

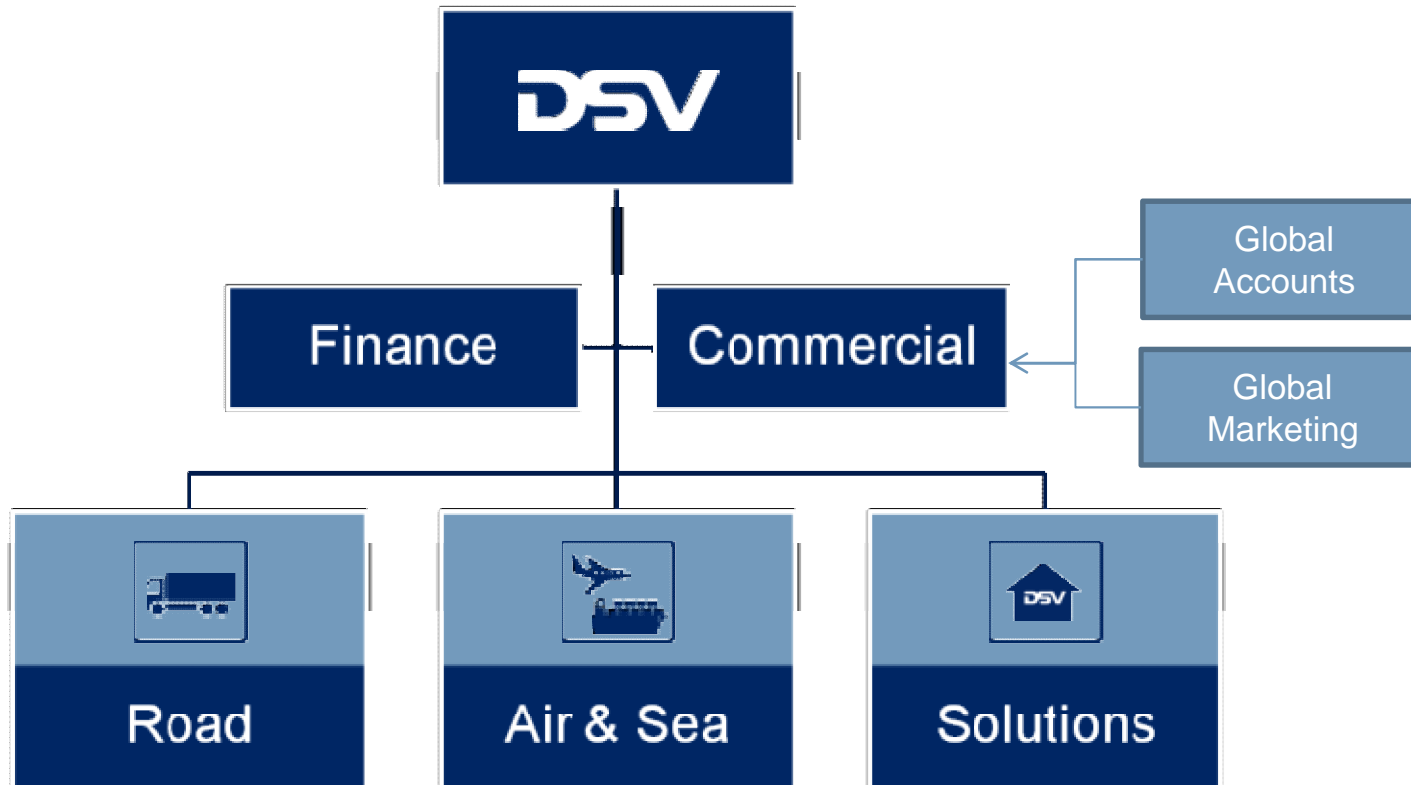
Sales and Key Account Strategy

René Falch Olesen, Chief Commercial Officer

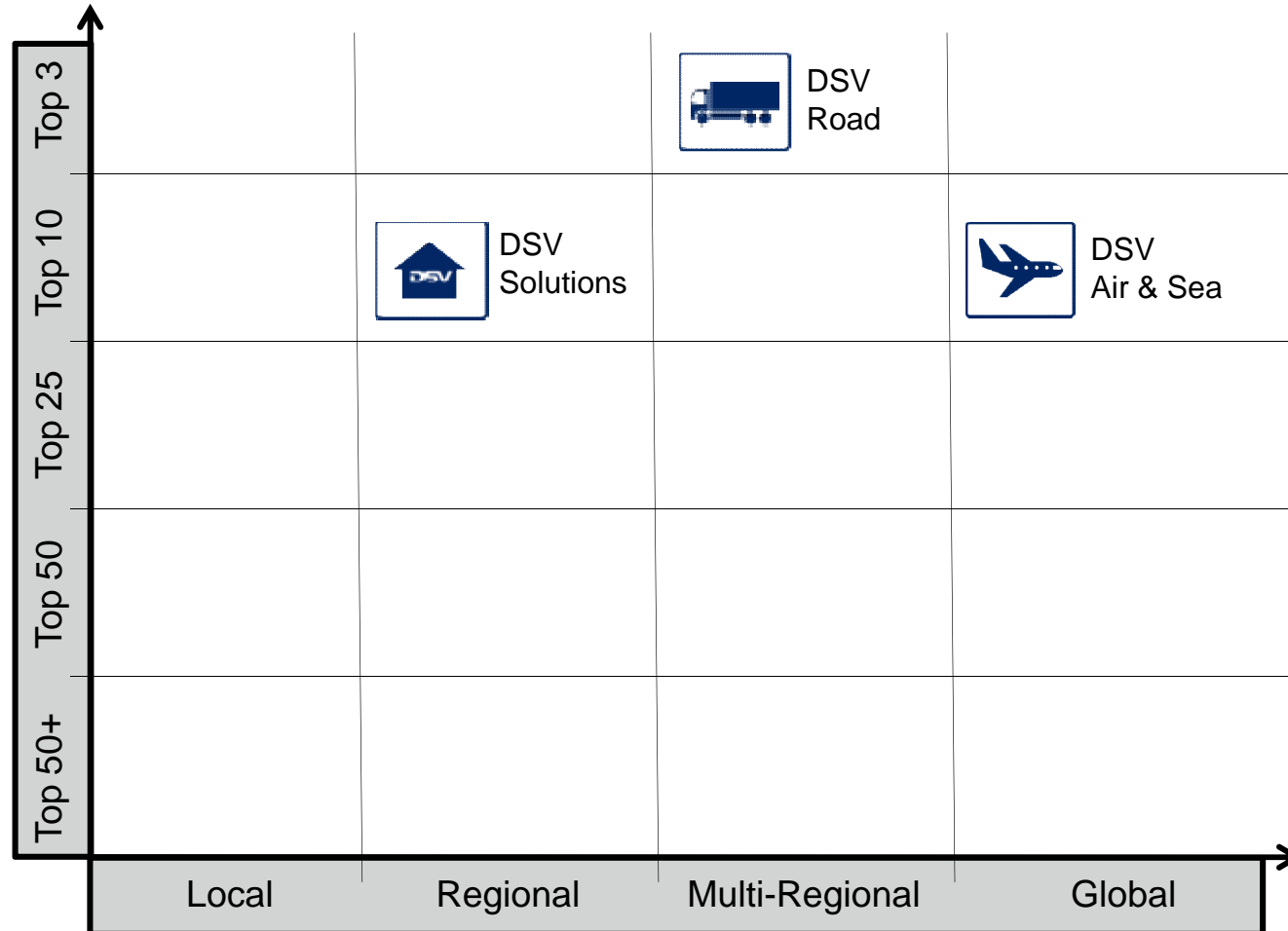
DSV Capital Markets Day, 11 May 2010



Structure



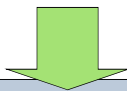
DSV Divisions Competitive Position



Current status ?

Many years of growth has created a solid platform

- Top five freight forwarder Globally
- Top Three player in Road in Europe
- Top ten player within Air & Sea Globally
- Top ten player within Solutions operation



We are one of a few who can serve Global Accounts

Why Global Accounts ?

DSV perspective

Serve more large multinational accounts

- Grow with our customers
- Leverage on DSV's network
- Growth, growth
- Buying power
- Profits

Industrialise our production

- Uniform work flow in relation to Global Key Account Management
 - Higher Quality
 - Lower cost
 - Professionalized customer approach
 - Enhance our value proposition – more integration with customer

