

Turn branch data into business impact.

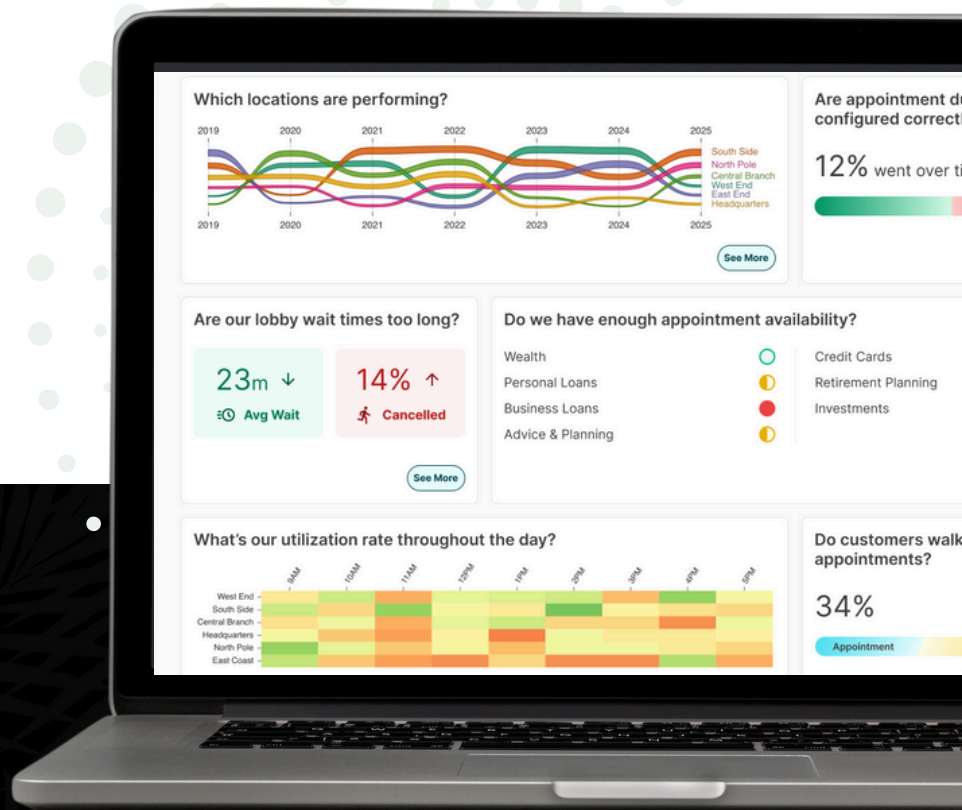
Coconut Analytics turns fragmented branch data into clear, actionable insights that help leaders increase deposits, improve customer experience, and optimize staffing efficiency.

Easily access curated dashboards that outline your **growth & revenue, operational efficiency, staff performance,** and **customer experience** to make real business impact!

Turn complexity into clarity with Analytics!

Key insights with Analytics:

- Growth & Revenue
- Staffing Optimization
- Advisor Performance
- Measurable Growth



Get the answers you need—Analytics make it all as easy as a breeze.

Growth & Revenue

- Which locations are driving the most revenue?
- How are my services trending?
- What are the outcomes of my meetings?

