



Marketing & Sales Europe 2005

Jürgen Höfling, DHL
11 February, 2005

- Market overview

- Achievements

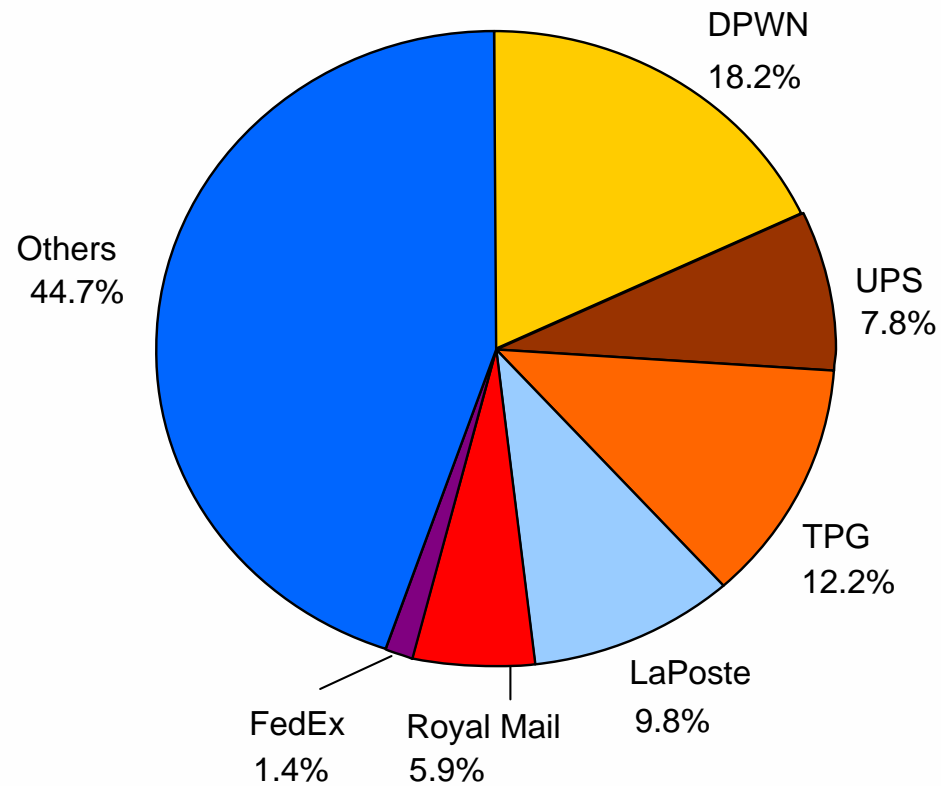
- The way forward

- Market overview

- Achievements

- The way forward

European CEP-Market 2003*



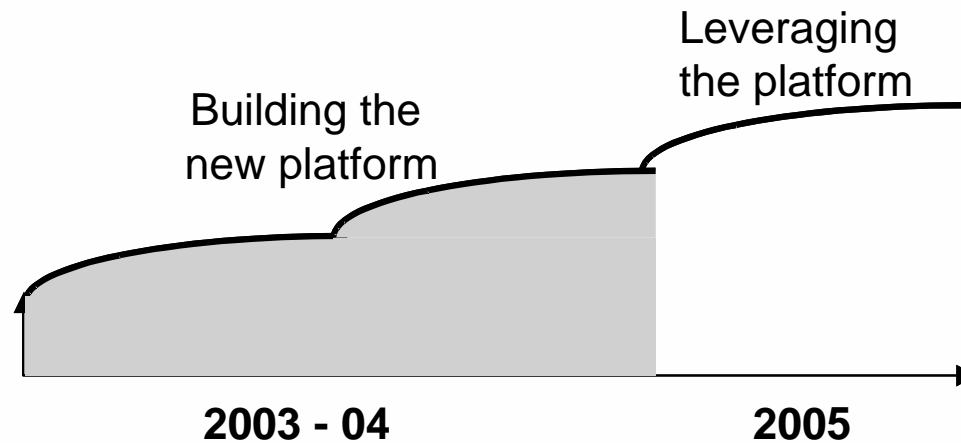
* Belgium, France, Germany, Italy, Netherlands, Sweden, UK