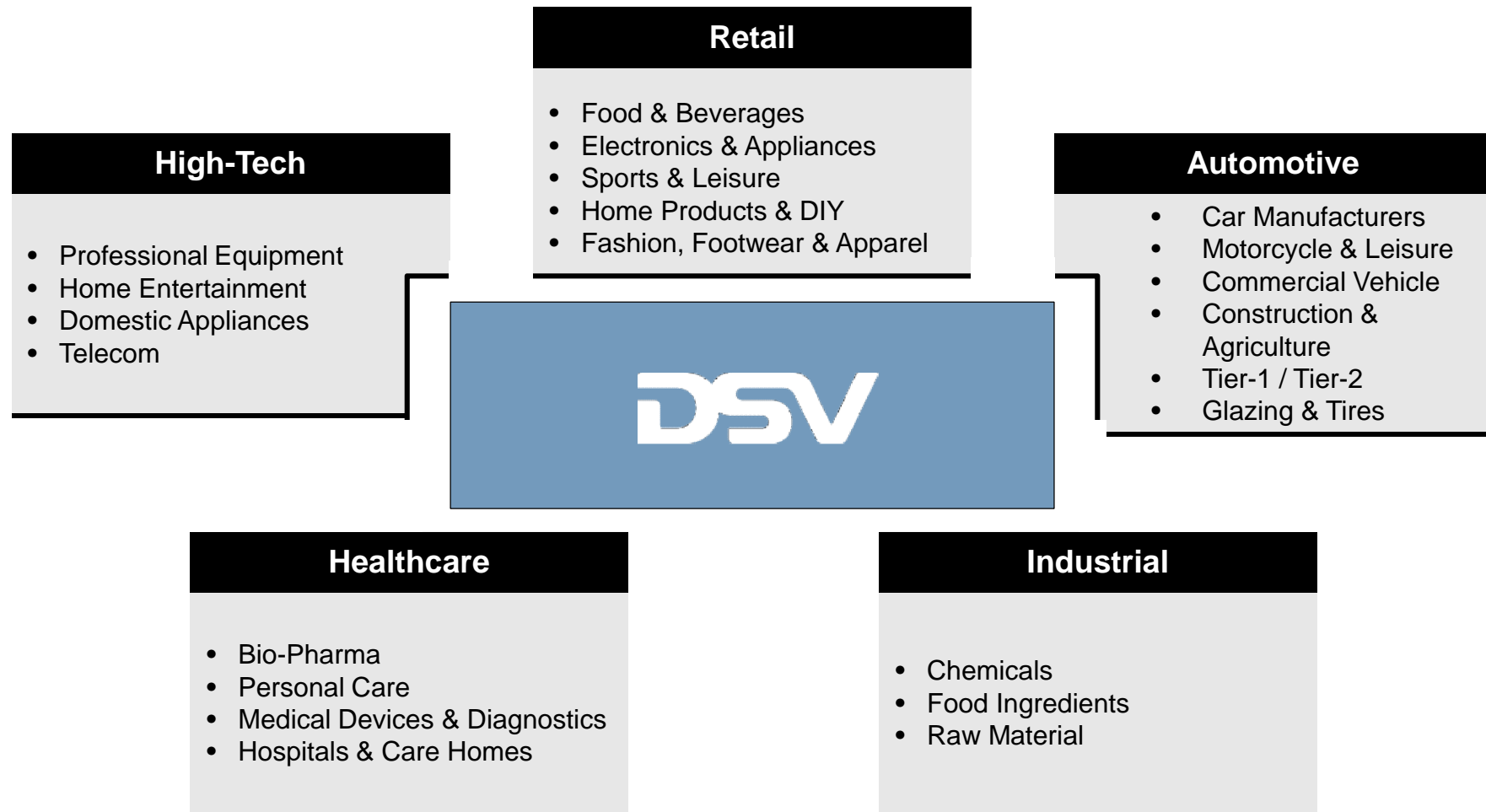
Why Global Accounts ?

Customer perspective

- Buying power
- Quality and Price
- Consolidation of suppliers
- One entry to all services
- Quick response
- Ease of integration
- Partners who add value, not just transporters
- Commitment
- Empowered account managers



