



- It is a pleasure to be with you today at the 2013 Veterinary Technology Summit.
- Whether you are on the AVIMark educational track or the ImproMed educational track, I am sure that these will be three days very well invested in advancing your veterinary practice.
- All of us are fortunate to serve a very hot global animal health market.
 - Just how hot is the global animal health market?

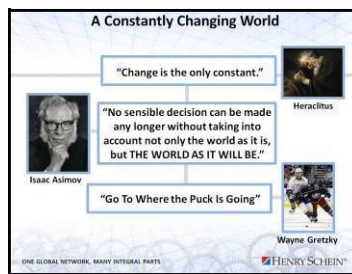
How Hot is the Global Animal Health Market?



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- This is how hot the global animal health market is!
- And when things get this hot, you probably will need to make some changes to keep your practice growing and successful.
- Change is essential, but it has to be the right kind of change that is embraced by the entire veterinary team.



- “Change is the only constant”
 - Greek philosopher Heraclitus (500 years B.C.)
- We live in a constantly changing world,
 - and that change extends to animal health care.
- Technology advances in a patient-centric practice are driving a higher quality of care delivered in more efficient and profitable practices,
 - which is enabling veterinarians to invest even more to drive future practice growth.
- Science fiction writer Isaac Asimov said:
 - “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.”
- We should make our decisions based not on where animal health is today,
 - but where we believe animal health will be in the future.
- Or as hockey legend Wayne Gretzky famously put it,
 - 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



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- Henry Schein embraces change.
- Henry Schein – 81 years of reinvention
 - Leading provider of health care products and services to office-based practitioners
 - 775,000 customers
 - Nearly 16,000 Team Schein Members
 - #296 on Fortune 500
 - Fortune's World's Most Admired for the 12 consecutive years
 - Ranked first in our industry for social responsibility



- The many segments of our Company are committed to working together to provide customers with the best valued-added offering, unparalleled service and seamless communication.
- We have three global business groups – Global Dental, Global Medical and Global Animal Health.
- Important solutions providers working with these three business groups are our Global Practice Solutions and Global Henry Schein Financial Services.
- Supporting the business groups with shared services and an efficient scalable infrastructure are our Global Services and other corporate functions.
- This is the architecture upon which our global network has been built, which will enable our Company to keep growing for many years to come.
- 2012 global sales: Dental 56%, Animal Health 26%, Medical 18%.
 - International 35%, Canada 4%, U.S. 61%.



- Our Global Animal Health Group is the world's leading animal health distributor.
 - We want our customers to rely on us to provide high quality care and operate more efficient and profitable practices.
- In just six years, we have become the leading animal health provider on three continents.
 - United States, Australia/New Zealand, and 11 European countries
 - Austria, Belgium, Czech Republic, France, Germany, Ireland, The Netherlands, Portugal, Spain, Switzerland, U.K.
- We have become “the animal health solution” in large part by becoming a leader in animal health practice management software.
 - 18,000 installed systems worldwide
 - ImproMed Infinity and ImproMed Triple Crown
 - DVM Manager
 - AVImark
 - Vet Solutions RoboVet
 - ProVet VisionVPM
 - Veterinary Instrumentation -- high-quality specialized veterinary tools in Europe, U.S. and Australasia



- We have been successful because we harness the power of our global network for the benefit of our five constituencies:
 - Team Schein
 - Supplier partners
 - Customers
 - Investors
 - Society

Our Customers



Customers

Innovative, integrated solutions that improve practice efficiency and profitability so our customers can focus on delivering high quality care to patients

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- For our customers, Henry Schein provides innovative, integrated solutions that improve practice efficiency and profitability so our customers can focus on delivering high-quality care to patients.
- These solutions are distinguished by:
 - widest possible selection of products and value-added services,
 - expert advice that reflects a global perspective,
 - appreciation of local market differences,
 - long-term commitment for support.
- If you need anything for your animal health practice, we want your first call to be to Henry Schein.
- We listen to our customers and respond to their needs.
 - Many of the products and services we now provide are a result of feedback from our customers.
- We encourage you to let us know how we are doing
 - and any new ideas for how we might even better serve you in the future.

Our Supplier Partners

Key Animal Health Supplier Partners









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- For our supplier partners, Henry Schein means expanded markets for their products.
 - Strong partnership with a single organization
 - Proven success in understanding and communicating valuable product attributes
 - Ability to help grow market share
- It means that if a health care manufacturer must choose a single distribution partner, Henry Schein should be their first choice.
- We have a growing offering of exclusive and semi-exclusive products for our customers that differentiate Henry Schein Animal Health.
 - These are just some of the key animal health supplier partners with which we have strong relationships



- We also are committed to corporate social responsibility worldwide.
- Working closely with our supplier partners and customers, Henry Schein Cares focuses on expanding access to care for underserved populations by
 - advancing wellness,
 - building capacity in the delivery of health care services
 - and assisting in emergency preparedness and relief.
- In 2012 and 2013 we were named one of The Ethisphere Institute's Most Ethical Companies, one of just 145 companies from around the world.
- Year after year, we have seen our Henry Schein Cares activities in the animal health, dental and medical segments grow around the world.

