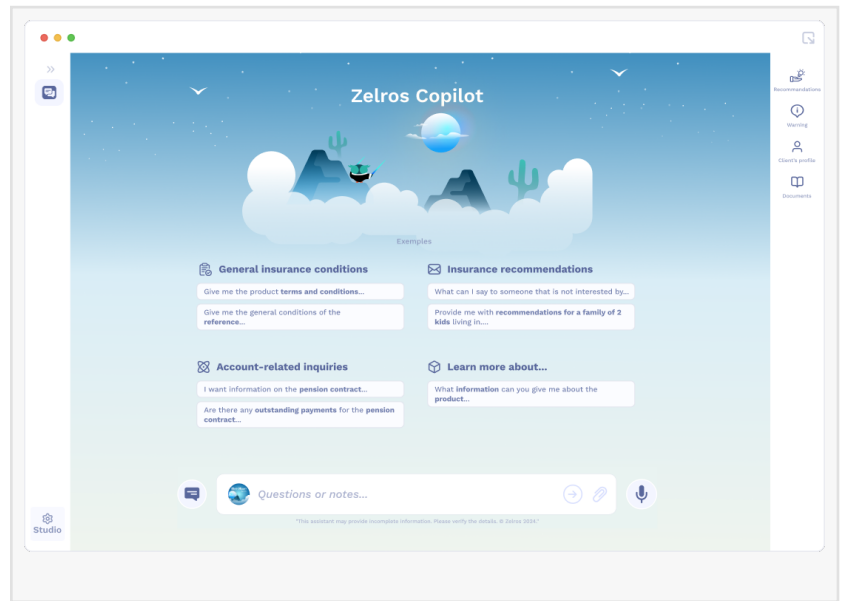


# Zelros unveils its 4-in-1 Copilot - A no-code, customizable solution for bank advisors & insurance agents

NEW YORK, NY, UNITED STATES, October 15, 2024 /EINPresswire.com/ -- Zelros introduces Blue Moon, the latest version of its Copilot, combining four powerful functionalities into a single platform. Designed to transform the way customer-facing teams, marketers, and data & IT professionals collaborate, this innovative solution sets a new standard for the financial services industry. [Learn more about the new features.](#)



Zelros Copilot is a fully configurable platform, made possible by its dedicated Studio. It is designed specifically for business owners, enabling them to quickly and easily equip their agents and advisors with cutting-edge AI tools. This ensures rapid deployment, streamlined operations, and minimal production times, empowering teams to stay agile and efficient.

The Blue Moon release consolidates both the expected and yet-to-be-discovered capabilities of specialized LLM agents in banking and insurance, bringing them together to help anticipate and serve each client's needs in a timely and personalized manner. It empowers insurance agents and bank advisors like never before. The 4-in-1 Copilot is engineered to deliver unmatched efficiency, adaptability, and intelligence. It offers flexibility, seamless integration with leading AI providers, and can adapt to any environment—whether integrated into existing systems or operating autonomously.

Discover - Zelros introduces the "Magic Questions", enabling agents and advisors to efficiently identify the unique needs and aspirations of their clients through targeted questioning and workflows, thus helping agents to collect essential zero-party data information on their clients (home, habits, financial projects...), for KYC (Know Your Customer) and risk assessment, allowing agents to gather critical information efficiently.

**Recommend** - Through the “Magic Recommendations”, Zelros empowers advisors with real-time, actionable insights to boost sales opportunities while ensuring compliance with protection, prevention and savings advisory duties. Instantly activate and adjust hundreds of personalized recommendations to support product launches, risk assessments, and marketing updates, all driven by AI-powered insights.

**Inform** - It's with the “Magic Answers” that Zelros supports agents & advisors to address inbound questions from their customers, whether on the phone or in person. Customers expect quick responses; speed equates trust, and high-quality. In just seconds, Zelros Copilot delivers precise answers to banking, insurance, and client profile-related questions. With trained LLMs, Zelros ensures no hallucination in the answers, always sourced from your structured and unstructured data.

**Automate** - Zelros no-code Studio can be leveraged to easily design, adjust, and automate workflows, streamlining operations across the board. With API integration, automate routine tasks and optimize processes like KYC (Know Your Customer) and underwriting, ensuring compliance with regulatory requirements while minimizing manual efforts. This comprehensive approach transforms the daily workflows of financial advisors, helping them focus on building relationships and driving customer satisfaction rather than managing mundane tasks.

Zelros is taking it a step further by integrating Agentic AI into its framework

With Agentic AI, Zelros is redefining what AI can achieve in the financial services industry. These agents go beyond assistance, functioning autonomously to take over tasks that typically need human intervention. They can plan, coordinate, execute, and even adapt to new scenarios on their own, identifying risks and correcting issues as they arise. In a world where customer expectations and regulatory pressures continue to grow, this advanced automation enables banks and insurers to maintain a competitive edge. Imagine having a dependable colleague who's available 24/7, constantly analyzing data and delivering real-time insights. That's what Zelros Copilot provides — an expert AI agent that supports advisors in real-time, seamlessly integrated into CRMs, standalone interfaces, or even through voice interactions. As Sam Altman rightly said, “Helpful Agents Are Poised To Become AI's Killer Function,” and Zelros is at the forefront of this transformation.

**Augmentation, Not Replacement** - “Agentic AI holds tremendous potential for the enterprise sector,” said Damien Philippon - CEO of Zelros. “Unlike consumer AI, where trust is still evolving, enterprise agents operate with clear objectives, a defined path, and the ability to autonomously achieve results faster and more cost-effectively than traditional methods. That said, the human touch remains crucial. Zelros is still a Copilot, designed to empower agents and advisors, not replace them.”

**Security, Privacy, and Trust** - As AI agents take on more responsibilities, security and privacy remain at the forefront of Zelros' priorities. Data handled by these agents is never used to train

other models or shared externally, ensuring compliance with privacy regulations such as GDPR and ISO 27001 and 42001. In addition to Azure OpenAI, new Zelros' certified LLMs like AWS Anthropic and IBM Granite are now supported in the platform, an unprecedented level of flexibility and control. What's more, robust guardrails are in place to manage and supervise the agents' output, ensuring quality and minimizing risk.

In a time when businesses are expected to do more with less, Zelros Copilot equips advisors with the tools they need to succeed — and Blue Moon sets the bar even higher.

#### About Zelros:

Zelros is a pioneering, award-winning AI platform that empowers insurance agents and bank advisors with its advanced Copilot. By integrating specialized LLM agents tailored for banking and insurance, Zelros helps professionals anticipate and meet each client's needs with personalized, timely solutions. Through AI-driven features, it enables agents and advisors to efficiently identify customer requirements, deliver personalized recommendations, automate workflows, and provide accurate, real-time responses. With seamless system integration and a strong emphasis on security and compliance, Zelros enhances productivity and enables financial professionals to deliver exceptional customer experiences while staying competitive.

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