DSV Industry Sectors Overview

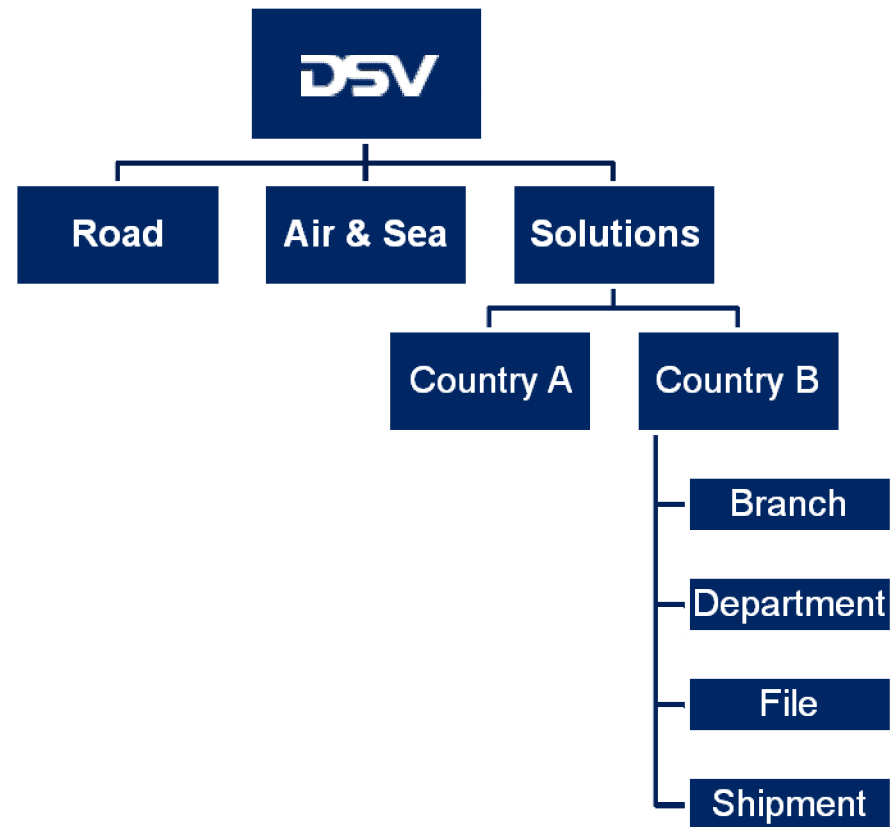


Account Types – expand focus, not re-focus



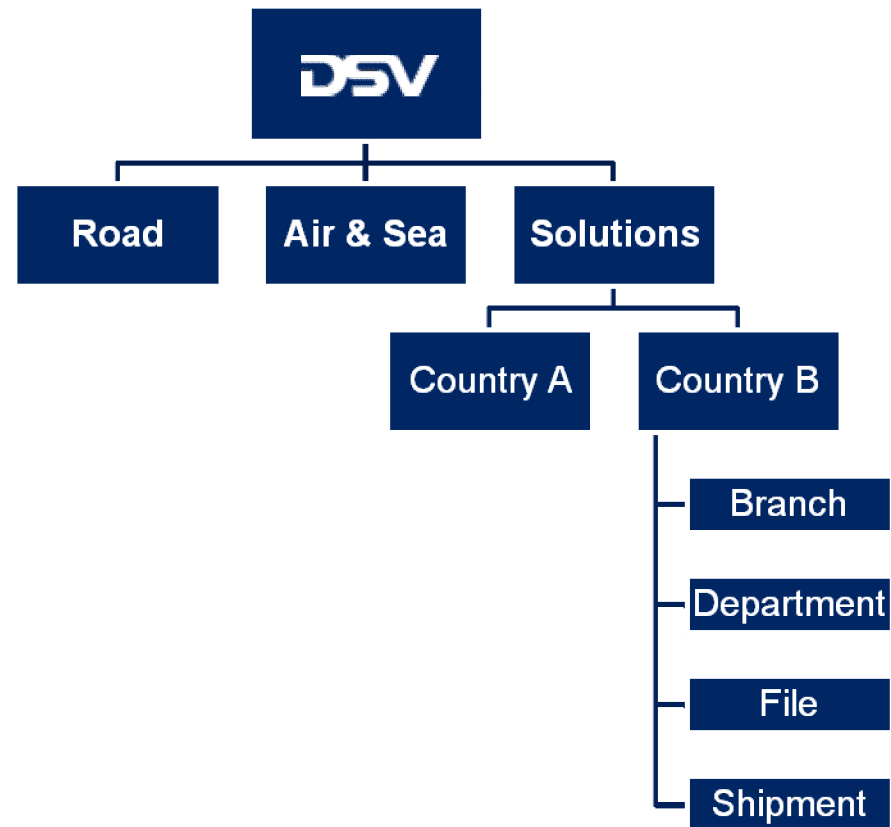
Is This An Attractive Account?