Source: MRSC in Cooperation with GfK, 2004

- Market overview

- Achievements

- The way forward



Achievements

- ✓ Substantial awareness and image gain through rebranding to new DHL
- ✓ Successful launch of harmonized Day Definite product DHL Europlus
- ✓ Substantial sales cost savings & profitability improvements
- ✓ Integration of sales forces completed
- ✓ Harmonization of processes and tools proceeding
- ✓ Customer service center integration progressing well
- ✓ Industry focus in key account management implemented

Source: Marketing & Sales Europe, February 2005

Starting Situation 2002-2003

Three distinct sales forces (DPEE, DANZAS, and DHL) with overlaps in customer portfolio



Milestones 2003-2004

Finalization of sales channel integration (Key Account, Field Sales, Direct Sales) by end 2004

- Harmonized sales processes
- Sales tools implementation
- Skilled sales staff offering the complete product portfolio

Target 2005

Integrated Sales Forces in Europe with continuous revenue growth

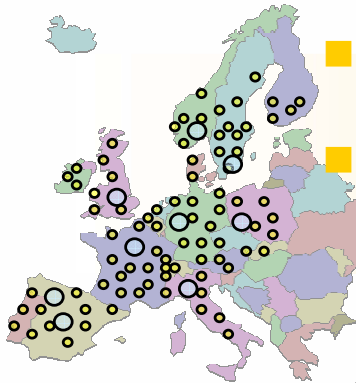


Source: Marketing & Sales Europe, February 2005

From...

Current Status ..

To...

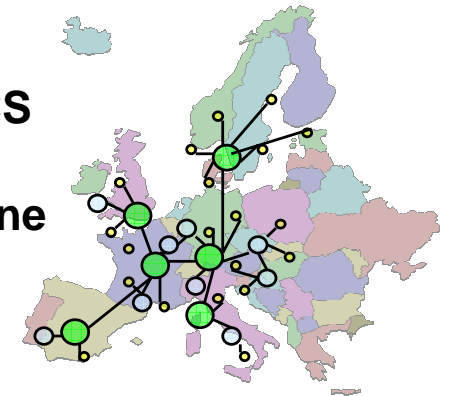


- Several hundred sites
- Various phone numbers per country

- 25% of sites already closed

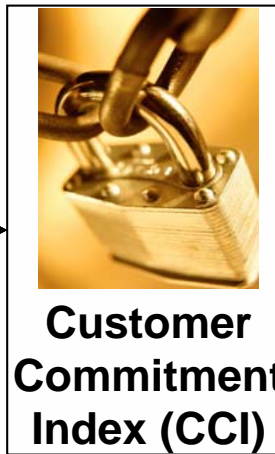
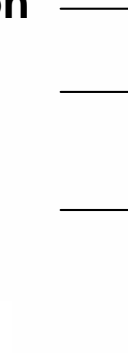


- Streamlined number of CS sites
- One CS phone number per country



Customer Commitment Components*

- Overall satisfaction
- Involvement
- Disposition (general opinion)
- Ambivalence (switching attitude*)

