

# Mind the Gap: Finding and Closing the Holes in Your Customer Engagement Paths

The best way to increase customer engagement is to make it easy for them to engage with you. Mapping out and streamlining all the possible entry points, or paths, a customer might take to contact you will help identify and eliminate bottlenecks in the process, improving customer experience and helping you reach your organizational goal of securing revenue generating touchpoints.

Entry points can range from LinkedIn advertisements leading to a microsite to a special 1-800 number that routes to specialized IVR to QR codes on a poster

in-branch. Ideally, they're simple to use and quickly capture the interest of both customers and potential customers when interacting with your brand.

Having many well mapped out entry points means that financial institutions with 15 branches and \$700 million in assets can drive the same digital appointment volume as those with 40+ branches and \$6+ billion in assets - a real example from a Coconut client. Making it simple to do business with your financial institution helps keep your customers engaged, actively interacting, and buying.

Use Coconut Software's gap analysis tool to identify your entry points and uncover any missed opportunities in your current strategy.

## We have entry points in our...

Y ☐  
N ☐  
N/A ☐

### MOBILE BANKING CHANNEL

Mobile banking apps have taken over as the [number one preferred channel](#) for customers aged 18-44. So it's safe to say that your app will be one of the first places these customers turn to for more information on your solutions.

By including prompts to book appointments for popular services after they've already launched the app, means you can reduce the number of taps, and time, needed to request a meeting.

Y ☐  
N ☐  
N/A ☐

### ONLINE BANKING CHANNEL

In terms of offerings that provide convenience, your online banking channel ranks as the [top factor](#) for most customers. That makes it the first place that many will turn to for information on products and services. By allowing them to schedule a physical meeting without leaving the site, you can remove friction and increase your conversion rate.

Y ☐  
N ☐  
N/A ☐

### ONLINE ORIGATION FORMS (ex: loan applications, opening an account)

Abandonment rates for online banking applications are at an [all-time high of 97.5%](#). While the reasons for abandonment can be complex, providing customers with a way to book an appointment and continue the process with a branch representative can help to capture some of those lost opportunities.

Y ☐  
 N ☐  
 N/A ☐

## CONTACT US PAGE

The average cost of booking an appointment via a traditional contact center is \$4, but booking that same appointment online is estimated at just \$0.10. That booking link could be saving you up to \$3.90 a click!

Y ☐  
 N ☐  
 N/A ☐

## LOCATIONS PAGE

You can assume that customers are planning to visit a branch if they're on this webpage. By allowing them to easily book an appointment through this page you ensure that they are able to plan their day and accomplish their task efficiently, rather than having them show up, wait in your lobby, and possibly leave.

Y ☐  
 N ☐  
 N/A ☐

## PRODUCT PAGE(S)

If your customer is reading about your products, they are already engaged and will likely have questions. Allowing them to quickly book an appointment with a qualified staff member to answer those questions is a great step toward capturing their business.

Y ☐  
 N ☐  
 N/A ☐

## STAFF INTRODUCTION PAGE(S)

Why do your customers visit staff profiles? To learn more about your advisors and determine if they will be able to help. Make it easy to schedule a meeting with by including a booking shortcut attached to that staff member's calendar in their bio.

Y ☐  
 N ☐  
 N/A ☐

## SERVICE INFORMATION PAGE(S)

Generally, the first step in any wealth management, mortgage or SMB services inquiry is a qualification call with a specialist. When prospective customers visit pages outlining these services, make it easy to schedule a call - it'll significantly improve conversions.

Y ☐  
 N ☐  
 N/A ☐

## BLOG CONTENT

Your company blog is a great place to provide customers with up to date advice, thought leadership on key topics, and information on financial offerings. It demonstrates that your staff are experts in their field. By adding direct booking links to your articles, you capitalize on your readers' interest and guide them to a face-to-face consultation.

Y ☐  
 N ☐  
 N/A ☐

## ONLINE CHAT OR CHATBOT

Chat is the [preferred support channel of Millennials](#), and AI chatbots are a great method to help provide it without increasing manpower. Often a customer starts a chat session looking for detailed information on solutions that a live agent, let alone a chatbot, would not be able to quickly answer. In those cases, having a method to prompt customers to book an appointment directly in the chat helps validate the usefulness of chat while getting them the assistance they need.

Y ☐  
 N ☐  
 N/A ☐

## SOCIAL MEDIA MARKETING

Brand loyalty among millennials increases by an average of 28% when they receive personalized marketing communications. The simplest way to ensure that personalized material gets in front of the right eyes is through social media marketing. With a custom booking shortcut that feeds directly from your social media post to “book a consultation” you can ensure quick conversions with your target audience.

Y ☐  
 N ☐  
 N/A ☐

## PAID DIGITAL ADS

By “following” your potential customers around the internet and showing them targeted ads after they have visited your site, engagement rates can skyrocket by up to 400%. Providing a consistent, persistent messaging and asking to “book a consultation”, you’ll stay at the forefront of your prospects minds as they make decisions. The quicker the process to get from initial engagement to booking a meeting means better conversions.

