coconut
SOFTWARE

Deliver Great Advice At Every Stage of The Customer Journey

Even in an age of digital transformation customers still want easy access to a real human for financial advice. But, it turns out they can't get it when they need it. Which is a shame because these one-on-one interactions are critical to every financial institution's bottom line.

Banks and credit unions that make it easier for their customers to connect with their team for advice are proven to attract more customers, sell more products, improve long-term loyalty and boost experience scores.
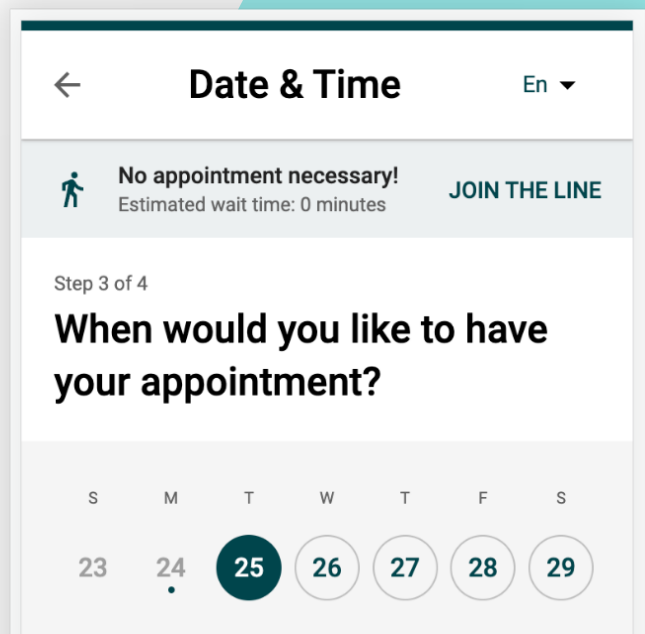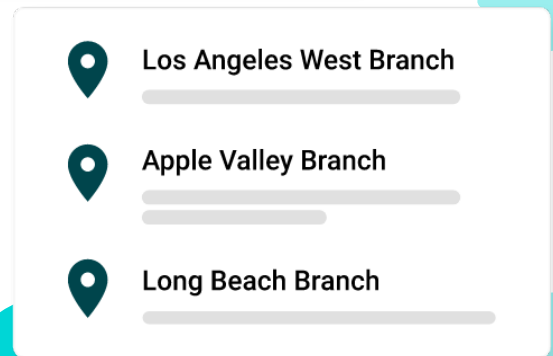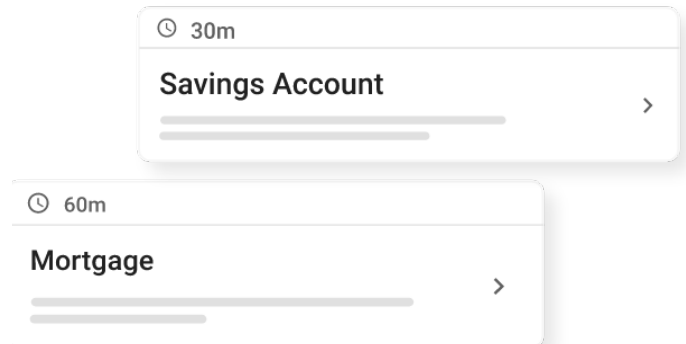
That's why we've spent over a decade working with financial institutions to make these connections effortless for customers and staff alike.

Meet Coconut Software

We're here to help financial institutions empower their team to deliver great advice at every stage of the customer journey by ensuring that:

- Customers can easily connect for advice when they need it
- Staff are empowered to deliver efficient, personalized service
- Advisors are in the right place at the right time

Take a peek inside the platform that makes it happen.

⏱ 30m

Savings Account ›

⏱ 60m

Mortgage ›

📍 Los Angeles West Branch

📍 Apple Valley Branch

📍 Long Beach Branch

← **Date & Time** En ▾

🚶 **No appointment necessary!**
Estimated wait time: 0 minutes   JOIN THE LINE

Step 3 of 4

When would you like to have your appointment?

S	M	T	W	T	F	S
23	24	25	26	27	28	29

CONNECT CUSTOMERS WITH ADVICE WHEN THEY NEED IT

Walk-ins who walk out because of long lines. Customers who need to repeat their story when they switch between channels or staff. No advisors available for your most in-demand services. Not with Coconut.

