



Reimagine AI enabled Future

- Marketing

1. Accelerate 2026 near-term use cases

2. Kickoff Reimagination Approach

3. Continue to drive usage and individual upskilling

Support Available for Global Services

- Cross functional AI Core Team available to support for
 - Exploring use cases & potential new AI tools
 - Setup quick POCs
 - Open Arena & AI Platform requests
 - Training needs & Change management
- Core Team: Samir Mallik, Richie Samson, Tosan Ojehere, Jacob Walls, Victor Rubel, Laura Skylaki Kath Davies
- Marketing AI Lead: Bethany Kinsella

Status of current AI initiatives in Marketing

Background: Marketing encompasses approximately ~800 global resources across product marketing, demand generation, Thomson Reuters Institute, brand management, digital marketing and operational functions. The marketing team's AI initiative is being revitalized through recentralization in July.

AI Tools Deployed: Enterprise Writer, Adobe Firefly/Express, Copilot 365, Open Arena, Claude.ai (testing)

Usage Statistics:

- 540 active users out of 808 headcount (**66.8% adoption**).
- Updated Internal AI Reporting: Enterprise Writer usage tracking started, Adobe tools to be tracked soon.

Business Impact:

- No productivity impact committed for 2025
- 2026 and 2027 targets are \$2.3M and \$6M respectively

Phase 1 Use cases:

- Marketing team have been experimenting with many AI tools. Productivity seen in content ops within Content & TRI, growing expansion in Demand Gen; automation of Gong sales insights for win/loss and customer references with AI underway.

AI x Marketing Transformation: AI Accelerated

Six foundational workstreams consolidate current initiatives and accelerate early wins through coordinated program management that ensures accountability, measures value* and manages organizational change.

Customer Intelligence & Targeting

ROI: 10% conversion lift, 1M+ new prospect contacts

Business Impact: Precision targeting through AI-enhanced customer data, predictive segmentation, and automated prospect identification driving pipeline growth.

Campaign Performance & Automation

ROI: 25% faster campaign execution

Business Impact: Accelerate time-to-market with intelligent campaign orchestration, predictive optimization and automated workflow management

Data & Analytics Intelligence

ROI: Same-hour insights delivery

Business Impact: Eliminate manual reporting delays, enable real-time decision-making with AI-powered analytics platform and natural language queries

Competitive Intelligence Platform

Strategic Priority: Unify market intelligence

Business Impact: Eliminate delays due to competitive data across platforms, enable improved decision making with AI-powered win/loss, competitive intel and customer voice for strategic advantage.

Content Generation & Optimization

ROI: 60-70% production efficiency gains

Business Impact: Scale content production with AI-powered creation, automated derivatives and brand consistent messaging across all channels.

