

# From Contact Center to Experience Center: The Truist Transformation

Kimberly Dorsett, Executive Vice President  
Head of Truist Care Centers

September 2025

# Purpose

## Inspire and build better lives and communities

### Mission

#### Clients

Provide distinctive, secure, and successful client experiences through touch and technology.

#### Teammates

Create an inclusive and energizing environment that empowers teammates to learn, grow, and have meaningful careers.

#### Stakeholders

Optimize long-term value for stakeholders through safe, sound, and ethical practices.

### Values



#### Trustworthy

We serve with integrity.



#### Caring

Everyone and every moment matters.



#### One Team

Together, we can accomplish anything.



#### Success

When our clients win, we all win.

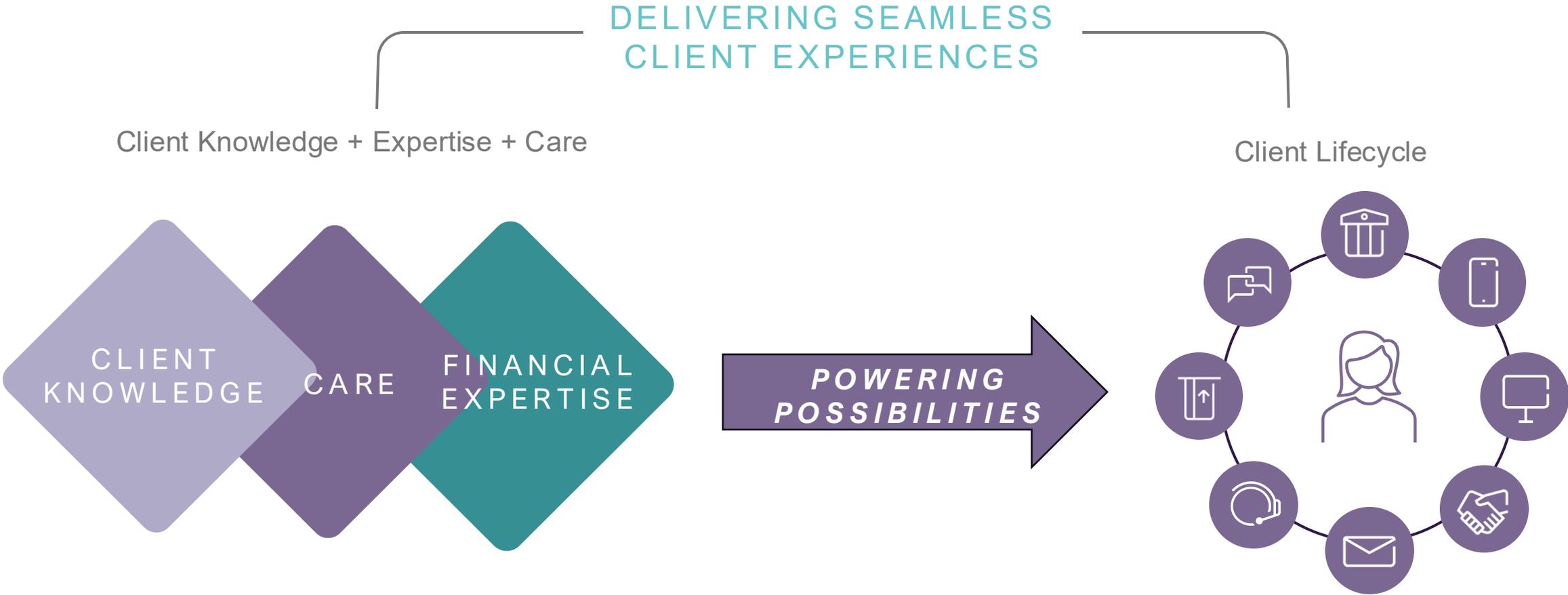


#### Happiness

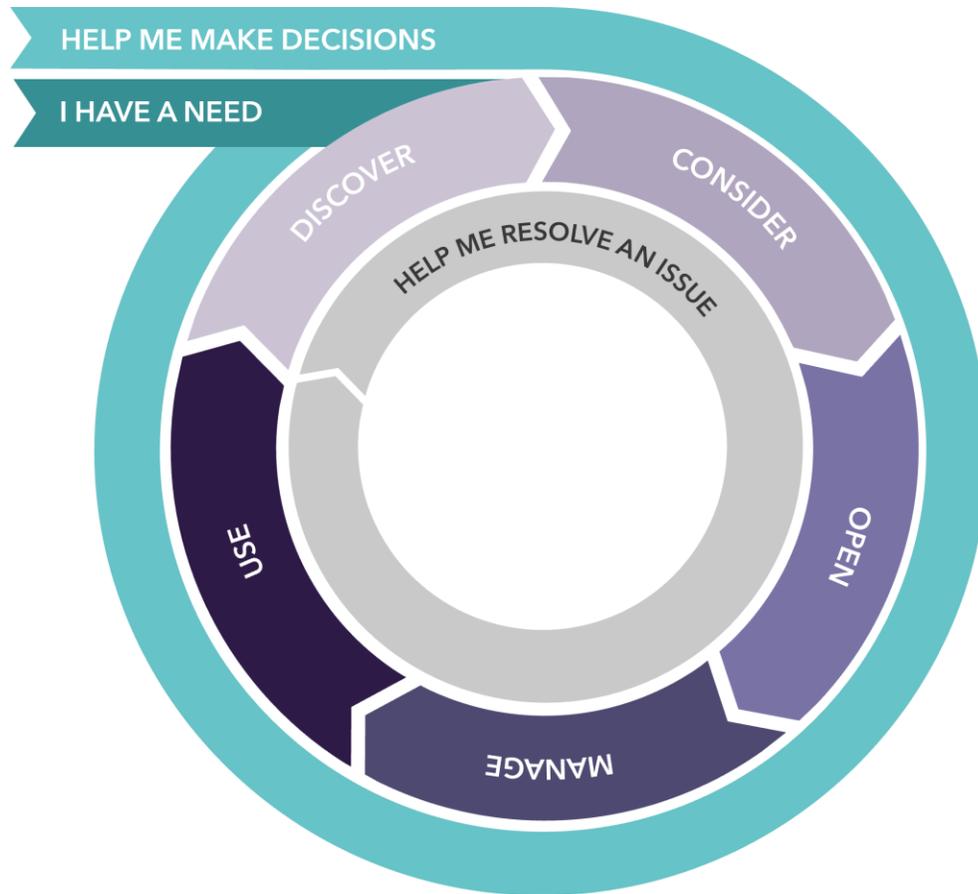
Positive energy changes lives.

# From Contact Center to Experience Hub

Powering what is possible: Delivering client-centered experiences across channels builds our brand



# How we personalize every part of a client's Care journey...



- What Truist products best serve my needs?
- How can I open a Truist account?
- How can I manage my money anytime, anywhere, using Truist products?
- How can I integrate my Truist account with my budgeting tool?

...and measure the business outcomes along the way

# Culture of Transformation

TOUCH + TECH = TRUST

