Customer Case:
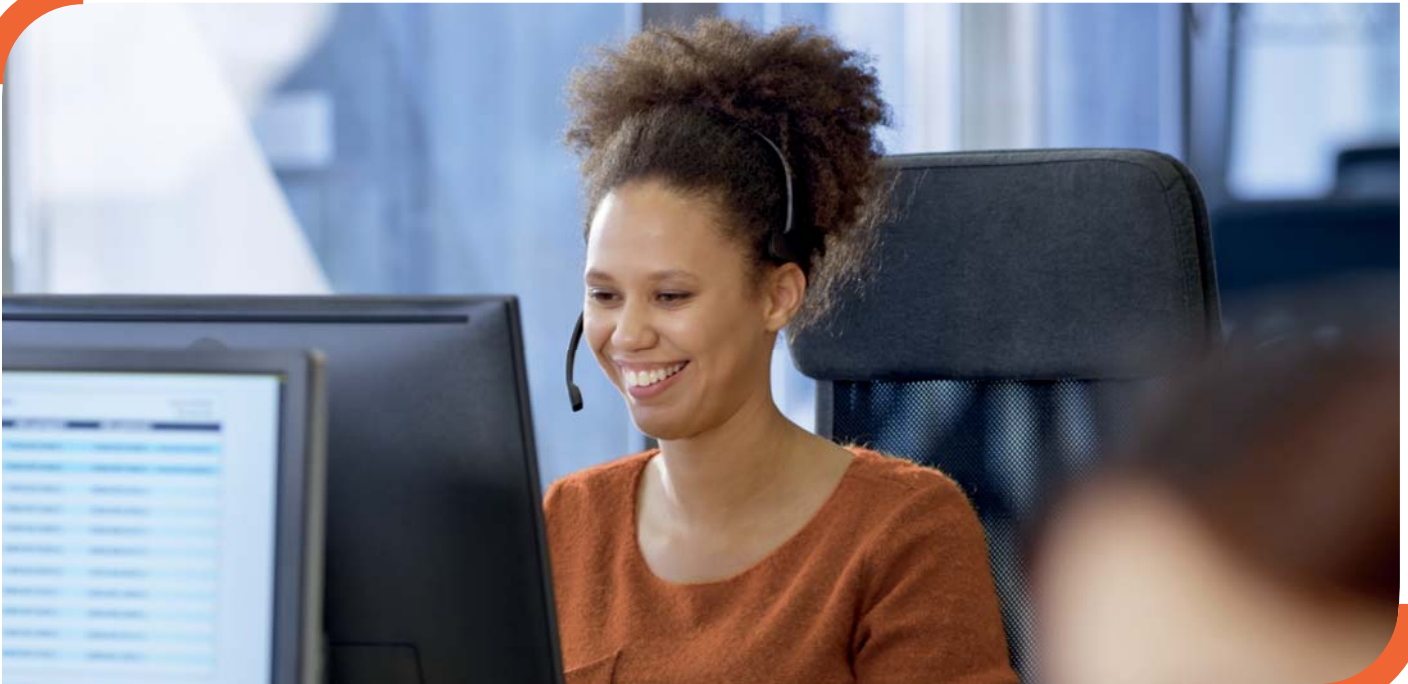## Zelros for Agent Coaching

Key customer facts

Leading French mutualist, in P&C insurance products for individuals and SMB

➤ Over **3 million** customers

➤ Over **6000** employees

➤ **3,4 billion** Euros (GWP) revenue

➤ Almost **7 million** policies

Business challenges

This leading mutualist insurer wanted to leverage every customer touchpoint to better serve their customers and bridge their protection gaps with relevant offers. Advisors handling customer calls need to be more efficient to properly handle all requests and recommend relevant offers to potentially upsell or cross-sell. However, insurance offerings remain complex, and advisors need help in knowing which offering is best for each customer and, more importantly, how to present it well to the customer.

"Our philosophy is that the innovations deployed, whether directly in the services provided to our customers, or internally, in the service of those who interact directly with them, must offer real added value. As a mutual company, our customer is indeed at the center of our interest,"

Deputy Managing Director
in charge of Organization, Information Systems and Innovation.

Learn more about how Zelros can help you be customer centric on:
www.zelros.com

Zelros solution for Agent Coaching

Advisor App	Predictive Models	Insurance Data Catalog
The advisors are equipped with the Zelros Advisor App, available in both their CRM (Salesforce Financial Service Cloud) and their in-house policy administration system. The Zelros app, seamlessly integrated into the advisor's workspace, sends notifications to the advisor when a specific advice/recommendation should be given to the customer.	The insurer leverages Zelros' AI* models to recommend its advisors with relevant advice tailored to each customer's situation. Zelros' AI* models find the best offer for the customer's needs and provide the advisor with the best way to present it to the customer. Zelros' AI* models are constantly improved thanks to feedback from advisors and customers. ** AI = Artificial Intelligence*	The insurer improves the customer experience with powerful insurance insights provided from curated data sources and partners. Customer intelligence is enriched with relevant insights on demographic, risk or situational elements that enable the advisor to better understand his customer and derive his needs.

Business benefits

Smooth customer experience
Zelros reduced the number of dropouts during the quote process done by advisors. Zelros enabled them to understand the risks to be insured on their own, without the help of an underwriting expert to review the case.

Increased sales efficiency
Zelros enables advisors to increase their sales efficiency. They not only know which offer to recommend to the customer, but also how to present it to the customer with the most relevant selling point.

Improved Cross Selling
Zelros increased the number of cross selling actions performed by advisors by 50% as well as their efficiency (+10%).

How was Zelros rolled out?

Setting up Zelros in the advisor environment was a 3 month project, involving business representatives, data experts and IT specialists. Zelros was initially deployed to 50 beta testers during a 6 months pilot phase. It allowed the insurer to secure the benefits from Zelros and to determine the best user experience for their advisor. It was decided to extend Zelros to all advisors, taking a phased approach that started with call center employees and gradually expanded to branches.

Zelros, the best recommendation engine for Insurance providers. Contact us to know more
www.zelros.com