

# Coconut Software Media Kit

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# 01

## OVERVIEW

Coconut Software is creating real-time engagements between customers and financial institutions.

Launch Date	2011
HQ Location	Saskatoon, SK, Canada
Company Size	50-100
Target Customer	Financial Services
Funding Stage	Series B / \$39.4M CAD in total
Press Contact	<a href="mailto:marketing@coconutsoftware.com">marketing@coconutsoftware.com</a>
Press Assets	<a href="#">Download Assets</a>

# 02

## PRESS RELEASES

Constellation Partners with Coconut Software to Provide a Powerful, Integrated Platform	READ →
Out of 800 Applicants Coconut Software has been Chosen to Participate in the Google Accelerator for Women	READ →
Coconut Software Announces Agreement with Arvest Bank	READ →

## GENERAL

It is a fact that only 6% of tech companies have female CEO. Katherine Regnier is proud to be one of them.

Katherine is the CEO and Founder of Coconut Software, the leading provider of appointment scheduling and lobby management solutions for financial institutions. The company was noted as one of the top 11 Companies in Tech to watch in Canada in 2020 and recently out of 800 applicants was accepted into the North American Google Accelerator.

The Coconut platform is a holistic solution that offers appointment scheduling and lobby management, tailored to tackle the challenges and pain points of banks and credit unions. A few notable customers include Arvest Bank, Morgan Stanley, First Horizon Canadian Tire, TELUS, and the Royal Bank of Canada.

Katherine started her company with a \$5K loan – the demand for Coconut's solution grew and in fall of 2016, she decided it was time to raise money. Since then she has successfully raised over \$39.4M, has experienced 100% growth year over year for the past three years and is projecting to have 80 team members by the end of 2021.

## MANIFESTO

Coconut is about People, Passion, and Performance. We refuse to accept mediocrity of our product, our performance, and the results we deliver. It's not okay to say we can't because it's hard. We say yes, because it's an opportunity to explore and innovate. We don't make excuses. Together, as a team, we get it done and do it right.

## PRODUCT DESCRIPTION

Capture your customers' interest as soon as they take action. Coconut Software is the leading [appointment scheduling](#) and [lobby management](#) solution for financial institutions that want to improve the digital and physical engagement of their customers, members and staff. Our suite of cloud based solutions provide a way to seamlessly schedule, measure and manage customer, prospect and staff interactions so you can manage your workforce while improving engagement.

View our [Product Data Sheets](#)

### [Appointment Scheduling](#)

Engage prospects and customers quickly through a streamlined appointment booking system. Allow customers to book time with staff when, where, and however it's convenient for them. Reduce administrative tasks so that staff can focus on what really matters: building deeper relationships with customers.




### [Lobby & Visitor Management](#)

Optimize branch efficiency and improve your customers' experience through lobby and visitor management. Reduce friction in the lobby and lower wait times through a management software that fits in with your existing systems.

## MISSION

To become the recognized leader in appointment scheduling and lobby management for banks and credit unions.

## CASE STUDIES

<p><b>ROGUE CREDIT UNION</b> Digitally Transforming to Measure Member Engagement</p>	<p>READ </p>
<p><b>WECU</b> Managing Visitor Traffic (&amp; Expectations) Through A Pandemic</p>	<p>READ </p>
<p><b>INTERIOR SAVINGS</b> Improves CX and Efficiency With Real-Time Insights</p>	<p>READ </p>

## TESTIMONIAL

**“Working with the Coconut team has been a fantastic experience. Not only does Coconut offer best-in-the-industry appointment software but they also have an incredibly passionate and dedicated team. Our implementation was a great success, a testament to both the software and the excellent team at Coconut.”**

Nathan Heemskerk

Director of Member Solutions & Integrations  
Tandia Financial Credit Union

## PARTNERS

Reserve with 

  
**Finn AI**

CONSTELLATION

 **BACKBASE**

 **central 1**

  
CHANNELNET

  
salesforce

  
**DBSI**  
Banking Redefined™

# 05

## ARTICLES

Coconut Software partners with Google to help financial institutions drive increased branch traffic through search

READ →

Arvest Bank Partners with Coconut Software to Manage In-Bank Traffic

READ →

Coconut Software raises additional \$6.5 million CAD in series A funding

READ →

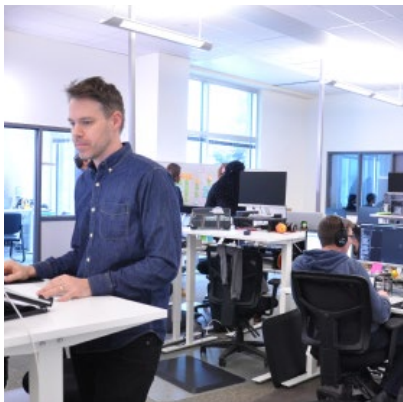
# 06

## AWARDS & RECOGNITION

2021	Great Places to Work Canada for Inclusion
2021	Great Places to Work Canada for Mental Wellness
2021	EY Entrepreneur of the Year 2021 Prairies Finalist
2020	Google for Startups Accelerator for Women Founders
2020	Shortlist for SaaS Product of the Year, Future of SaaS
2020	WESK Celebration of Achievement Award
2018	CIX Top 20 Innovative Companies
2018	Find-A-Way Raj Manek Award
2018	Women Entrepreneur of the Year – Prairie Region

# 07

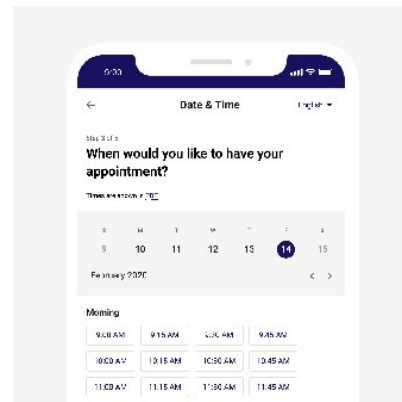
## MEDIA ASSETS



TEAM IMAGES [→](#)



