

Metropolitan Commercial Bank, Rockland Trust & Salem Five Bank Reveal Successful CX Strategies to Drive Digital Growth

Agent IQ, ebankIT, Finotta and The NBS Group host exclusive workshop on the future of customer experience in banking

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/EINPresswire.com/ -- Focused on the personal element of banking relationships, industry innovators Agent IQ, ebankIT, Finotta and NBS will host an exclusive half-day workshop, [Innovate to Compete 2024](#), to explore how leading financial institutions are leveraging technology to enhance customer engagement.



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To stay competitive, relying solely on differentiated products or services is no longer enough. Financial institutions must move beyond legacy methods to attract and retain customers. Ultimately, the future lies in meeting customer expectations and preferences, enabled by technology that supports engagement through digital channels. This approach allows financial institutions to not only enhance the customer experience but also stand out in an increasingly crowded market.

During this deep-dive discussion, attendees will hear from bank executives on how their bank delivered a personalized experience across every digital channel; connected and engaged with customers outside the branch; and personalized financial guidance to drive digital growth and retention.

Panelists include:

- Jean-Philippe Gerbi, SVP, Chief Digital Officer for Metropolitan Commercial Bank,
- Nick Carr, Retail Project Manager for Rockland Trust, and
- Rob Ames, Head of Digital Delivery for Salem Five Bank.

Attendees will also hear from industry leaders on how to supercharge the customer experience and how technology has allowed financial institutions to support customers whenever and however they choose to engage with the bank.

The event will be held June 26, 2024, at The Westin Copley Place in Boston. For more information and to register, [visit our site](#). Attendees are also invited to Fenway Park the afternoon before on June 25 at 4 p.m. for the Boston Red Sox versus Toronto Blue Jays.

About Metropolitan Commercial Bank

Metropolitan Commercial Bank (the "Bank" or "MCB") is a full-service commercial bank. The Bank provides a broad range of business, commercial, and personal banking products and services to individuals, small businesses, private and public middle-market and corporate enterprises and institutions, municipalities, and local government entities. The Bank is a New York State chartered commercial bank, a member of the Federal Reserve System and the Federal Deposit Insurance Corporation, and an equal housing lender. The parent company of Metropolitan Commercial Bank is Metropolitan Bank Holding Corp. (NYSE: MCB). For more information, please visit the Bank's website at MCBankNY.com.

About Salem Five Bank

Salem Five Bancorp is the holding company of Salem Five (www.salemfive.com), a mutual bank founded in 1855. Whatever the need and whatever the goal, Salem Five's banking, investment and insurance professionals have the expertise to move customers forward. Salem Five has \$7 billion in assets and 34 retail branches in Essex, Middlesex, Norfolk and Suffolk counties. Divisions include Salem Five Mortgage Company, one of the largest mortgage lenders headquartered in New England; Salem Five Wealth Management & Trust offering fiduciary wealth management services to institutions and high-net-worth individuals; and Salem Five Insurance Services, which provides personal and commercial insurance. Salem Five deposits are insured through the FDIC. Salem Five Mortgage Company's NMLS # is 4662. Equal Housing Lender. Securities are offered through LPL Financial, member FINRA/SIPC. Life insurance products are offered through LPL Financial or its licensed affiliates. Insurance and investment products are not FDIC insured, not bank guaranteed, may lose value, not a deposit, and not insured by any federal government agency.

About INDB and Rockland Trust

Independent Bank Corp. (NASDAQ Global Select Market: INDB) is the holding company for Rockland Trust Company, a full-service commercial bank headquartered in Massachusetts. With retail branches in Eastern Massachusetts and Worcester County as well as commercial banking and investment management offices in Massachusetts and Rhode Island, Rockland Trust offers a wide range of banking, investment, and insurance services to individuals, families, and businesses. The Bank also offers a full suite of mobile, online, and telephone banking services. Rockland Trust was named to The Boston Globe's "Top Places to Work" 2023 list, an honor earned for the 15th consecutive year. Rockland Trust has a longstanding commitment to equity

and inclusion. This commitment is underscored by initiatives such as Diversity and Inclusion leadership training, a colleague Allyship mentoring program, and numerous Employee Resource Groups focused on providing colleague support and education, reinforcing a culture of mutual respect and advancing professional development, and Rockland Trust's sponsorship of diverse community organizations through charitable giving and employee-based volunteerism. In addition, Rockland Trust is deeply committed to the communities it serves, as reflected in the overall "Outstanding" rating in its most recent Community Reinvestment Act performance evaluation. Rockland Trust is an FDIC member and an Equal Housing Lender.

About Agent IQ

Agent IQ is the pioneer in digital relationship banking, providing personal and persistent customer engagement solutions supported by a powerful built-in AI that supports bankers and strengthens customer relationships. Blending the best of human emotion and empathy with the speed and efficiency of computer intelligence, the Lynq™ platform empowers FIs with the ability to provide proactive support and real-time insights to improve customer satisfaction, enhance service efficiencies, and increase profitability, while reducing the cost of serving. For more information, visit www.agentiq.com.

About ebankIT

ebankIT enables banks and credit unions to deliver the same humanized, personalized, and accessible digital experience on mobile, web, and voice banking, as well as whatever future channels may come next. Enhanced with flexible and robust full omnichannel capabilities, ebankIT Digital Banking Platform offers a fast and seamless digital banking transformation. With extensive customization capacity and a continuous focus on human interactions, ebankIT future-proves the digital strategy of banks and credit unions, empowering them with a truly customer-first approach. For more information visit www.ebankit.com.

About The NBS Group

With roots dating back to 1988, The NBS Group is the industry's trusted partner in transforming banking with a tailored combination of strategy, technology and performance improvement services. For more information, visit www.thenbsgroup.com.

About Finotta

Built by bankers, Finotta's Personified platform is designed to assist in key financial goals like starting an emergency fund, paying off debt, or wealth building, providing timely, impactful suggestions and strategies to make your financial institution top of wallet and top of mind. For more information, visit www.finotta.com or follow us on LinkedIn.

Mary York

York Public Relations

+1 706-280-9267

[email us here](#)

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