DSV	
Turnover	€20 mln
EBITA	€2 mln



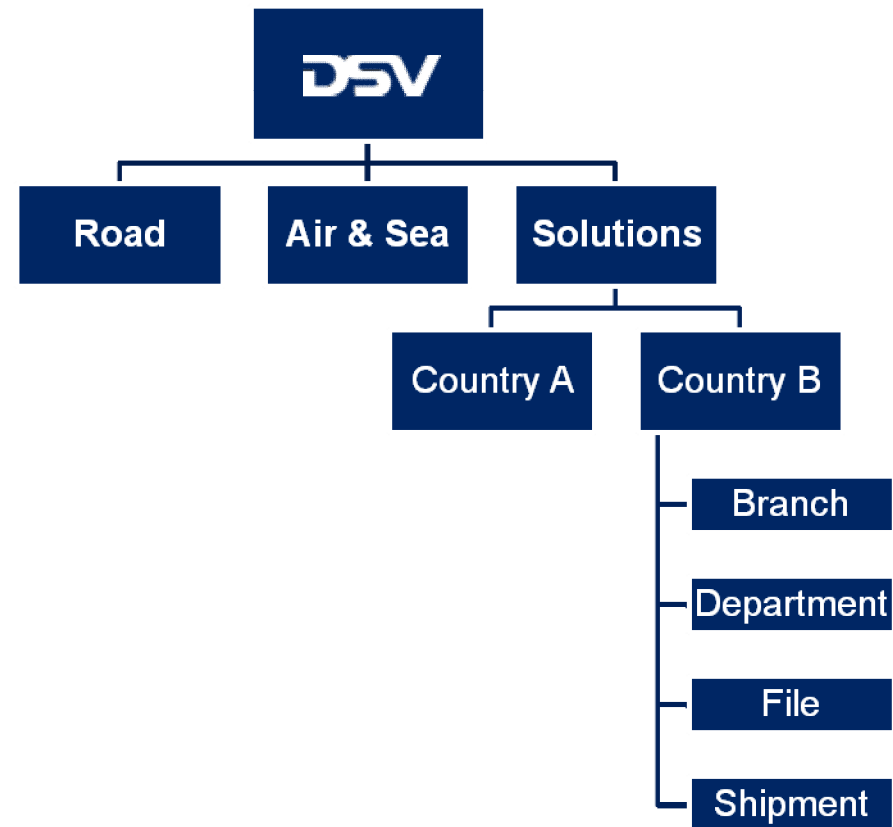
Is This An Attractive Account?

DSV			
Turnover	€20 mln		
EBITA	€2 mln		
	A/S	R	S
Turnover	€10 mln	€5 mln	€5 mln
EBITA	€2 mln	€0.5 mln	-€0.5 mln



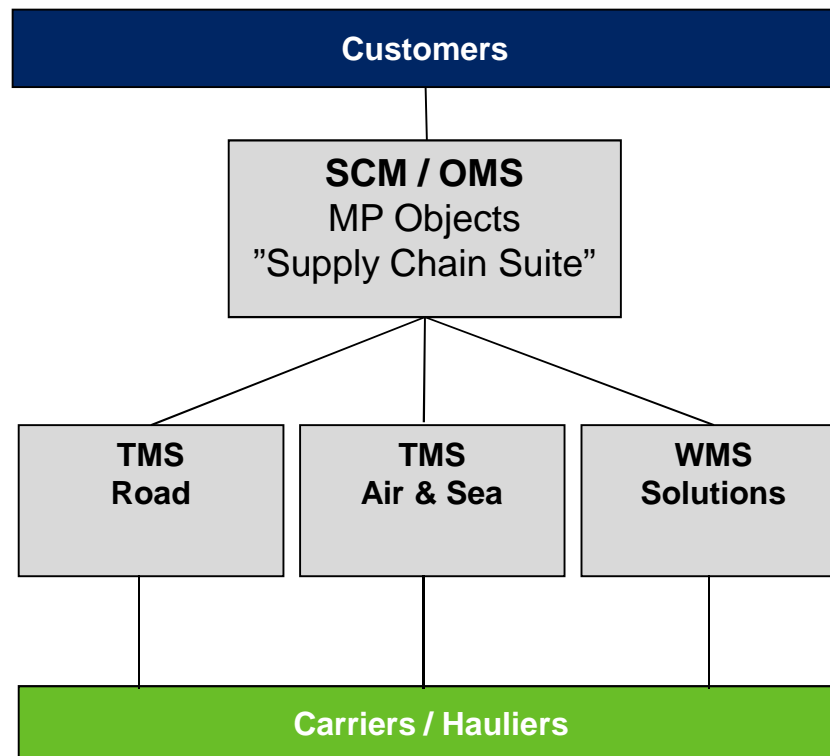
Is This An Attractive Account?

