



Brandon Hall Group

EXCELLENCE AWARDS 2023

Align Technology’s Sales Associate Program: Best Program for Sales Training and Performance

Align Technology

Best Program for Sales Training and Performance

January 2024



Company Background



Company-at-a-Glance	
Headquarters	Tempe, AZ
Year Founded	1997
Revenue	3.8B (2022)
Employees	20,000
Global Scale (Regions that you operate in or provide services to)	Global Operations (Sales Associate Program funnels to the United States only at this time)
Customers/Output, etc. (Key customers and services offered)	Key customers include Dentists, Orthodontists, and Dental Service Organizations. The Align Technology company sells customized clear aligners (Invisalign®) through doctors to patients, as well as the digital intra-oral scanner portfolio (iTero®) that assists in digital record keeping, patient education, treatment planning, and disease diagnostics.
Industry	Dentistry/Orthodontics/Medical Devices/Technology
Stock Symbol	ALGN
Website	https://www.aligntech.com/



Business Conditions and Business Needs

Uniquely, Align’s sales force sells both Invisalign® clear aligners as well as the capital equipment line of iTero® intra-oral scanners. The result is twofold: The Territory Managers must navigate a highly complex sales journey, which then results in the explicit need for the Sales Development Center of Excellence to deliver a comprehensive in-house training program that produces highly agile, industry-intelligent, motivated, and ultimately high-revenue-producing Territory Managers. The creation of the Align Technology Sales Associate Developmental Program continues to answer that dual demand with increasingly impressive results. The “SA Program” has become one of the primary pathways that attract Territory Manager candidates (Sales Associates) and through rigorous and well-thought-out learning experiences delivers highly skilled Territory Managers who have attained multidisciplinary mastery in the diverse Align product portfolio, the company’s internal systems and processes, and a Brandon Hall Group award-winning proprietary sales methodology (SMILE®). Also, a Sales Associate, on the way to becoming a high-performing Territory Manager, learns and commands the advanced clinical acumen needed to assist the company’s customers in providing patients with industry-leading solutions for orthodontic, restorative, and preventive oral health solutions.

Overview

Established in 2015, the Align Technology Sales Associate Program began as a space for informal education and assessment of Early-in-Career recruits. Initially, the SA Program was created for the purpose of supplying well-rounded, field-ready candidates for Territory Manager (TM) positions across the US. Currently, over the course of 24 cohorts, the SA Program has continuously enhanced the curriculum, format, rigor, and therefore preparedness of emerging TMs that support the critical needs of the business. Critical factors of the SA Program’s impressive success have been the relentless analyses of results, and then the swift implementation of critical refinements that keep Align’s Territory Managers impactful in a fast and constantly evolving market. What originally started as a partially funded trial, has now become a significant pillar of organizational customer support and sales success.

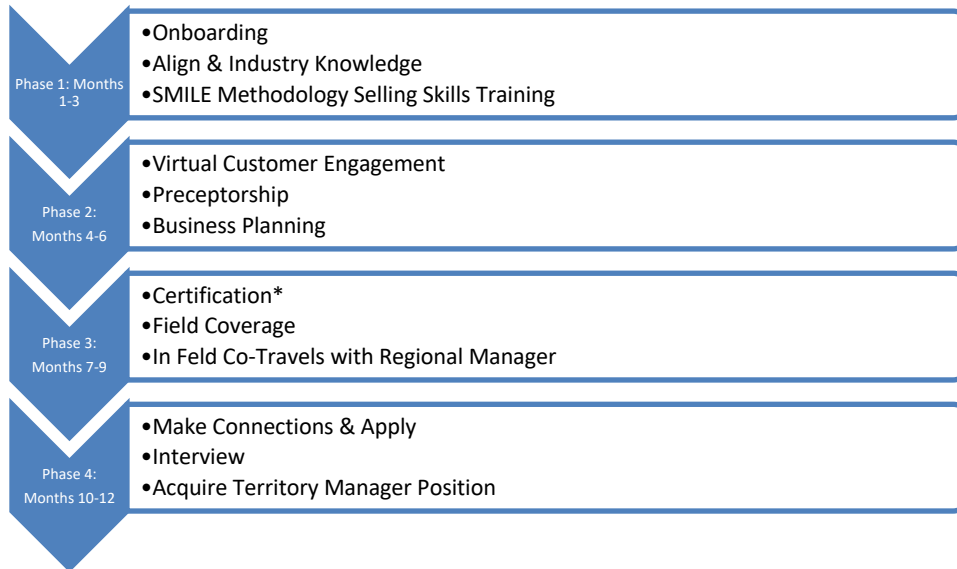
The SA Program educates, influences, and inspires Early in Career recruits to be well-prepared and productive TMs. The consistently quantified ROI that well supports the continued 7.22MM annual resource allocation. The SA Program has become an integral part of the Align salesforce and is viewed as the primary training and development pathway for future TMs. The SA Program creates a highly valued pipeline of proficient,



