

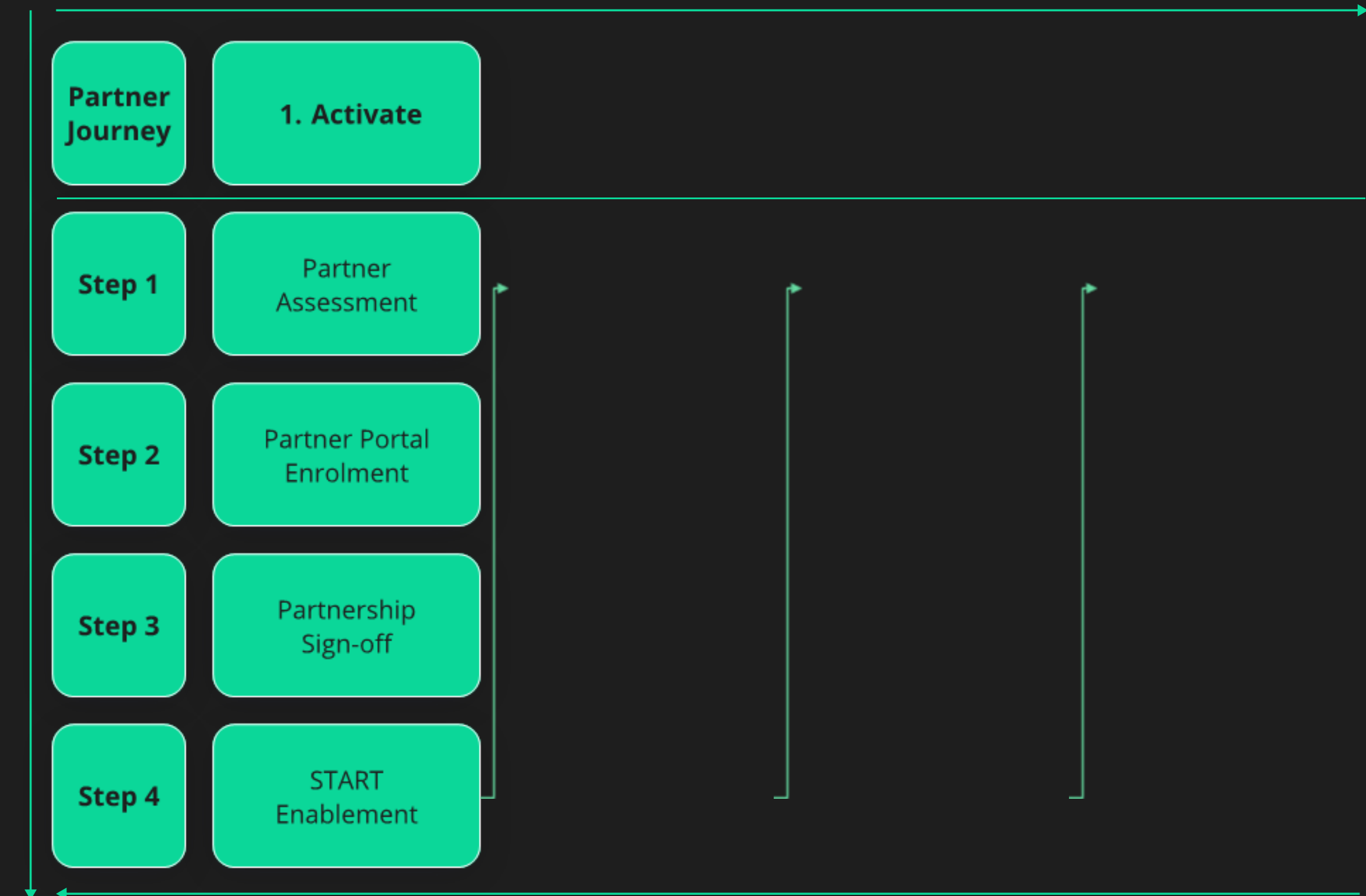
# Partner onboarding journey with FintechOS

