

# Elevate the Video Appointment Experience

Refine video banking at your institution with Coconut Connect, the market's best end-to-end video solution.

Connect streamlines the entire video meeting process, from booking calls to post-meeting follow up. Now, your clients and staff can focus on financial conversations—instead of technical complications.


## Exceed Your Client's Video Expectations

Make your virtual engagements as smooth as your in-person appointments with a fuss-free video banking solution designed to handle complex transactions.


Coconut Connect is browser-based, so no thirdparty downloads are necessary to join a call. Plus, co-browsing, markup tools, and e-signature capabilities mean the entire service is handled from a single screen.

Preview of your settings



 Unmute

 Turn off camera

More 

### Rachel Watson - Mortgage Application

Today, 12:30pm - 1:15pm

[Join now](#)

Clients

 Rachel Watson  
 In call

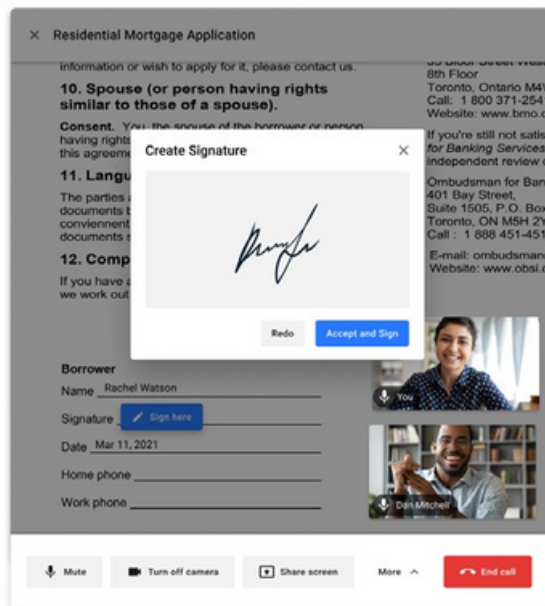
Staff

 Dan Mitchell (You)  
Not in call

## Streamline Staff Workflows, From Start to Finish

Forget to send a join link? Create next steps? Coconut automates meeting link creation and identity capture processes—so your staff have less admin work to juggle before calls start.

Team members can also see meeting details, collect signatures, take notes, review client meeting history, and create follow-up tasks—all from one easy-to-use application. (Bye-bye, tab toggling!)



## A Secure, Integrated, End-to-End Video Solution

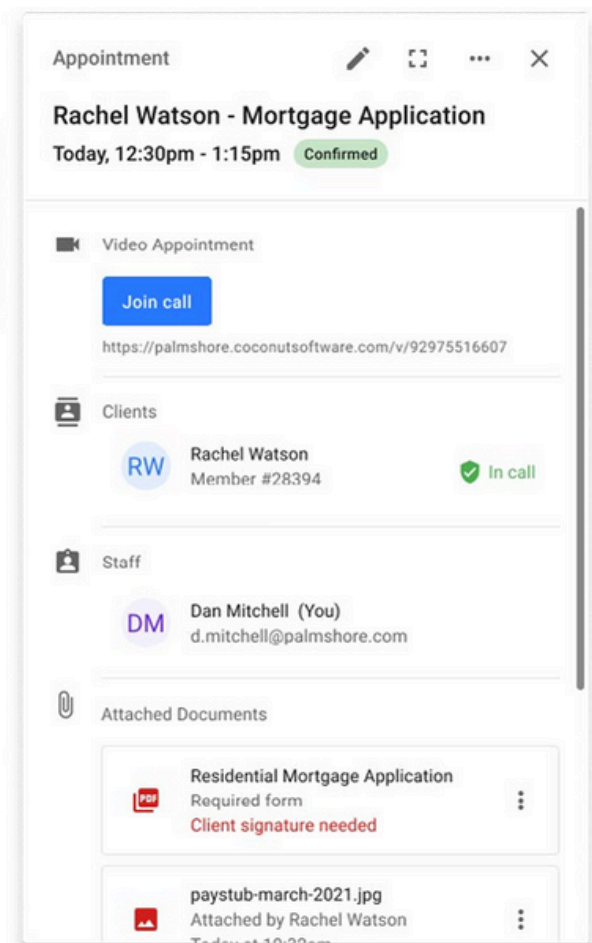
Connect is integrated with Coconut’s Appointments tool—so booking a video meeting is effortless. It can also be integrated with SSO, CRM, and e-signature solutions to streamline operations and sync important data.

Financial institutions can also rest easy knowing that their client data and privacy is protected, thanks to Connect’s unique booking links, identity capture, and encrypted call recordings.

## Get a Bird’s Eye View of Video Data

Collect the data you need to make smart decisions about staff coverage, virtual service offerings, and more with Connect’s reporting and tracking features.

Coconut captures appointment types, meeting duration, client NPS, and outcomes from video meetings, so it’s easier to spot opportunities for improvement. Plus, you can use audio recordings for training purposes.





## VIDEO + AUDIO CONFERENCING

Deliver real-time, high-quality video and audio interactions via Coconut Connect, enabling advisors to handle complex transactions remotely with customers



## UNIQUE JOIN CODE FOR SECURE ACCESS

Customers can effortlessly join meetings by entering a unique code provided via SMS, email, or in-branch staff, ensuring immediate access to expert advice.



## UNIFIED QUEUE MANAGEMENT

Remote advisors can manage and monitor multiple branch queues from a single dashboard, improving staff efficiency and reducing wait times.



## AUTOMATIC WAIT TIME CALCULATION

Provide accurate, real-time wait times based on staff availability, foot traffic, and appointments, keeping customers informed and improving overall experience.



## REAL-TIME ROOM AVAILABILITY

Enable staff to view and manage meeting room availability instantly, ensuring seamless scheduling and minimizing downtime between customer appointments.



## MARKUP, AND CO-BROWSING

Allow remote advisors and customers to collaborate in real-time on documents and web pages, with the ability to annotate and fill out forms together during the video meeting.



## INSTANT BRANCH NOTIFICATIONS

Keep branch staff informed of queue updates and virtual meeting statuses via SMS or email, helping them assist customers more efficiently.



## VIDEO RECORDINGS AND TRANSCRIPTS

Automatically record meetings and generate transcripts, ensuring compliance, enabling training, and providing a record for review.



## ELECTRONIC SIGNATURE CAPTURE

Enable members/customers to sign documents digitally during video meetings, eliminating the need for physical paperwork.



## ANALYTICS AND REPORTING

Track key metrics such as meeting duration, satisfaction, outcomes, and abandonment rates to make data-driven decisions.