# DIGITAL TRANSFORMATION AND PARTNERSHIPS IN FINANCIAL SERVICES



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# Introduction

Digital Transformation and Partnerships in Financial Services Training Course builds the strategic capability that banking and financial services leaders need to modernise their business through technology and ecosystem partners. Financial institutions rarely transform alone. They combine internal modernisation with fintech partnerships, open banking interfaces, and platform collaborations. Each partnership also introduces new risk: integration failure, regulatory exposure, and unclear accountability. This course develops the discipline that prevents those outcomes. It covers transformation strategy, digital operating models, and platform economics. Furthermore, it applies fintech partnership models, open banking, and API strategy. In addition, it develops governance, outsourcing risk, and performance management. As a result, participants transform and partner with confidence.

# Digital Transformation and Partnerships in Financial Services Course Objectives

- Explain digital transformation drivers in financial services.
- Assess digital maturity and prioritise transformation initiatives.
- Design digital operating models and channel strategies.
- Apply open banking and API-based integration models.
- Evaluate fintech partnership and ecosystem options.
- Structure partnership agreements and commercial models.
- Apply outsourcing and third-party risk management standards.
- Apply regulatory, data privacy, and security requirements to partnerships.
- Monitor partnership performance using KPIs and governance routines.
- Build transformation roadmaps, business cases, and benefits tracking.

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## Course Methodology

- Interactive lectures with real transformation and fintech partnership cases.
- Digital maturity and process mapping workshops.
- Partnership structuring and risk assessment exercises.
- Governance, API strategy, and performance measurement practice.
- Structured peer review with facilitator feedback on transformation plans.

## Who Should Take This Course

- Banking and financial services executives.
- Digital transformation and innovation leads.
- Product and channel managers.
- Fintech partnership and business development staff.
- Risk, compliance, and third-party oversight officers.
- Consultants advising on financial sector transformation.

## Digital Transformation and Partnerships in Financial Services Course Outlines

## Day 1: Digital Transformation Strategy in Financial Services

- Transformation drivers: customer expectations and competition.
- Digital maturity models for financial institutions.
- Legacy modernisation and core banking transformation.

- Digital operating models and organisational design.
- Customer journey mapping and channel strategy.
- Business case development and benefits realisation.
- Case study: assessing a bank's digital maturity and priorities.

## Day 2: Platforms, Open Banking, and API Strategy

- Platform business models and ecosystem economics.
- Open banking frameworks and regulatory drivers.
- API design, security, and lifecycle management.
- Data sharing standards and consent management.
- Embedded finance and banking-as-a-service models.
- Integration architecture and middleware considerations.
- Workshop: designing an open banking partnership interface.

## Day 3: Fintech Partnerships and Ecosystem Models

- Partnership models: distribution, referral, and joint ventures.
- Fintech assessment and due diligence frameworks.
- Commercial models: revenue share, subscription, and fee-based.
- Build, buy, or partner decision analysis.
- Negotiating partnership terms and performance commitments.
- Pilot design, scaling, and exit planning.
- Workshop: structuring a fintech partnership and commercial model.

## Day 4: Third-Party Risk, Regulation, and Controls

- Outsourcing and third-party risk management frameworks.

- Regulatory expectations for outsourcing and cloud services.
- Data privacy, confidentiality, and cross-border data issues.
- Cybersecurity, resilience, and business continuity requirements.
- Control design, audit rights, and service level agreements.
- Concentration risk and exit strategy design.
- Workshop: assessing a third-party partnership risk profile.

## Day 5: Governance, Performance, and Value Realisation

- Partnership governance structures and joint committees.
- KPI frameworks and partnership performance scorecards.
- Transformation roadmap design and milestone tracking.
- Change management, culture, and capability building.
- Benefits tracking and value realisation reviews.
- Reporting to boards and regulators on partnership arrangements.
- Course review, assessment, and action planning.

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## Conclusion

By successfully completing Digital Transformation and Partnerships in Financial Services, participants will gain a thorough understanding of transformation strategy, platforms and open banking, fintech partnership models, third-party risk and regulation, and governance, performance and value realisation. They will also acquire practical skills in financial services transformation strategy and maturity assessment, open banking and API partnership design, fintech partnership structuring and commercial modelling, and third-party risk management, governance and performance monitoring. In addition, the course prepares them to modernise financial services through controlled, well-governed and measurable partnerships. Gentex Training Center delivers this programme with a strong focus on applied financial sector transformation and governance-ready delivery.

## FAQs for Digital Transformation and Partnerships in Financial Services course

### Q1 What is the "Digital Transformation and Partnerships in Financial Services" course about?

It is a five-day programme on modernising financial services through technology and ecosystem partners. It covers transformation strategy, platforms and open banking, fintech partnership models, third-party risk and regulation, and governance, performance and value realisation.

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## Q2 What are the key benefits of the "Digital Transformation and Partnerships in Financial Services" course?

Participants transform and partner with stronger structure and control. The course improves digital maturity assessment and prioritisation, sharpens open banking and API design, strengthens fintech due diligence and commercial modelling, improves third-party and outsourcing risk management, and raises partnership governance and performance reporting quality.

## Q3 What skills will I gain from the "Digital Transformation and Partnerships in Financial Services" course?

Participants gain financial services transformation strategy and maturity assessment, open banking and API partnership design, fintech partnership structuring and commercial modelling, and third-party risk management, governance and performance monitoring. These four skills cover the practical core of this work.

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# Q4 What tools, methods, or standards are covered in the "Digital Transformation and Partnerships in Financial Services" course?

The course covers digital maturity models, legacy modernisation and core banking transformation, digital operating model design, customer journey mapping, business case and benefits realisation, platform business models and ecosystem economics, open banking frameworks, API design, security and lifecycle management, data sharing and consent management, embedded finance and banking-as-a-service, integration architecture and middleware, partnership models including distribution, referral and joint ventures, fintech assessment and due diligence, revenue share, subscription and fee-based commercial models, build-buy-partner decision analysis, partnership negotiation and performance commitments, pilot design and scaling, outsourcing and third-party risk management frameworks, regulatory expectations for outsourcing and cloud, data privacy and cross-border data requirements, cybersecurity and resilience standards, control design and audit rights, service level agreements, concentration risk and exit strategy design, partnership governance structures, KPI frameworks and partnership scorecards, transformation roadmaps and milestone tracking, change management and capability building, benefits tracking, and board and regulatory reporting on partnership arrangements.

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## Q5 How is the "Digital Transformation and Partnerships in Financial Services" course applied in real-world practice?

Participants apply the methods to real and simulated financial institutions. They assess digital maturity and set priorities, map customer journeys, design open banking interfaces and API strategies, evaluate fintech partners through due diligence, structure commercial and partnership terms, assess third-party and outsourcing risk, design controls and service level agreements, build partnership governance and scorecards, plan transformation roadmaps, and track benefits for boards and regulators. Many leave with a digital maturity assessment framework, a partnership structuring template, and a partnership governance scorecard ready to use.