

MEET ON DEMAND

Real-time advisor access across every channel

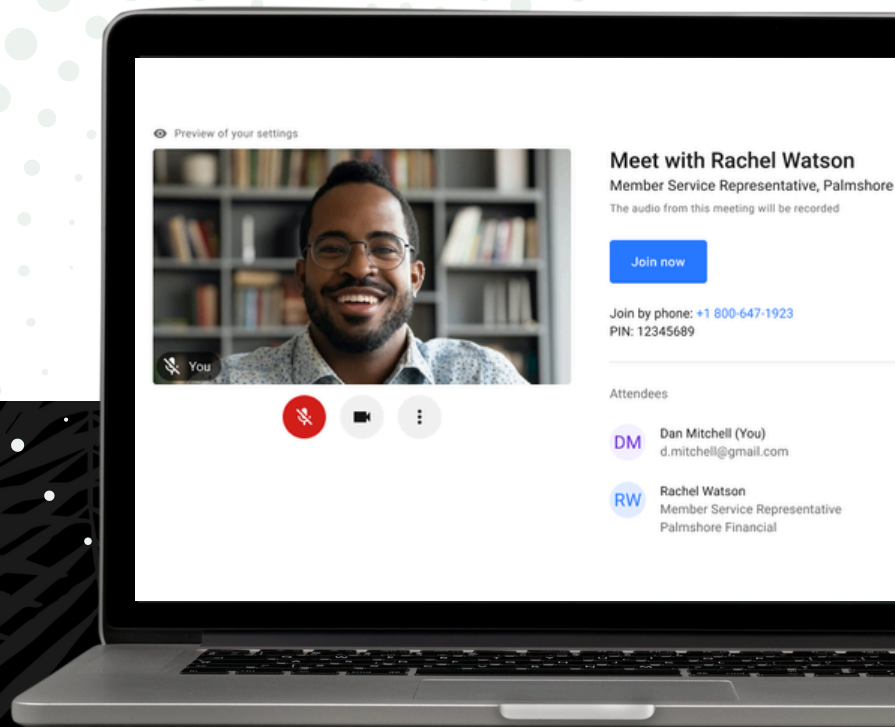
Meet on Demand enables your financial institution to connect clients with the right specialist over video—powered by Coconut Connect or Microsoft Teams—by tapping into your full network of advisors, whether they're in-branch, at another location, or working remotely.

Meet with clients without delays or rescheduling, optimize staffing, and convert idle capacity into revenue opportunities.

Meet with clients faster.
**No waiting. No rescheduling.
No frustration.**

Key Advantages of Meet on Demand:

- Reduce Wait Times
- Optimize Staffing and Costs
- Convert Every Interaction
- Provide More Services



Reduce Wait Times

- **Connect with Remote Advisors:** Walk-ins are quickly connected to the right specialist—whether they're in another branch or working remotely—so no one is left waiting.
- **Unified Queue Across Branches:** Staff can view and serve walk-ins from multiple locations in a single dashboard, helping balance demand and shorten lines.

Convert Every Interaction

- **Seamless Meeting Connections:** The moment a virtual walk-in is accepted, a meeting room and code is created—easily connecting the customer with the advisor.
- **Global Wait Times:** Customers see shorter wait times, giving them confidence they'll be served quickly and reducing frustration or the chance they'll drop off.



1. Dan Mitchell

Estimated wait time: 18 minutes



2. Brandi Black

Estimated wait time: 7 minutes

Optimize Staffing and Costs

- **Staff Pooling Across Branches:** Route overflow from busy locations to advisors with availability elsewhere, maximizing workforce capacity without adding headcount.
- **More Opportunities for Staff:** With access to walk-ins from across your branch network, advisors stay productive, meet more clients, and drive more revenue.

Flexible Service Access

- **Specialists Available Anywhere:** Make your experts—mortgage, wealth, small business—available wherever they're needed. Every branch can deliver the full range of services, no longer limited by on-site FTEs.
- **Flexible Customer Experience:** Give customers the freedom to meet on their terms. Whether they need help immediately, prefer to schedule, want in-person service, or value the convenience of virtual banking, you can deliver more options without adding staff.

STAFF POOLING

Advisors can be assigned to multiple branches, giving walk-in clients access to a shared staff pool.

VIDEO BANKING

Use either Coconut Connect or Microsoft Teams to power your end-to-end video conferencing.

GLOBAL WAIT TIME CALCULATION

Display accurate, real-time wait times based on staff availability and traffic across all branches.

GRANULAR SELF CONTROL

Advisors can choose which branches they support for remote walk-ins, with their availability included in wait time calculations.

MEETING ROOM ACCESS CODE

Access codes are generated for in-branch virtual meetings, enabling staff to launch client calls directly from meeting rooms.

UNIFIED QUEUE

Staff can view walk-ins from their own branch and other participating branches in a single, unified queue on their dashboard.

VIRTUAL BANKING TOOLS

Automatic recording, transcripts, eSignatures, and real-time co-browsing—everything you need for effective remote meetings.

BRANCH AND STAFF CONTROL

Branches can choose whether remote staff may serve their walk-ins and whether their staff can support other branches.

INSTANT NOTIFICATIONS

Keep staff updated on queue changes and virtual meeting statuses via SMS or email for both in-branch and digital lines.

REAL-TIME ROOM AVAILABILITY

Enable staff to view and manage meeting room availability easily for in-branch virtual meetings.

**Intelligent Branch
Solutions**

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+1 (888) 257-1309

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Meet on Demand in action**

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