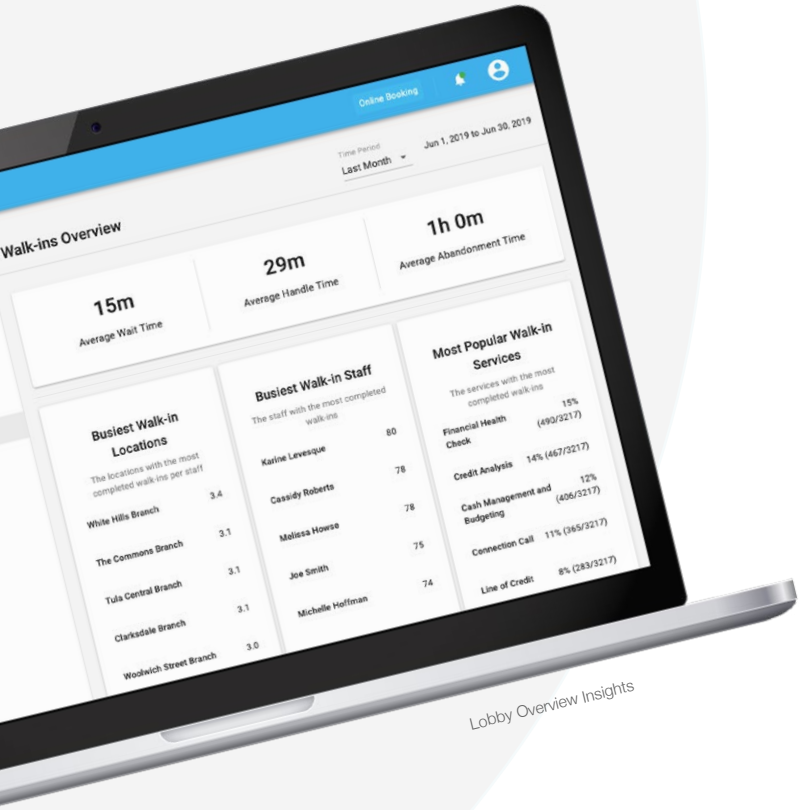
coconut SOFTWARE

Coconut Insights

Appointments Overview Insights



Lobby Overview Insights

From Information to Action

Dive deep into what makes your customers tick. Get a clear picture of the business flow across different locations. Understand exactly what's working, and what isn't. By collecting and analyzing data from every facet of the customer journey — from online scheduling and your contact center to the lobby itself — Coconut provides the insights you need to get results and make decisions.

Key Benefits

Receive Instant Performance Insights:
Access real-time insights through centralized reporting to help measure performance and trends.

Get a Clear View of Your KPIs:
Track key performance indicators with daily, monthly, and annual reporting to gain a strategic advantage in planning for the future.

Optimization Made Easy:
Understand and predict the performance of both digital and physical customer engagement channels with insights into conversion rates by service, staff or location.

Lower Cost, Higher Efficiency:
Anticipate upcoming appointment volume, no-show and cancellation rates to make better workforce decisions that allow for decreased idle time and optimized staffing requirements.

Insights Overview & Reports

Access valuable insights into staff, service, and location performance. Get a view into engagement trends over time, key stats and leaders across the organization in the Overview, or dive deeper into the information by:

- **Comparing location performance through the number of completed appointments.**
- **Checking how popular each service is, and identifying potential problem services.**
- **Easily viewing staff performance across the organization.**
- **Tracking your staff's adoption of Coconut through the number of appointments they book.**
- **Comparing wait time across locations and identifying historically busy days.**
- **Viewing average handle time to see how long each service is actually taking.**
- **Tracking staff performance through handle time and throughput.**

Security & Privacy

We adhere to industry-leading standards to manage the collection and tracking of information in our system, and set strict policies across our organization to keep data safe for you and your customers.

- **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).**
- **Full backups are run nightly with incremental backups every five minutes.**
- **We have staff trained in international privacy law that sit on the IAPP Canadian Advisory Board.**

About Coconut Software

Coconut Software is the preferred Appointment & Lobby Management solution for modern banks and credit unions. Partnering with financial organizations like Jackson Hewitt, First West, Connect First, and RBC, Coconut empowers you to create personalized customer experiences across all touchpoints, optimize workforce efficiency, and gain real-time insights for better forecasting.

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