# Elevate the Video Appointment Experience
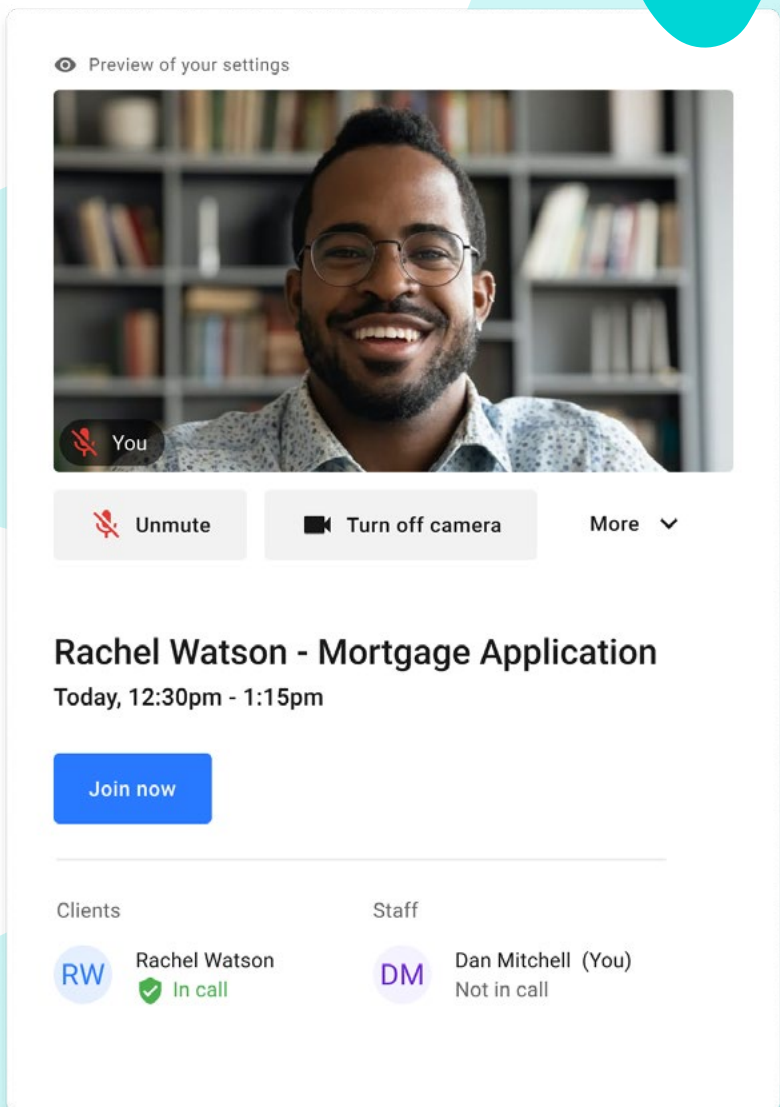
*Refine video banking at your institution with Coconut Connect, the market's best end-to-end video solution.*

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 third-party downloads are necessary to join a call. Plus, document sharing, co-browsing, markup tools, and e-signature capabilities mean the entire service is handled from a single screen.

