

Four horizontal orange lines of varying lengths are positioned above and below the title. Each line has a solid orange circle at its right end.

Accelerating Internal AI

Marketing

April 2, 2025

Objectives of Today's Discussion

- Review current Progress
- Discuss 2026 / 27 roadmap
- Agree on a plan to provide 2026/27 productivity commitments

Enterprise Internal AI Savings Dashboard

		Baseline People cost		Ambition 2027		Aggregated Productivity Benefits \$M				Benefits - % of Total	
Group	Function/Segment	\$M	HC (#)	%	\$M	2024	2025	2026	2027	2026	2027
GTM	TAP	93	608	5%	5	-	0.7	3	4	3%	5%
	Legal	157	832	5%	8	-	-	5	8	3%	5%
	Government	40	184	5%	2	-	-	1	2	3%	5%
	Corporates	216	1,157	5%	11	-	-	3	6	2%	3%
	Print	20	291	5%	1	-	-	1	1	3%	5%
	International	144	2,512	5%	7	-	-	-	-		
	Marketing	96	786	5%	5	-	-	1	1	1%	1%
O&T	CXDT & C2C	110	2,208	15%	17	0	1.7	7	8	6%	7%
	Content Ops	51	1,513	15%	8	0	3.0	6	8	12%	16%
	PE	298	3,298	15%	45	3	11.5	17	20	6%	7%
	CIO	174	1,928	15%	26	1	4.0	10	17	6%	10%
	D&A	19	207	15%	3	-	-	-	-		
	Global Services, Others - excl RM	23	107	5%	1	-	0.3	0	1	2%	2%
Enterprise Functions	Finance	81	753	10%	8	-	0-1	1	8	1%	10%
	Comm. Excellence	36	375	10%	4	-	0-1	1	3	3%	8%
	HR/Comms	61	433	10%	6	-	0-1	1	6	2%	10%
	Strategy	14	47	10%	1.45	-	0.1	0	1	3%	10%
	General Counsel (incl RM)	25	130	10%	2	-	0.6	1	2	5%	8%
Product	Product Management, Design & Tax content	152	1,338	5%	8	-	-	-	-		
	Editorial	268	1,999	15%	40	-	1.8	4	8	1%	3%
Total		2,463	24,201	9%	226	5	23.6	61	104	2%	4%

Marketing Team's Current AI Progress

1. **Content generation** for creative assets needed to be produced to support evergreen content and Demand Generation Marketing Campaigns - accelerate growth with increased content creation and editing, productivity, and time savings. Streamline content production and reduce dependency on Agency resources

Tool: Adobe express for graphic content, Enterprise Writer for written content; Targeted Impact: 4,600 hours per month
Current Status: 27 out of 100 licenses distributed for Adobe Express. Entp. Writer roll out pending with Procurement process.
2. **Knowledge Management** for marketing content Tool: Open Arena Chains
Targeted Impact: Cost avoidance of \$100K of proposed Stravito tool
Current Status: POC is successful after a few attempts, roll out status to be updated.
3. **BDR Coaching and content optimization from Customer calls** Tool: Gong AI;
Targeted Impact: 5% increase in appointment to opportunity conversion & 3% increase in response rate
Current Status: Testing was not successful, need to find an alternate tool.
4. **Customer Segmentation/Targeting** (From Market Definition to List Pull): Tool: Custom tool developed by Deloitte
Targeted Impact: Tailor marketing our campaign messages to specific customer segments, thereby enhancing campaign performance.
Current Status: Encountered several challenges, took 8-12 weeks longer to complete with a reduced scope. Although successfully developed AI-driven customer segments, require further testing and iteration to fully test and realize the potential.
5. **Personal Productivity** in daily work: Tool: Copilot 365, Open Arena
Targeted Impact: Achieve 2-3 hours of savings per user per week from Word, Teams, Outlook, PowerPoint and Excel (in near future).
Current Status: 100 Copilot licenses deployed so far with 93% active usage in Marketing team. Open Arena active usage ~40% of the team.