DSV			
Turnover	€20 mln		
EBITA	€2 mln		
A/S	R	S	
Turnover	€10 mln	€5 mln	€5 mln
EBITA	€1 mln	€0.5 mln	€0.5 mln
Solutions	Country A	Country B	
Turnover	€2.5 mln	€2.5 mln	
EBITA	-€0.5 mln	€1 mln	



Conceptual Solution Design (high-level)

A Supply Chain Management and Order Management System is placed on top of Transport Management Systems, for global Control Tower functionality for order orchestration, milestones & events, track & trace, reports, visibility, ...



DSV use Salesforce.com as a global CRM system

DSV CRM Overview

- Used in 47 countries in Europe & Asia with ongoing roll-out to new countries
- Online since 2007
- Salesforce.com SAAS – configured to match DSV requirements

Total active users

- 1700+ Sales users
- 300+ Operational users

CRM Data	# of records
Accounts	630.000
Contacts	265.000
Leads	75.000
Activities	1.130.000



Salesforce CRM offers extensive reporting capabilities

UK CEO Dashboard



UK User Adoption Dashboard



UK Road Division Dashboard



UK Individual Sales Staff Dashboard



Benefits of DSV CRM - today

- First focus sales efficiencies and results
- More accurate management of the sales pipeline and forecasts
- Easier integration of new Systems, People and Processes
- Full visibility of customers' activities across regions, borders and divisions.
- Better visibility and ability to serve Global Accounts
- Customer service integration – analysis – internal/external communication

Global tender win

1. The customer
2. The requirement
3. The solution
4. The selection process
5. The implementation

The Customer - facts

Molnlycke Healthcare		
€85M spend per annum	Growth Industry	Long history with suppliers

CONTENTS

1. The customer
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MHC EMEA tender strategy

The Challenge

- Volume market – price pressure
- Premium market – high service
- Managing growths initiatives