Irina Olanescu  
Partner Success Director  
FintechOS

Dan Bratanu  
Business Analysis and Solution Architecture  
FintechOS

# The journey

## FTOS Partners Onboarding Journey

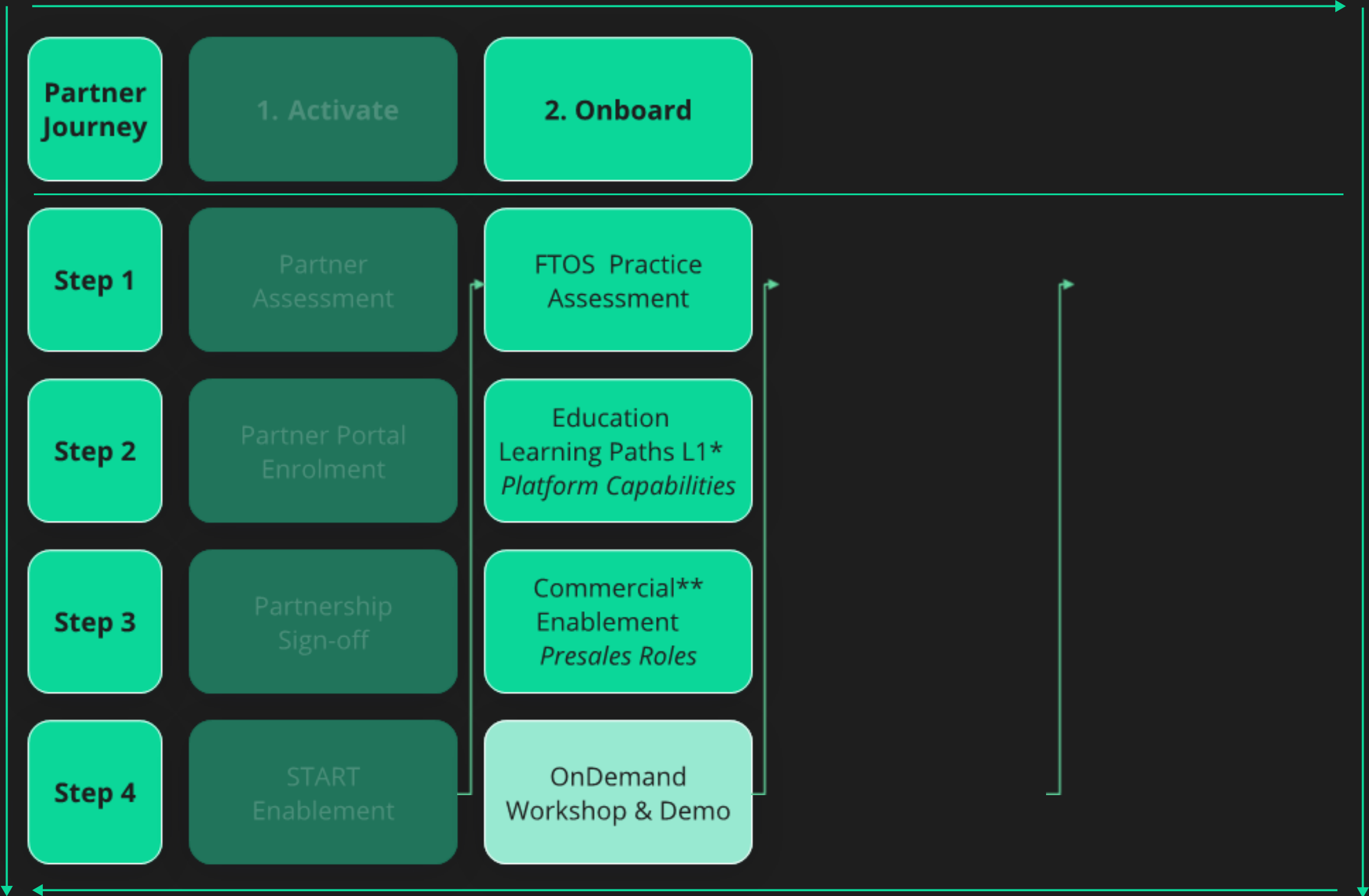


**The FintechOS partner journey reflects the partners' evolution in relation with their expertise in the FintechOS platform, and the maturity and predictability of their engagement.**

\*Training Paths L1 : Digital Self-led courses & Instructor-led boot camps  
\*\* Dedicated enablement programs based on partners' profile