## T3 Accelerator Lab (T3AL)

Located in the Innovation and Technology Center and launched in Nov 2022, the T3 Accelerator Lab is where we are redefining client and teammate experiences using phone channels, focusing on creating best in class winning solutions that combine technology and touch, the foundation for a trusted banking relationship.



Engage front-line teammates to co-create and collaborate with system designers, engineers, Subject Matter Experts, product owners, and other key partners, to reimagine experiences by evaluating, testing and operationalizing cross-functional initiatives.

Bring distinctive client and teammate experiences into the future with human centered design, agile methodologies, and innovation.

## 2024 Highlights

- **Client First Solutions Call Volume Optimization Sprint** scaled previously limited empowerments to multiple groups within TCC, reducing approximately 5,000 client transfers, while continuing to support risk mitigation.
- Supported **successful launch of Unified Desktop** to 3,500+ TCC voice agents with UAT, early adoption, pressure-testing training and readiness, issues and enhancement identification and serving as change-champions.
- **Commercial Card Experience Sprint** resulted in improved client authentication and verification, reduction in client complaints and multiple process improvements, strengthening partnership with Payments LOB.



# The Teammate Experience as a driver of the Client Experience



## TOUCH + TECH = TRUST

- Unified Desktop
- Universal Agent
- Interactive Voice Response (IVR)
- Agent Assist Chat feature

## Beyond Technology

- Empowered teammates
- Client and teammate journey design process
- Career Growth
- Financial and Health Benefits

Leaders  
in banking

TRUIST 

Unwavering  
in care