Usage of AI tools

Active usage in Feb 2025

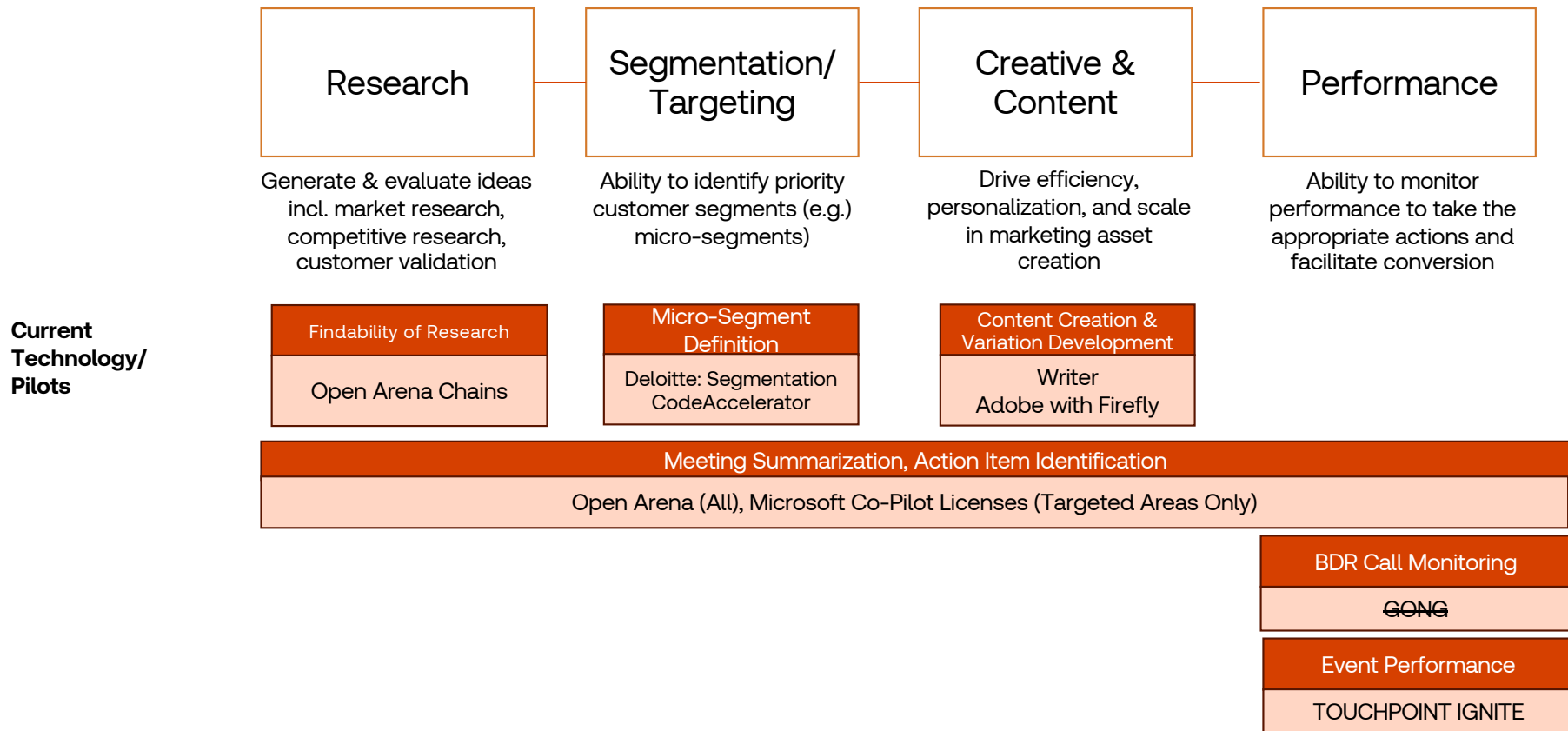
Active Users by Tool/Platform				
Management Chain - Level 03	Copilot 365	GitHub Copilot	Gong	TR Open Arena
⊖ David Carrel	93	1	1	245
⊕ Ali Bohra	26			54
⊕ Beatriz Oliveira	1			26
⊕ Betty Wetherell-Gustafson	10		1	19
⊕ David Carrel				8
⊕ ELT-1	4			2
⊕ John Whitfield	18			14
⊕ Majaliwa Bass				7
⊕ Melinda Chan	7			44
⊕ Mike Abbott	14			27
⊕ Paul Hart	11	1		20
⊕ Trae Harris				18
⊕ Victoria McCafferty	3			13
Total	93	1	1	245