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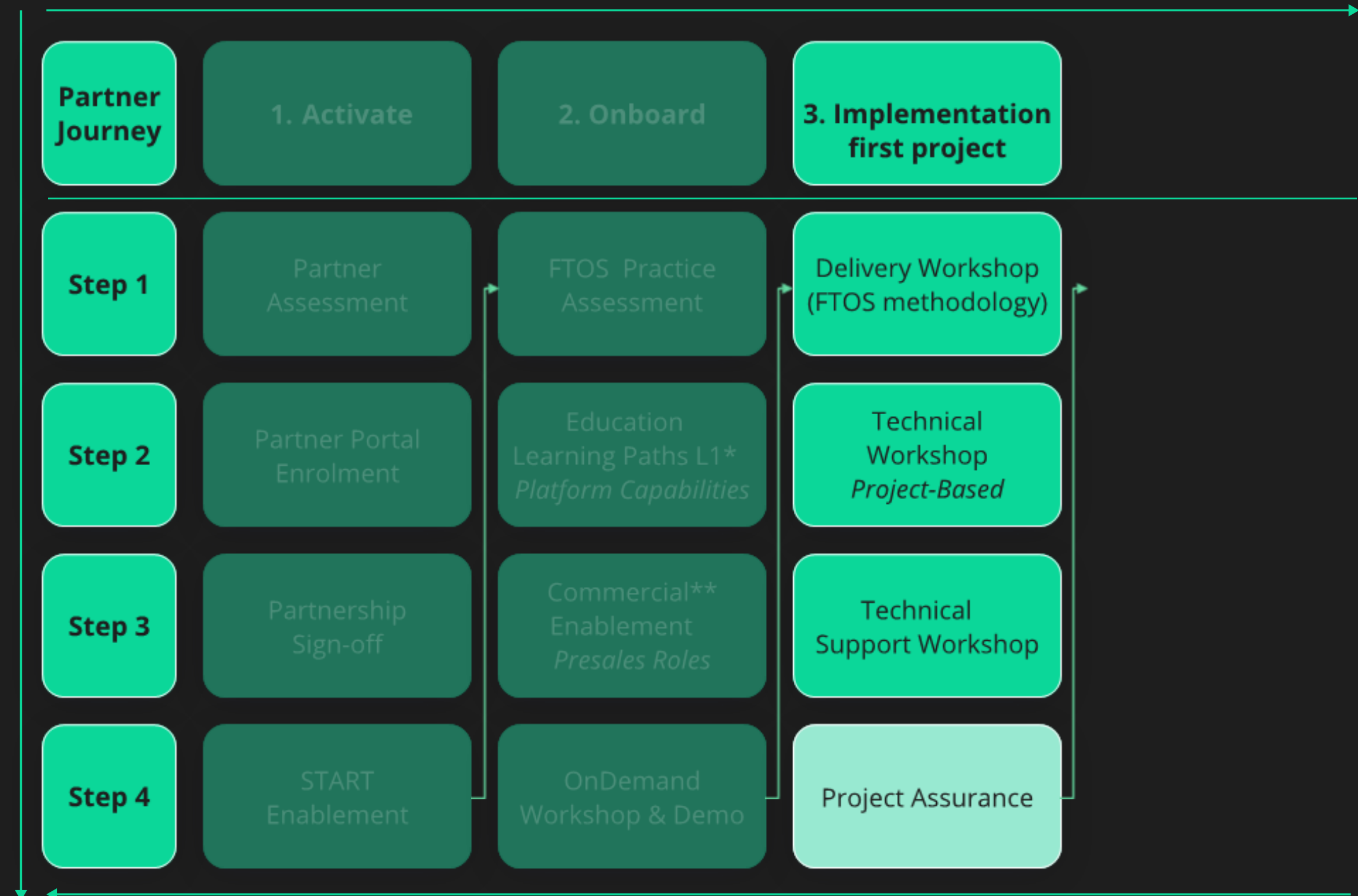
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**Starting with an initial assessment of joint opportunities of a FintechOS practice build, the partner walks through a guided step-by-step path, from shaping initially the platform fundamental knowledge, to a more sophisticated approach of building specific capabilities, either in vertical solutions or in products.**