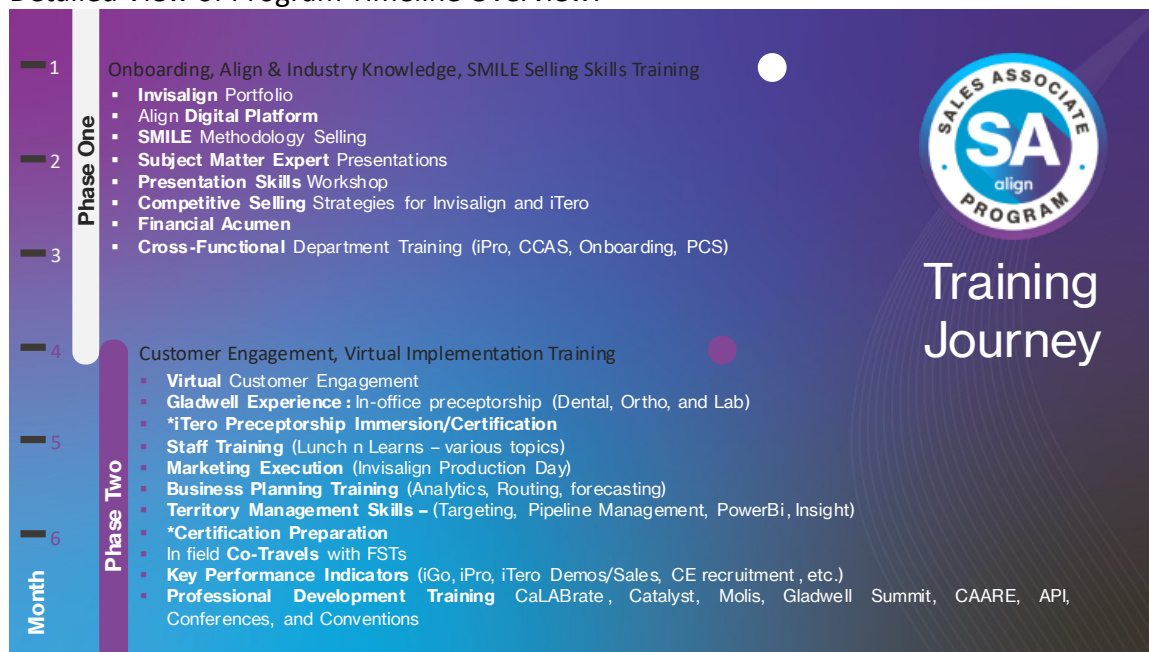
diverse, knowledgeable sales professionals with expertise in Align’s products, strategies, technologies, and customers.

