

Welcome to the Appointment Economy

Distance engagements are here - support customers and staff with seamless appointment scheduling, virtual meetings, on location visitor management and the analytics needed for informed decisions.

Drive Your Digital Transformation With Coconut's Engagement Platform

With the move to distance engagements, your organization is likely tackling:

01

INCREASED PRESSURE TO MANAGE FOOT TRAFFIC

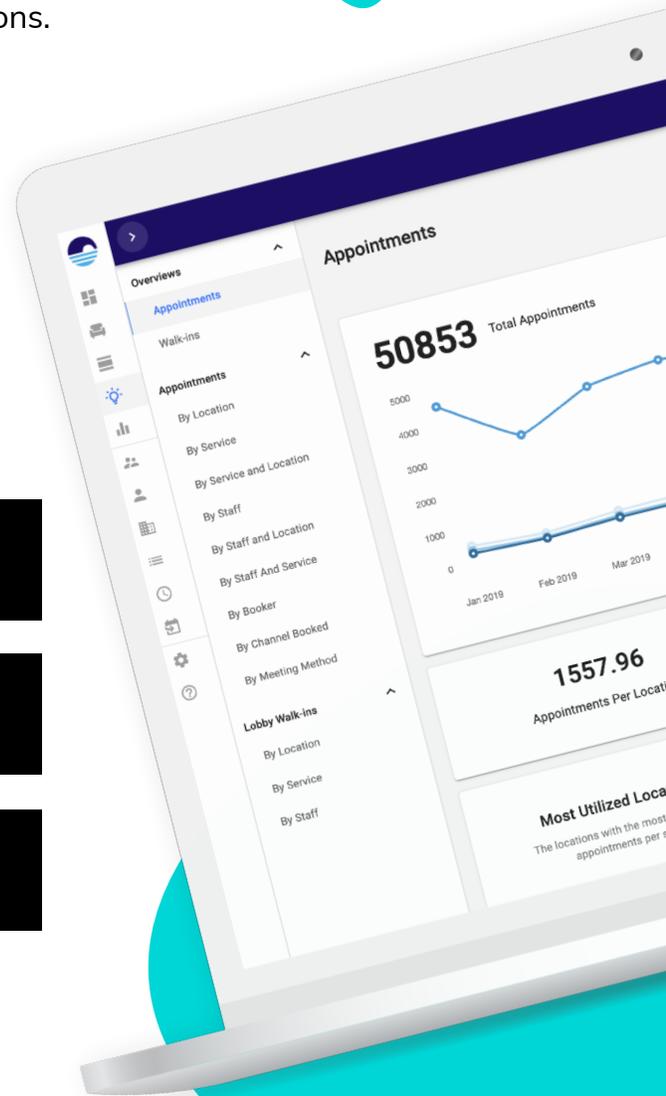
02

REQUIREMENT TO IMPROVE THE NUMBER OF REVENUE GENERATING APPOINTMENTS

03

OPTIMIZATION OF STAFF COVERAGE

We're here to help you transform your operations to keep engagement high in a time of change.



01

EFFICIENTLY MANAGE FOOT TRAFFIC

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Organizations need to move as many on-location services to virtual platforms to reduce the number of clients and prospects visiting your physical branches and store fronts.

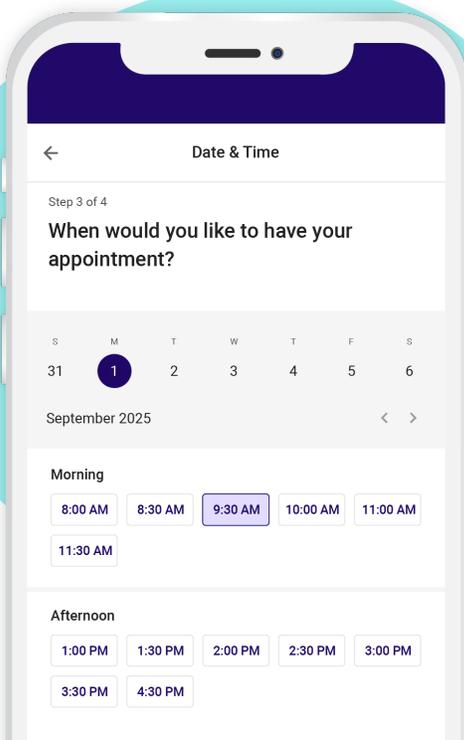
For those services that must be done face to face, like using a safety deposit box, managing the visitor traffic will keep your clients and staff safe.

Our system allows customers to indicate that they have arrived for their appointment without having to enter, triggering an instant notification to be sent to staff. This improves communication and decreases customer wait time in your lobby.

With Coconut's real-time insights, management can track the number of customers waiting to see a staff member, estimated wait times, and data on the busiest times of the day, by location, staff, service and more. This helps you determine which services can be moved to virtual engagements, reducing the foot traffic even further.



“During this unprecedented time the implementation of phone appointments and call back queue have provided an additional channel for our business lines—banking, insurance and wealth management—to continue to help our members and clients while we limit in-person interactions. Both updates were quick and simple to set up and we are receiving very positive feedback from our end users, members and clients. These options have shown to be valuable additions to our service delivery and we anticipate an increase in use over the long-term.”