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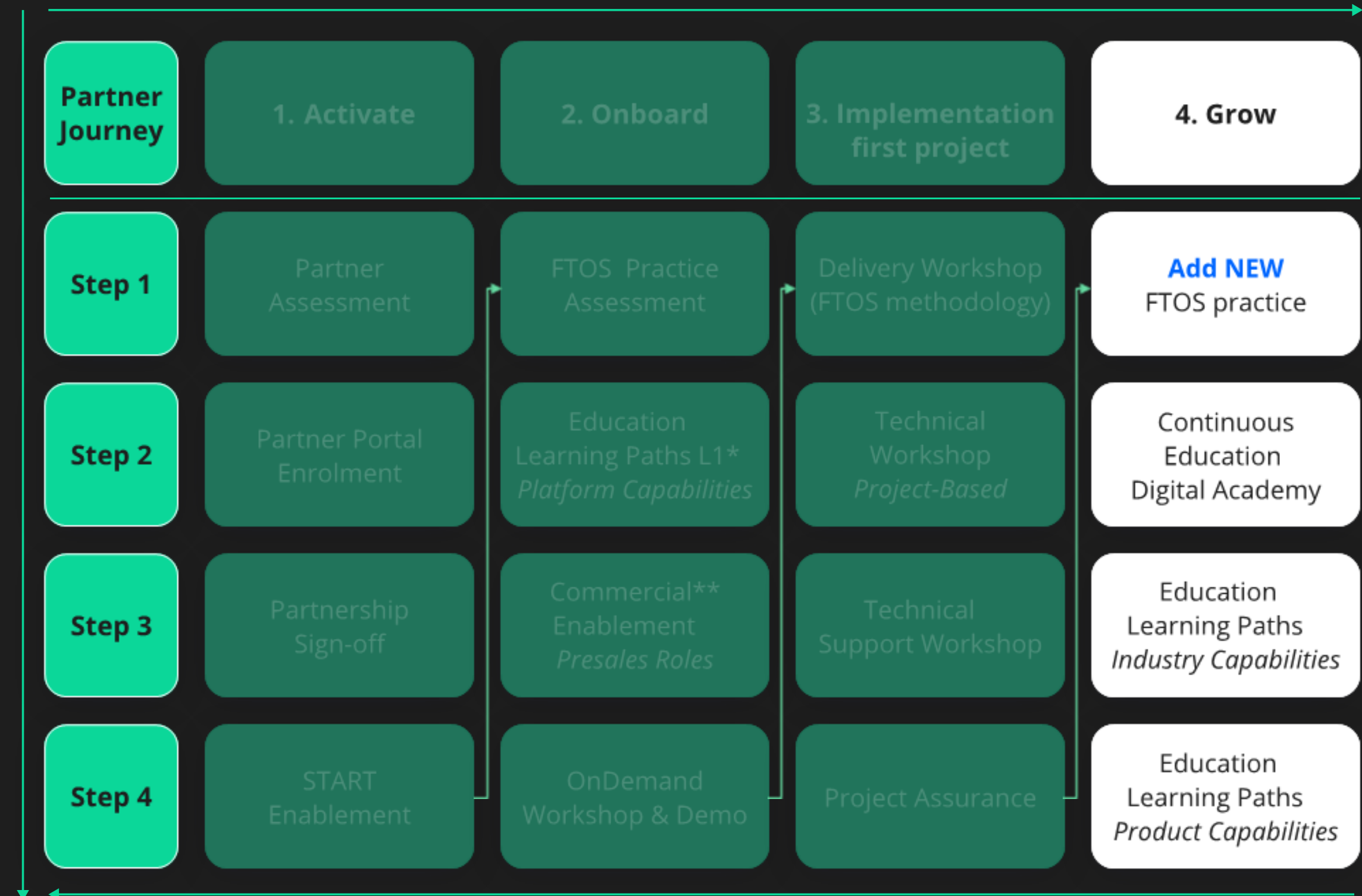
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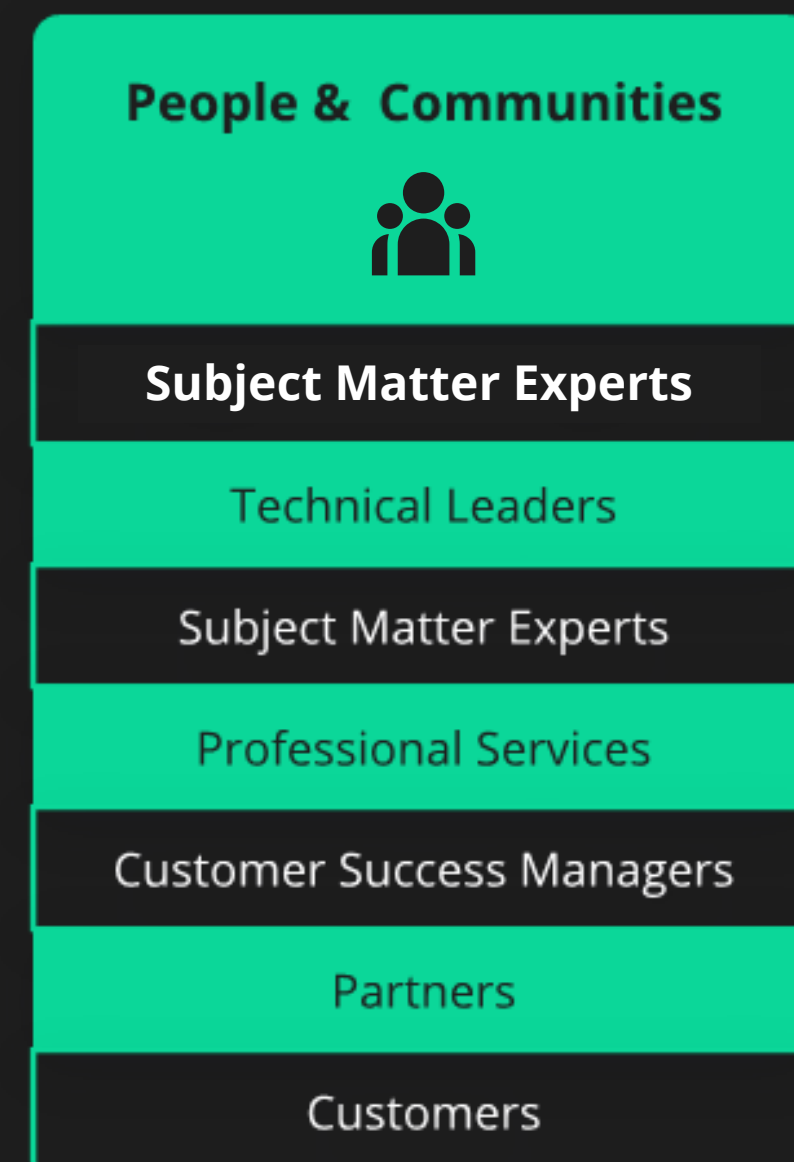
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**The continuous learning offered through the FintechOS Digital Academy keeps open the communication streamline with our partner for sharing our expertise, best practices and knowledge.**