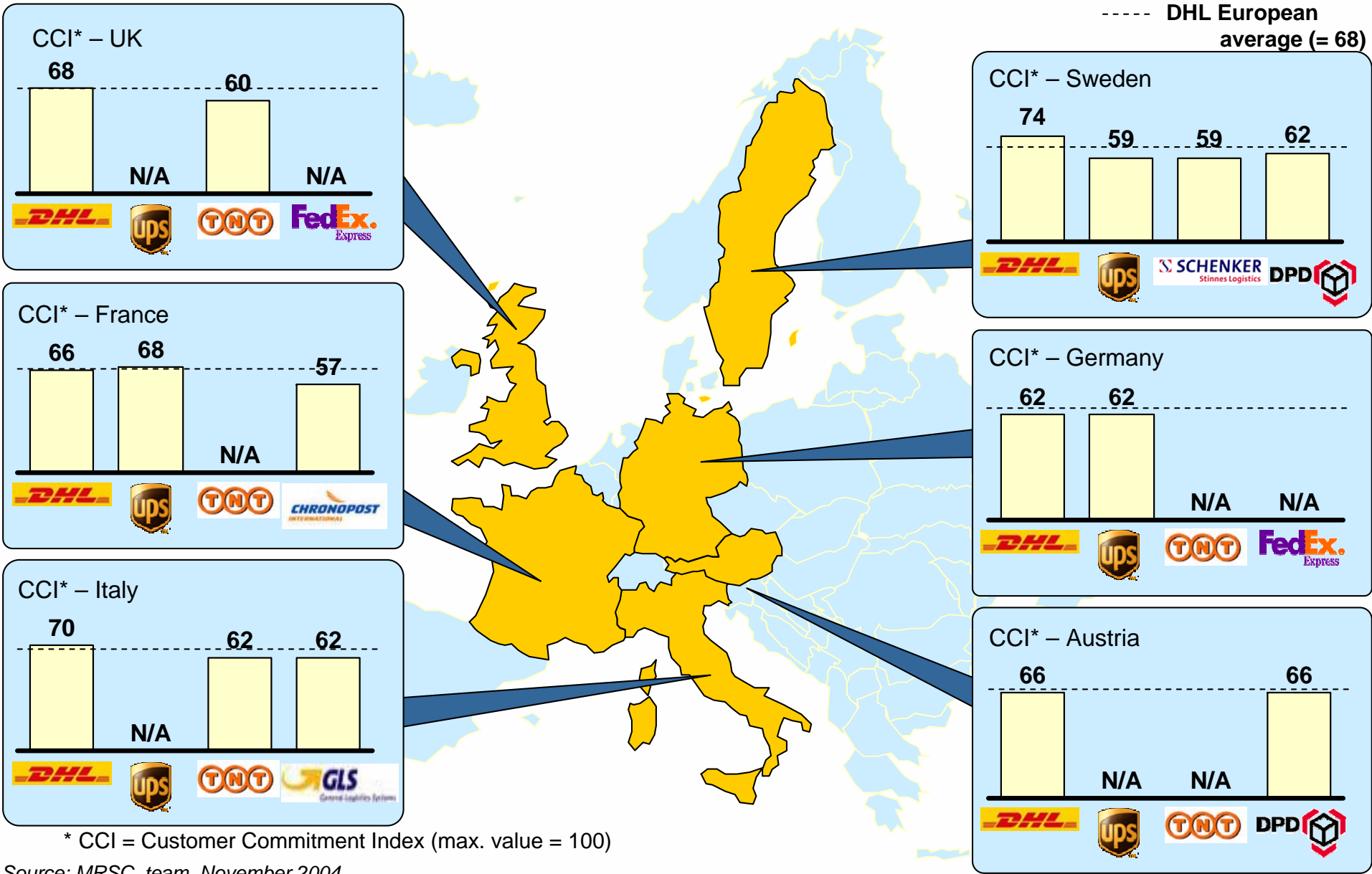


Customer commitment to DHL remained high throughout integration

* Questions: "How satisfied are you overall?" (**Satisfaction**); "How important is the choice of a service provider for express/freight shipments?" (**Involvement**); "Pls. indicate the way you feel about different service providers for express/freight service providers." (**Disposition**); "There are many good reasons to continue using this service provider" vs. "... switching to another provider" (**Ambivalence**)

