

Branch Workforce Management

100+

hours
saved per branch every
year

Coconut Branch Workforce Management helps banks and credit unions forecast branch demand more accurately, reduce time spent scheduling, and place the right skills in the right branch at the right time.

By analyzing appointment demand, lobby traffic, and teller transactions, Coconut turns complex branch activity into precise forecasts and staffing recommendations—all in one connected system.



The only workforce management solution purpose-built for retail banking

Forecast with Confidence

Branch staffing is too important to run on outdated reports, spreadsheets, and instinct. Coconut gives teams a clearer way to plan by using real appointment, walk-in, and teller demand data already flowing through your branches.

Staff for Greater Impact

Effective staffing is not just about coverage. It is about putting the right people in the right place at the right time. Coconut connects staffing recommendations directly to demand, aligning advisor skills, specialties, and language capabilities—not just headcount.

Simplify Scheduling

Coconut brings forecasting, staffing recommendations, scheduling, absences, and appointment availability into one system, so managers can stop switching between tools and manually inputting data.

95%

accuracy
in branch demand
forecasts





Dive into Branch Workforce Management

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Demand Forecast

- Forecast branch demand using actual appointment, walk-in, and engagement data.
- Identify peaks by branch, role, service type, and channel.
- Generate forecast outputs that directly inform workforce planning decisions.



Workforce Planning

- Convert forecasted demand into time-of-day staffing recommendations.
- Align staffing to service intent, appointment type, and advisor expertise.
- Support budgeting, hiring, and FTE planning with demand-backed models.



Shift Management

- Schedule shifts and appointments in one connected workflow.
- Execute against the workforce plan with real-time agility.
- Reduce manual coordination, exports, and tool sprawl.



Analytics & Data

- Standardize reporting across the branch network.
- Connect staffing decisions to performance and ROI.
- Measure workforce impact on member experience and branch outcomes.