coconut SOFTWARE

Virtual Engagements Built for Financial Institutions

Reduce the number of applications your staff need to navigate during a virtual engagement, so they can stay focused on what matters—delivering an exceptional experience.

Make the most of your staff's — and members' — time.

Virtual engagements are here to stay. But, most advisors don't have a solution to host them effectively. Which leaves them having to pull together an end-to-end experience on the fly. The result? Frustrated staff, wasted time and a less than stellar member experience.

Coconut Connect brings all of the tools your advisors need to deliver an effective virtual engagement into one place. Enabling them to easily view a member's recent activity, launch a virtual engagement, verify a member's identity, share documents and collect e-signatures all in one familiar place, Coconut.
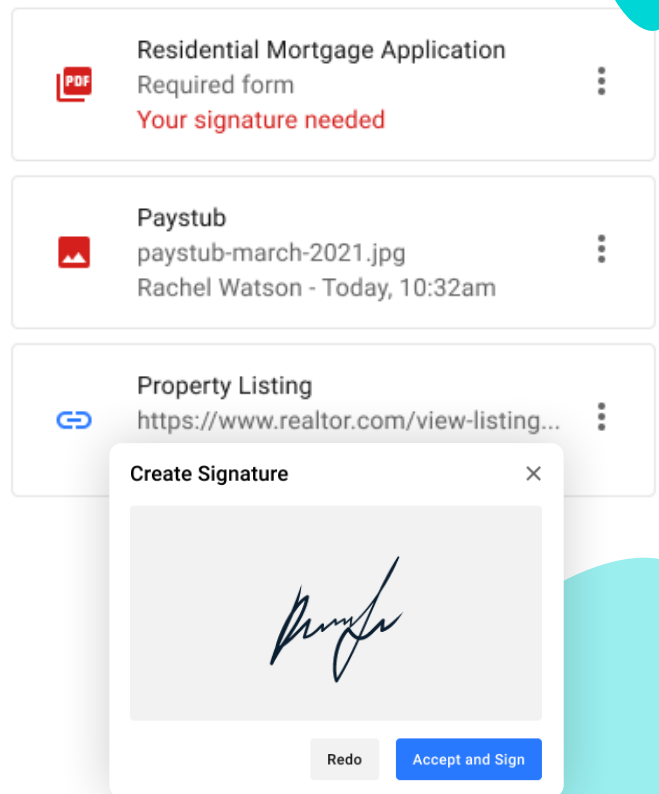
Make It Easy for Your Members to Join & Participate Virtually

Member expectations are changing. More and more are looking for a mix of virtual and physical options to meet with their financial institution. However, it can be a challenge for banks and credit unions to bring the same exceptional experience members have come to expect in-branch to the virtual world.

That's because traditional video conferencing solutions aren't built to handle financial services— they're built for internal meetings between staff. Coconut Connect keeps every aspect of your member's experience top of mind, reducing friction and frustration along the way.

Browser-based experience means they won't have to download a third-party application to join. A secure link will be included in their appointment so they can join in a single click from any device they choose. Then they can easily browse, share and sign documents with your staff right on their screen. No need to bounce back and forth between their discussion and inboxes to dig out documents.
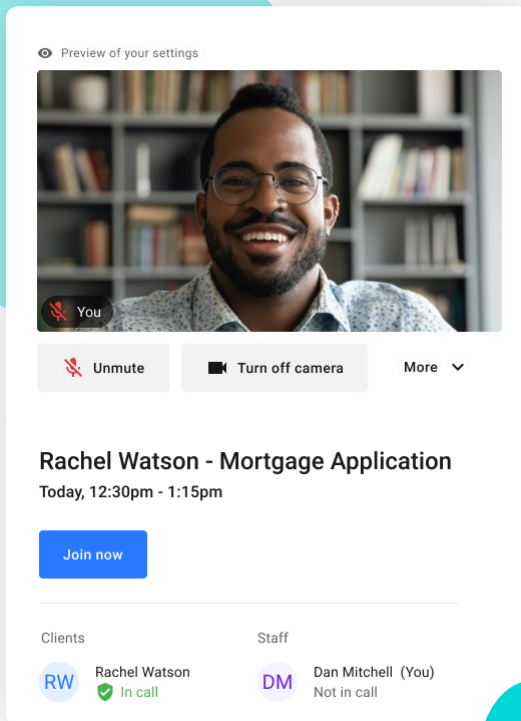
Give Your Staff a Solution They'll Actually Want to Use

Your advisors have a lot of tasks—and apps—to navigate during a virtual engagement. They need to launch the appointment, verify a member's identity, share and collect documents, capture e-signatures, note meeting outcomes and initiate next steps. All while trying to deliver a great experience.