## Streamline Staff Workflows, From Start to Finish

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

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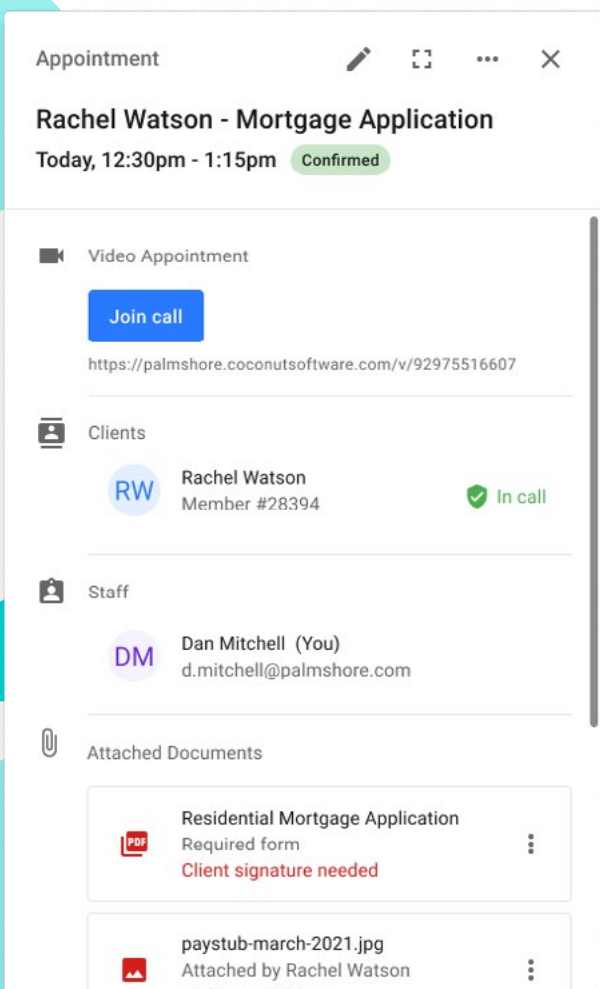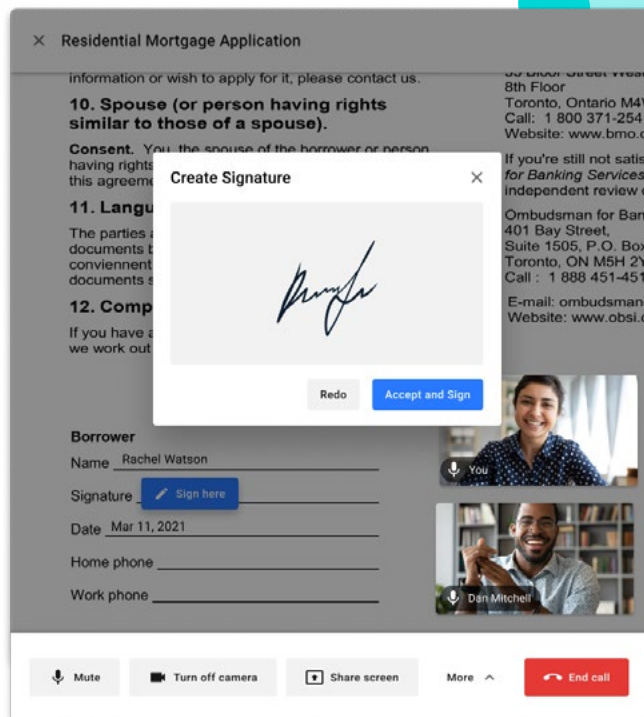
## A Secure, Integrated, End-to-End Video Solution

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 verification tools, 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.

# Coconut Connect
## Key Video Banking Features

**VIDEO + AUDIO CONFERENCING**

Let clients join a meeting remotely from a browser—no third-party conferencing app download needed.

**AUDIO RECORDINGS + TRANSCRIPTS**

Automatically record and securely store appointment audio. Then, generate transcripts for training purposes.

**CUSTOM BRANDED BACKGROUNDS**

Use our out-of-the-box options or customize your virtual experience with branded backgrounds.

**AUTOMATIC, SECURE JOIN LINKS**

Every video appointment has a unique link and will use a secure browser connection to ensure privacy.

**SCREEN SHARING + MARKUP TOOLS**

Clients and staff can share their screens, walk through documents, and highlight important details live.

**DATA TRACKING + REPORTING**

Get a view of meeting length, NPS, and outcomes from video meetings to spot opportunities for improvement.

**ELECTRONIC SIGNATURE CAPTURE**

Collect e-signatures instantly—without switching between screens— through either DocuSign or OneSpan.

**CLIENT IDENTITY VERIFICATION**

Verify a member's identity manually or through SSO (with select online banking platforms) before a call begins.

**COBROWSING**

Let your video call attendees navigate the same online forms and web pages together with real-time cobrowsing.

**LIVE CHAT**

Share links, send messages, and answer questions during a video appointment through a live chat box.

---

## SCHEDULE A CONSULTATION

**COCONUTSOFTWARE.COM**

**+1 (888) 257-1309**

---

**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.*