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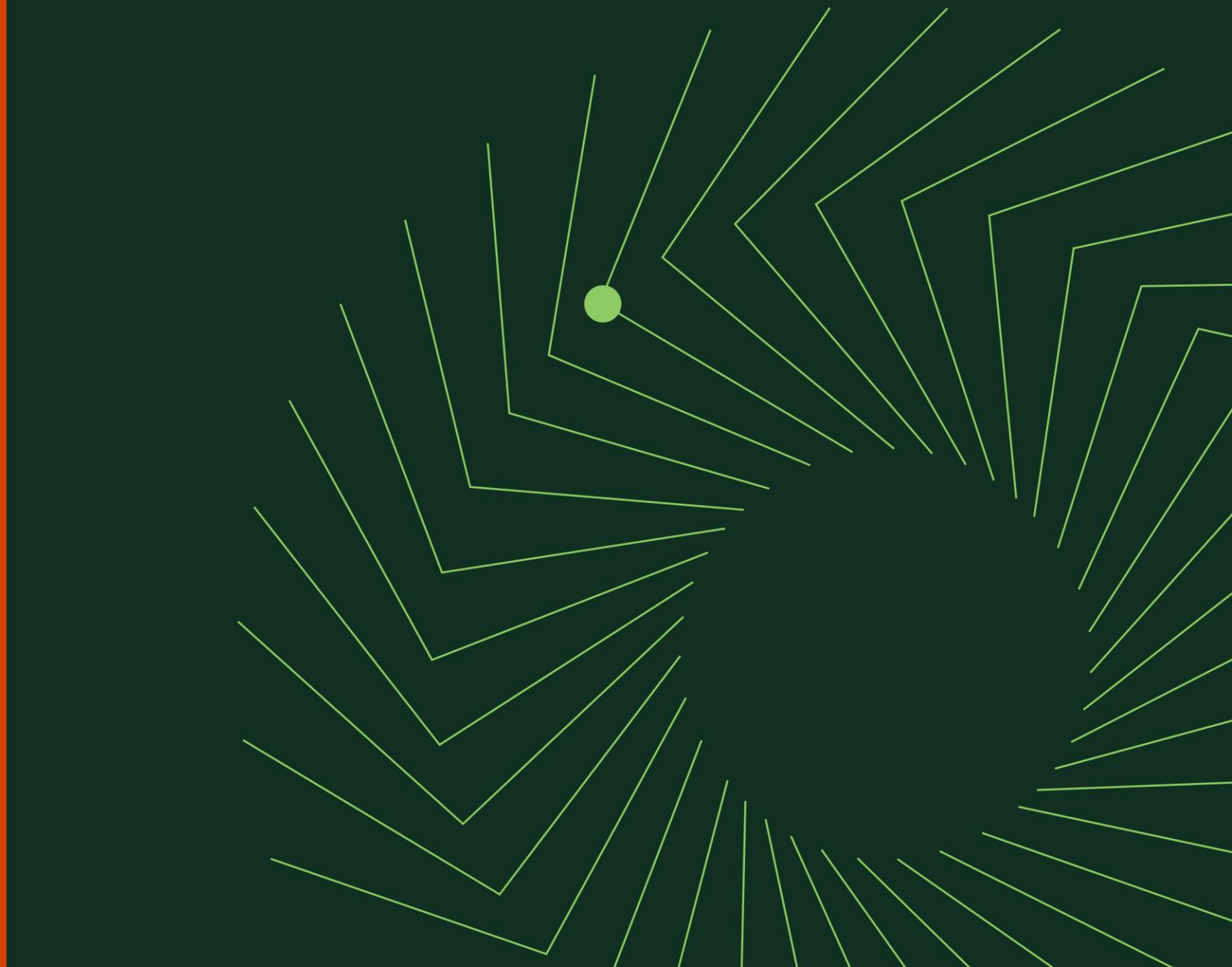
Investor Day 2024