Source: MRSC Team, November 2004

DHL Customer commitment remains high

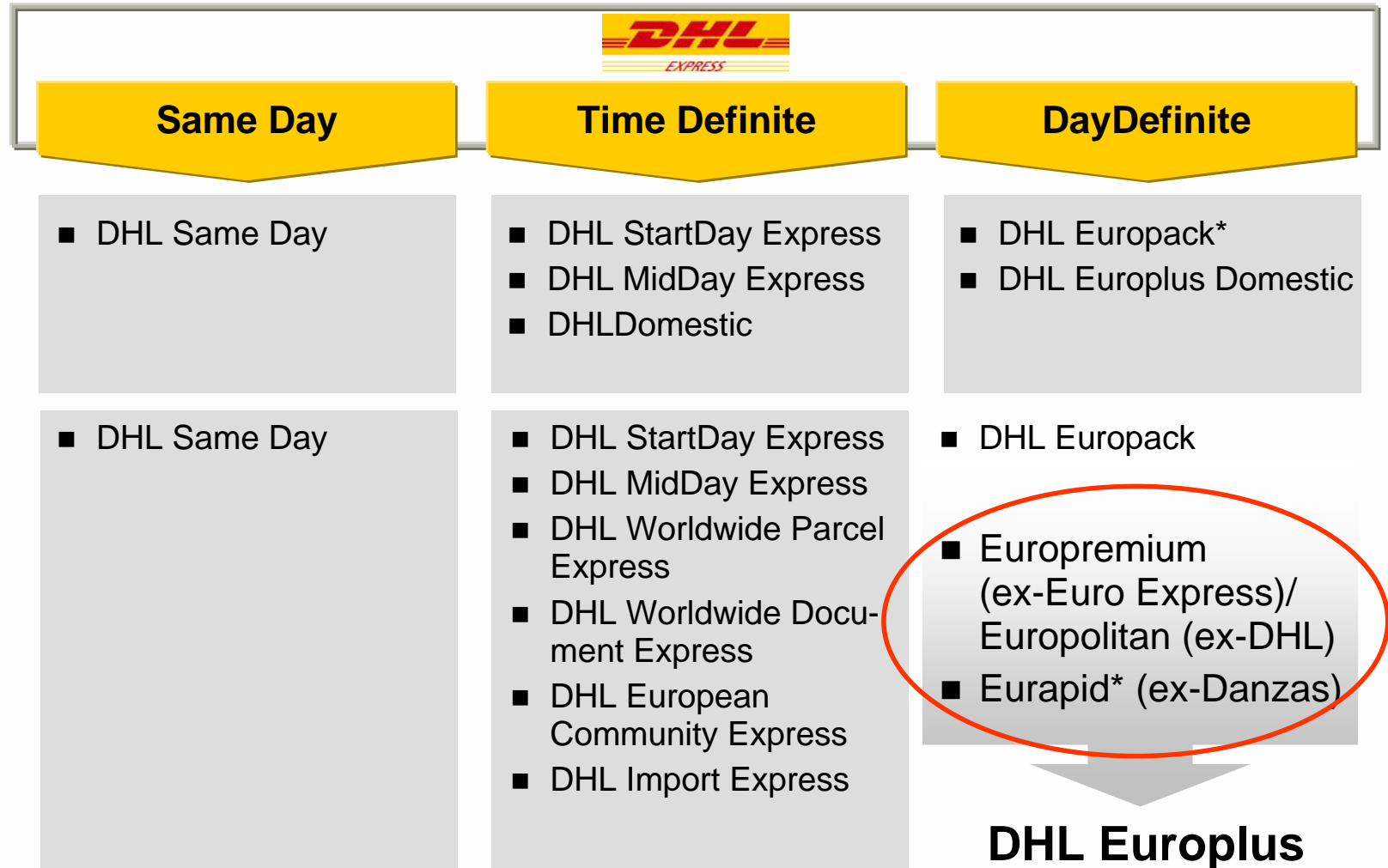


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Harmonization of DHL Product portfolio is well progressing