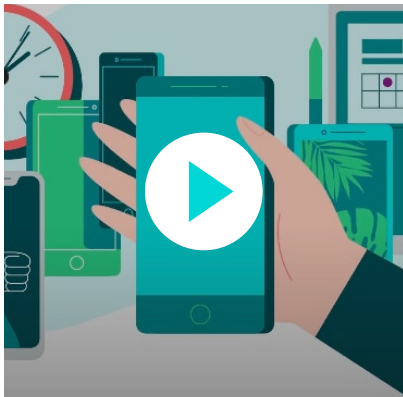
LOGOS [→](#)



PRODUCT IMAGES [→](#)

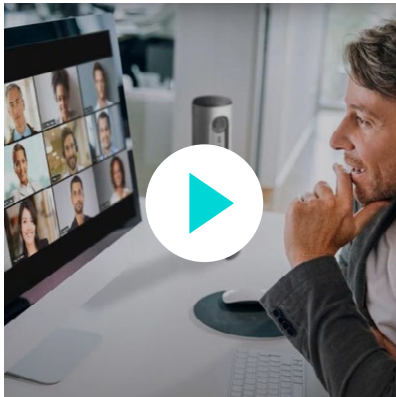
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## ADDITIONAL MEDIA



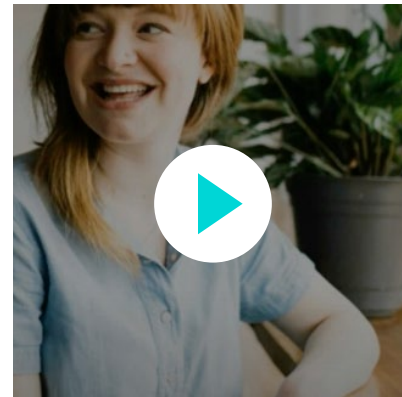
### COCONUT EXPLAINER VIDEO

Coconut Software takes care of scheduling logistics so your staff can focus on improving customer experience and building deeper connections.



### CUSTOMER ENGAGEMENT TACTICS IN THE AGE OF PANDEMIC BANKING WEBINAR

Social distancing is now a reality for banks and credit unions, with rising demands for digital solutions from the public, customers and employees alike.



### INDUSTRY PANEL DISCUSSION: EMBRACING A CUSTOMER-FIRST MINDSET

Banks and credit unions must bridge the gap between digital and physical channels and rethink traditional processes, in order to redefine Modern Banking.





## Katherine Regnier

### CEO & FOUNDER

Katherine was proudly born and raised in Saskatchewan. She has led the company through venture capital funding, strategic partnerships and rapid growth. Today, Coconut Software is trusted by large enterprises such as Arvest Bank, Morgan Stanley, First Horizon Canadian Tire, TELUS, and the Royal Bank of Canada.

In addition to running her business, she is passionate about giving back to Canada and wants to help pave the way for future entrepreneurs. As a strong advocate for women in tech, she regularly speaks at events sharing her experience and learnings with others.

[LinkedIn](#)

[Images of Katherine](#)



**ROMEO IULA**  
Chief of Product &  
Technology

Romeo completed a Computer Science degree at the University of Saskatchewan and immediately joined the world of startups. He eventually moved on to become a senior developer at zu before joining Coconut Software as Katherine's second employee. Since then, he has since played a significant role driving the success and culture of the organization.

[LinkedIn](#)

[Images of Romeo](#)

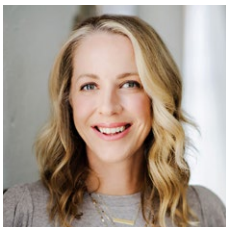


**JIM MACDONALD**  
Chief Revenue Officer

Jim leads the sales and marketing team at Coconut Software. Before joining Coconut, Jim was the Chief Marketing officer at UXP Systems (sold to Amdocs in 2018), the VP of Sales at CiRBA (now Densify), the EVP of Sales at Changepoint (sold to Compuware in 2004) and the SVP of Solect Technology Group, sold to Amdocs in 2000 as Canada's first unicorn transaction. Jim is active on multiple technology industry boards and is a graduate of Western University with a BSc in Computer Science.

[LinkedIn](#)

[Images of Jim](#)



**LINDSAY COURNOYER**  
Chief Marketing Officer

Lindsay leads the marketing team at Coconut Software. Before joining Coconut, Lindsay was the VP of Marketing at Axonify (acquired by Luminate Capital in May 2021). Lindsay is a member of Pavilion, a global community for high-growth leaders and holds an Honours BA from Western University and post graduate certificate from Humber College.

[LinkedIn](#)

[Images of Lindsay](#)



**MATT PETROW**  
VP, Finance &  
Human Resources

Matt leads the administration for Coconut Software as the company's Vice President of Finance and Human Resources. Before joining Coconut Matt was the Director of Finance for TCU Place Performing Arts & Convention Centre in Saskatoon where he was responsible for improving the efficiency of the facility, and introducing a new budgeting and strategic planning approach. Matt earned his Chartered Accountant designation while articling at Deloitte and also holds a Masters in Professional Accounting and Bachelor of Commerce Degree, both from the Edwards School of Business.

[LinkedIn](#)

[Images of Matt](#)



PRESS INQUIRIES: [marketing@coconutsoftware.com](mailto:marketing@coconutsoftware.com)



FACEBOOK



LINKEDIN



INSTAGRAM



GLASSDOOR



TWITTER