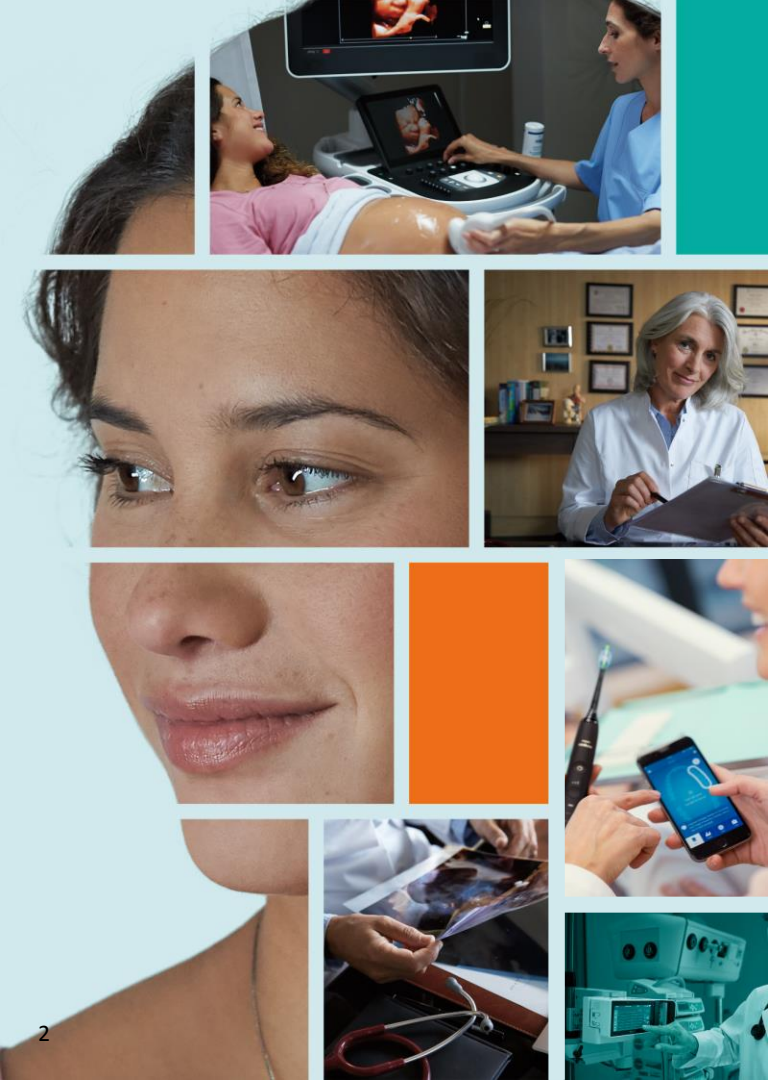


A person wearing a blue surgical cap, glasses, and a white face mask is looking at a computer monitor. The monitor displays a grid of data points, possibly a medical chart or dashboard. The background is blurred, showing other people in a clinical setting.

Delivering growth in a changing market

Brent Shafer
Chief Market Leader North America



Key takeaways

- **Our strategy** fully supports the North America market trends as we **help** key health systems/IDN customers in the **transition to value-based care**
- Our market position has improved overall and **we are gaining strength**
- We are **continuing our strong delivery** with long-term strategic partnerships and new solutions

Policy debates creating near-term customer uncertainty while we continue to perform

We are monitoring **several policy issues** that impact our customers and partners:

Future of the ACA

Medical Device Tax

Bundled payments

Insurance exchanges

- Our customers remain committed to **pursuing the 'quadruple aim'**:
 - Better outcomes
 - Lower costs
 - Better patient experience
 - Better staff engagement
- **Our business models** appeal to our customers
- **Our strategy continues to yield results** despite the uncertainty

We are capitalizing on the trends transforming healthcare



Our innovations improve the health and well-being of individuals and our strategic partnerships with health systems improve patient outcomes and reduces costs

Diagnosis & Treatment continued growth and margin improvement



- **Ultrasound: Maintain profitability and continued growth**
 - Extend leadership in Cardiology
 - Strengthen position in General Imaging; build in OB/GYN



- **Diagnostic Imaging: Regain share and commercialize new innovations**
 - Continue MR growth, rebuild CT/AMI position
 - Introduce new solutions for productivity & outcomes
 - Opportunity in out-of-hospital channel



- **Image-Guided Therapy: Continued leadership & expansion**
 - Growth via new platform and channel expansion
 - Drive Volcano and Spectranetics synergies

Connected Care & Health Informatics new value propositions in a faster growing segment of the market



- **Patient Monitoring: Extend leadership**
 - Build on 50%+ share with new offerings
 - Establish ‘springboard’ for telehealth