* Gradual migration to DHL Europlus as of July 1, 2004

Source: Marketing & Sales Europe, February 2005

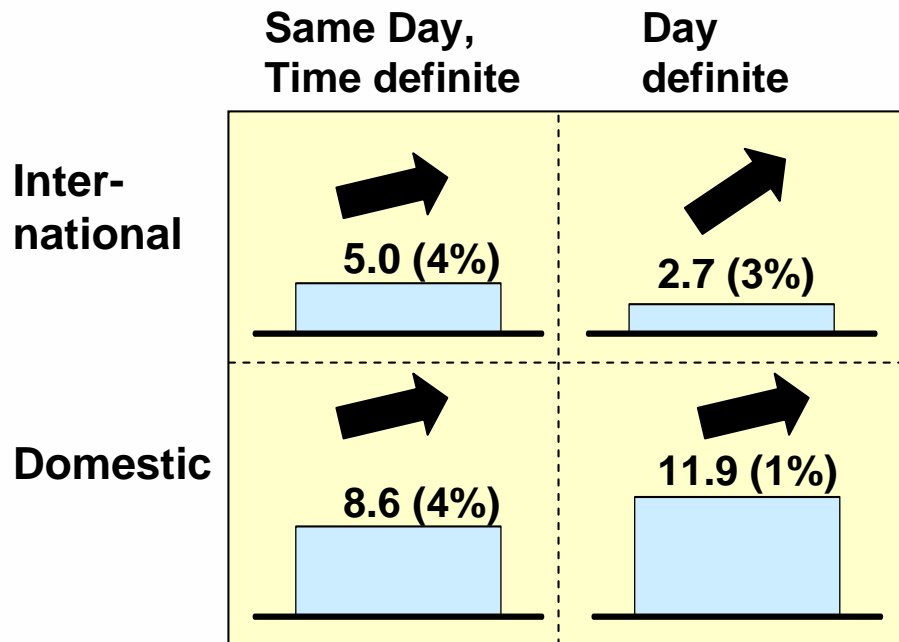
2005-06 Focus on fast growing segment – Harmonized road-based product DHL Europlus



Harmonized international Day Definite product launched: DHL Europlus

➔ Growth expectation 2004 - 07

European CEP market segments and growth 2003 (vs. 2002)
EUR bn (growth in %)



DHL Europlus

Status

- Leading coverage across Europe: available in 25 EU countries by 2nd quarter 2005

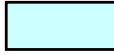



Positioning

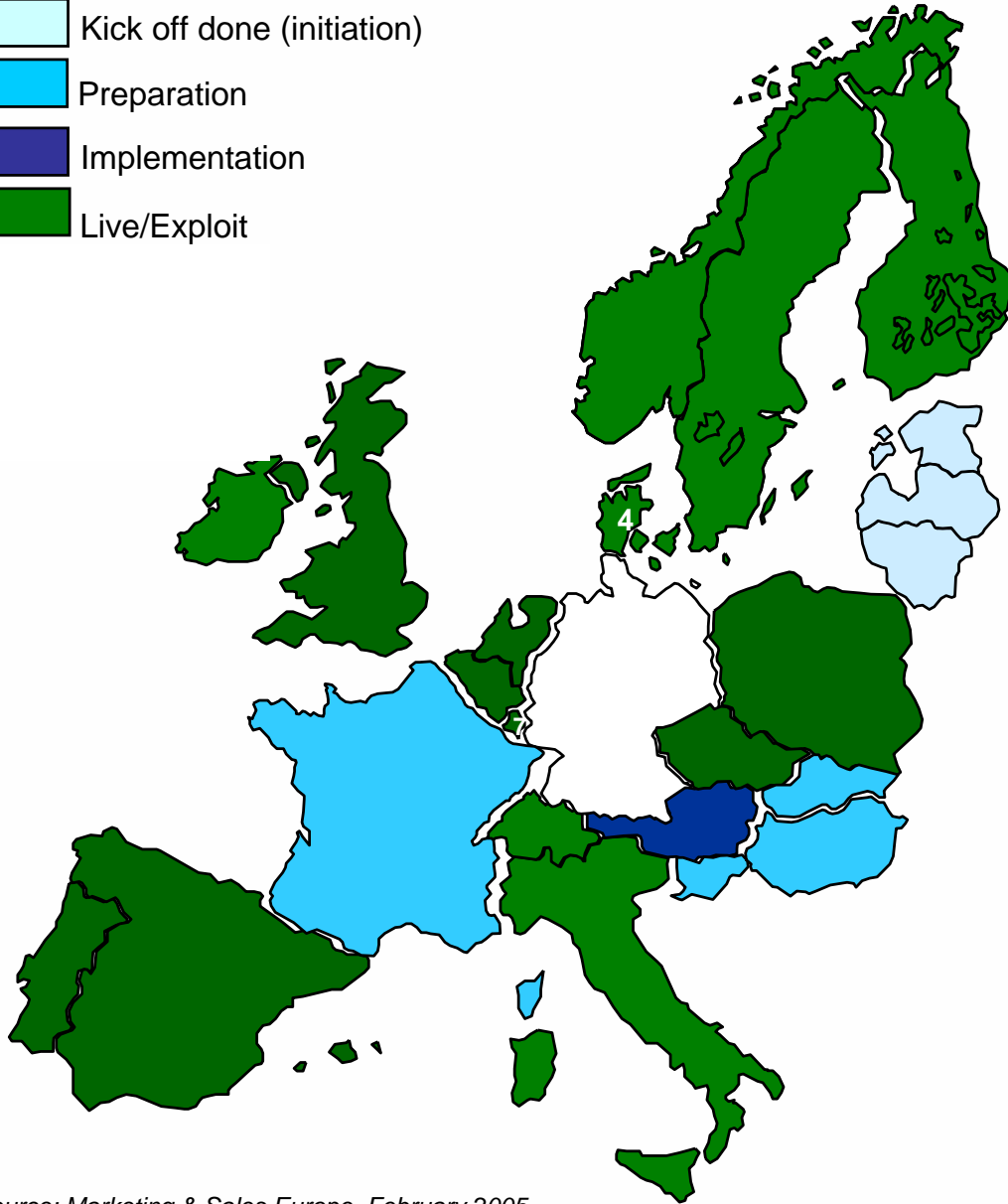
- **Reliable:** quality level on par with best market standards, further improvements under way for 2005
- **Fast:** Significant lead time improvements planned for 2005
- **Convenient:** Internet booking, full track&trace, broad range of features all over Europe, e.g. COD, receiver pays

