TR Marketing
AI Transformation

Monthly Update & Discussion

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TR Marketing AI Transformation

- **Monthly AI Update**

- **Workstream Program Highlights** (Caroline/Katie)

- **Value Capture Progress** (Quinn)

- **MLT Discussion incl. Tosan & Samir**
  - Barriers to progress
  - Support needed to resolve challenges

- **Future Forward Marketing**
  - Each MLT leader's accountability for driving AI outcomes

- Reference materials: one-pagers in Appendix

Where We Stand with AI Today

76.4%
Current AI Usage to our Goal of 100%

182
Marketing AI Champions

584+
Marketing Tech Survey responses

17
Marketing AI Training Sessions YTD

What our survey data reveals:

Top Development Areas

- **Workflow efficiency:** Workfront complexity most cited across teams
- **Content creation:** PowerPoint and writing process optimization
- **Time management**: Manual processes consuming strategic time
- **Tool guidance:** Understanding applications and starting points
- **Confidence building**: Examples and best practices for quality

Time Investment Opportunities

- **Campaign development:** Workfront, MPRM, Anaplan coordination
- **Content operations:** PowerPoint creation, asset management
- **Lead management:** Manual loading, vetting, routing
- **Analytics/reporting:** Data extraction, dashboard creation
- **Cross-team coordination:** Multi-stakeholder workflows

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Ideas to take Marketing AI active usage* from 76% to 100%

MANAGEMENT CHAIN	BU	HEADCOUNT	ACTIVE USERS	Sep 2025 ACTIVE USERS %
⊟ **David Carrel**	**Marketing**	766	585	**76.4%**
⊞ _David's Directs	Marketing	9	5	55.6%
⊞ Ali Bohra	Marketing	126	118	93.7%
⊞ Beatriz Oliveira	Marketing	67	42	62.7%
⊞ Bethany Kinsella	Marketing	14	14	100.0%
⊞ Betty Wetherell-Gustafson	Marketing	104	72	69.2%
⊞ David Carrel	Marketing	66	59	89.4%
⊞ John Whitfield	Marketing	35	20	57.1%
⊞ Melinda Chan	Marketing	147	106	72.1%
⊞ Mike Abbott	Marketing	88	74	84.1%
⊞ Trae Harris	Marketing	73	49	67.1%
⊞ Victoria Sampson	Marketing	37	26	70.3%
Total		766	585	**76.4%**

TR average active usage (Sept) - 78.5%
TR OKR to reach by Dec 2025 –   100%

Data as of September 2025

Showcase Quick Wins
Share success stories: 40% time savings, 30% content boost. Create FOMO with visible results.

Tailor to Roles
Role-specific use cases for social, email, research teams. Make AI directly useful, not abstract.

Peer Champions
Deploy AI Champions from 90%+ teams as coaches. Peer-led enablement builds trust.

Leadership Modeling
Leaders use AI visibly in their work. Share AI tips in team meetings to normalize usage.

Gamification
Launch "AI Adoption Challenge" with leaderboards. Team competitions with recognition and incentives.

AI Bootcamps
4-8 week training blitz with Office Hours. Hands-on demos, quick tutorials, live problem-solving.

Internal Campaign
Weekly "AI Tip" emails, intranet posts, demo fairs. Treat it like marketing to marketers.

Workflow Embedding
Integrate AI into SOPs and checklists. Make AI the path of least resistance in daily work.

Address Fears
1:1 check-ins to understand blockers. Create safe space for experimentation without penalty.

Recognize Usage
Public shout-outs for AI champions. Celebrate progress and acknowledge effort, not just results.

Cross-Team Mentoring
Pair 90%+ teams with lagging ones. Share best practices through collaborative workshops.

Track & Iterate Weekly
Mini-milestones: 85% mid-Nov, 95% mid-Dec. Weekly metrics with rapid feedback loops.