Y ☐  
 N ☐  
 N/A ☐

## PRINT/EXPERIENTIAL ADS

Using more traditional advertisements, like print or at events, but crafting them to make them easy to interact with is a key entry point. Using engaging design, QR codes, vanity URLs and toll free numbers means you can drive interested prospects to the right path.

Y ☐  
 N ☐  
 N/A ☐

## LEAD CAPTURE

For businesses that organize seminars, conferences or other lead generation activities, providing attendees with a clear CTA and link to book a 1:1 follow-up meeting is a great call. By placing these links in all related digital content and emails and making it as easy as possible for those interested in learning more to reach out, you can help to maximise the number of qualified leads generated by your efforts.

Y ☐  
 N ☐  
 N/A ☐

## EMAIL MARKETING

With the avalanche of emails we receive every day, the power of email marketing is being diluted. However, if your recipients are opening and clicking on your email communications, make the call to action simple - instantly booking an appointment means higher conversions.

Y ☐  
 N ☐  
 N/A ☐

## EMAIL SIGNATURES

Communication between advisors and their clients should be as frictionless as possible. A simple method to eliminate back and forth emails and phone calls while still bringing customers through the door is to embed a booking link directly in staff email signatures.

Y ☐  
 N ☐  
 N/A ☐

## TRACKING YOUR MARKETING (ex: QR codes, vanity URLs, 1-800 numbers)

Entry points can range from LinkedIn advertisements leading to a microsite to a special 1-800 number that routes to specialized IVR to QR codes on a poster in-branch. Using these methods to drive to specific entry points means your marketing teams can track what is most effective for your clients. Then, the process can be analyzed to determine where there are bottlenecks that can be removed or reduced.

Y ☐  
 N ☐  
 N/A ☐

## CONTACT CENTER

As the first touchpoint for many appointment-driven businesses, establishing a good relationship with callers is vital for a good customer experience. Yet studies have shown that oftentimes, [more than half of the information](#) collected by contact center reps is not relayed to the customer-facing advisor.

By bringing all customer engagements onto a single platform, contact centers can not only provide faster, more accurate bookings, but also allow them to make note of any information the customer provides during the call to pass on to the advisor.

Y ☐  
 N ☐  
 N/A ☐

## GOOGLE LISTINGS

Before visiting the branch, most people first go online to check hours and location. In fact, [86% of people](#) look up a business on Google Maps before visiting, even when they already know the address. Through the “Reserve with Google” integration, users are able to view branch specific services and availability and book a meeting directly within Google Maps, Search and Assistant results, eliminating friction from the customer journey and helping to streamline your walk-in traffic flow.

Y ☐  
 N ☐  
 N/A ☐

## ATM

As ATMs become smarter, customers increasingly turn to them for their needs without even entering the branch. Providing clients with the opportunity to book an appointment for in-branch services via the ATM based on activity and profile provides another way to engage and capture interest in an organic and thoughtful way.

Y ☐  
 N ☐  
 N/A ☐

## IN BRANCH KIOSK

Interactive touchscreen displays to explore products and get advice while waiting in branch have been rated as among the top solutions for improving the branch experience by [53% of respondents](#).

An excellent method for converting branch visitors into confirmed appointments even during busy hours when they aren't able to wait, in-branch kiosks can help to increase conversion without added manpower.

Y ☐  
 N ☐  
 N/A ☐

## GROUP APPOINTMENTS

By creating a single custom booking link to be used for all attendees, you can keep customer advisory courses, internal training sessions, large meetings and other group engagements organized. Get a quick and easy view into all RSVPs, provide automated email and SMS reminder notifications, enable each attendee to signal if their attendance changes, and receive instant updates.

# Scorecard

Y = 1 POINT

N = 0 POINTS

N/A = 0 POINTS



0-3

Usually, if you find yourself in this scenario you are in the early stages of implementing your appointment scheduling solution. Oftentimes only certain teams are using the solution, or you are still trying appointments out.

If this is not the case, the solution you're currently using may not be optimized to the way in which you do business. This occasionally happens when a solution is too big, or too small, for a company. Scalability is key to future cost containment.

In either case, these limited entry points could be holding your business back from getting the most out of your appointment scheduling solution. To conclude your gap analysis, and determine next steps, download our [Appointment Scheduling Buyer's Guide](#).

4-9

Most companies in this range have made good use of entry points. To continue to capitalize on these paths, ensure that the points link directly to the relevant product, representative or location (ie, an entry point on a mortgage page should pre-select 'mortgage' as the service).

To start uncovering more areas for inclusion, ask your solution provider if it is possible to integrate with systems like your digital banking channel, and be sure to include scheduling links in your marketing materials.

Check out our [panel discussion](#) to discover more on how to bridge the digital-physical gap in the modern banking industry.

10+

You are an appointment expert - congratulations! To discover more about the way technology is set to change the way financial institutions interact with their customers, download our [Becoming Future Proof Guide](#) to explore some of the top technologies you should explore in order to set yourself up for success in the years ahead.

No matter where in the spectrum your company falls, it's likely that there are opportunities to improve. Let us help.

Book an appointment with one of our experts today!

BOOK NOW