Source: Marketing & Sales Europe, February 2005




After successful physical integration of sales forces now harmonization of processes & tools



-  Kick off done (initiation)
-  Preparation
-  Implementation
-  Live/Exploit



Business benefits

-  Higher productivity
-  Increased potential revenue
-  Improved customer relationship

Source: Marketing & Sales Europe, February 2005

Market research shows that we need to focus on being closer to the business and ease of use



Impact of key drivers on funnel performance

Index

++ very important, = neutral, - negative



Closer to business	++	++	++	=	++	++
Easy to use	++	++	++	++	++	++
Customer relations	++	++	+	=	++	++
Value for money	++	+	++	++	+	++
Fast	+	+	+	=	+	+
Reliable	+	++	+	=	+	+
Trustworthy	+	+	+	=	+	+

Source: Marketing & Sales Europe, February 2005

■ Strong domestic heritage and knowledge

- Customer relations & local market knowledge built on strong domestic companies
- Number 1 or 2 in most European countries

■ Customer understanding

- Systematic approach to support customers in optimizing their individual business and supply chain
- Covering the full range of customers' transport needs

■ Unparalleled worldwide and domestic network

- Dense & reliable domestic networks with stations close to all major business areas
- Global reach to over 220 countries

Source: Marketing & Sales Europe, February 2005



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Express & Logistics

More options nationwide. Deliveries from 500 grams to 500 tonnes.

Don't just think of DHL for international documents. We're just as happy to spend your delivery across the country as around the corner. You get the reliability and service of an international leader. With the convenience and price of a national carrier. www.dhl.co.uk

Campaign example focusing on being closer to our customers' business



Make the most of your business with someone who knows every Mousehole in Britain.

As close to your business as you are.