AI Transformation Program Definition

The Marketing Transformation Program is a multi-track initiative designed to deliver immediate improvements while shaping a scalable, AI-enabled future-state operating model for marketing.
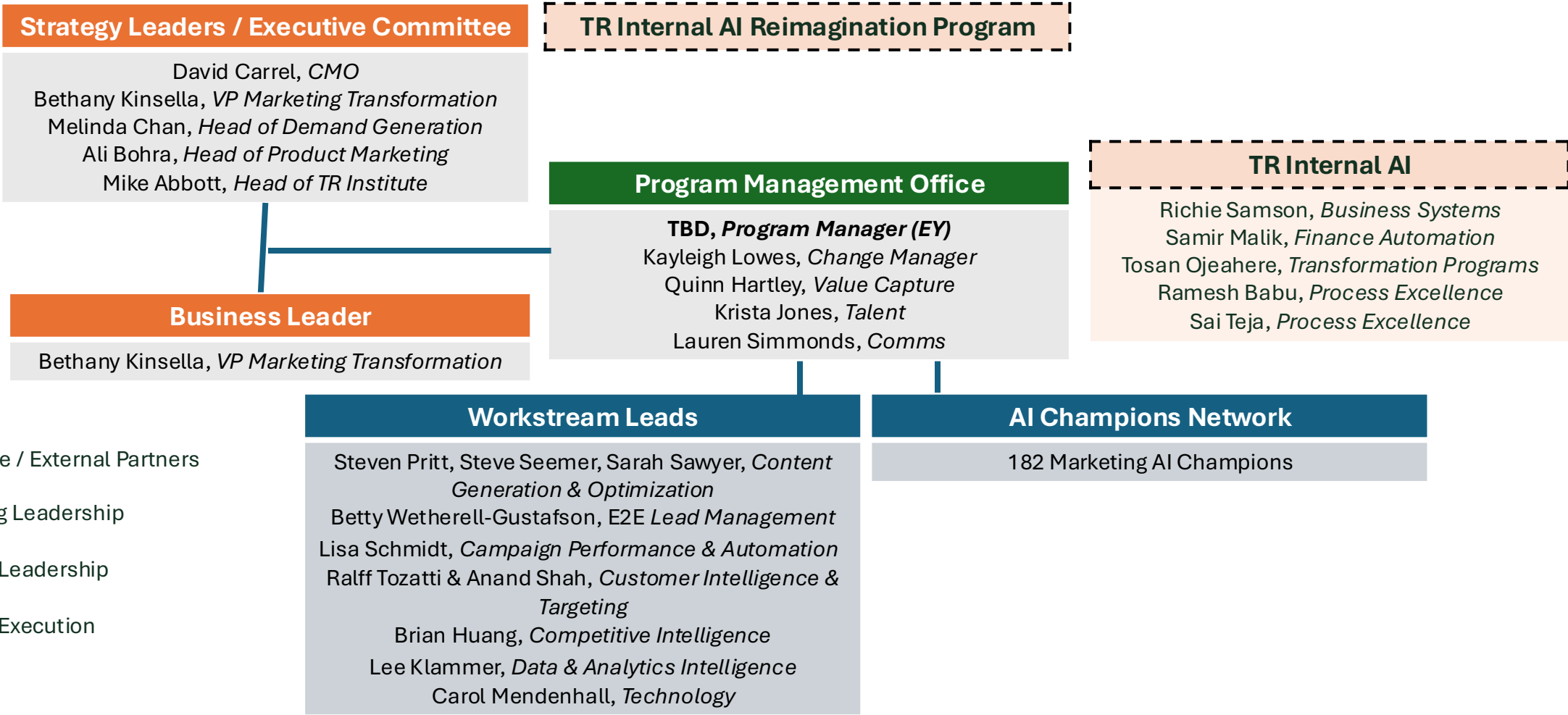
Near-Term Impact

Six foundational workstreams have been established to capture what's already in flight, formalize scope, and deliver early value:

1. Content Generation & Optimization
2. E2E Lead Management
3. Campaign Performance & Automation
4. Customer Intelligence & Targeting
5. Competitive Intelligence Platform
6. Data & Analytics Intelligence

