

Customer case: Insurance and retail banking

Crédit Agricole experience

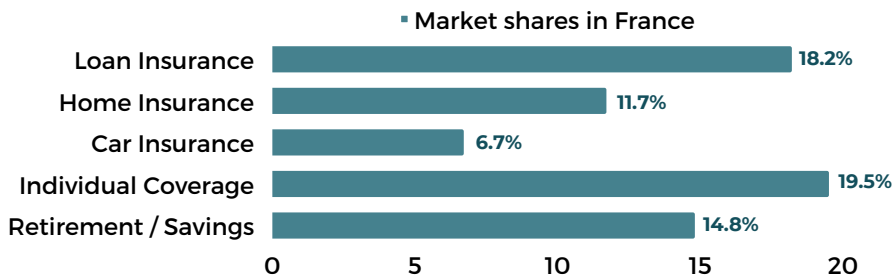


About Zelros

Zelros is a recommendation engine specialized in the insurance industry. Leveraging intelligent data, Zelros provides insurers' sales and digital marketing teams with the customer intelligence they need to create proactive and personalized experiences on any channel.

Key Customer Facts

Credit Agricole offers a complete range of competitive products as well as services to their 52 million customers across 49 countries.



Business Challenges



Personalization

Customers are looking for more personalization, from advisors' advice and product diversity while insurance players must comply with regulations by putting their customers' interests first.

- Optimize every customer contact



Product knowledge

Advisors are facing an increasing number of products, in constant evolution, and more complex portfolios, which required smart tools to guide and coach them.

- Increase the volume of quotes
- Improve conversion rates

"What I like is its evolutionary side, it's easy to use and it drives skill development"

Zelros' Solution

Zelros' integration started with the configuration of 4 products: **Health, Legal Protection, Life Insurance, and Every Day Accident**. Then it extended to home insurance, remote surveillance, and car insurance.

Zelros' goal: delivering insights that meet Credit Agricole's needs to promote **cross-selling** and **upselling** while helping advisors during their journey and sales approach.



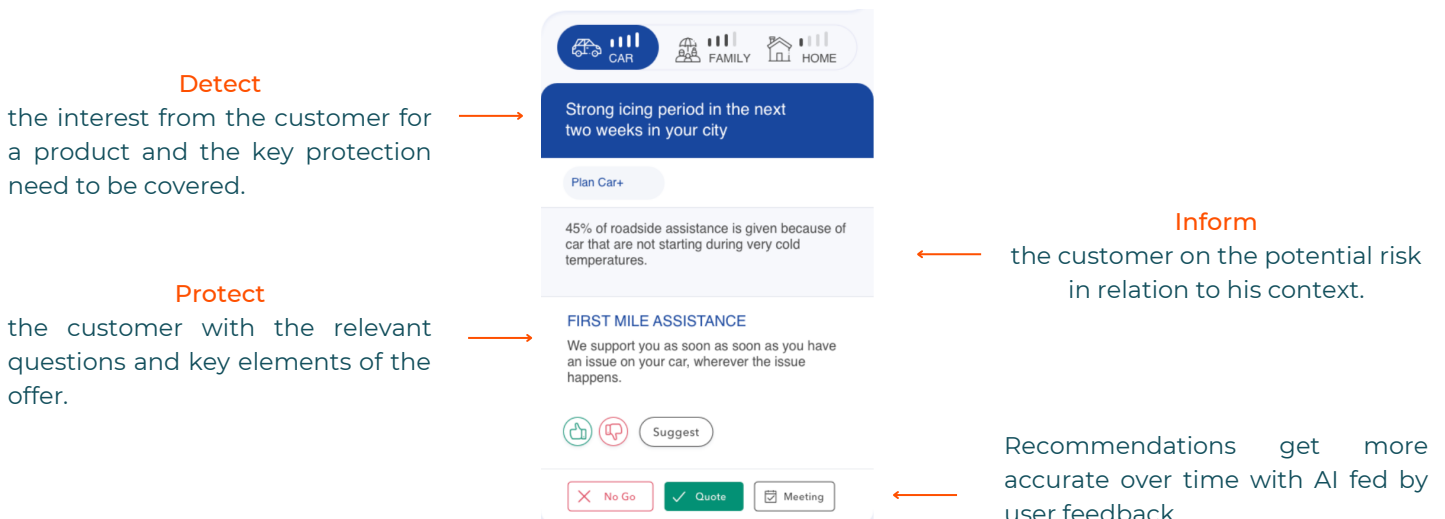
Identify client's coverage needs via **Machine Learning** scores



Offer **personalized advice** by identifying **life events** (recent activities, birth, new purchases...)



Advise clients toward the **right policies** with a framework of targeted and **personalized arguments**



Business Benefits



Rapid & Easy Implementation

- Less than 2 months for 4 product lines
- Easy deployment in the advisor workspace that adapts to the expertise of the advisor with connectors to market-leading CRMs like Salesforce.



Strategic Reporting

Zelros enables **advanced analytics and insights** on how your customers engage with you by giving data about what leads to cross selling / up-selling, **key segments that engage in specific offers**, and **embeds advanced insurance analytics** into your Business Intelligence platform (PowerBI, Tableau, Dataiku).



Secure data transfer and data integration strategy

Zelros allows for fast and secure data transfer as well as APIs for integration



Improve sales performance

Zelros increases the sales performance of insurance experts by 50% and of bank advisors by 200%.

"Zelros provides great guidance and helps raise client awareness proactively"

Zelros, the recommendation engine for Insurance providers. Contact us to know more.

www.zelros.com