DHL Europe Britain. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam massa ut amet,ummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud eerci tatos aliquamper consetipit laboris nisi ut aliquip ex ea commodo consequat. Duis auteum vel cum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel ut amet illam dolore ea feugiat nulla facilisis at vero quis, sed illum conmodo dolore et accumsan et iusto odio dignissim. www.DHL.com

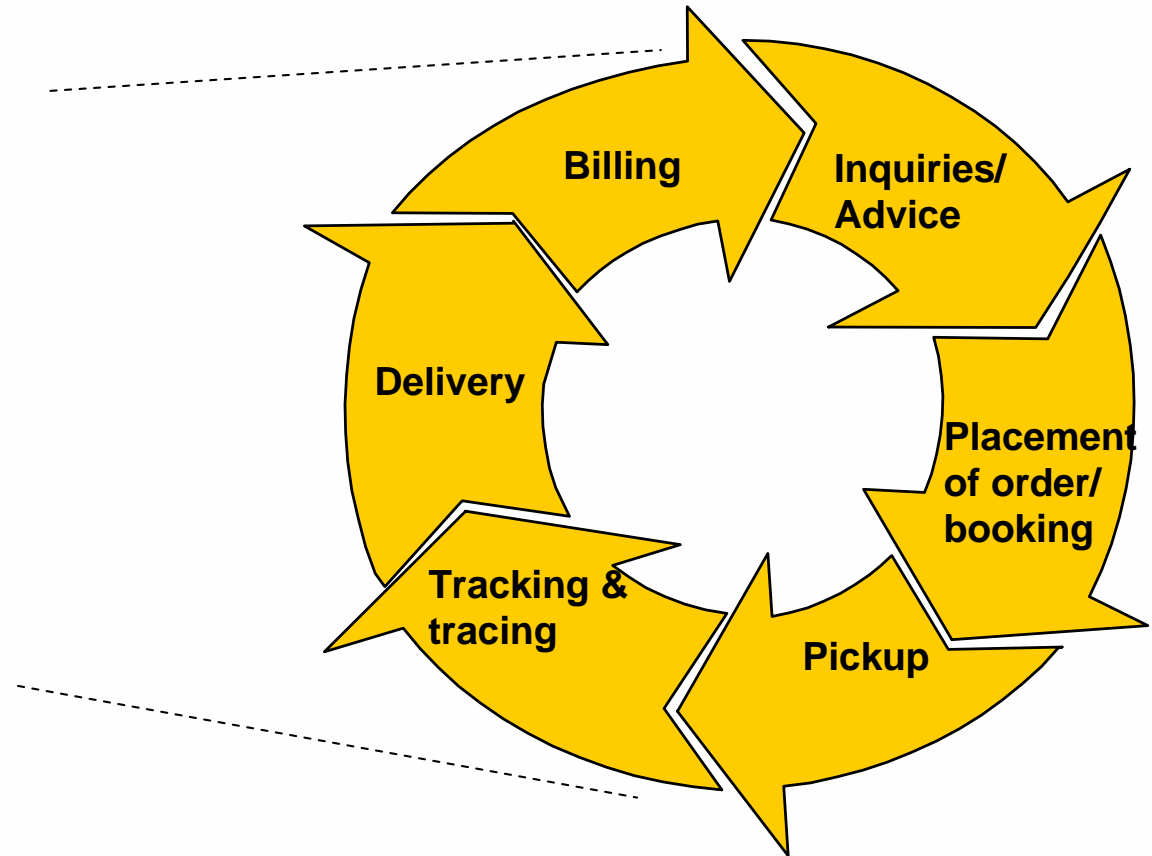
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Permanent improvements of applications to strengthen "Ease of use"



- EasyShip
- Harmonized Web Applications
- Interactive Voice Response



Source: Marketing & Sales Europe, February 2005

The DHL *SERVICEPOINT* network offers a number of easy to use shipping services

Customer Expectations

Convenience & Availability

Easy to ship

Reliability

DHL Service Offer

- 3,000 new DHL *SERVICEPOINT* locations in the next three years in Belgium, Netherlands, Italy and UK
- Further expansion is under way with full European coverage targeted
- Locations close to potential customers with longer opening hours and later cut off times
- **EXPRESS4YOU** product offer: bring, pack and ship
- All inclusive and simple pricing
- Simplified transaction process
- Track&Trace



