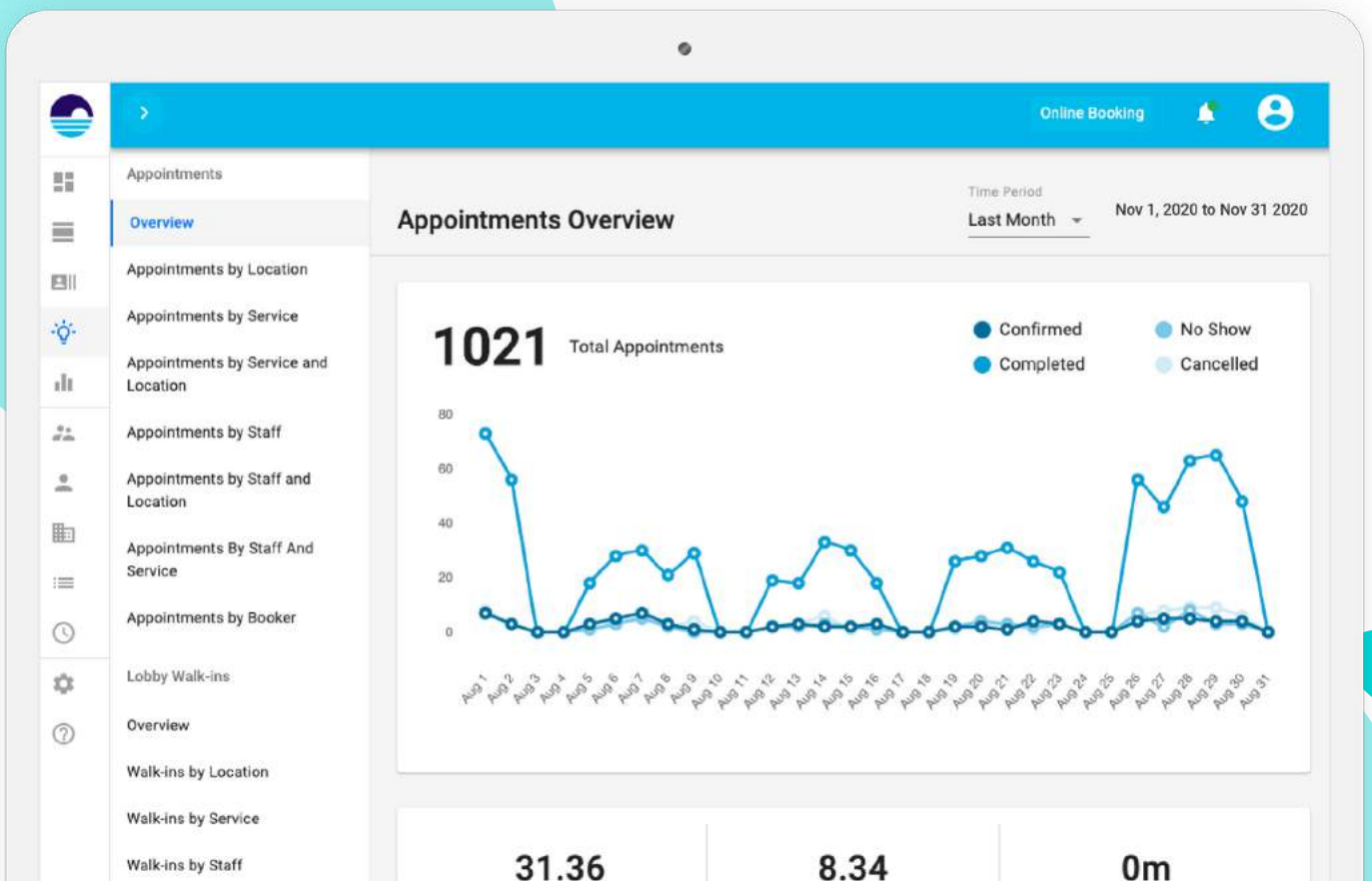


# From Information to Action

## Gather Data From Every Facet of Your Customer Journey to Drive Efficiency & Growth

Many financial institutions are finding that their physical channels are slowing operations, impacting both customer satisfaction and staff efficiency. Having access to advanced insights and analytics are more important than ever to gain valuable data into performance and outcomes of customer and staff engagements.