**FintechOS ecosystem means useful resources at the hand of our partners.**





# Resources



**Inside FintechOS Ecosystem we offer to our partners the access to a remarkable pull of resources that help them build unique capabilities for facing a highly competitive industry.**




**In our communities we put together partners with subject matter experts, experienced professionals and technology specialist for sharing experience, learning and develop by creating together new solutions and approaches.**

# Resources

People & Communities 	Knowledge Transfer 
Partner Success Managers	Platform knowledge transfer
Technical Leaders	Platform Road Map
Subject Matter Experts	New Releases & Features
Professional Services	Competitive Differentiators
Customer Success Managers	Built-in Features
Partners	Industry Business Practice
Customers	Project Assurance

**Platform roadmap and new features are visible to our partners and give them visibility and predictably of their business within a very dynamic and demanding market.**

# Resources

People & Communities 	Knowledge Transfer 	Best Practices 
Partner Success Managers	Platform knowledge transfer	Scoping / Analysis
Technical Leaders	Platform Road Map	Implementation
Subject Matter Experts	New Releases & Features	Industry Business Scenarios
Professional Services	Competitive Differentiators	Products Specifics
Customer Success Managers	Built-in Features	Configuration & Integrations
Partners	Industry Business Practice	Project Management & Governance
Customers	Project Assurance	Technical Support

**Best practices are constantly shared with our partners for helping them to be more efficient and effective.**

**Project Assurance offers to our partners a safety belt for the unforeseen situations generated by the very up to speed environment we are acting in.**



# Enablement through a new Learning Platform

## Scaling through self-led onboarding

Instant access to role-based learning  
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## Accessibility

