Agent IQ | ROCKLAND TRUST BANK

Case study

Rockland Trust scales digital relationship banking with YourBanker

Rockland Trust used Agent IQ to bring personal banker relationships into digital banking, helping account holders connect with a banker of their choice while scaling meaningful conversations over time.

Headquarters

Brockton, MA

Asset size

Approx. $20B



Results at a glance

10K+

account holders used YourBanker in the first 45 days

20K+

account holders adopted YourBanker within the first 90 days

153K+

account holders using YourBanker by the second year

229,993

users by March 2026

3.6X

growth in annual Q2 conversations from 2021 to 2025

293,277

Q2 conversations in 2025

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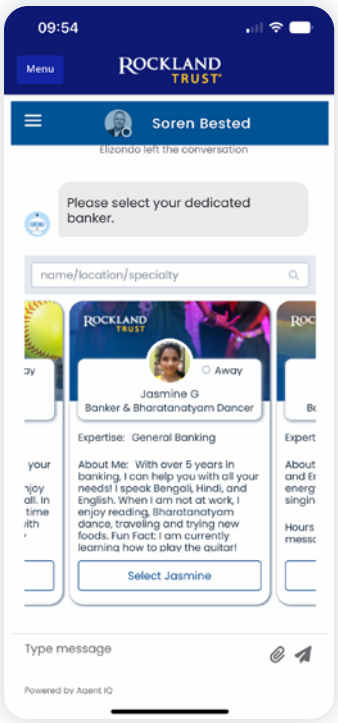
The challenge

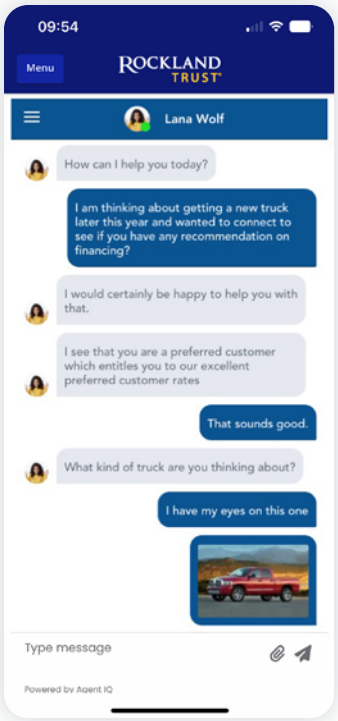
Rockland Trust has long differentiated itself through relationship-based banking and high-touch personal service. As more account holder activity shifted into mobile and online banking, the bank saw a strategic opportunity: extend that same relationship model into digital channels.

The challenge was not simply to add chat. Rockland Trust needed a digital experience that felt personal, persistent, and connected to the banker relationship.

What Rockland Trust needed

- Bring branch-style relationships into digital banking
- Let account holders choose and return to a personal banker
- Preserve conversation history and context over time
- Scale meaningful conversations without creating a live-chat burden





The solution

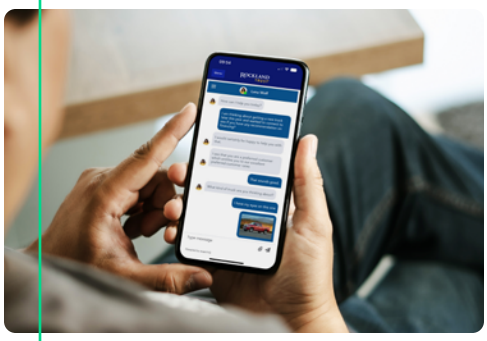
Rockland Trust partnered with Agent IQ to launch YourBanker, a digital relationship banking experience embedded directly within Q2 mobile and online banking.

YourBanker allows account holders to select a personal banker and continue secure, asynchronous conversations over time. Unlike traditional live chat, the experience is designed around continuity. Account holders can return to the same banker instead of starting over with a different representative each time.

High-touch, personal service at scale

YourBanker made digital banking feel less like a service queue and more like a relationship.







How YourBanker works

1. Choose a banker

Account holders select a banker from within digital banking based on banker profiles and preferences

2. Start a secure conversation

Because YourBanker is embedded in Q2, account holders can engage from the mobile or online banking experience they already use

3. Continue with context

Conversations persist over time, so account holders do not need to repeat their story or re-establish context

4. Expand support when needed

Bankers can bring in subject matter experts, support more complex needs, and use insights from conversations to better understand account holder priorities

Adoption proof

Rockland Trust launched YourBanker without a significant marketing push. Adoption quickly exceeded expectations.

Launch period
- 10K+ account holders used YourBanker in the first 45 days

First 90 days
- 20K+ account holders adopted the service

Second year
- 153K+ account holders were using YourBanker

March 2026
- 229,993 users

Adoption continued well beyond launch, showing that account holders were not simply trying a new feature. They were returning to a digital relationship channel that gave them a personal point of contact







Sustained engagement

Adoption was only part of the story. The stronger proof point is that account holders continued using YourBanker for real conversations with the bank.

Annual Q2 conversations

- 2021: 81,271
- 2022: 183,551
- 2023: 228,864
- 2024: 260,533
- 2025: 293,277

3.6X conversation growth

Annual Q2 conversations grew from 81,271 in 2021 to 293,277 in 2025

Expanding the relationship model

Personal: Account holders can choose a banker and continue building that relationship over time

Persistent: Conversation history stays intact, helping bankers serve with context instead of starting over

Scalable: Asynchronous messaging allows bankers to support large books of relationships without the pressure of real-time live chat

Broader platform value

As the program matured, Rockland Trust expanded how it used Agent IQ across more service and relationship use cases.

- Anonymous web chat for unauthenticated visitors
- Co-browsing to guide account holders through digital experiences
- Video chat for more personal support moments
- Real-time translation for 100+ languages
- Small business banking support for approximately 25,000 SMB clients
- Conversation analytics to understand account holder needs

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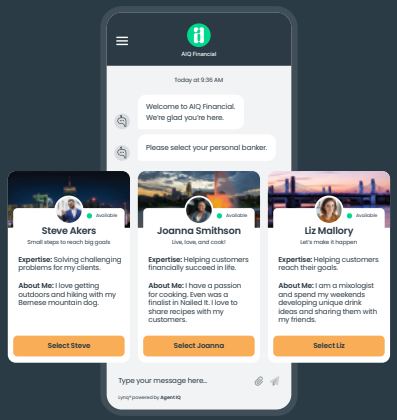
Takeaway

Rockland Trust shows that digital banking can strengthen relationship banking, not weaken it.

With Agent IQ, Rockland Trust gave account holders a personal banker inside digital banking, preserved context across conversations, and created a scalable way to keep human relationships at the center of digital engagement.

> The Agent IQ platform combines the best of AI support and lets the power of our human bankers shine through.

—**Patrick Myron**
SVP, Rockland Trust



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