Long-Term Transformation

In parallel, a leadership-aligned track will focus on defining the long-term strategy and AI-enabled operating model for marketing. This will include articulating a clear vision, operating principles, and strategy to enable future capabilities that ensure scalability, integration, and sustained value. This will shape future investments, workstream evolution, and enterprise alignment

Our Marketing AI Program Team

Strategy Leaders / Executive Committee

David Carrel, *CMO*
Bethany Kinsella, *VP Marketing Transformation*
Melinda Chan, *Head of Demand Generation*
Ali Bohra, *Head of Product Marketing*
Mike Abbott, *Head of TR Institute*

TR Internal AI Reimagination Program

TR Internal AI

Richie Samson, *Business Systems*
Samir Malik, *Finance Automation*
Tosan Ojeahere, *Transformation Programs*
Ramesh Babu, *Process Excellence*
Sai Teja, *Process Excellence*

Program Management Office

TBD, *Program Manager (EY)*
Kayleigh Lowes, *Change Manager*
Quinn Hartley, *Value Capture*
Krista Jones, *Talent*
Lauren Simmonds, *Comms*

Business Leader

Bethany Kinsella, *VP Marketing Transformation*

Workstream Leads

Steven Pritt, Steve Seemer, Sarah Sawyer, *Content Generation & Optimization*
Betty Wetherell-Gustafson, E2E *Lead Management*
Lisa Schmidt, *Campaign Performance & Automation*
Ralff Tozatti & Anand Shah, *Customer Intelligence & Targeting*
Brian Huang, *Competitive Intelligence*
Lee Klammer, *Data & Analytics Intelligence*
Carol Mendenhall, *Technology*

AI Champions Network

182 Marketing AI Champions

= Enterprise / External Partners

= Marketing Leadership

= Program Leadership

= Program Execution

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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

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AI x Marketing Transformation: Workstream Program Management

Each Workstream has worked to define a one-page scope – see appendix

Messaging & Positioning AI Initiatives

AI Key Initiative

Simplify and speed creation of the following using comprehensive data sources quickly: win/loss, battle cards, value props

Leads

Brian Huang, Ralff Tozatti, Ashley Van Scyoc, Emily Flury

Potential Tools

Writer · Thomson Reuters Open Arena · Copilot · Claude

Sprint Plan

Current Sprint	Next Sprint
Outlining process of artifact creation: interviewing owners	Explore AI tools and where they fit best in defined processes

Initiatives & Dependencies

Automation of Artifacts	Data Layer
Have AI agents assist in process of creating win/loss, battle cards/comp. intel, and value props using voice of the customer and strategic competitor monitoring	Create a data layer where all data flows into single source of truth to ease access with an AI agent
☐ Tool selection, data access	☐ Tech/data resource

Milestone	Date
Definition of processes	10/17
Tool integration plan	11/30
Documentation & training, change management	12/19

Lead Management AI Initiatives

AI Key Initiative

Enhance efficiency of lead management & nurture with AI and automated processes

Leads

Betty Wetherell-Gustafson, Justin Ostrowski

Potential Tools

Outreach · Thomson Reuters Open Arena · Power Automate · CHILI PIPER · GENESYS · 6sense

Initiatives & Dependencies

Lead Activation Efficiency	Lead Engagement Efficiency
Use automation, AI and processes to streamline and deliver Leads faster and with high levels of accuracy.	Create a personalized, positive lead follow up experience using automation, ai and processes.
☐ Data Accuracy Mapping	☐ Tech and Data Integration

Initiative	Milestone	Target Date	Status
Activation Efficiency	Organization Efficiency (Head Count, Role Alignment)	Sept 2025	Complete
Activation Efficiency	Lead Enrichment & Delivery Optimization	Dec 2025	In Development
Engagement Efficiency	Integrated Chili Piper Expansion	Nov 2025	Soft Launch
Engagement Efficiency	John Barrett 2.0 (Digital BDR)	Feb 2026	In Development

