

Coconut Appointment Management

Optimize Branch Operations and Improve Member Engagement

Optimize staff performance and reduce idle time by better aligning staffing decisions with appointment demand.

Increase member loyalty by providing a consistent and effortless experience. Give your members the flexibility to choose, by offering more touch-points across the appointment journey.

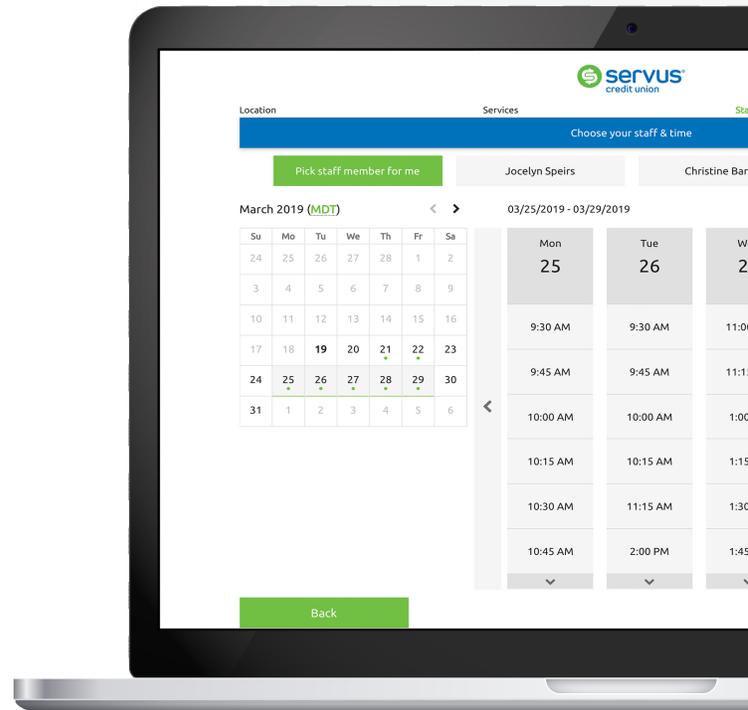
Key Features

Centralized Booking: Improve efficiency by centralizing the management of multiple locations, staff, and services in one platform, gaining visibility into member engagement with real-time reporting.

Contact Center Optimization: Decrease workforce costs by improving efficiencies & reducing wasted time by allowing representatives to book appointments in just a few simple clicks.

Configurable Branding: Increase brand recognition with tailored branding and messaging across the entire customer journey, from landing pages to notifications.

Booking Shortcuts: Eliminate email tag and personalize the experience with direct links to staff, services and locations in emails and promotional materials, ensuring that members can book exactly what they need with ease.



Self-Serve Scheduling: Grow your membership with new business and improve retention by providing an always-on, online, self-serve booking channel that also promotes your array of services.

Check-In: Improve communication and decrease member wait time in the lobby by allowing members to let you know when they have arrived (or if they're running late) with real-time check-in.

Automated Emails and SMS Notifications: Reduce no-shows by confirming appointment details beforehand and sending appointment reminders.

Real-time Performance Reporting: Access valuable business insights through centralized reporting to help measure performance and trends.

Integrations

Flexible. Responsive. Easy to work with. Whether you need to integrate with a third-party or proprietary in-house system, Coconut Software is your best partner for success.

- **Salesforce Sync:** Flexible integration that enables appointment data to flow into Leads, Contacts, Activities and Campaigns. As well as full support for mapping custom questions from forms to custom fields in Salesforce.
- **Enterprise Calendar Sync:** Two-way sync for MS Exchange, Office 365 and Google Calendar and Outlook.com.
- **Data Analysis:** Google Analytics, Google Adwords, SQL Server, My SQL, Postgre SQL.
- **Communication:** Twillio, Postmark notification channels, WebEx.
- **Marketing Automation:** Eloqua, Hubpot, Pardot, Marketo.
- **Proprietary Solutions:** Including Workforce Management and CRMs.
- **Published API:** Go above and beyond our existing functionality and build your own integration.

Security & Privacy

Coconut Software understands the security needs surrounding SaaS applications and have implemented specific measures to monitor and protect your data.

- **Hosting available in the USA or Canada.**
- **All data is encrypted in transit, and at rest.**
- **Database encryption is done via Amazon RDS and uses AES-256.**
- **We are SOC 2, CASL, and GDPR compliant.**
- **All Coconut application and client data is backed up to Amazon Simple Service Storage (S3).**
- **We run full backups nightly and incremental backups every five minutes.**
- **We have staff trained in international privacy law that sit on the IAPP Canadian Advisory Board.**

Trusted by



About Coconut Software

Coconut Software is transforming how credit unions engage with their members by allowing them to effortlessly manage on-demand and pre-booked appointments with real-time insights to optimize results. Working with financial services like Jackson Hewitt, First West, Connect First, and RBC, we understand that your needs are complex and we are committed to delivering a premium experience to each of our valued clients.

Visit: coconutsoftware.com or call 1-888-257-1309