Operational Efficiency

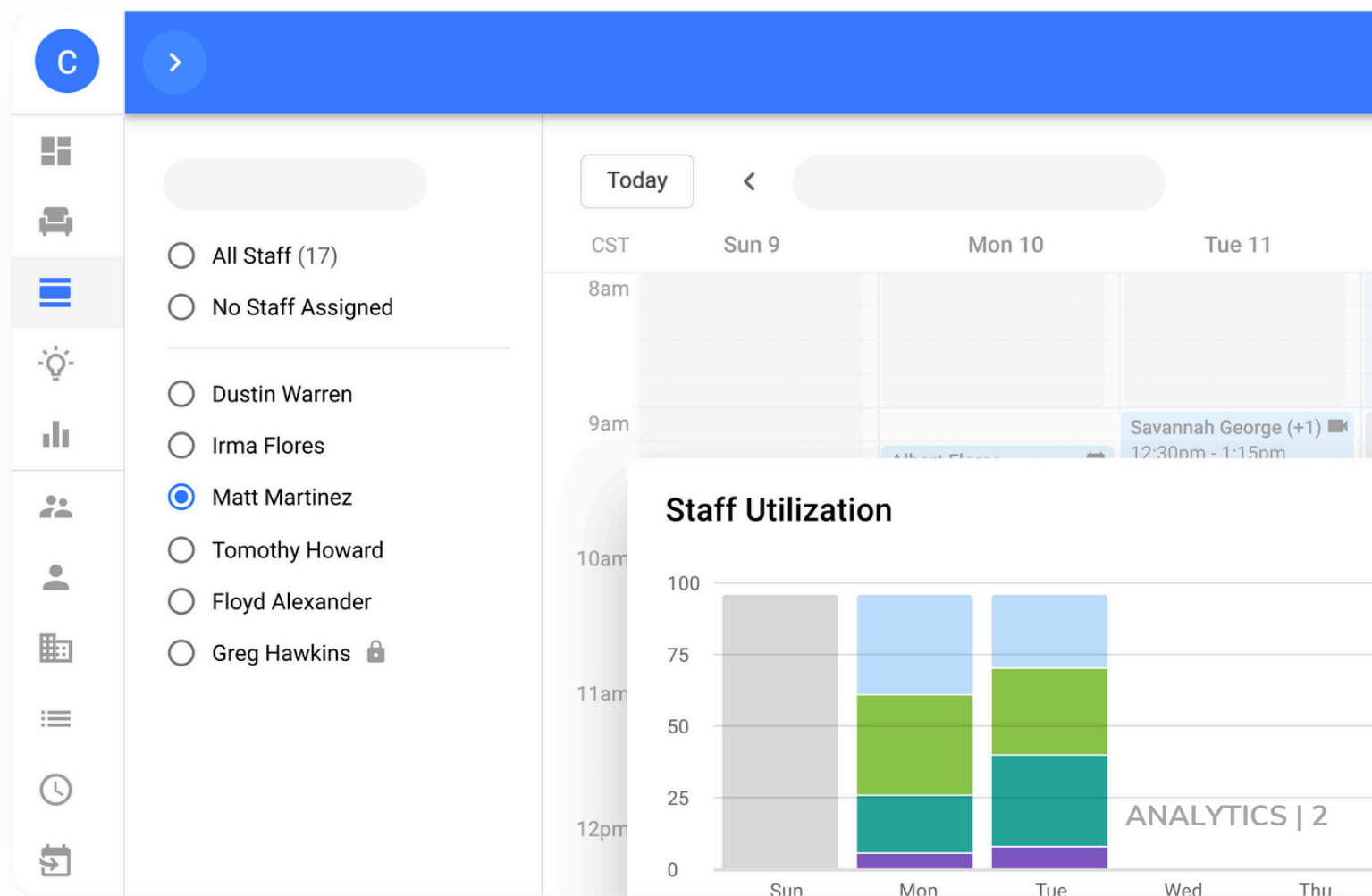
- Are appointment durations configured correctly?
- When are my busiest times?
- Is the team's workload balanced?

Staff Performance

- Who are my top performing staff?
- How busy are my staff?
- What do I need to coach my staff on?

Customer Experience

- What is my client feedback?
- How is my feedback trending?

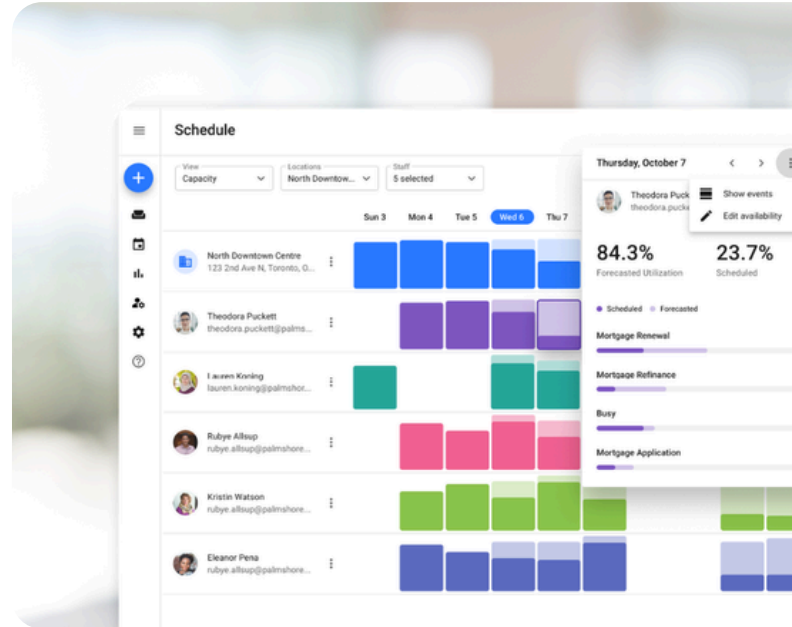


Two licence types designed to work together.

View License - For staff who need quick access to insights. Includes:

- Access to pre-built dashboards & reports
- Drill into metrics & explore visualizations
- Export reports to PDF or CSV
- Set up email alerts for scheduled exports
- Benchmarks (coming soon)

Best for: Branch managers, frontline staff, operational teams who monitor performance



Edit License - For staff who need to build, customize, and manage data. Includes everything in View, plus:

- Create and edit custom dashboards & reports
- Full data exports with audit logs
- Advanced filters and custom visualizations
- AI Insights — conversational data queries (coming soon)

Best for: Analysts, leadership teams, data power-users, anyone shaping insights for broader teams



**Intelligent Branch
Solutions**

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**Schedule a demo to see
Analytics in action**

BOOK A DEMO