Analytics AI Initiatives

AI Key Initiative

Create agentic Analytics capabilities that **answer every stakeholder data & insights question** and, eventually, autonomously searches for impactful trends & recommendations to surface

Leads

Lee Klammer, Pasquale Mingnano, James Leech, Narayana Vasa

Potential Tools

Thomson Reuters Open Arena · tableau · Power BI

Initiatives & Dependencies

Data Retrieval	Insights Generation
Functionality to retrieve accurate, relevant data along with appropriate context for any reporting inquiry.	Draft insights based upon retrieved data and make recommendations to dig further or take action.
☐ Tool limitations	☐ Tool limitations

Milestone	Date
Information AI Assistant (Knowledge Base)	Launched July 2025
Data Agent (English to SQL + Query Executor)	Production Oct 2025
Deep Research Agent (complex, comparative)	Production Nov 2025

Content AI Initiatives

AI Key Initiative

Enhance efficiency through automated written content creation

Leads

Steven Pritt, Sara Sawyer, Steve Seemer

Potential Tools

Writer

Initiatives & Dependencies

Written Content Automation	Translation & Localization
Create newsletters, whitepapers, blogs, reports, webinars, podcasts, and other top of funnel content using AI tools	Localize content for different geos and translate immediately
☐ Resourcing for scalability (build vs. buy), product marketing contact	☐ Tool capabilities

Webflow Integration	Webinar Automation
Transform ways of working for TRI, allowing for self-publishing at scale and dynamic report creation	Automate webinars to reduce creation time from 12 weeks to 4 and automate aspects of publication
☐ Resourcing for scalability	☐ Cross-function collaboration

Audience Segmentation AI Initiatives

AI Key Initiative

Improve data quality and integration to identify and engage the right audiences and expand pipeline using more efficient workflows

Leads

Anand Shah, Ralff Tozatti, Guneet Singh

Potential Tools

Thomson Reuters Open Arena · TREASURE DATA · dun & bradstreet

Sprint Plan

Current Sprint	Next Sprint
• TechM AI Agents (Kickoff) • Persona Agent 4.0 (Launch) • TD Audience Agent (finalize scope) • OpenArena Gen AI solutions to improve CDP data quality (Dev)	• TechM AI Agents (Title/Function/ Level Standardization)

Initiatives & Dependencies

Data Quality	Whitespace Growth	Platform Agents
AI-driven standardization and enrichment of CDP data to improve segmentation and targeting	Expand pipeline by identifying and integrating high-value prospects from external sources	Automate campaign workflows and audience creation through AI-powered platform agents
☐ Treasure Data/ D&B capabilities	☐ Treasure Data/ D&B capabilities	☐ Platform & Integration Alignment

Milestone	Date
Audience Agent Discovery & Scoping	August 2025
Whitespace Outreach Blitz	Q3 2025
Job Title Standardization Initiative	Q4 2025
Audience Agent Pilot Launch	Q1 2026

Campaign Development AI Initiatives

AI Key Initiative

Automate the end-to-end campaign process through connection of strategy, workflows, and tools

Leads

Lisa Schmidt

Potential Tools

Thomson Reuters Open Arena · LeapPoint · Firefly · eloqua · ON24 · 6sense · Writer

Initiatives & Dependencies

Automated Workflows	Content Development
Reduce campaign management time by automating end-to-end workflows	Create personalized content using agents and tools
☐ Cost dependencies for tools ☐ Ways of working across teams	☐ Tool capabilities

Sprint Plan

Current Sprint	Next Sprint
Smart Campaign Pilot #1 Debrief and Learnings	Smart Campaign Pilot #1 expansion to support Q1 planning

Milestone	Date
Smart Campaign Pilot Phase 1 complete	10/3
Smart Campaign Phase 2 Kickoff	10/24

AI x Marketing Transformation: Workstream Program Management

For individual workstreams, we are tracking progress and driving milestone achievement

Project Plan

Tracking deadlines, milestones, dependencies, and progress across workstreams to identify blockers and report workstreams' statuses

Cross-Workstream

Bridge siloes between workstreams and share recent updates/learnings on AI initiatives. Workstreams will walk away with a basic understanding of initiatives in motion and who to contact to collaborate.