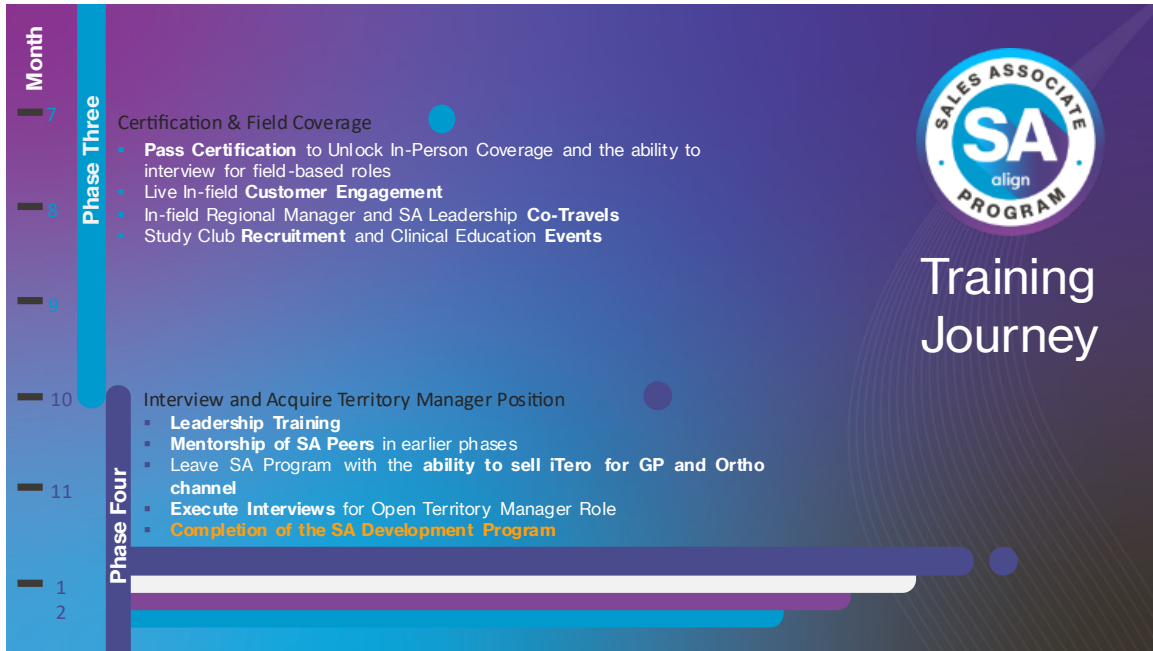
Design of the Program

High-Level Program Timeline Overview:



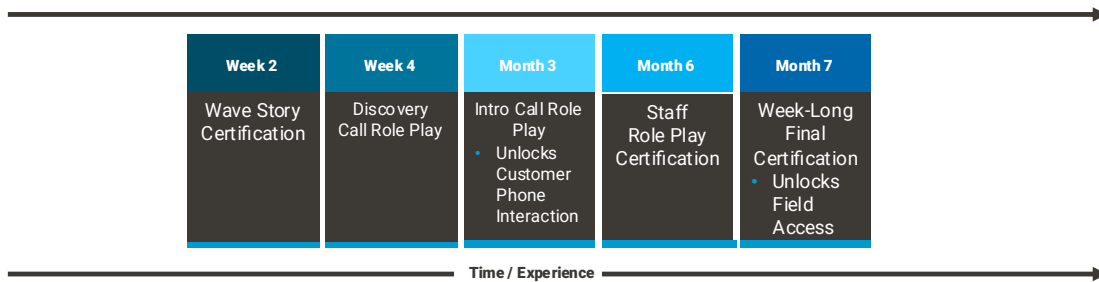
Detailed View of Program Timeline Overview:





Final Certification Process:

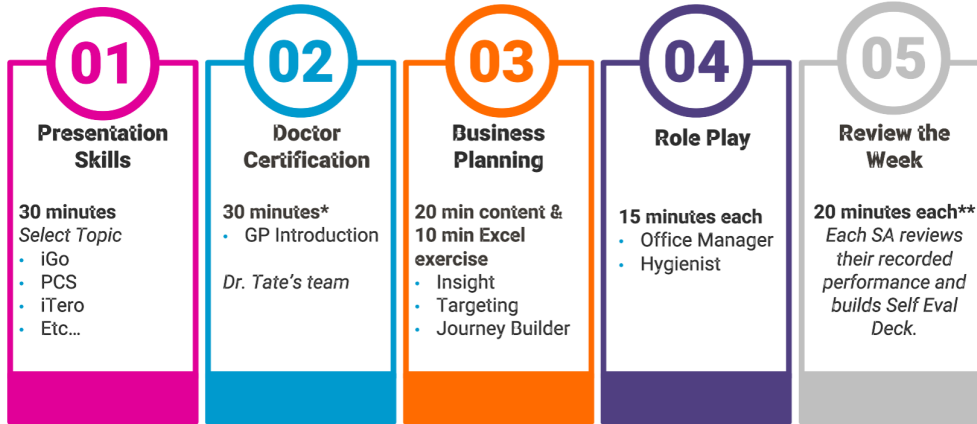
Gates to Full Certification



*SA Readiness Evaluated/Rated Throughout Program



GP Certification Process



*You must pass additional certification processes for iTero to pass overall certifications