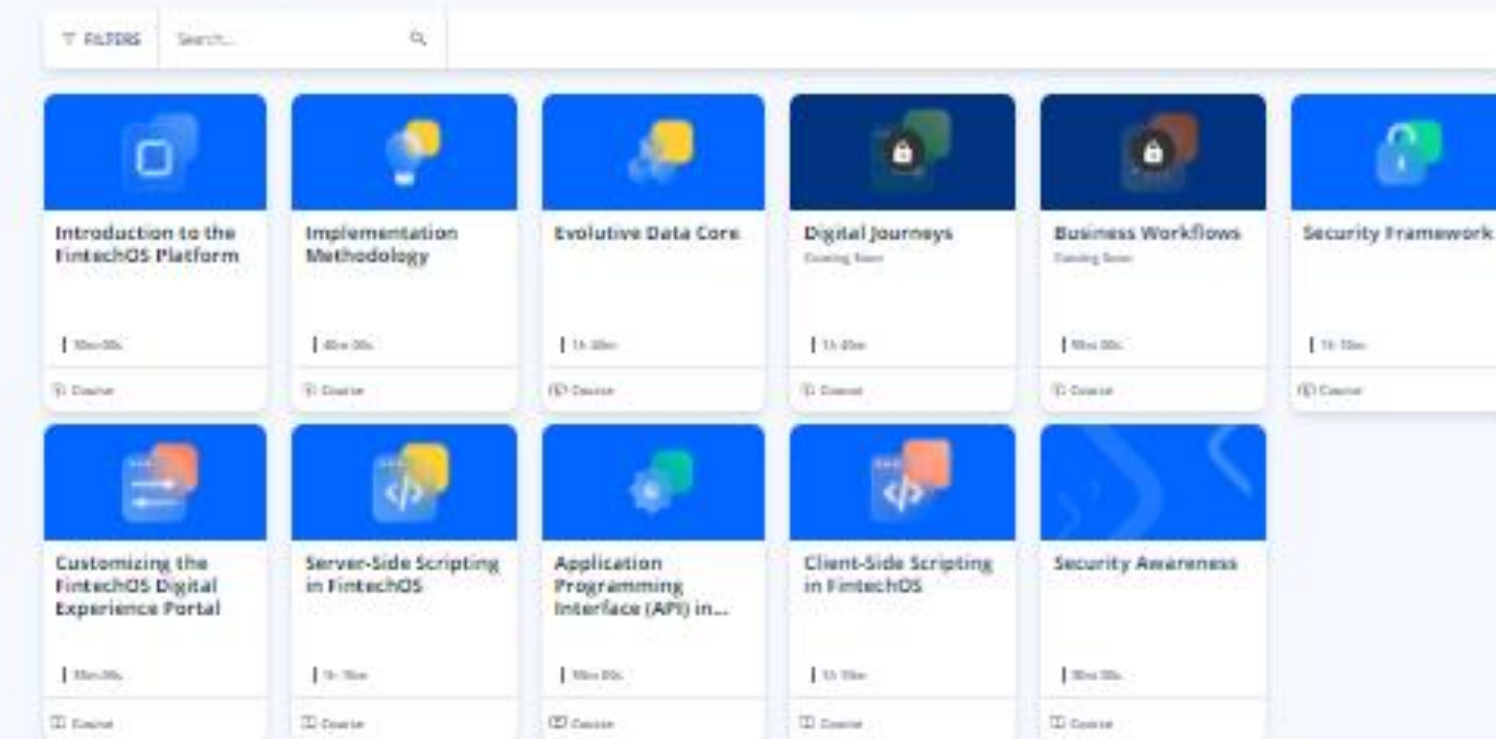
From micro-learning to customized, guided learning programs and certification tracking. From self-led training resources to instructor-led sessions.



### Learn, work, implement

Become a master in every detail of the FintechOS platform and operate at the speed of light. Impress your clients and stakeholders with the quality of your deliverables and boost your career up with our guided or self-learning courses.

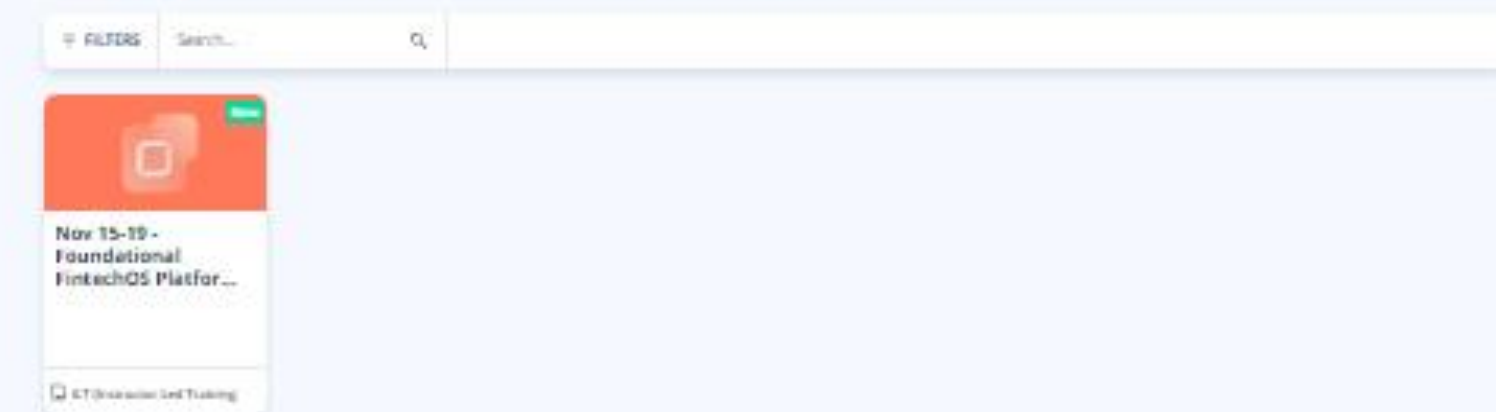
### Enroll and start right away with the latest courses available