COASTAL
COMMUNITY

02

INCREASE THE NUMBER OF REVENUE GENERATING APPOINTMENTS

Coconut clients typically experience a

23% drop in no shows.

Many of your highest revenue generating services have likely decreased recently. The challenge is not only to increase the number of engagements with clients and prospects, but also to increase the conversion to a completed sale. This is where our enterprise level appointment scheduling software can help.

By providing self-serve appointment scheduling, synced in real-time to staff availability, and based on requested services and preferred location, you'll reduce the chances of abandonment by making it easy for customers to book time with your staff when it's convenient. No more back and forth emails to confirm availability, nor reminders and follow ups pre and post meeting. Coconut automatically sends notifications via email and SMS helps to remind about upcoming appointments and reduces no shows.

For your face to face services that cannot move digital, Coconut helps reduce on-location engagement drop offs by providing estimated wait times, simple callback requests, and walk-in queuing. For clients that cannot wait, booking appointments at a future date and time of their choosing is easy through a lobby kiosk, a greeter or on their mobile device.

03

OPTIMIZE YOUR STAFF COVERAGE

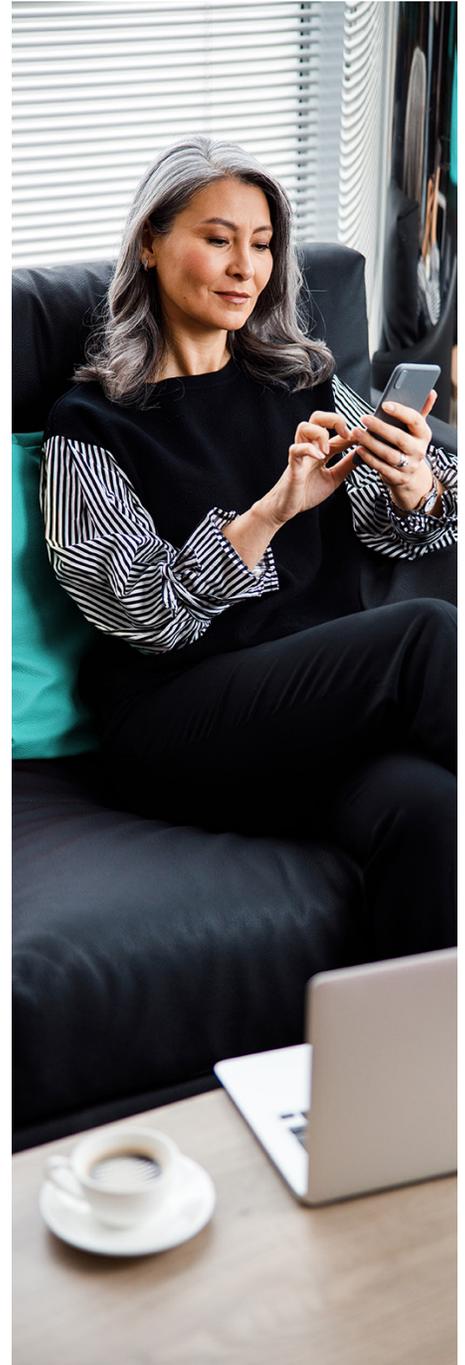
Keeping your workforce engaged is a top priority for many organizations - key to this is ensuring each person has the right amount of value-added work to do. With Coconut, you can optimize your staff coverage by tracking and measuring performance through operations metrics including average handle and wait times across locations. This allows managers to make more informed decisions about scheduling, performance and training.

Insights such as branch busy times, your most popular services, number of appointments per staff member, combined with data from your human resources system, means you can ensure the right coverage to reduce wait times and keep staff engagement up.

View drop-off, no show, conversion, and engagement trends through the customer journey to schedule the right staff members to action engagements with your clients and prospects.

PRODUCT FEATURE OVERVIEW

- ✓ **Centralized Appointment Management Platform**
- ✓ **Intelligent Queuing System:** Real time in-branch availability
- ✓ **Check-In System:** Instant notifications sent to staff that customer has arrived
- ✓ **Accurate Wait Times, for Staff & Customers**
- ✓ **Phone & Video Meetings**
- ✓ **Real-Time Availability Through Calendar Integrations**
- ✓ **Callback Requests:** Customers can request a phone or video callback
- ✓ **Booking Shortcuts:** Direct links to book meetings faster with specific staff, locations or services
- ✓ **Customer SMS & Email Reminder Notifications**
- ✓ **Easy to Use Dashboard**
- ✓ **Deep Data by Service, Staff, Method or Location**
- ✓ **Single Sign On:** Securely authenticate, and quickly log in
- ✓ **Custom Branding:** Logos, Colours, Imagery & Type Face
- ✓ **U.S. Data Hosting & Data Encryption**
- ✓ **Canadian Data Hosting & Data Encryption**
- ✓ **SOC 2, CASL & GDPR Compliant:** Keeping your company and customer data safe



Get up and running in as little as two weeks.

[COCONUTSOFTWARE.COM](https://coconutsoftware.com)

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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.