So Why Partner With Henry Schein?



 HENRY SCHEIN®
ANIMAL HEALTH
 Rely on Us

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- So why should your veterinary practice partner with Henry Schein?
 - Because we understand the importance of technology and its application in the animal health profession.

Technology Continues to Advance Veterinary Practices

Then



Now



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- Veterinary practices have embraced technology-driven change as a path to success over the years in many ways:
 - In the ever increasing standard of care provided
 - In ways to make the practice more productive and profitable
 - In the range of services provided to clients and their pets



- Henry Schein Animal Health is helping to lead this technology revolution in the veterinary field with the right technology solutions for your animal health practice.
 - Here are three proven practice management software systems by which you probably know us.

First, there is Infinity from ImproMed – the most powerful veterinary practice management software.

- Many of you attending may already use Infinity in your practices and appreciate the incredible capabilities of this solution.
- Infinity is focused on innovation that is meaningful and necessary for today's successful veterinary practices.
- It is providing unique capabilities to create a better workflow and more efficiency for the practice.

Another ImproMed solution is Triple Crown – an equine-focused practice management system that is flexible enough for the mobile practitioner or the large equine hospital.

- With Triple Crown, data is entered once and it updates all patient files including imaging, laboratory, all the way through to billing.
- Triple Crown is focused on creating efficiencies and saving the veterinary practitioner time and effort, allowing for more time to focus on patients.

We also offer AVImark, which many of you may already be using.

- With over 9,500 veterinary clinics using the AVImark for Windows program, AVImark is, by far, the software system of choice for veterinary clinics today.
- AVImark is simple to use.
- The Windows-based program is very intuitive, and all the information you need for each client or patient can be viewed on one screen.
- AVImark is a terrific solution because it enables complete electronic medical records and paperless practices.

- Infinity, Triple Crown and AVImark are terrific solutions, but we are not stopping there.



- We are rolling out an exciting new targeted client communication project that uses technology to address three veterinary practice objectives:
 1. Increase client communications. This program will grow and streamline the number of clients that your clinic is communicating with on a regular basis.
 - It will deliver targeted and relevant information to clients while branding your veterinary practice to pet owners.
 2. Increase patient visits. It will help compel pet owners to bring their pets to the veterinarian based on innovative, personalized, marketing communication.
 - This includes wellness and treatment programs, pet health reminders and other animal health educational programs.
 3. Increase revenue per visit. It also will target pets by species and categories, and help the entire veterinary team learn how to increase revenue per category.
- This is an exciting new technology-driven pet-owner marketing program that you will be hearing more about here at the Summit and from your Henry Schein Animal Health representative in the future.

**New Technology Solutions
for Your Animal Health Practice**



INTELLIGENT INVENTORY^{LLC}

**A Cloud-based Service to Help
Veterinary Practices Manage
Inventory**

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- Then there is our Intelligent Inventory solution, a cloud-based service to help veterinary practices manage inventory.
- Intelligent Inventory is an efficient time-saving service that simplifies your entire order and inventory process.
 - Decreases time to order and receive inventory from vendors.
 - Greatly reduces the amount of time the veterinary team will spend processing purchase orders and other inventory-related tasks.
 - Enhances your practice's product pricing, inventory control and inventory accuracy.
- Ultimately, Intelligent Inventory enables your entire veterinary team to spend more time focusing on patients and clients.

The Future of Veterinary Technology




Now is the time to focus even more closely on how technology can transform your practice and drive your future success!

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- Looking not too far into the future, this is the next step in animal health technology.
 - We will be able to track and manage our pets' health with our smartphone in close communication with the veterinarian from wherever we may be in the world.
- Because you are attending this Summit, you already appreciate the significant role that technology is playing to drive change in veterinary practices.
- Now is the time to focus even more closely on how technology can transform your practice and drive your future success,
 - Enabling you to increase efficiency as you provide a high level of care.

Questions to Ask Yourself Over the Next Few Days



Are we making the right change?


Is this change creating a solution for the future?

Does the change deliver real benefits to clients?

Are we looking at the veterinary “world that will be”?

Are we choosing a trusted advisor who embraces change, shares our focus and commitment to build our practice?

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- As you see the many technology solutions at the Summit and hear from the experts, ask yourself the following as you consider making a change:
 - Are we making the right change?
 - Is this change creating a solution for the future?
 - Does the change deliver real benefits to clients?
 - Are we looking at Asimov’s veterinary “world that will be?”
 - Are we choosing a trusted advisor who embraces change, who shares our focus on the future of animal health and our commitment to build our practice?
- After asking these questions, I hope that you will “rely on us” to be your best long-term partner in building the success of your practice.
- Thank you.