Workstream	Workstream Lead	% Activities not started	% Activities Completed	% Activities on track	Activities delayed	Activities at risk
Analytics	Lee Klammer	25%	17%	58%	0%	0%
Content Operations & Creation	Steven Pritt, Sara Sawyer and Steve Seemer	0%	33%	67%	0%	0%
Customer Segmentation & Strategy	Anand Shah & Ralff Tozatti	32%	11%	58%	0%	0%
Messaging & Positioning	Brian Huang	17%	17%	67%	0%	0%
Lead Management	Betty Wetherell-Gustafson	0%	50%	50%	0%	0%

Workstream	Key Initiative and Deliverable	Description	Phase Plan, Design, Dev/Test, Released or Completed, Re
Messaging & Positioning	Create scope document	Define workstream's vision and objective, scope & focus areas, success measures, quick wins, in-flight initiatives, key milestones and considerations/support needed	Completed
Messaging & Positioning	Automation of Artifacts: Step 1- Definition of Processes to support (3) Products: Win /Loss, Battle Cards/ Competitive Intelligence, Value Props	Step 1: Definition of Processes to simplify and speed creation of the following using comprehensive data sources quickly	Design
Messaging & Positioning	Automation of Artifacts: Step 2-Tool Integration Plan to support (3) Products: Win /Loss, Battle Cards/ Competitive Intelligence, Value Props	Step 2: Explore AI Tools and where they fit best in defined processes to support. Beta testing with Open Arena Deep Search	Design
Messaging & Positioning	Automation of Artifacts: Step3-Release of (3) Products: Win /Loss, Battle Cards/ Competitive Intelligence, Value Props	Step 3: Release of Win /Loss, Battle Cards/ Competitive Intelligence, Value Props	Design
Messaging & Positioning	Automation of Artifacts: Step 4- Documentation & training, changement management to support (3) Products: Win /Loss, Battle Cards/ Competitive Intelligence, Value Props	Step 4- Documentation & training, changement management to support	Plan
Messaging & Positioning	Data Layer: Platform consolidation and AI capability development	Create a data layer where all data across platforms (SF, Eloqua, Gong) flows into single source of truth to ease access with an AI agent	Not Started

Program Management
PMO, Change Management, Comms, Talent, Value Capture

Messaging & Positioning	Lead Management	Analytics & Technology
Content Operations & Creation	Customer Segmentation & Strategy	Campaign Development

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Value Capture Progress

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AI Value Capture

- TR Business Transformation Levers for 2026 – 2028 are Broader AI, Location Strategy, and Performance Management

- 2026 Targets are materially evenly split across levers, however the Broader AI lever will increase in weight as we move to 2027 & 2028

Business Transformation Lever	2026	2027	2028
Broader AI	31%	49%	79%
Location Strategy	36%	34%	21%
Performance Management	33%	17%	0%

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AI Time Savings

- Total Marketing savings goal of 3% of annual hours, or ~48K FTE hours saved by end of 2026 (4K hours per month)

- Below are the monthly goals by team

2026 Goal	
Group	**Hours saved/month**
Demand Generation	700
TRI	550
Product Marketing	400
Events	150
Content	450
AEM	150
Latam	150
Digital	400
MO&A	550
BDR	500
Total Marketing	**4000**

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Progress & Next Steps

▪ We have identified 2,500 potential hours/month saved through the AI workstreams with more identification to come

▪ Finalize identification of potential hours saved from the "TBD" workstreams below

▪ 1 full quarter of "true AI realization" (i.e. proof the work is working with AI) required before value is officially captured

▪ Each workstream will need to work with MLT to sign-off on value capture impacting their teams