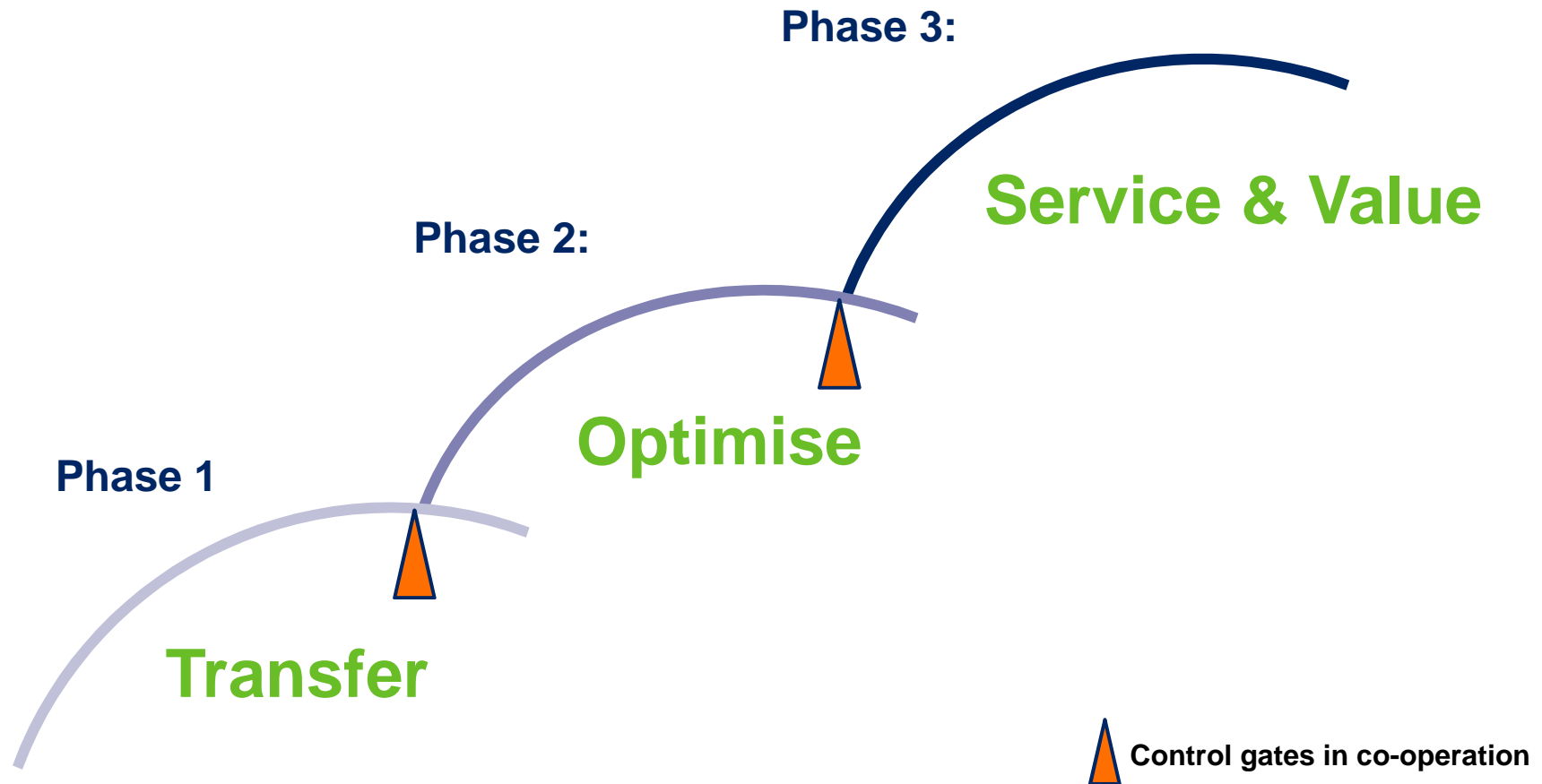
The Promise

- Reduce supply chain costs by 20%
- Reduce tied-up capital by 20%

The Strategy

- Increase transparency throughout Supply Chain
- Reduce complexity in network and processes
- Standardize operations and processes
- Increase flexibility and establish scalability
- Use metrics to ensure sustainable progress

Evolutionary model of co-operation



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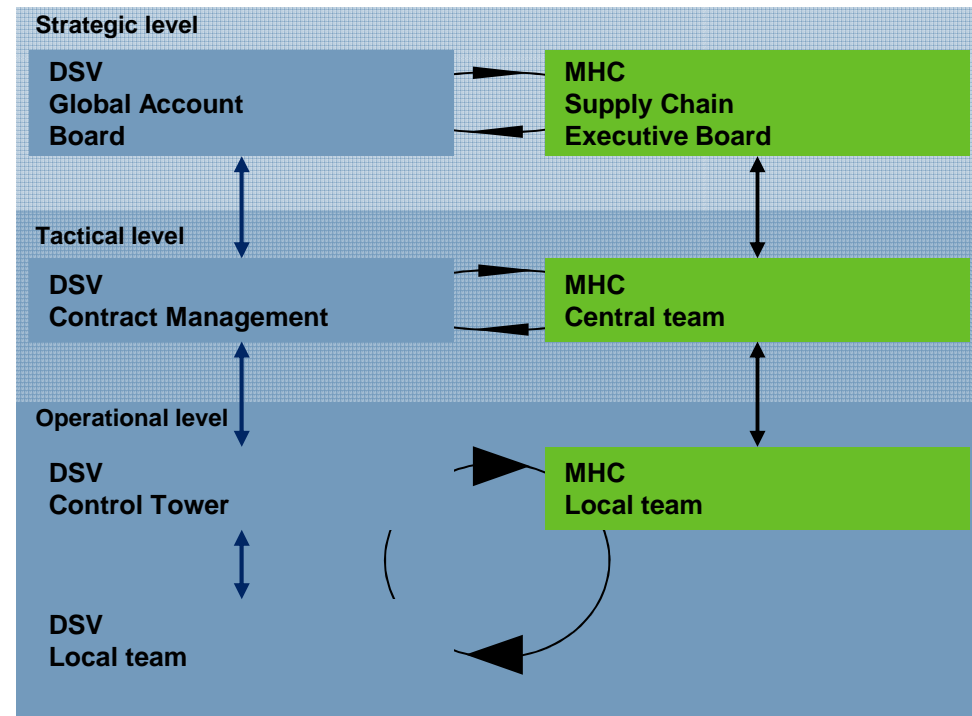
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MHC Account

Relationship governance model

- MHC have an experienced Global Management structure
- DSV have an experienced Global Management operation with multiple operational entities involved
- Clear communication structure between both companies
- Manage the business relationship with one common objective while each having its corporate responsibility
- Both organisations require a person that works jointly in managing both organisations with regard to day-to-day operations and resolving issues arising;

Mirror imaged governance model



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Evaluation criteria

Subject	Freight Forw. X	DSV	Freight Forw. Y
Scope of offer	●	●	●
Financial & Risk assessment	●	●	●
Operations & Processes	●	●	●
Account management	●	●	●
TO BE modelling	●	●	●
Transit time	●	●	●
Commercial offer (price)	●	●	●
Industry experience	●	●	●
Completeness against project deliverables	●	●	●
Adherence to project milestones	●	●	●
Cultural fit, such as	●	●	●
Committment & eagerness			
Preparations & ability to listen to signals			
Ability to deal with "stress factor"			
Presentations, content & focus			
Vision			
Energy level			