Other tools in discussion for usage/benefits tracking

SAP Name	TRs Use and Description	Team Use	Tech Stack	AI Functionality	Categories
6sense Insights Inc	Enables intent based marketing practices through correctly identifying an accounts buying stage. https://trtap.abm.6sense.com https://trlegal.abm.6sense.com	AEM; Corporate; LatAm; Legal; Tax; Digital Activation	GTM	Available - some usage	Personalization & Testing
Grammarly (via Insight Direct)	Grammar Review AI. Using free licenses. Paid licenses for FindLaw	FindLaw	GTM	Available - some usage	Content Management
On24 Inc	Webinars, virtual events; Webcasting and events platform	AEM; Corporate; Legal; Tax	GTM	Available - usage	Campaign Management; Events & Webinars
Oracle	TR's ACTIVE Marketing Automation platform used by many global teams across TR.	Corporate; Legal; Tax	GTM	Available - usage	Campaign Management; Content Management; Data Management; Events & Webinars; Lead Management
Outreach Corporation	Outreach is a communication workflow tool integrated with Salesforce. Outreach is used by BDRs and SDRs in Marketing and Commercial Excellence to automate appointment setting	BDR; Corporate; Legal; Tax	GTM	Available - some usage	Lead Management; Content Management
Writer, Inc.	First use cases in Marketing regarding how we are adopting AI in our work.	Content COE	Enterprise	Available - usage	Decision Management; Content

Active usage tracking and estimating productivity benefits from each of these tools will provide a better estimate of current and future savings

Future of Marketing with AI Strategy: 2025



Open Discussion on how accelerating impact

- Do we need to enhance the list of use cases
 - New use cases in 2025
 - Potential tools/use cases for 2026
- Should impact tracking be more robust
- What other opportunities do we have to accelerate

Appendix

Improve Content Creation: Unlocking Scale in Graphic Content Editing



Adobe Express

What is Adobe Express?

All-in-one AI content creation technology application for making and editing creative assets. Generative AI tools like Generative Fill, Text to Image, and Text to Template (beta), all powered by Adobe Firefly.

Adobe Express is one of several foundational platforms need to build out our full content supply chain. Future investment into other tools will be needed to accelerate automation, deployment and insights/ metrics.

Bringing our adobe Technology stack into the cloud and off premise will play a key role.

Use Case

CONTENT CREATION

CHALLENGE: Content teams struggle with the volume of creative assets needed to be produced to support evergreen content and Demand Generation Marketing Campaigns.

SOLUTION: Adobe Express will help us accelerate growth with increased content creation and editing, productivity, and time savings. All of this can be done securely and with the assurance of compliance with our brand.

SUCCESS
METRICS

4,000+ Total Hours Saved

Improve Content Creation: Unlocking Scale in Written Content

WRITER

What is Writer?

Full-stack generative AI written content solution with flexible application layer, composable UI options to create custom templates, AI guardrails with style guides, terms, and snippets to make sure your work is compliant, accurate, inclusive, and on-brand.

Tool integrates with internal data sources through Knowledge Graph, enabling accurate output generation, research, data analysis, and question-answering. SSO secure authentication.

Enterprise-ready: LLMs are auditable, transparent, and architected to keep our data private.

Built-in ROI tracking with enterprise-wide application beyond Marketing (HR, Product, Legal, IT, Sales).

Use Case

CONTENT CREATION

CHALLENGE: Content teams struggle with the volume of written content required to be produced to support Evergreen Content and Demand Generation Marketing Campaigns.

SOLUTION: Writer will help us accelerate growth with increased content production, productivity, and time savings. All of this can be done securely and with the assurance of compliance with our brand.

SUCCESS METRICS

456+ Total Hours Saved

Gong.ai: BDR COE Pilot

Using AI to drive efficiencies and growth



What is Gong?

A Revenue intelligence tool that captures the most comprehensive set of customer interactions in the industry — from video calls, to phone calls, emails, and more — basically anywhere your team interacts with customers or prospects. Then uses Industry-leading AI to process the full context of your customer interactions and delivers personalized guidance to accelerate opportunity.

Use Case

COACHING



CHALLENGE: Our non-native English speaking to improve onboarding and provide timely & relevant coaching to assist in their individual conversations to be more relevant with our customer base. With a large team it can be difficult to identify issues at scale where extra training would be the most beneficial as it should increase conversion rates.

SOLUTION: Gong.ai will allow us to identify specific positive or negative behavior we want to track using AI. It would then send notifications to management when these behaviors are being used in phone calls or email responses so we can address in real time. We'll also be able track these trends over periods of time to measure the success of our mitigations.

SUCCESS
METRIC

↑5%pts

Appointment to
Opportunity Rate

Use Case

CONTENT OPTIMIZATION



CHALLENGE: While we have separate reporting through Outreach, Salesforce and Genesys, we do not have an easy way to combine or search all customer responses to find common themes to easily optimize at scale.