** Send your ppt to SA Sups by 5pm the evening prior – time will be spent receiving feedback & next steps

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SMILE Methodology®

As Brandon Hall Group award recipient, “SMILE” is a proprietary sales methodology used to train SAs how to interact with customers efficiently, effectively, and productively. It is designed to enhance the identity of Align’s customer-facing teams by identifying customer needs, strategically planning ways to solve them, then pulling those strategic plans through at the customer level. Example below:





Delivery of the Program

Once hired, the SAs begin a 7-12 month cultural, clinical, and sales process learning experience. Upon acceptance, the SAs are relocated to Align's Raleigh, NC headquarters. The SAs then participate in extensive classroom and hands-on training, professional development, and sales coaching. Once fully prepared and formally certified, the SAs are approved to apply to vacant territories, competing against external hires with traditionally more industry experience. The SAs' extensive classroom experience, hands on training, professional development, and the coaching provide an invaluable talent pool for hiring Regional Managers. Once they earn a TM role, the SAs are then relocated to take over a territory anywhere in the US. In 2022, 41 SAs were promoted to TM positions across the country.

Measurable Benefits

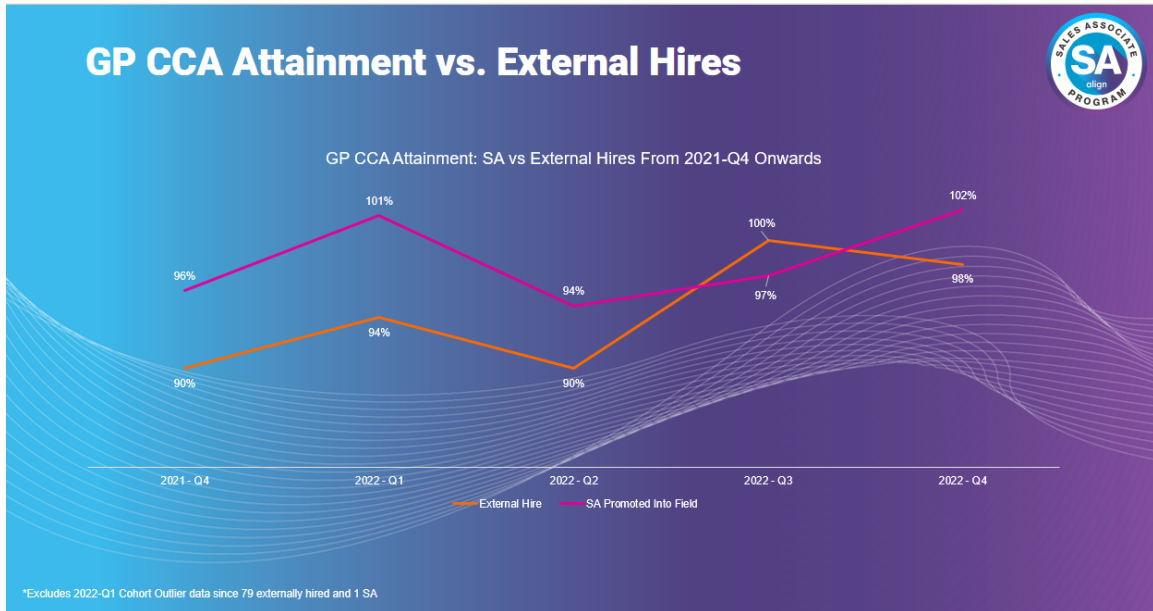
The first measurable goal is the certification to compete for an open sales territory. Certification is a rigorous process that measures an SA's capability to drive revenue in the field. Once successfully certified, an SA applies and interviews for front-line Territory Manager positions. To date, the program has demonstrated a 98+% success rate in achieving that goal.