Kirsty Roth

Chief Operations and
Technology Officer

Customer Experience and Generative AI Platform

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Key Messages

1. **We delivered against our Change Program customer experience initiatives**

2. **Over the next 3 years, we will focus on improving our NPS, streamlining digital and commercial systems, and driving productivity**

3. **Our Generative AI Platform will increase the speed to market of new AI features, while ensuring quality and security**

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We Delivered Against our Key Change Program Priorities

Change Program Priorities

#1 Taking an End-to-End View of the Customer Journey

#2 Creating a Comprehensive Omnichannel Experience

#3 Providing Tools to Sales & Support Employees with a 360° Customer View

#4 Utilizing Shared Capabilities, Data & Analytics and Completing the Shift to the Cloud

#5 Using Digital to Grow with Small & Medium Businesses (SMBs)

Realized outcomes

- 97% of products meeting performance targets
- Optimized product portfolio from ~170 to ~110 products
- Deploying weekly updates to 85%+ strategic products
- Reached 1.5B+ API calls per month
- 90%+ of revenues enabled on Cloud
- Introduced single call center platform
- Improved NPS from 16 to 23
- Delivered ~$300M Digital sales and renewals
- Enabled AI-driven upsell offers

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2024 – 2026 Priorities: Improve NPS, Streamline Systems, and Drive Productivity

Area	Sustained NPS Growth Through Customer Obsession	Streamlined Digital Sales and Commercial Systems	Continued Focus on Productivity
Levers	1. Deliver a consistently stable and reliable product experience 2. Streamline user experience through unified design and shared components 3. Leverage AI to improve customer self-help capabilities	4. Expand Digital Sales and Renewals to new products and geographies 5. Increase personalized sales and modernize the Global Print Store 6. Deliver strategic enhancements to our commercial systems technology stack	7. Continue build out our Global Center presence 8. Leverage AI to drive internal efficiencies 9. Finalize our data center exit and continue our cloud-first strategy

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Drive Improved Customer Self-Help Capabilities, Leveraging AI for Speed and Quality

Our Support Experience today

- Help content available in 80%+ of strategic products
- 20+ products have in-product support across Legal, TAP and Corporates
- 100K+ on-demand training visitors and 6.6M+ self-help sessions in 2023
- Chat or Chatbot available across Help & Community experiences
- 7 user communities in place, including UltraTax, HighQ and Checkpoint

Priorities for 2024 - 2026

1. Deploy product-agnostic, intelligent chatbots
2. Expand self-help capabilities to more products
3. Increase adoption of self-help

Leverage LLMs[1] that can:

- Generate accurate responses to customer and Customer Service agents
- Create help content faster
- Save customers' time by enhancing and expediting our agents' responses to inquiries

(1) LLMs – Large Language Models

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Pursue Internal AI Opportunities

Priority in Scope Areas

1. Go to Market
   - Marketing
   - Sales
   - Sales Operations
2. Content & Editorial
3. Operations & Technology
   - Engineering & Technology
   - Content Operations
   - Customer Support
4. Enabling Functions
   - Finance
   - Human Resources

Highlights of Early Results in Specific Tasks

Marketing and Content Ops generating initial productivity gains in tasks relating to drafting new content and meeting summarization

Customer Services and Support improving productivity in knowledge-based article generation, training materials for agents, and client communication

Product Engineering generating productivity in certain coding and testing automation tasks

2024 - 2026 Key Opportunities

- Customer experience improvement
- Better customer retention
- Better content quality
- Improved sales pipeline
- Manual effort reduction
- Improved employee experience
- Spend optimization
- Improved code quality
- Information security enhancements

