

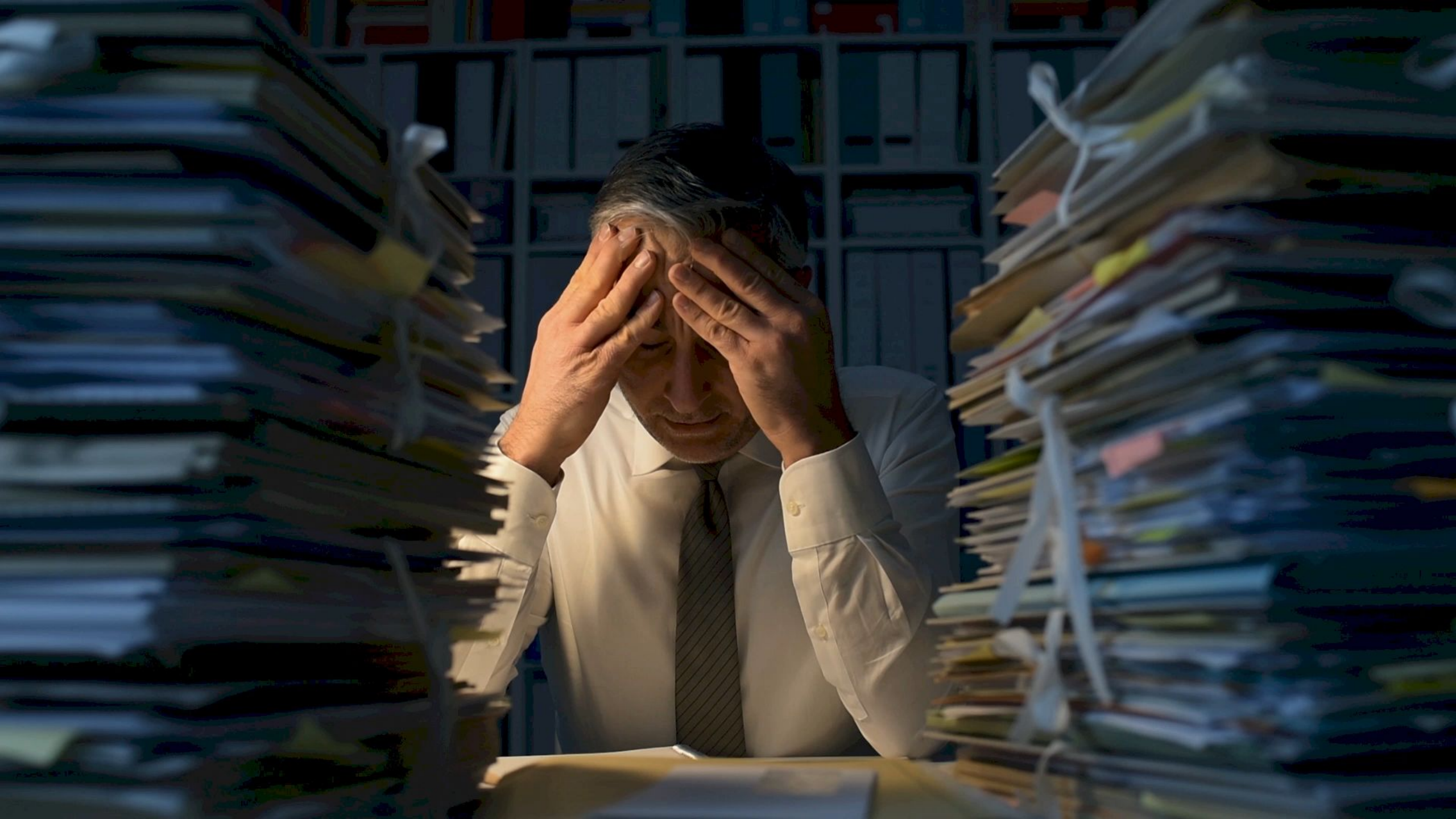


AI Is Rewiring Marketing Systems, Your Team & How Customers Find You

TL Nguyen

Cornerstone Capital Bank
VP, Enterprise Growth &
Marketing Delivery





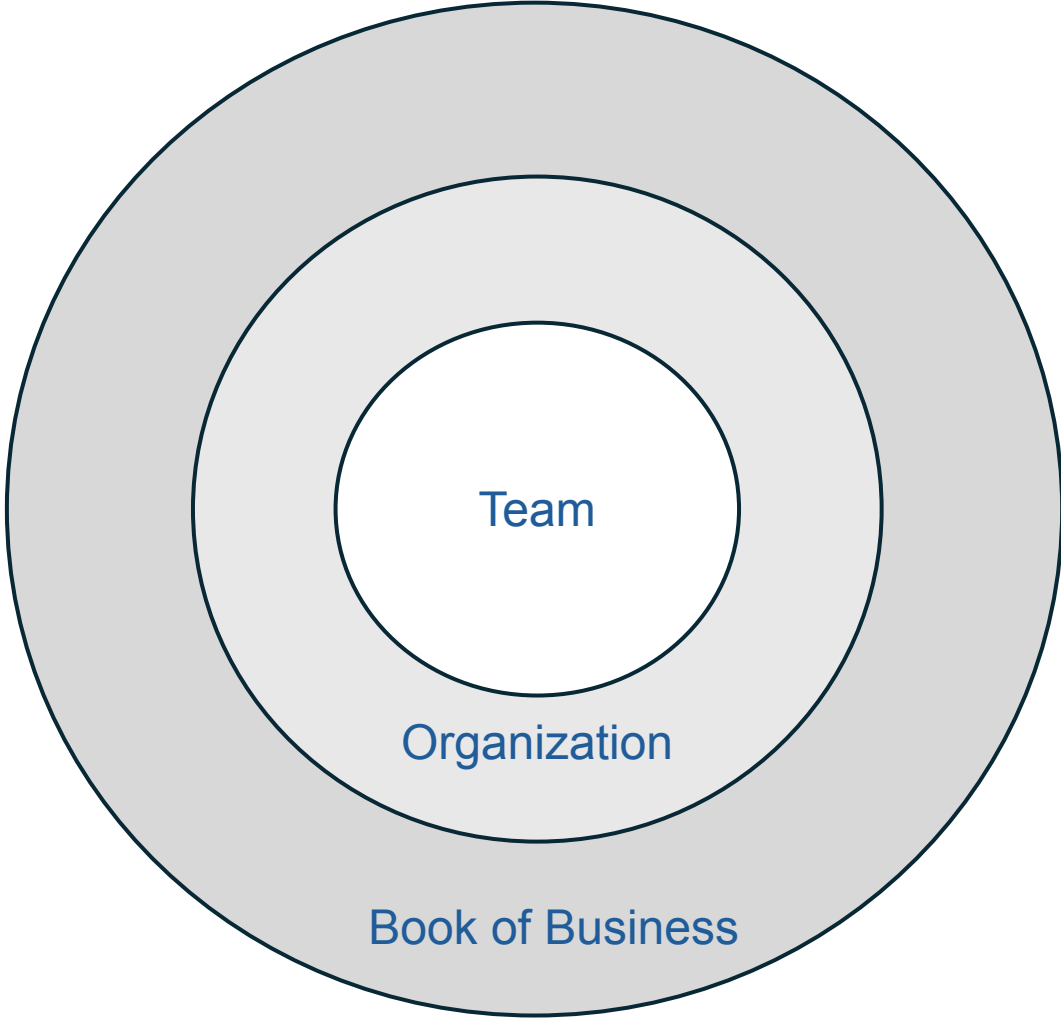




Think of large
language models
as a pot of soup



**Vietnam Sets Guinness Record for World's
Largest Bowl of Instant Phở**



Team

Organization

Book of Business

AI for Marketing Leaders

Three Circles of Impact



AI for your Marketing Team

- **Hack 1:** See how your team actually spends their time... without asking. Copilot surfaces collaboration data across your team... who's in meetings, who's in deep work, and where time is going.
- **Hack 2:** Ask Copilot about any past meeting (even ones you missed). Every recorded Teams meeting with transcription becomes a searchable knowledge base.
- **Hack 3:** Create a Meetings to Action Process (non-negotiable). After meetings, CoPilot can recap key decisions/action items, turn notes into a project brief and draft an email with next steps.

Today

Show me how my team spent their time this week

 Copilot



AI for your Organization

- **Build Custom AI Agents Without Code**
Turn existing documents into self-service AI assistants.

- **Examples:**

HR Agent: Answers handbook questions

Product Pal: Helps LOs find loan product guidance

Marketing Intake Agent: Routes requests and gathers missing details

Compliance Assistant: Helps teams stay aligned with regulatory standards

the list goes on...

Hello, I'm Marketing Project Manager. How can I help?



Just now

I need a 203k|

14/2000



AI for your Book of Business

Agentic AI helps manage the moment, not just create the message.

- With Salesforce, AI can help teams read borrower signals, understand where someone is in the journey, and recommend the next best action.

What this can look like:

- **Borrower Signals**
Engagement, loan stage, product interest, follow-up gaps, life events
- **Next Best Action**
Recommend the right message, task, follow-up, or human touchpoint
- **Personalized Journey**
Deliver more relevant content based on borrower behavior and need
- **Relationship Protection**
Flag opportunities, risks, and moments where a human should step in



A server room with rows of server racks and blue lighting. The racks are filled with server units, and the floor is highly reflective, showing the racks and lights. The overall atmosphere is futuristic and high-tech.

A lot of the AI conversation has focused on whether it replaces marketers. I think that is the wrong question. The better question is: where can AI remove friction, create clarity, and help our teams focus on the work only humans can do?



Let's Connect
on LinkedIn