- **Health Informatics: Continue growth & add solutions**
 - Strong performance in Cardiology and Enterprise businesses
 - Focused on expanding CIO relationships
 - AI-based innovations to enable better clinical decisions



- **Population Health Management: Important, fast-growing segment**
 - Integrating and leveraging Wellcentive
 - Build on telehealth successes with key US health systems
 - Leverage strong in-home presence

Personal Health continues strong above-market performance



- **Male Grooming: Innovative products to drive further growth**
 - Expand category by recruiting new users
 - Increase customer lifetime value with recurring revenue



- **Oral Healthcare: Grow category and extend leadership**
 - Convert manual toothbrush users to electronic products
 - Increase engagement with dental professionals



- **Sleep & Respiratory Care: Capture continued market growth**
 - Develop self-pay market
 - Enhance DME offering with services
 - Expand connected products & platform

Market leadership in Long-term Strategic Partnerships

Evidence of our success

Augusta University Health System

Georgia, USA



Technology management
excellence

Westchester Medical Center

New York, USA



Transforming care delivery

Mackenzie Health

Ontario, Canada



“SMART hospital” of the future

Marin General Hospital

Marin County, USA



Care transformation for the
whole patient

Medical University of South Carolina

South Carolina, USA



Enterprise-wide patient
monitoring

Banner

Arizona, USA



Connected health & cost
management

Bon Secours Charity Health System

New York, USA



Population health programs

Phoenix Children’s Hospital

Arizona, USA



Pediatric care transformation

Advocate Healthcare

Illinois, USA



Connected care programs

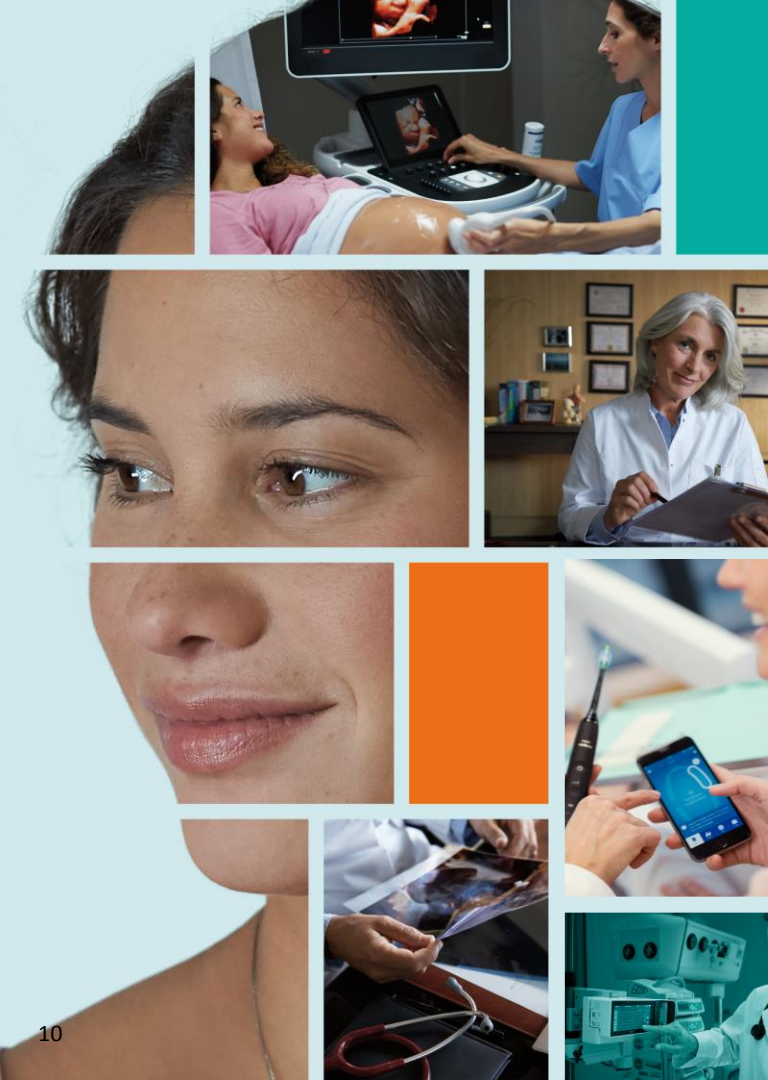
Average duration: 10-15 years

Average value: USD ~200 million

Partnership approach is key to our growth ambition



- ✓ Aligned with **customer needs** and **market opportunity**
- ✓ Early success has built **experience**
- ✓ Opportunities to **expand** existing relationships
- ✓ Strong **pipeline** of new partnerships



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