End-to-End Lead Management

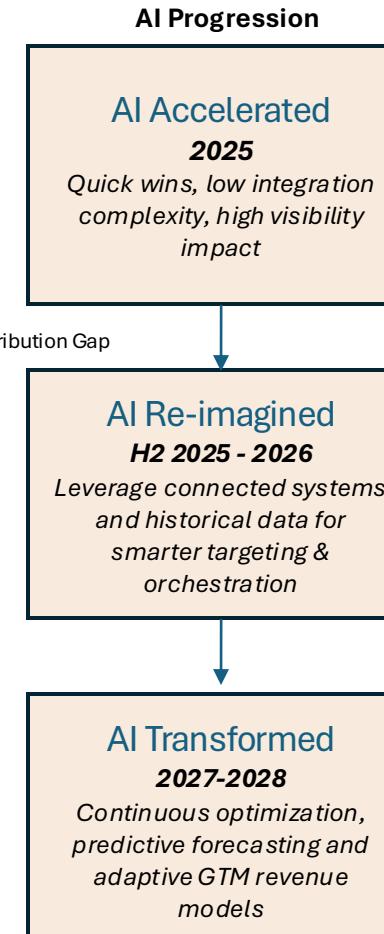
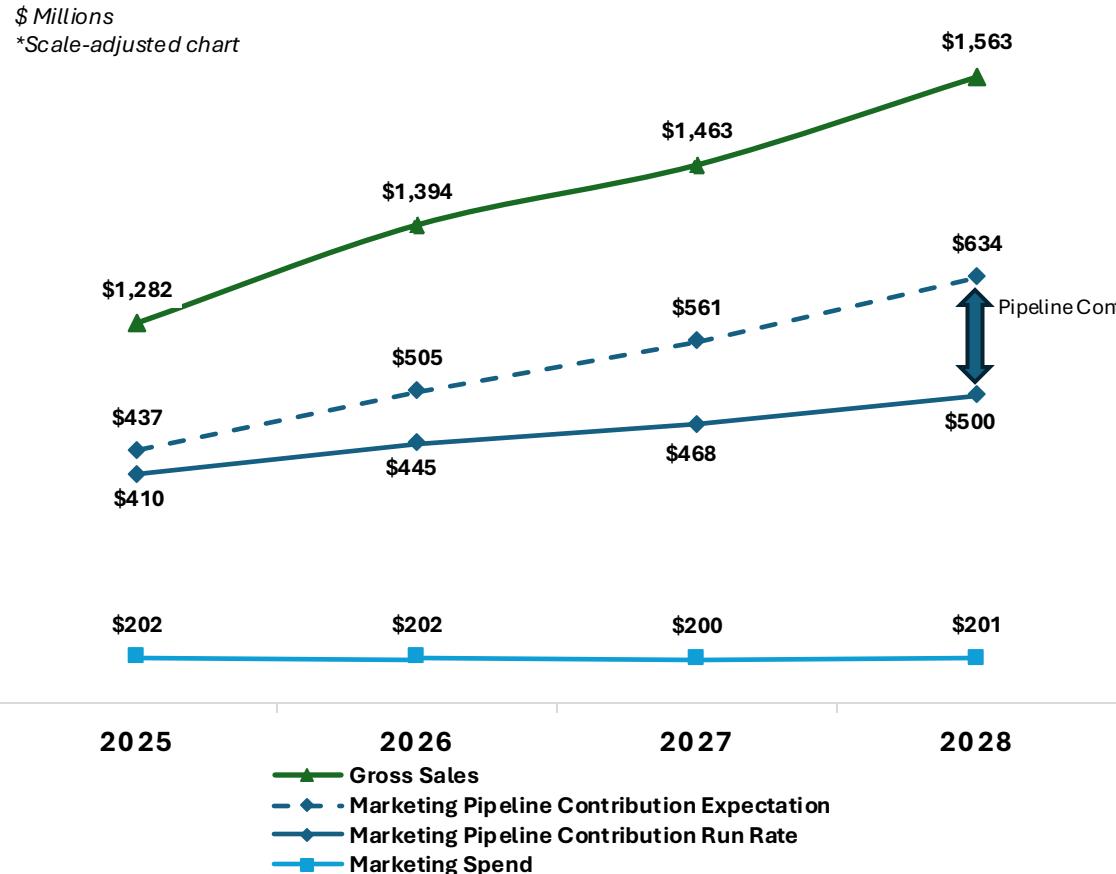
ROI: Efficiency in Lead Management

Business Impact: Automate manual work in end-to-end lead management process, improve up-front data collection, lead scoring and routing.

*Initial estimate - value measurement and capture pending Finance validation

AI x Marketing Transformation

We have a gap between expectations and current status of AI efforts which will require additional investment in order to accelerate.



Quick execution with SaaS AI tools

- Increased content production - Higher volume and quality of marketing materials with WRITER, Open Arena, MS Co-Pilot
- Faster access to TRI insights - Instant research and data retrieval capabilities through Open Arena chains
- Smarter campaign planning – Persona AI assistant guides campaign planning and optimization

Deeper CRM/Data Integration

- Market-Product Solution-Customer Fit:** Identify best fit solutions and audiences to target for growth; driving higher conversions.
- AI-Driven Analytics:** Uncover deep customer characteristics that lead to insights to personalize engagement strategies.
- AI-Driven Orchestration:** Coordinate marketing workflows through autonomous, specialized AI agents

Continuous optimization with predictive + prescriptive AI

- Predictive AI Marketing:** Forecast customer needs and market shifts before they occur
- AI Customer Journey Management:** Recommend (or automatically implements) the next best action for every customer and campaign
- Marketing Mix (ie. Channel, Product) and ROI Optimization:** Continuously fine-tuned for optimal performance

Source: Finance. Data as of August 4, 2025

2025 based on June Actual and H2 Fcst

2026-2028 based on Sales run rate and increased contribution expectation

One Key Metric: Marketing Pipeline ROI

Marketing will begin by initially tracking Marketing Pipeline ROI for our Internal AI transformation effort, growing our measurement strategy through our value capture workstream.