SOLUTION: Gong.ai will allow us to analyze BDR emails, chat transcripts, phone scripts being used by LOB to systematically help us understand what messaging is resonating with customers and extract meaningful insights that could be actionable to scale content optimization.

SUCCESS
METRICS

↑3%pts

Response
Rate

Improve Information Findability: Unlocking Insights and Efficiency

A GenAI enabled knowledge management tool for TR Marketing

A centralized repository for validated documents.

Natural language search capabilities of full document content, not just searching titles, will allow more users to access more readily a range of information which is currently held in siloed teams and requires the knowledge from that team to know “what we have and where it is saved”.

The search will **only** pull from the repository so we can have confidence in the validity of the GenAI output.

Methods being evaluated:

Preferred – Copilot Studio within SharePoint. POC underway with TR Institute

Alternative – 3rd Party software, Stravito

Use Case – TR Institute

MAXIMIZING RESEARCH VALUE

CHALLENGE: Within the TR Institute alone, over 50 research projects are conducted annually as part of productized research, paid engagements and Thought Leadership. These insights are crucial for market understanding, sales conversations, and strategy development. However, there is no simple way to know what information exists or how to access it. Moreover, similar topics across multiple surveys make it challenging to get a comprehensive overview without reviewing all relevant outputs.

SOLUTION: A GenAI-enabled knowledge management tool lets TR users search all research outputs with natural language queries, requiring no prior knowledge of existing data or surveys. It provides comprehensive and reliable results by accessing all validated research documents.

SUCCESS
METRIC



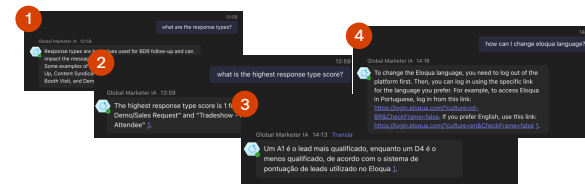
25% quarterly search increase in early stages (no baseline, new initiative)

Use Case – Marketing Ops

GENERAL KNOWLEDGE

CHALLENGE: in marketing operations we are usually requested about technical information on lead scoring or Eloqua related configurations (i.e.: change Eloqua standard language from English to Spanish/Portuguese)⁴

SOLUTION: By creating a copilot bot, we can integrate these solutions into our internal knowledge base. This ensures that consultations regarding lead scoring, Eloqua configurations, and other technical requests can be automatically addressed by marketers.



SUCCESS
METRIC



Increase employee efficiency by delivering full up-to-date knowledge information

Improve Information Input: Streamline Vendor Management

A GenAI-enabled vendor management system

A streamlined process for adding and managing vendor information.

Natural language interface and automated form generation capabilities will allow marketers to directly input vendor details into the system, eliminating the need for time-consuming email communications and manual data entry by the finance team.

The system will integrate with existing PowerApp Marketing Spend Operations, ensuring seamless PO creation and maintaining data consistency across platforms.

Methods being evaluated:

Preferred – AI-powered chatbot integrated with PowerApp

Alternative – none

Use Case – Marketing Ops

ADD VENDOR

CHALLENGE: In marketing finance, we often add vendors to our PowerApp Marketing Spend Operations for PO creation. This typically starts with an email where marketers provide vendor details like name, address, and ERP ID, which we then use to update the vendor list. This always a time-consuming action.

SOLUTION: Using the bot, we can present marketers with a form to directly input vendor information into the PowerApp application, streamlining the process and reducing the need for email communication.



Improve Event Insights at SYNERGY24 (Internal AI Centric)



Unlock a Deeper Understanding of Your Attendees with In-depth Audience Insights

What is Touchpoint Ignite through Certain?

Make faster decisions with instant access to actionable insights, using AI-driven, intuitive conversational interface.

Simply pose a question to generate meaningful insights, reports and charts in minutes, not hours or days.

Use plain language, seamlessly unlock insights beyond standard metrics

Existing Vendor: 2024 Complimentary Add On: \$5K Value

Use Case

EVENT INSIGHTS



FUNCTIONALITY: TouchPoint Ignite is an add-on to the SYNERGY mobile app backend that provides data analysis/visualization and a chat bot for event insights

VENDOR: Certain (existing enterprise platform for event management)

BENEFITS

Reduce time/resources to produce event insights; trial run of Certain's dashboarding & data analysis capabilities