### Start with our custom learning programs



### Keep an eye out for our soon to come instructor-led sessions



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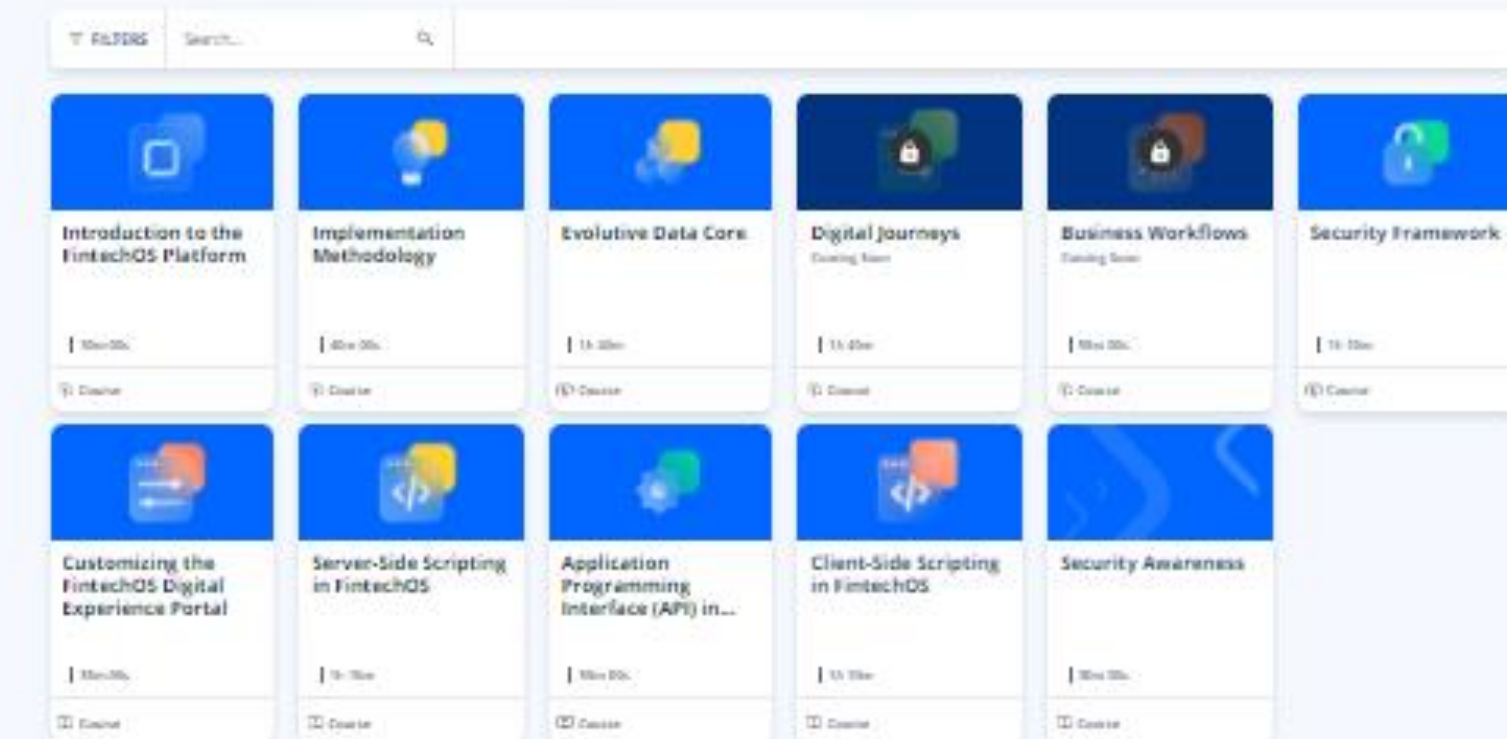
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## Business impact

Product-focused around foundational platform capabilities for Digital Consultants and Digital Developers. So you can endorse product accessibility and uncover relevant insights and key functionalities.