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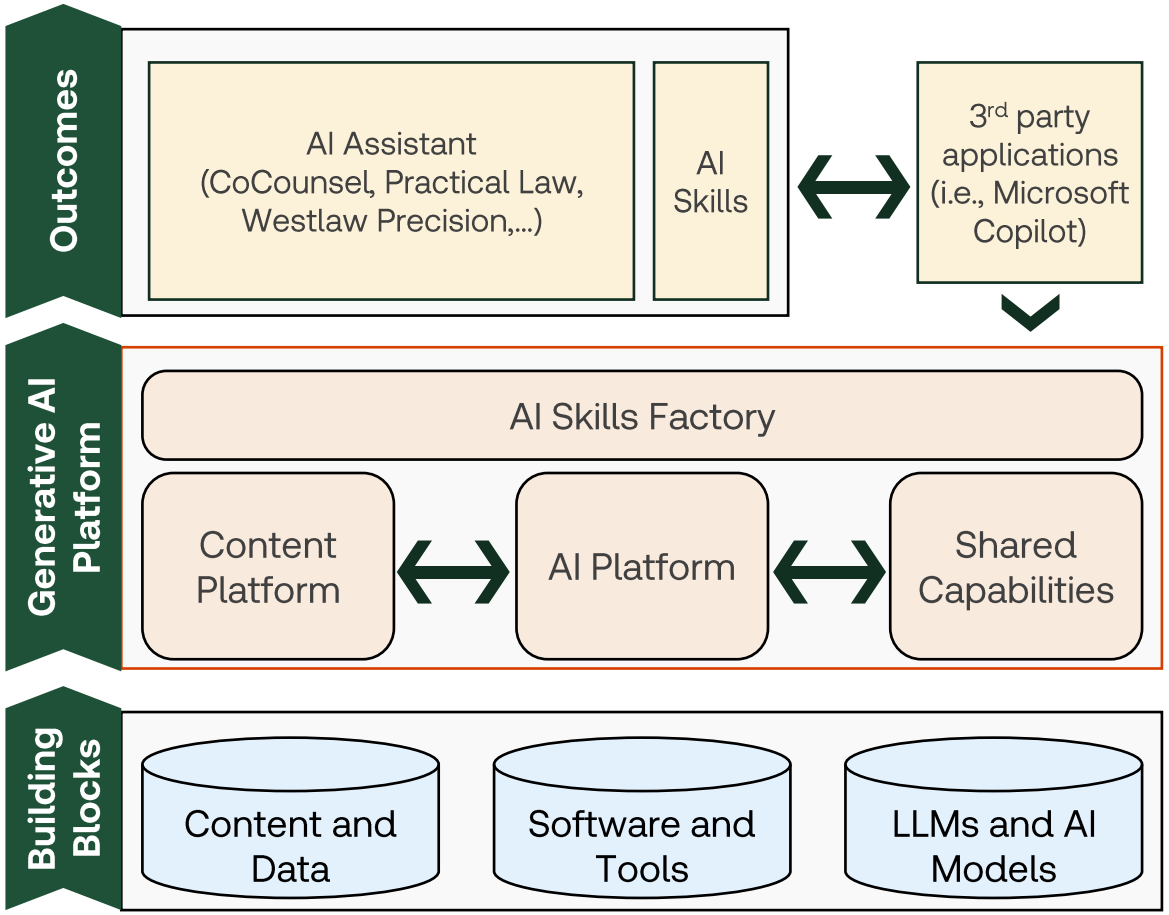
Our Generative AI Platform Enables Speed to Market with Quality & Compliance

TR Generative AI Ecosystem



The Generative AI Platform is an in-house development platform to design, build and deploy Gen AI Skills securely with speed

Key Components:

- Enablement – allowing for a seamless and consistent experience across AI skills, technologies and personas
- Security and Quality – ensuring safe and secure access to TR's content, monitors quality of Generative AI solutions, and thereby reinforces customer trust
- Speed and Reusability – introducing workflow automation and capabilities for leveraging existing solutions
- Resource Management – tracking and managing the substantial computational power required by generative AI solutions

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