Reimagine Branches

Video + Appointment & Lobby Management + AI

Transform every branch into a **full-service branch**, optimize staff utilization, improve the visitor experience & NPS scores, boost branch ROI with Lobby Management, Appointment Management, In-Branch Video Banking, and AI Assistant for the Branch.

The Branch Operations Suite

What's Included

- ☑ Branch Utilization Analytics and Insights
- ☑ In-Branch Video Banking
- ☑ Lobby Management
- ☑ Appointment Management
- ☑ AI Assistant for Branch Staff
- ☑ Text Messaging

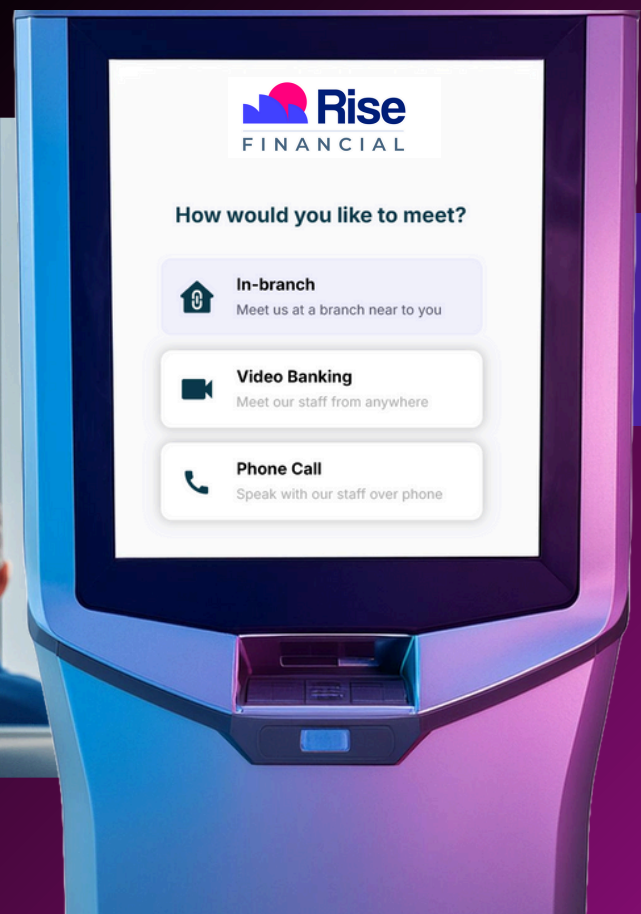An additional fee is applicable for integrations and add-ons;

Integrations and Add Ons Available

+ Loan Origination Systems

meridianlink ORIGENCE. temenos

Encompass WITHCLUTCH

+ Account Opening Systems

meridianlink opening

+ E-Sign Systems

DocuSign IMM/eSign

+ Reputation management

In-Branch Video Rooms

Kiosk-based Appointments

Rise
FINANCIAL

How would you like to meet?

In-branch
Meet us at a branch near to you

Video Banking
Meet our staff from anywhere

Phone Call
Speak with our staff over phone

Growth. Experience. Impact.

Analytics and Insights

Traffic insights create **20% service improvement efficiency**

Get holistic branch insights — traffic data, appointment volumes, service type, and more —to cut costs, optimize peak/non-peak hours staffing, enable the best visitor-expert match, and improve the overall visitor experience.

In-Branch Video Banking

Reduce branch walkouts/**lost opportunities by 70%**

Transform every branch into a **full-service branch** with In-Branch Video rooms or kiosks. Visitors can access experts in a personalized setting at any branch, and experts can serve multiple branches from anywhere ("Anywhere Staffing").

Appointment Management

Accommodate member schedules, maximize staff utilization

Maximize staff utilization by aligning staff allocation with service request types, reducing manual tasks (automated routing & self-service), and avoiding double bookings (real-time calendar sync). Reduce visitor no-show rates with easy appointment scheduling/ rescheduling, automated reminders, and virtual appointment options via phone or video.

Lobby Management

Reduced wait times & **30% boost in visitor satisfaction** with remote check-ins

Enable branch visitors to check-in/join the branch queue remotely or at an on-site kiosk. Visitors receive next-in-line alerts and live queue updates via Text or on the kiosk. Optimize staff utilization and member experience with insights from lobby traffic data, scheduled appointment volumes, service type requests, and more. Reduce branch walkouts and wait times.

AI Assistant for Branch Staff

90% query containment from branch staff to back office/experts

Reduce staff training & turnover with ChatGPT-like AI Assistant that helps your staff answer visitor questions from your documents [policies, procedures, training manuals, etc.] quickly and accurately. Also helps maintain compliance and improve visitor experience/NPS scores.

Trusted by 600+ Credit Unions

Xplore FEDERAL CREDIT UNION

60%
Increase in the number of accounts opened with In-Branch Video Banking

49%
Loans Funded through In-Branch Video

70%
Reduction in lost opportunities (due to excessive wait time) with In-Branch Video

84%
Growth in booked loans/loan applications

Resource One

Quick Implementation

Start using Eltropy for your branch to increase staff utilization, reduce operational costs, and improve visitor experiences.

Get Started Today

team@eltropy.com