Experience</p>	<p>Educational Outreach</p> <ul style="list-style-type: none"> - Comprehensive CE offering - Collaborative / external ed comp. - KOL enrollment & development - Partnerships (dentsply / others) - 3rd party CE partner - DI comprehensive roadshow - Patient public awareness - Dentsply training center - Training Center <p>#1</p>	<p>Customer Experience</p> <ul style="list-style-type: none"> - Electronic form process (warranty) - Auto ordering - Order tracking (automation) - Regional product distribution - Loyalty program x 4 - Delight customer entire experience exceptional - World class customer experience - Optimized Sales structure / deployment <p>#3</p>		
 <p>Expanding Sales Opportunities</p>	<p>Inside Sales</p> <ul style="list-style-type: none"> - Inside Sales reps - Leverage Customer service - Inside sales team (outbound, leads and t - Inside sales team x 2 - Inside sales team rep alignment <p>#5</p>	<p>Strategic Accounts</p> <ul style="list-style-type: none"> - University DSO - Leadership in DSO space - DSO's and universities - New Markets – DSO and GP 		
 <p>Delivering Exceptional Solutions</p>	<p>Bundling</p> <ul style="list-style-type: none"> - Packaged therapy solutions (bundling) - Effectively bundle products - Leverage Dentsply 360 Sirona - Product bundling / Solution bundling - One Dentsply – Bundling - Bundling within solutions – simplant, regen, implants, restorative, etc. 	<p>Marketing & Product Development</p> <ul style="list-style-type: none"> - Proactive & aggressive messaging - Comprehensive & strategic Marketing - Full & flawless launches - Efficiency / time improve R&D process - Bigger Global voice - Endentulous solutions Company - Shift market mindset key focused solution - Product enhancement – new products <p>#4</p>	<p>Digital Workflow</p> <ul style="list-style-type: none"> - Leader in digital space - Full digital end to end solutions - Digital workflow packages - Digital connectivity with communication portals 	<p>Technology</p> <ul style="list-style-type: none"> - Brainshark – LMS training modules - Web/social media - Use tech better – video, social, infrastructure.
 <p>Enhancing Employee Satisfaction</p>	<p>Retention and Development</p> <ul style="list-style-type: none"> - Mentor program - Brainshark - Community outreach charity – live the vision - DM retention and development - Talent retention - Compensation plan R & R - People development - Employee teambuilding – community projects <p>#2</p>			

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DENTSPLY Implant - Top Strategic Projects/Opportunities

<i>Educational Outreach</i>	Project Sponsor - Casey Project Lead - Allison
<i>Marketing & Product Development</i>	Project Sponsor - Matt Project Lead - Open
<i>Retention & Development</i>	Project Sponsor - Darin Project Lead - Kevin
<i>Customer Experience</i>	Project Sponsor - Bill Project Lead – Steve McCormick
<i>Inside Sales</i>	Project Sponsor - Perm / Dianne Project Lead - Mike

2016 Focus Summary

- Continue with current deployment approach
- Execute on tight account plans
- Accelerate performance in H1 (Incentive & CE)
- Deliver on focused SOAR initiatives
- Deliver above market performance and win back share!

Chin up and Stand Tall



Over the Trees



Above the Competition



Performance will Follow



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