	2024 Actual	2025 Target	2026 Estimate	2027 Estimate
Total Marketing Pipeline	\$ 956,700,000	\$ 1,111,100,000	\$ 1,290,418,323	\$ 1,498,676,491
Total Marketing Spend	\$ 198,797,110	\$ 201,935,429	\$ 201,633,691	\$ 200,470,626
Marketing Pipeline ROI	4.8x	5.5x	6.4x	7.5x

Definitions

- Marketing Pipeline ROI = Total Marketing Pipeline (created+progressed)/Total Marketing Spend (people+non-people)
- 2024 = actuals
- 2025 = target set at beginning of year
- 2026-2027 = Total Marketing Pipeline assumes 16% growth rate YoY (in line with 2024-2025 run rate) while Total Marketing Spend is flat at the targets received from Corporate Finance producing a steadily increasing ROI expectation (~1x per year)

Last 12 months	2025 Q1 Actual	2025 Q2 Actual	2025 Q3 Target	2025 Q4 Target
Total Marketing Pipeline	\$ 822,421,000	\$ 974,929,516	\$ 1,090,427,143	\$ 1,111,100,000
Total Marketing Spend	\$ 197,470,425	\$ 201,156,212	\$ 204,940,180	\$ 201,935,429
Marketing Pipeline ROI	4.2x	4.8x	5.3x	5.5x

Definitions

2025 quarterly view is showing rolling last 12 months for both Total Marketing Pipeline and Total Marketing Spend

Develop End-to-End Reimagined Roadmap

Build a vision, plan and roadmap that moves TR Marketing to be a leading AI-centric marketing organization.

The Plan: Articulate the most critical Business/Marketing Priorities, and Investment Areas

Create a vision, and plan, that details what TR Marketing needs to do to succeed in the new era, considering changes in customer buying behavior, TR's transition to SaaS, and the competitive environment.

Re-imagine the How

- 1. Simplify Operations:** Identify complexity barriers and create simplification plan to streamline marketing operations.
- 2. Define concise Marketing AI vision:** Develop strategic vision for AI evolution in marketing over 2-3 years.
- 3. Breakthrough Opportunities:** Identify and prioritize areas requiring complete reimagining (not incremental improvements) to achieve Reimagine Program targets.
- 4. Investment Strategy:** Highlight priority investment areas in capabilities, processes, technology, data, and AI. Include benchmarks to support funding decisions.

Marketing AI Program Organizational Chart



Q3 Program Roadmap

	July				August					September			
	3	10	17	24	31	7	14	21	28	5	12	19	26
Program Management Foundation													
Program Management Office (Definition, R/R, Plan)			✓										
Change Management Plan (Approach, Review, Final)					✓	✓	✓						
Learning Day: AI Focused (Prompting for Mktg, Manager Sessions)												✓	
Value Capture (Framework, Review, Complete, Assessment)							✓		✓			✓	
Align Value Capture with Program Metrics													✓
Workstreams Foundation													
Marketing Employee Pain Point Survey					✓								
V1 Internal Role Mapping					✓								
V1 Role Mapping Complete							✓						
Process Mapping Test & Learn: E2E Lead Management													✓
Individual Workstreams													
Workstream Lead Kickoff					✓								
V1 Workstream Brief Complete & Review							✓						
Value Capture Reviews											✓		
V2 Workstream Brief Complete												✓	
Review & Align on Quick Wins per Workstream												✓	
Workstream Activation Plan Complete												✓	
Initiate Quick Win Execution													✓
Reimagine													
MLT Kick Off & Target Conversations										✓			
Kick Off 8 Week Vision, Plan, Roadmap Design Effort											✓		

Next Steps

- Expand process mapping efforts beyond E2E Lead Management – dependency on process excellence team resourcing
- Engage enterprise data, business architecture, technology teams in October as part of the Reimagine road mapping effort – dependency on resourcing from these teams
- Full alignment of Reimagine vision, plan and roadmap (incl. investment strategy) by end of year