▪ Actuals tracking will be done via FTE tagging exercise by HR and Finance

AI Workstream Value Capture Progress	
Workstream	**Hours saved/month**
Lead MGMT	1000
Analytics	1500
Content	TBD
Customer Intelligence	TBD
Messaging	TBD
Campaign Development	TBD
Total	

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MLT Discussion

Barriers to progress
Support needed to resolve challenges

Future-Forward Marketing: Plan and Scope to build an AI-enabled approach for Marketing at TR

Define AI Strategy and Key Priorities / Outcomes	Understand Best Practices	Identify Capability and Tech Gaps	Develop AI and MarTech Roadmap	Executive Share-out of TR Marketing Strategy
Solidify **top focus areas for AI in marketing** guided by an overall strategy and vision	Showcase B2B SaaS AI marketing trends and best practices with best of breed AI capabilities	Identify **key areas of opportunity** based on industry POV, current state, and defined vision	Define and validate key areas to **prioritize GenAI / AI** to transform marketing and build 3-year roadmap	Collaborate on **Future Forward TR Marketing story** for executive leadership

KEY OUTCOMES AFTER 8 WEEKS

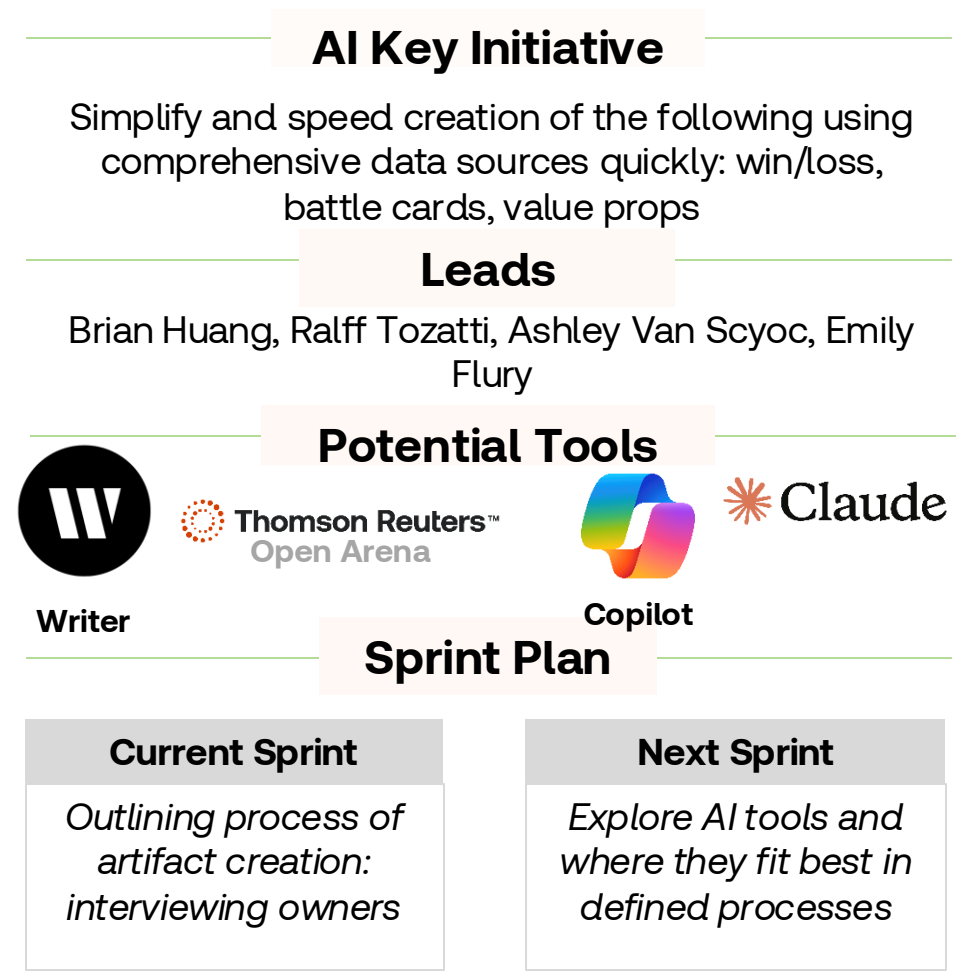| **Defined marketing strategy for leadership alignment**	**Benchmarks / examples of leading AI marketing capabilities**	**Key AI focus areas, opportunities and gaps to address to achieve vision**	**Roadmap and plan to activate high impact AI areas**	**Estimation of cost savings and revenue increase**