Strategic, high value decision making must be based on accurate data - by collecting and analyzing information from every facet of the customer journey. Coconut allows you to optimize management of your team, branch and customers, keeping revenue up and wasted resources down.





**“I love to look at the insights. It’s great for me to be able to pull the information up and for us to take a look at the agents and see how they’re booking to get insights into coaching opportunities and drive further results. We never really had that data before, so that’s probably the most exciting feature from a member perspective.”**



## WHY INSIGHTS?

### SEE THE BIG PICTURE

View drop-off, no-show, conversion, and engagement trends through the customer journey, plus location and advisor performance across the organization. Understanding the big picture means more effective branch reopening strategies and execution.

### RECEIVE INSTANT PERFORMANCE INSIGHTS

Access valuable insights with centralized real-time reporting to measure trends in everything from individual engagements to staff and branch performance.

### LOWER COSTS, INCREASE EFFICIENCY

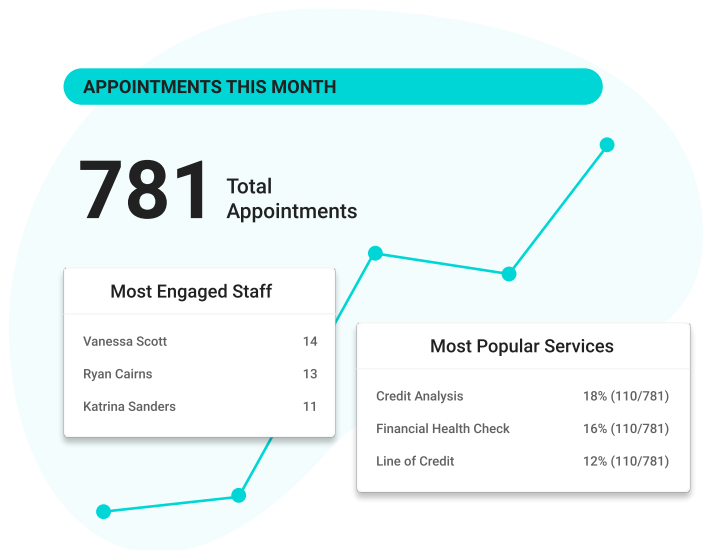
Anticipate appointment volume, no-show and cancellation rates to make better workforce decisions for decreased idle time and staffing requirements.

### GET A CLEAR VIEW OF YOUR KPIs

Track your key performance indicators through daily, monthly, and annual reporting to gain a strategic advantage when planning for the future.

### MAKE OPTIMIZATION EFFORTLESS

Get your customer engagement channels operating at peak performance with insights into conversion rates by product, service, staff or branch.



## INSIGHTS FEATURES

- ✓ Reporting: Cancellation Reasons
- ✓ Cross Domain Tracking
- ✓ Google Analytics
- ✓ GoogleAds Conversion Tracking
- ✓ UTM Parameters
- ✓ Easy to use Dashboard
- ✓ Exportable PDF & CSV files via custom reports
- ✓ Daily/Weekly/Monthly/Annual Reporting
- ✓ Deep Data by Service, Staff, Method or Location
- ✓ Advanced Time Tracking
- ✓ Tools to anticipate Appointment Volume, No-Shows & Walk-In Traffic
- ✓ Branch Busy Times
- ✓ Branch Capacity
- ✓ Branch Utilization
- ✓ Region Reporting
- ✓ Mobile Specialist Capacity
- ✓ Mobile Specialist Utilization
- ✓ Staff Capacity
- ✓ Staff Utilization
- ✓ Today's Capacity & Projected Busy Times
- ✓ Walk-Ins by Location, Service, & Staff
- ✓ Appointments by Location, Service, Staff & Method

# Get up and running in as little as two weeks.

COCONUTSOFTWARE.COM

+1 (888) 257-1309

[SCHEDULE A CONSULTATION](#)

### 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.