The marriage contract

Married life

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Project scope

- Nordics (FI,NO,SE) with DSV and local partners
- Denmark with DSV
- Baltic's with DSV
- UK & Ireland with DSV and local partner
- Benelux with DSV and local partners
- Germany with DSV, IDS and GLS
- France with Groupe Heppner
- Eastern Europe with DSV



Implementation

- 14 countries MHC customer service changes
- 14 countries phase in DSV
- 14 countries phase out incumbent carrier
- 14 countries warehouse process changes



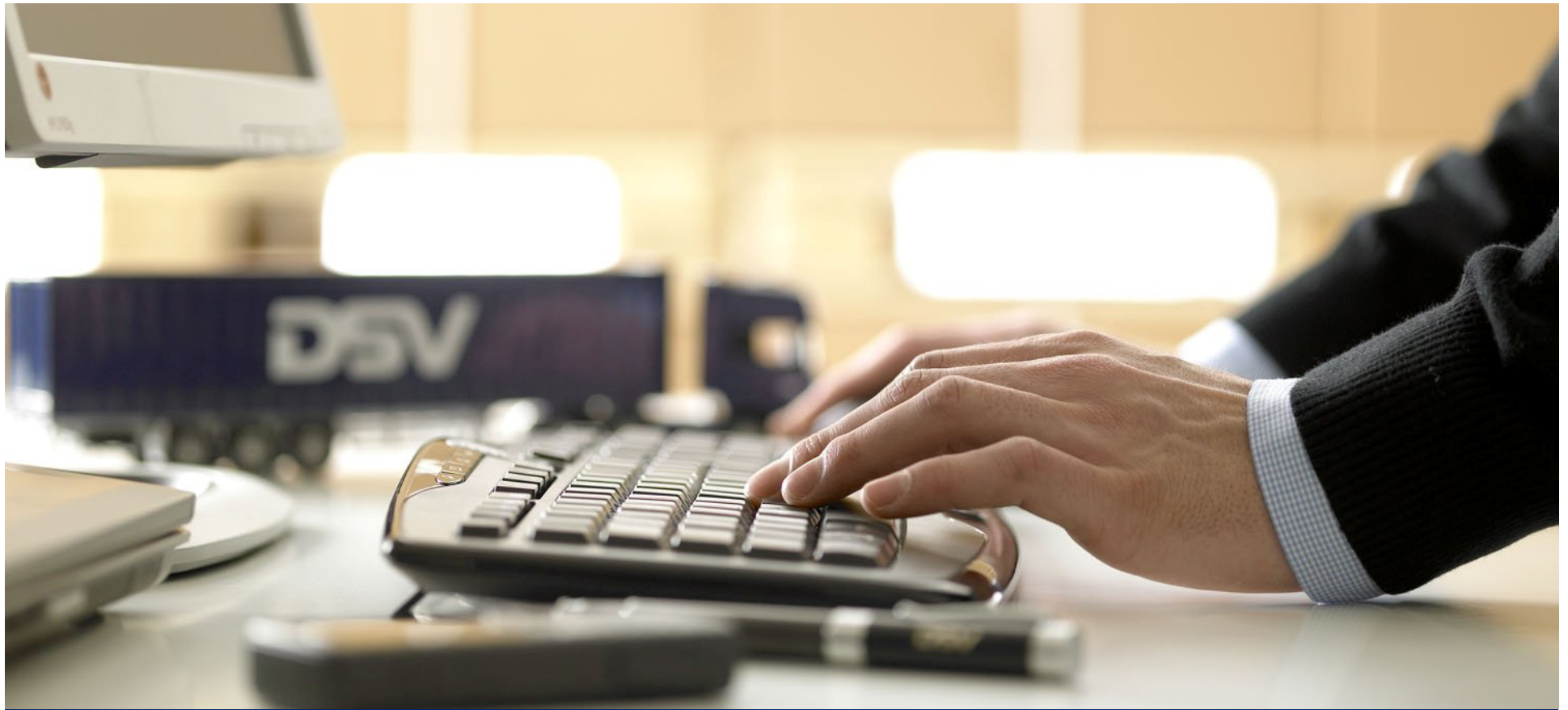
The 'Not Invented Here' Syndrome





Who's Having The Most Fun?

DSV



www.dsv.com

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