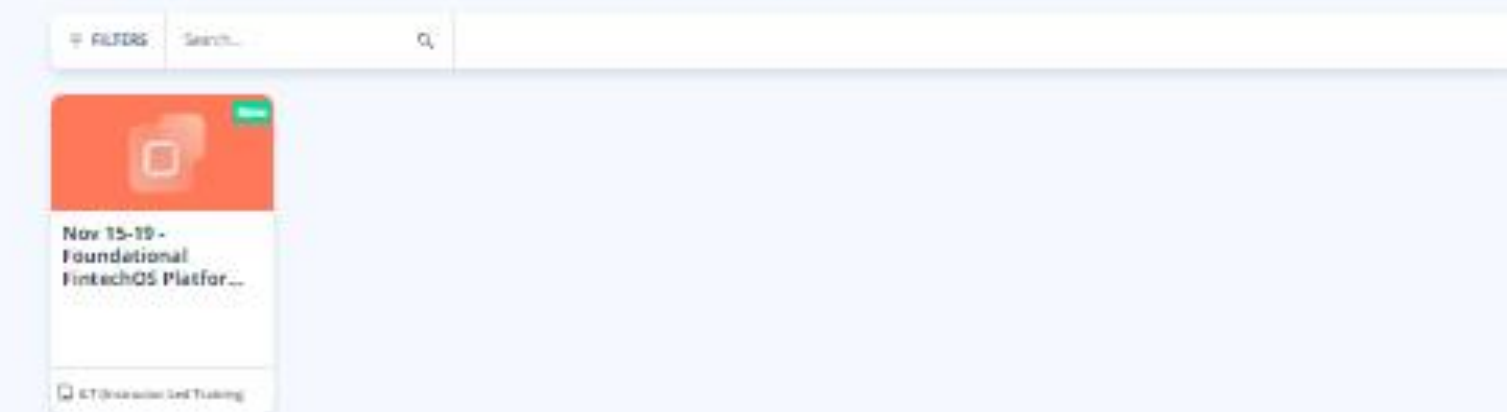
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# Why a New Academy?

The New Academy mission is to **enable Employees, Partners, Clients** to become **digital makers** to better implement **FintechOS Financial Solutions**, by delivering **role specific Self-Paced** or **Instructor Led Training courses** and **Certification programs**.



fintechOS  
academy

# New Academy Learning Plans - Roadmap



Instructor-Led  
Training (ILT)

Continuous enablement through new trainings on incremental approach

Self-Paced  
Training



## Level 4 - Learning Plan - Vertical Business Solutions → Certification Programs



Personal  
Finance

SME  
lending

Mortgages

\*new  
Vertical Business  
Solutions



Property

Commercial

Health

\*new  
Vertical Business  
Solutions

## Level 2 - Learning Plan - FintechOS Foundational Layer

Product  
Factory

C360 & Hyper-  
Personalization

Operational  
Ledger

## Level 3 - Learning Plan - Core Admin Capabilities & Extended Capabilities

Banking  
Core Admin  
Capabilities

Banking  
Extended  
Capabilities

Insurance  
Core Admin  
Capabilities

Insurance  
Extended  
Capabilities

## Level 1 - Learning Plan - Platform Capabilities (OS)

LIVE

### Self-Paced Training

Introduction to the  
FintechOS Platform

Implementation  
Methodology

Evolutive  
Data Model

Digital  
Journeys

Business  
Workflows

Security  
Framework

Customizing the  
FintechOS Digital  
Experience Portal

Server-Side  
Scripting

Application  
Programming  
Interface (API)

Client- Side  
Scripting

### Instructor-Led Training (ILT)

Automation  
Processors

Formula  
Engine

Configuration  
Management

Report  
Templates

- Verticals
- Capability
- Course Title



# Thank you!

Thank you for your time.

**FintechOS 22 is here and we are ready to support your commercial and implementation teams.**

## What's next?

1. Get up to speed with FintechOS 22 with the new Academy:  
<http://academy.fintechos.com>.
2. Search for your favorite app on FintechOS Marketplace:  
<https://marketplace.fintechos.com>.
3. Register on the FintechOS Partner Portal:  
<https://partners.fintechos.com>.

Implementation partners, *book today your session with our Partner Success team* to update your training plan for FintechOS 22.

Commercial partners, get acquainted with our priority solutions for banking and insurance and *engage our Partner Sales team to plan the GTM initiatives*.

For anything else, just get in touch with us:  
[partners@fintechos.com](mailto:partners@fintechos.com).

Access all the recordings from  
FintechOS Leap 2021 at:  
<https://leap.fintechos.com/>

Ready to find out more? We'd love to hear from you:  
[hello@fintechos.com](mailto:hello@fintechos.com)