We'll put your customers at the helm of their experience. It starts by learning more about what kind of advice they're after so we can guide them to an advisor that can help them. Then we serve up all of the ways they can connect—think phone, video, in-person appointments—so they can choose the method that works best for them.

EMPOWER STAFF TO DELIVER EFFECTIVE SERVICE

Say goodbye to unpredictable branch traffic, team burnout, high handle times and missed opportunity costs. With Coconut you can get more done with the team you have today by giving them more control over their day.

First, we'll give staff a clear view of who is in their queue to connect across the channels they serve. Then we'll share more about each customer's needs, history and current product mix so advisors can prepare for every conversation. With all of the tools they rely on available in one spot, they'll spend less time tab toggling and more time with their customer.

PUT ADVISORS IN THE RIGHT PLACE, AT THE RIGHT TIME

Over and understaffing. Struggling to understand where your team spends their time. Unsure of how your team is contributing to your growth goals? With Coconut, you can ensure that your service delivery model is always cruising in the right direction.

Start by understanding how many advisors you'll need to meet customer needs across channels to reduce over or understaffing. Then figure out which advisors have capacity to pitch in during busy times to get the most out of the team you have. Plus, you can measure how staff, locations and services translate into products sold and revenue impact—no analysts required.

"Because associates have much of their paperwork complete before the appointment, they are less hurried and can spend more time listening to customers."

MICHELLE FITTRO,
Director of Retail Product Development at Arvest Bank

40 minute reduction in handle time

"We're increasingly moving walk-ins to high-value appointments and building that behavior because we know appointments convert."

AARON YOUNG,
SVP of Branch Operations and Retail Banking at CU SoCal

12% increase in funded loan applications

Peek Inside Our Platform

APPOINTMENT SCHEDULING

Let customers be their own cruise directors when it comes to scheduling time with your team. With Coconut, they can quickly find the advisor best suited to help them. Then choose a time, day, service, and channel that works for them.

QUEUE MANAGEMENT

Allow customers to see wait times and join the queue online, through self-serve tools or your frontline team. Regardless of how they get started, we'll add them to a central queue so advisors always have a clear view of who's in line and what they need help with.
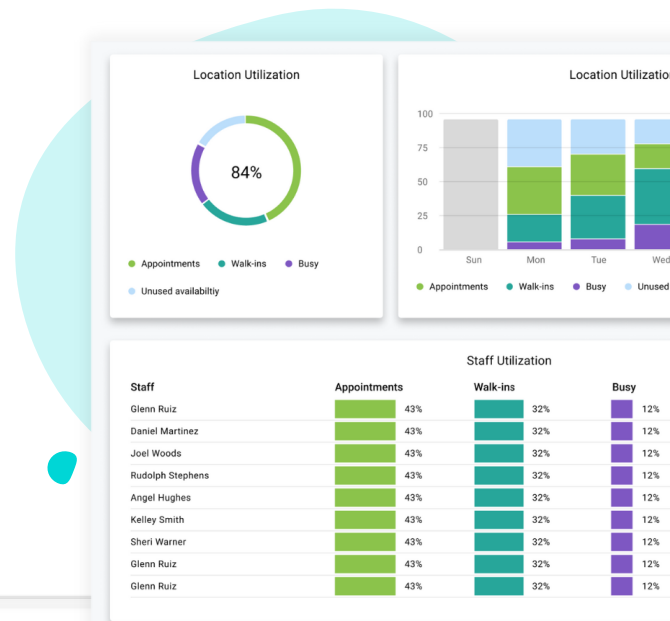
VIDEO BANKING

Make customers feel like they're getting the same in-branch experience they've come to know and love, virtually. Advisors can start video calls, review customer details, share documents and collect signatures all in one location. (Bye-bye tab toggling).

BRANCH + ATM LOCATOR

Elevate the location search experience beyond dots on a map. Coconut's intuitive Branch Locator serves up the best location based on your customers' needs. Then enables them to connect with the right advisor in just a few clicks right on your location page.

ADVANCED ANALYTICS

Move your service delivery model from guesswork to growth. With Coconut, you'll know how many advisors you'll need to keep up with customer needs across channels. Plus, you can collect outcomes from every interaction so you know how staff and services impact revenue.

About Coconut Software

Coconut Software makes it effortless for customers to connect with their bank or credit union. Our appointment scheduling, queue management, and video banking solutions are used by leading financial institutions 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.**

SCHEDULE A CONSULTATION

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