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Next Steps

- **Future Forward Marketing: Visioning & Big Rocks Workshop (w/EY): 10/23**

- **Marketing AI People Leadership Series Session 2 – Led by Ali Bohra Head of Product Marketing: 10/29 – Topic: Talent Transformation**

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Appendix

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Potential Tools

Writer

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Copilot

✳ Claude

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Thomson Reuters™ Open Arena

+ableau

Power BI

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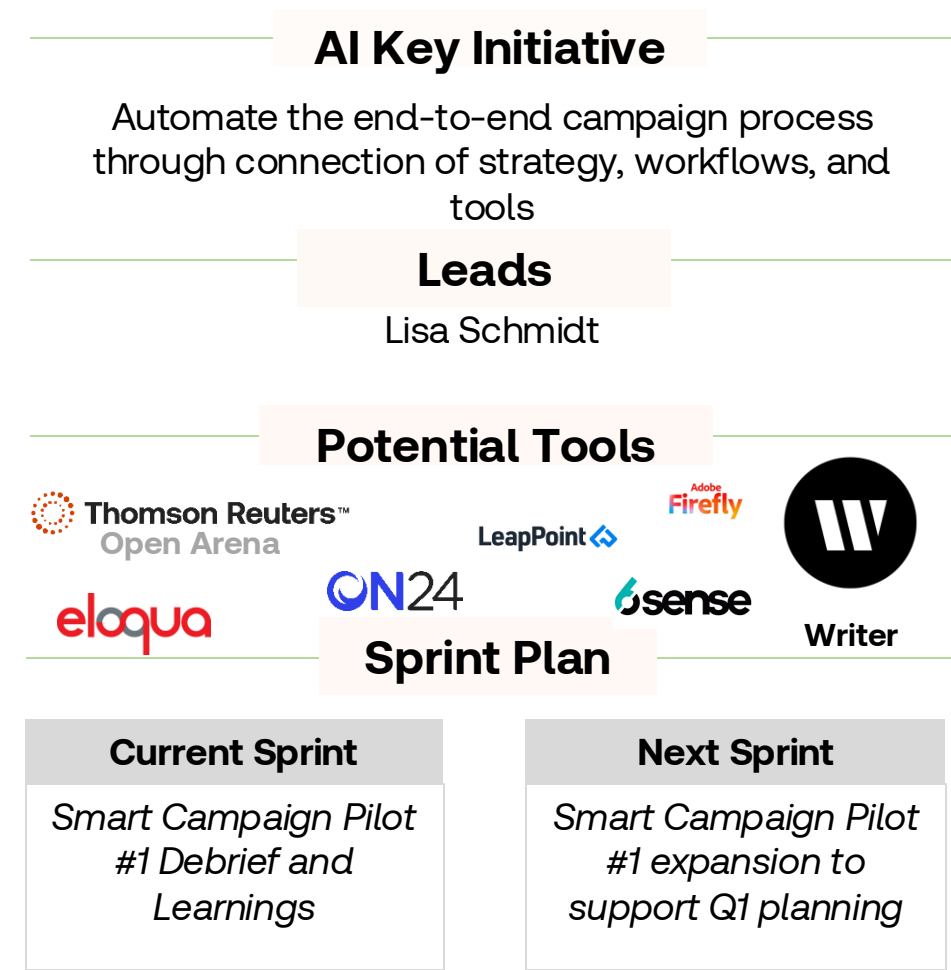Anand Shah, Ralff Tozatti, Guneet Singh

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Thomson Reuters™ Open Arena

LeapPoint

Adobe Firefly

W Writer

eloqua

ON24

6sense

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