



Truist builds client planning decks 92% faster

Located in Charlotte, NC with 37,000+ employees, Truist is the sixth largest U.S. bank holding company.

The Challenge

In 2015, Truist (formally SunTrust Bank) kicked off a strategic initiative to improve the quality and distribution of their content for internal use and for meetings with customers. Pitch books that relationship managers (RMs) would compile looked vastly different from one another leading to lack of consistent customer experiences. Even within the five sections of the deck, there were inconsistencies in formatting and design. Internally, Truist wanted to streamline preparation for annual client planning sessions. These decks contained complex data about upsell opportunities and new target accounts that RMs would pitch to leadership to get buy-in for their strategy to meet their quota. Each deck took between six to eight hours to complete, taking away from RMs valuable time in the field.

The Solution

Truist adopted Seismic to streamline content creation. RMs can build customer pitch books for customers in a matter of minutes that are consistent across the organization. Annual client planning decks are now created in minutes instead of hours. Truist integrates Seismic with Salesforce and internal data sources to pull individual RM profiles, top portfolio information, and revenue per client directly into presentations to chart out each RMs goal for the next year. Truist also expanded their use of Seismic to model which products would offer the most value for customers. RMs can take income statements from any company, flow in liability and asset data into Seismic, and then have recommended products served up in just a few clicks to have more insightful conversations with prospects.

The Impact

On top of ensuring brand consistency across RMs at Truist, Seismic now saves at least five and a half hours per RM in creating annual client planning decks.



92%

faster creation of annual
client planning decks