The second measurable goal that is carefully tracked is employee retention. Consistently, SAs remain with Align longer than external hires. The SA retention rate currently sits at >67% over the past 7 years.

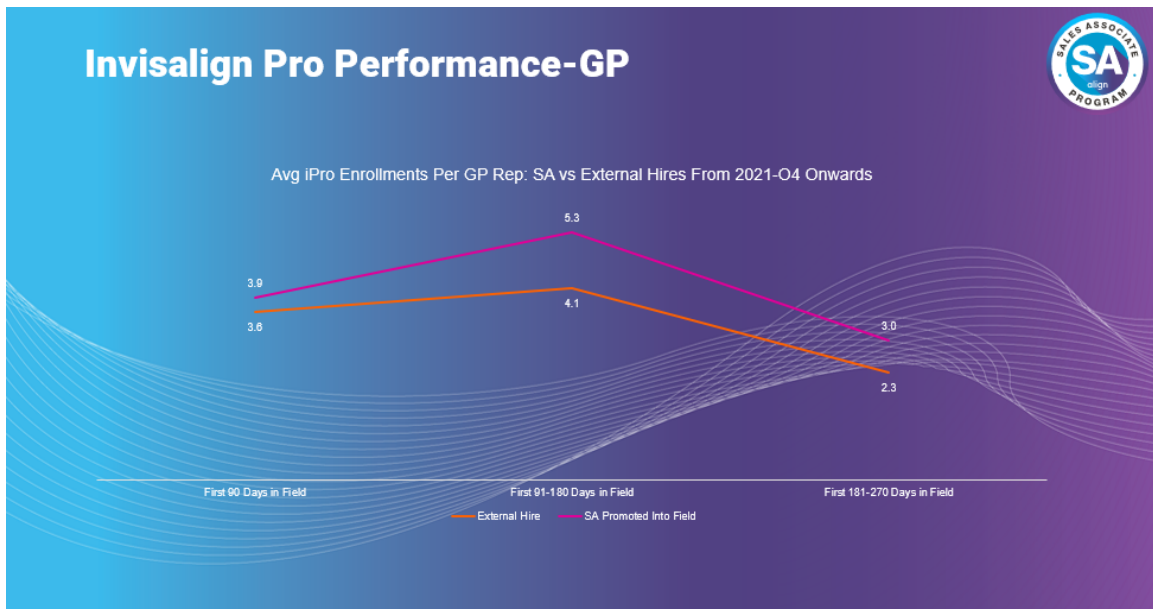
The third measurable goal is the comparison of sales activity and revenue performance of promoted SAs, versus that of external hires (who often start with significantly more industry and/or sales experience.) Align's analytics team runs detailed analysis on this comparative sales activity and revenue data. The data analyzed includes tracking Average Sales Calls Per Day, Sales Quota Attainment, and Continuing Education Enrollment (Invisalign Pro – an internal program explained below). SAs consistently outpace external hires. This is attributed to the understanding that SAs are fully trained, coached, and evaluated on the critical fundamental skillsets that TMs are expected to understand, know, and implement the day they enter the field.



Examples below:



