

# Manage Your Locations & Visitors

## Face to Face & From Afar

Improve the traffic flow within your locations, streamline your workforce and improve customer experience, all while reducing costs. Coconut's smart visitor management system fits seamlessly into your existing operations, reducing wait times, quickly engaging walk-ins, and managing queues.

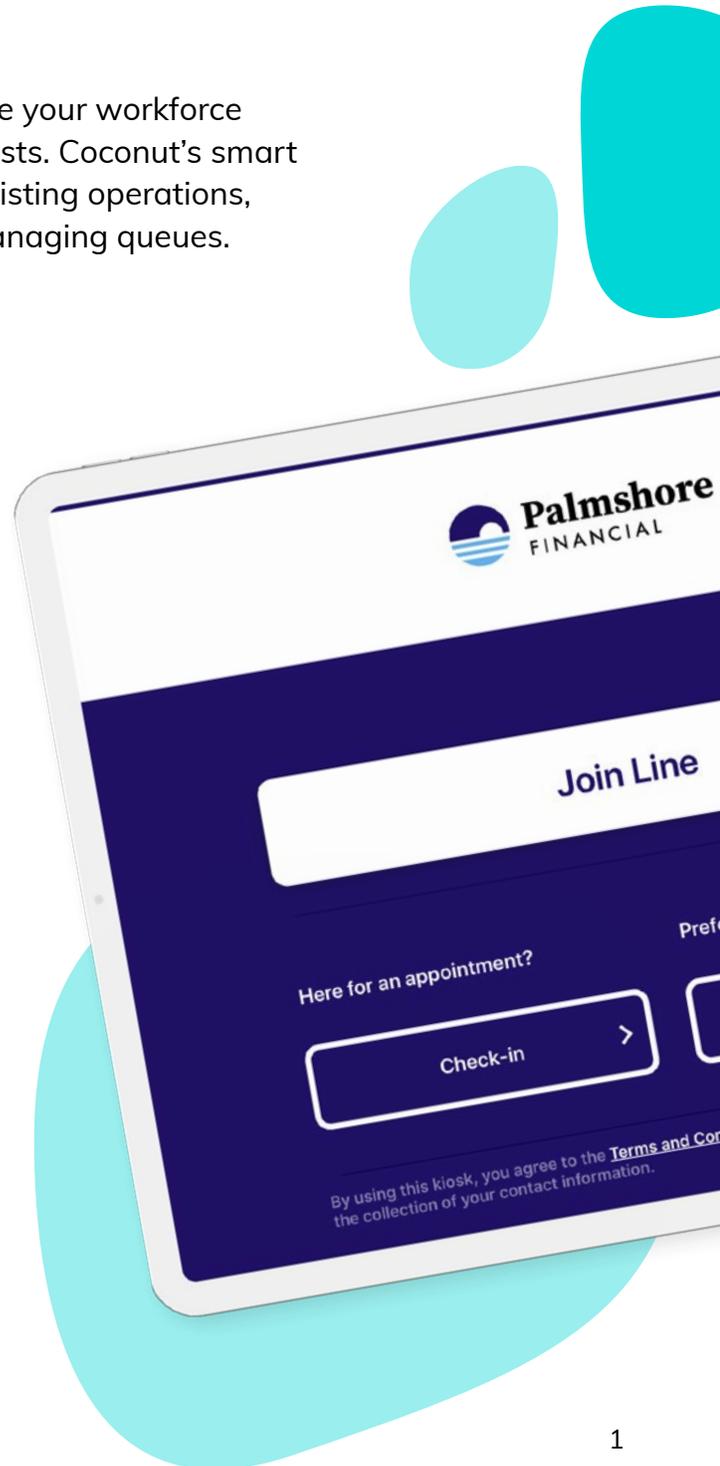
## Drive Your Digital Transformation With Coconut's Engagement Platform

In the new appointment economy, your organization is likely attempting to:

**01** IMPROVE CUSTOMER ENGAGEMENT WITH CLEAR WAIT TIMES

**02** MANAGE FOOT TRAFFIC & SCHEDULED VISITORS

**03** GAIN VISIBILITY INTO DATA FOR LOCATION TRAFFIC



# 01

## IMPROVE CUSTOMER ENGAGEMENT WITH CLEAR WAIT TIMES

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Your customers and staff are busy - faced with a long wait time or queue, engagement plummets and you miss out on key customer experience touchpoints. Our unique algorithm calculates highly reliable wait times based on pre-booked appointments, staff calendars, branch traffic, and other important factors. This means your customers know exactly how long it'll take to see a staff member and can decide the most convenient engagement method - waiting in line, filling out a callback request, scheduling an appointment, seeing their place in line on Lobby TV, or self-service at a kiosk or ATM.



**“We wanted the member experience to be effortless and intuitive. We wanted it to be pleasant. Whether that’s an in-branch experience that started online, an online experience that moves to the phone, or an experience that stays online the whole time, we want that to be seamless.”**



# 02

## INCREASE THE NUMBER OF REVENUE GENERATING APPOINTMENTS

**20%** of customers who abandoned a busy lobby

**rebook when they're sent missed notifications.**

Eliminate friction in the lobby by allowing customers to view real-time availability and join the appropriate queue instantly - whether it's from their mobile device at home, while waiting in their car for their appointment, or physically in your location.

Customers can indicate that they have arrived for their appointment on the system, triggering an instant notification to be sent to staff, improving communication and decreasing member wait time in the lobby. And when it's time for their appointment, a SMS text can remind them to return to the branch.

Our Lobby Management system reduces worries about foot traffic - with clear line of sight to walk-ins, appointments and wait times, you can manage staff coverage and ensure social distancing requirements are being met. Don't want customers to approach the greeter until their meeting time? Simply provide updates via email and SMS to check-in virtually and approach the branch only when advised to do so. And we can automatically send out follow up emails after their appointment concludes.

# 03

## GAIN VISIBILITY INTO DATA FOR LOCATION TRAFFIC

You can't manage what you can't measure. With Coconut, you get a complete, real-time view of location data to smooth foot traffic spikes based on staff availability, engagements, wait times, and more.

Track and measure location and staff performance, as well as operations metrics including average handle times, wait times, and foot traffic per service across all your locations. Is a branch routinely experiencing high wait times? Now you'll be able to make more informed decisions on operational improvements and then evaluate performance.



## LOBBY MANAGEMENT FEATURES

- ✓ In-Branch Walk Ins - via Greeter or Tablet
- ✓ Self-Service In-Branch Kiosk App
- ✓ Lobby View
- ✓ Intelligent Queuing System
- ✓ Check-In System
- ✓ Accurate Wait Times for Staff & Customers
- ✓ Flexible Work Scheduling
- ✓ Real Time Availability
- ✓ No Double Bookings
- ✓ Callback Requests
- ✓ Staff SMS Updates: In-Branch Arrivals
- ✓ EN/FR/ES
- ✓ SSO - Single Sign On
- ✓ Self-Serve System Administration
- ✓ Best in Class Emergency Support Model
- ✓ SOC 2, CASL & GDPR Compliant
- ✓ Data Encryption: Amazon RDS Using AES-256
- ✓ Comprehensive Help Center
- ✓ U.S. Hosting
- ✓ Canadian Hosting
- ✓ Incremental Backups Every 5 Minutes & Nightly Full Backups

# Get up and running in as little as two weeks.

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### About Coconut Software

Our cloud-based, enterprise level appointment scheduling and visitor management platform combines your on-location and digital channels, providing self-service booking and curbside pickup, online and physical queuing, wait time tracking, callback requests and virtual meeting support as well as contact center integration.