This usually leaves them spending more time navigating than advising. Which means engagements take longer, crucial steps can be missed and members may feel like their advisor is distracted, taking away from the experience they expect.

Coconut Connect keeps everything your advisors need at their fingertips by integrating seamlessly with the tools your team already relies on. We'll handle identity verification before the member joins to save time and reduce risk. And, once the meeting kicks off, your advisors can easily share documents, answer questions, collect e-signatures and review their member's history without ever leaving their screen.
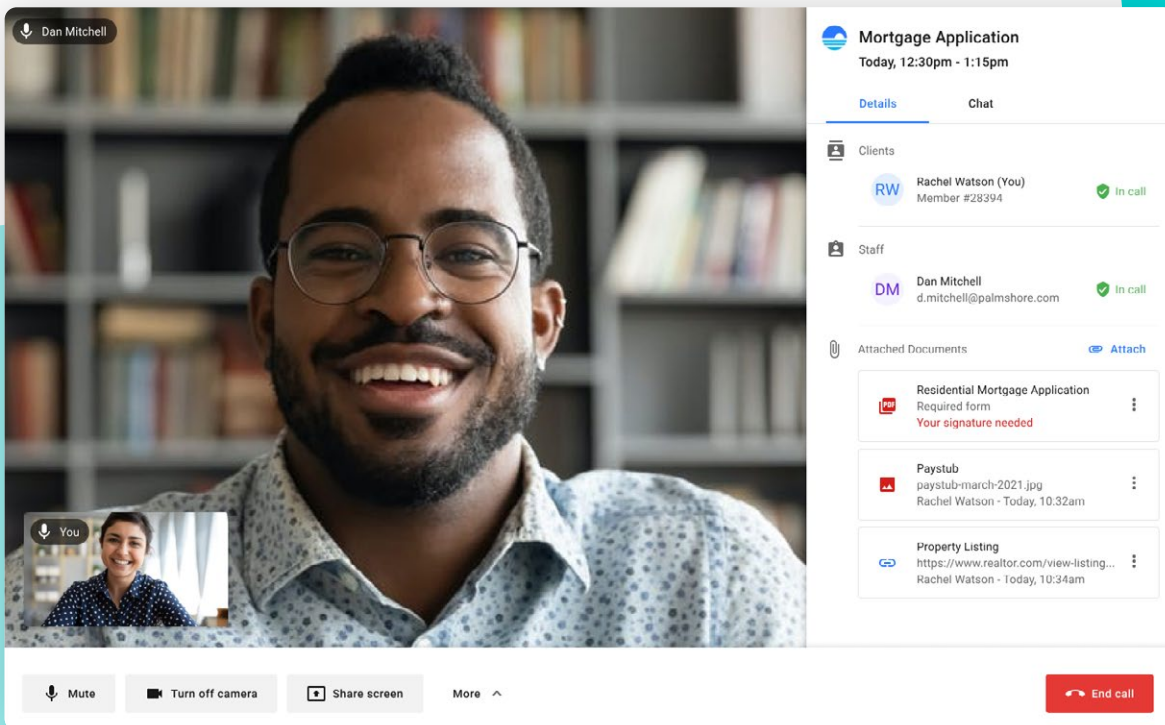
Find Efficiencies & New Opportunities

Every financial institution is looking for ways to do more with less. Staffing shortages and hybrid work models are new realities that are changing the way financial services are delivered. Virtual engagements offer more flexible, faster and less expensive ways to connect the right members with the right advisors.

Coconut Connect allows your team to address member needs from anywhere. Advisors can handle appointments from their home, reducing travel time between branches. Contact center agents can quickly share their screen to walk through digital banking activities. And members can rest assured every detail is taken care of in the moment.

The best part? We'll gather all of your critical, decision-making data in one location to help you understand which virtual services are most popular, and how members rate their experience. With Coconut Connect, you can make better decisions about services you offer, and the workforce you'll need to support them.

SCHEDULE A CONSULTATION

COCONUTSOFTWARE.COM

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About Coconut Software

Coconut Software makes it effortless for customers to connect with their financial institution. Our enterprise appointment scheduling and lobby management solutions are used by leading banks and credit unions across North America, including RBC Royal Bank, Arvest Bank, Vancity and Rogue Credit Union. The result? A seamless customer experience that's improved NPS scores, reduced wait times and increased conversion rates for the organizations who use it. Founded in 2011, Coconut Software is headquartered in Saskatoon, SK with offices in Toronto, ON.