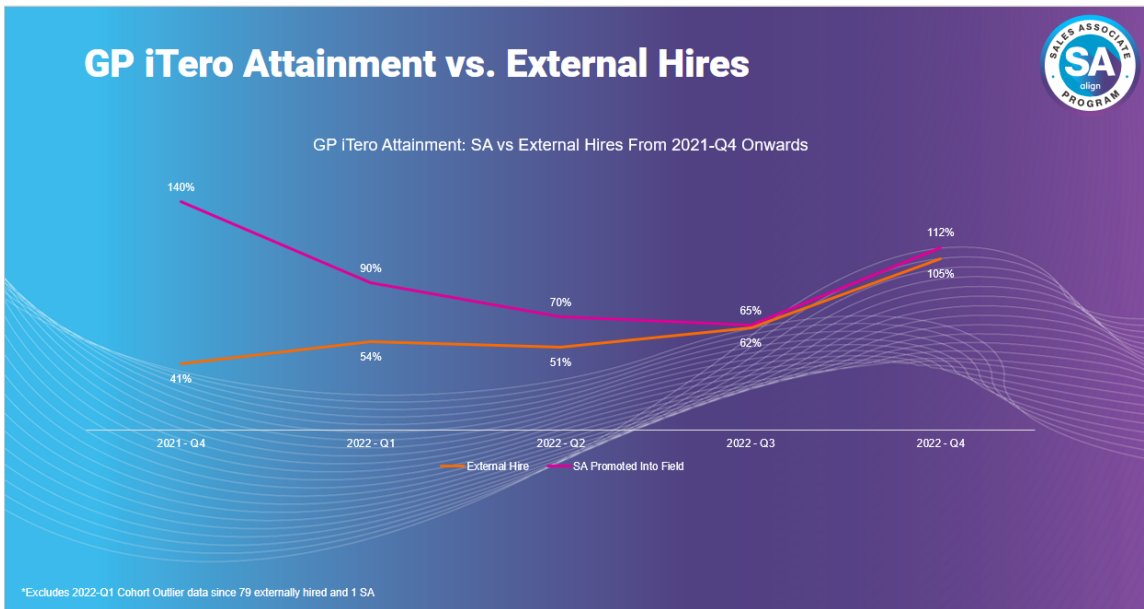
CCAs are a measure of the number of Invisalign cases doctors submit (quota). A greater CCA attainment signifies greater quota attainment. The program sets SAs up for diving into the customers’ needs and concerns, while being resourceful and providing them with the proper tools needed to grow their practices and treat their patients. CCAs generated in the field directly impact the company’s primary mission of “Transforming Smiles and Changing Lives.”





Invisalign Pro is an internal, customer development team that assists doctors in building their clinical confidence in fully leveraging the digital platform that creates positive patient outcomes. When doctors are more clinically proficient in efficiently and confidently using Align Technology’s software, they treat more patients with Invisalign, and consistently have better, more productive patient outcomes.

Territory managers are expected to enroll doctors in Invisalign Pro each quarter. We’ve been able to quantify that SAs consistently enroll more doctors in Invisalign Pro than external hires. That is important because doctors enrolled in Invisalign Pro produce 4.5 more CCAs over a 12-month period than customers not enrolled. This has proven to have a direct correlation with quota attainment and outperformance.



With extensive product portfolio knowledge prior to entering the field, SAs are better prepared to educate and be confident in advancing the best solution suited for each customer. iTero Element intra-oral scanners are an integral component of the company’s product portfolio. SAs understand the comprehensive, seamless experience Align has to offer with its digital technology as soon as they enter the field. SAs consistently outperform external hires in quota attainment for the company’s capital equipment portfolio



Metrics – Program History



President Club Winners

2018 (5%)
2019 (28%)
2020 (25%)
2021 (24%)
2022 (27%)

Field Sales Promotions

Supervisors	3
Field Sales Trainers	22
Regional Managers	9

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President’s Club is the premier award the Align salesforce competes to win each year. Only the top 10% of performers in the field achieve this coveted award. During the past five years, the SA Program has delivered an impressive number of President Club award winners. This is remarkable when one considers that external hires arrive with significantly more sales experience.

Overall

Overall, Align Technology’s development and renewed investment in the Sales Associate program have produced significant contributions to the effectiveness and productivity of their salesforce. Looking forward, this program will continue to evolve with the expectations of the Align salesforce even further integrating advanced topics such as capital equipment selling/closing, competitive selling, clinical implementation of Smile Architect® (an iTero® intra-oral scanner integration with Cone Beam Computed Tomography), and a host of other new training innovations as the need of the business evolve with market demands.

The program will continue to evaluate the strengths and opportunities of TMs in the field and in response, create content and experiential learning that promotes the continued ability to outperform external hires and overachieve quota and revenue targets. The SA Program will serve each year as a larger and larger sourcing route for highly skilled and trained, field-ready sales professionals, capable of delivering the Align mission of “Transforming Smiles and Changing Lives.”



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About Brandon Hall Group™

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

Membership

Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

SOME WAYS WE CAN HELP

Excellence Awards

Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

Advisory Offerings

Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.



ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM

recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.



SMARTCHOICE® PREFERRED PROVIDER PROGRAM

uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.