

Coconut Software VS Digital Customer Service Platforms

Over 150 financial institutions use Coconut Software to make appointment scheduling, lobby management, and video banking a breeze.

Our suite of solutions make conversations about complex financial products and services more enjoyable—for clients and staff alike.

Why Financial Institutions Choose Coconut

Coconut’s platform is best for financial institutions that want to drive more profitable, high-quality conversations, while reducing administrative work for frontline staff and contact centers.

01 Focus on high-value products and services like loans, mortgages and other complex products and services.

02 Central location to see how each touchpoint throughout the client journey connects to long-term revenue.

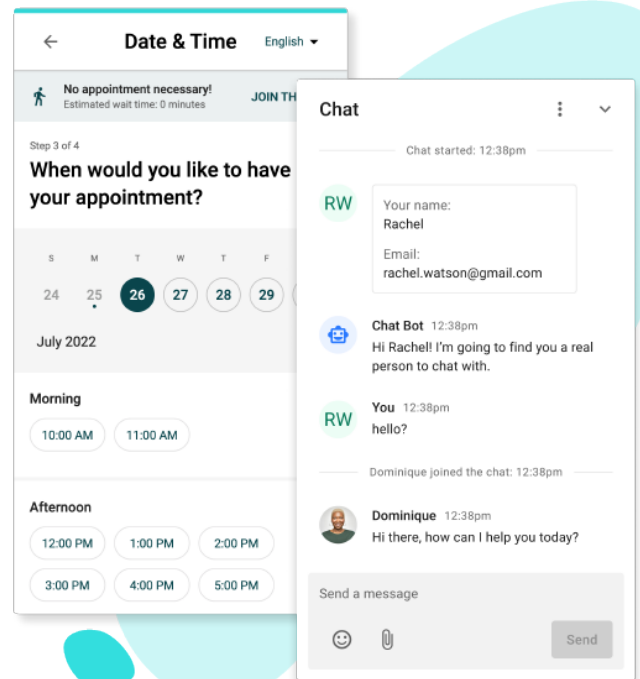
03 Seamless experience between channels that allows clients to begin their journey online and end in person.

04 Strategic support for more than just your contact center, which helps you get more out of your investment.

“Our customers report that their experience is smoother and more pleasant. Coconut Software has allowed us to build connections between our associates and community.”



MICHELLE FITTRO,
Director of Retail Product Development, Arvest Bank



KELLY JACOBSEN,
VP Marketing & Operations, Yolo Federal Credit Union

“I can confidently say that Coconut is one of our favorite vendors to partner with.”

Why Choose Coconut over our Competitors?

COCONUT SOFTWARE VS. DIGITAL CUSTOMER SERVICE	COCONUT	DIGITAL
<p>Focus on High-Value Services Coconut quickly connects clients and staff to discuss complex services like loans, financial advice, and more—making interactions more enjoyable and efficient.</p>	✓	✗
<p>Seamless Hybrid Experience Coconut is digital-first, not digital only. Which means clients have the flexibility to begin their journey online and finish in person.</p>	✓	✗
<p>Robust Multi-Channel Reporting Get the clearest view of your client's journey. Capture interactions across physical and digital channels to see which channels lead to the highest-value outcomes.</p>	✓	✗
<p>Staff Utilization Insights See where your team spends their time and who's overbooked. Then, adjust schedules or staffing to get the most out of your team.</p>	✓	✗
<p>Pre-Scheduled Appointment Support Instantly route clients to the right staff member based on their needs, share advisor availability, and allow them to book a meeting in just a few clicks.</p>	✓	✗
<p>Walk-In Support For Physical Branches Instantly engage walk-in traffic with self-serve tools that allow them to join the line, see wait times, or schedule an appointment without waiting in line.</p>	✓	✗
<p>Products Built In-House We work closely with our customers to determine where we head next. And we build it all in-house, meaning every update delivers a smooth experience for end users.</p>	✓	✗
<p>All-in-One Solution Coconut's solutions impact more than just your contact center. Tailored solutions for marketing, lending, retail, and experience help stretch your budget further without adding multiple tools to your tech stack.</p>	✓	✗

About Coconut Software

Coconut Software makes it effortless for customers to connect with their financial institution. Our appointment scheduling, video banking, and lobby management solutions are used by leading banks and credit unions across North America, including RBC, Arvest Bank, Vancity, and Rogue Credit Union. Organizations that use Coconut benefit from a seamless customer experience that improves NPS, reduces wait times, and increases conversion rates. Founded in 2011, Coconut Software is headquartered in Saskatoon, Saskatchewan, with offices in Toronto, Ontario. For more information, please visit: www.coconutsoftware.com.

COCONUTSOFTWARE.COM

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