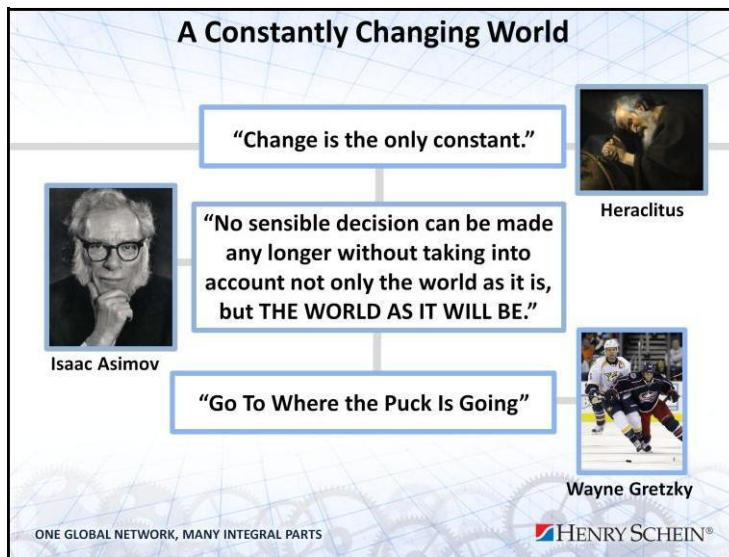


- Welcome to global dental leaders from academia, clinical practices, lab community, professional associations and the dental industry.
- Today's topic: what we can do to advance adoption of digital technologies for the benefit of the patient.
- We will hear from:
 - Dr. Robert Gottlander, a pioneer in the field of dental prosthetics;
 - Dr. Marcus Abboud of Stony Brook University, on how digital dentistry is changing the classroom experience;
 - David Lampert of Town & Country Dental Studios, on the effect of digital dentistry on the dental laboratory;
 - Dr. Bill Busch of North Kansas City Dental Group, on digital dentistry in the practice.
- First, Henry Schein's perspective on change and what we are doing to address a quickly changing dental market.



- “Change is the only constant”
 - Greek philosopher Heraclitus (500 years B.C.)
- Our constantly changing world extends to oral health care.

Isaac Asimov:

- “It is change, continuing change, inevitable change, that is the dominant factor in society today.
- No sensible decision can be made any longer without taking into account the world as it is, but the world as it will be.”
- Make decisions based not on where dentistry is today, but where we believe dentistry will be in the future.

Wayne Gretzky:

- We should not go to where the puck is, but “go to where the puck is going.”

A History of Change and Reinvention



Henry Schein
1932



Henry Schein 2013






ONE GLOBAL NETWORK, MANY INTEGRAL PARTS

 HENRY SCHEIN®

- Henry Schein embraces change.
- Henry Schein – 81 years of reinvention
 - Leading provider of health care products and services to office-based practitioners
 - Nearly 800,000 customers
 - Nearly 16,000 Team Schein Members
 - #296 on Fortune 500
 - Fortune's World's Most Admired for the 12 consecutive years


Henry Schein – World's Largest Provider of Dental

Products and Related Oral Health Solutions	
Practice Management Software	
X-ray sensors and 3D X-rays	

ONE GLOBAL NETWORK, MANY INTEGRAL PARTS HENRY SCHEIN®

- Ongoing reinvention at Henry Schein
 - From a mail-order dental supply company into the world's largest provider of dental products and related oral health solutions to dental practitioners and dental labs.
 - World's largest provider of dental practice management software (Dentrix, Dentrix Enterprise, Easy Dental and others)
 - Best solutions available in the dental practice management software business,
 - Global leadership role in digital imaging; providing the best sensor and imaging solutions.
 - World's largest provider of dental X-ray sensors and 3D X-rays.

The Future of Dentistry



Dr. Gordon Christensen

“The paradigm shift going on in dentistry today is the most major and significant in my long career.


THE CHANGE TO DIGITAL IS PROFOUND.

It is in almost everything we do in a dental practice ranging from the records we take to the crowns we seat to the medications we prescribe.

Some dentists are slower than others to change as the general population was in the year 1900. Yes, we have horses and they will slowly get us to work, but automobiles are now here.

GO FOR DIGITAL!”

ONE GLOBAL NETWORK, MANY INTEGRAL PARTS



- Dr. Gordon Christensen:
 - “The paradigm shift going on in dentistry today is the most major and significant in my long career.
 - The change to digital is profound.
 - It is in almost everything we do in a dental practice ranging from the records we take to the crowns we seat to the medications we prescribe.
 - Some dentists are slower than others to change as the general population was in the year 1900.
 - Yes, we have horses and they will slowly get us to work, but automobiles are now here.
 - Go for digital!”

The Dental Practice of the Future

Dental Digital Solutions Driven by Patients



**More Patient Choices and
Greater Patient Health Benefits**



**Enhanced Practice Efficiency,
Profitability and Quality of Care**

ONE GLOBAL NETWORK, MANY INTEGRAL PARTS

 HENRY SCHEIN®

- The dental practice of the future will include dental digital solutions that are driven by demand from the patients themselves.
- Offers more patient choices and convenience and greater patient health benefits.
- Benefit oral health practitioners by enhancing practice efficiency, profitability and the quality of care provided to patients.
- We are reinventing Henry Schein to be an even more valuable partner to our dental customers.

Reinvention – What's Next?

 **HENRY SCHEIN®**
DENTAL



**Henry Schein Will Be the Leading
Provider of Dental Digital Solutions
to Dental Practices and Laboratories!**

ONE GLOBAL NETWORK, MANY INTEGRAL PARTS

 **HENRY SCHEIN®**

- Henry Schein will be the leading provider of dental digital solutions to dental practices and laboratories.
 - Achievable if we take care of our customers.
- Henry Schein and our customers will partner to reinvent the delivery of dentistry and care for patients.
 - Solutions to operate more efficient and profitable practices and provide high-quality care to patients
- Henry Schein and our customers value solutions that enhance patients' health.
 - shared patient-centric focus.
 - shared goal to enhance patient health.



What is needed to become the leading provider of dental digital solutions to the general dentist and specialist?

- World's leading portfolio of dental practice management solutions and electronic medical record systems
- Digital prosthetic solutions
 - Connect Dental: dental restorative solutions for practices and laboratories
 - DDX
 - E4D
- Commitment to open architecture
- Provide solutions that deliver the greatest patient benefits and position our customers to operate successful practices.
- The complete patient-centric solution is best seen today in our dental digital offering.



- Henry Schein is committed to do all that we can in partnership with you to advance the adoption of digital technologies for the benefit of the patient.
 - We look forward to working with you to achieve this common goal.