fintechOS

Webinar

FintechOS Partner Product Enablement Week

JUN
28 | 29 | 30

Tuesday to Thursday, 28-30 June
Starting 12:00 PM UK Time

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Sessions Agenda

Tue, Jun 28th	Wed, Jun 29th	Thu, Jun 30th
Release Overview **12:00-13:00 UK time**	fintechOS lighthouse **Mortgage DIP & Calculator, Help Center, and more** **12:00-13:00 UK time**	fintechOS lighthouse **BNPL Checkout Digital Journey Accelerator, and more** **12:00-13:00 UK time**
HPFI Updates **14:00-15:00 UK time**	fintechOS northstar **Personalized Insurance Solutions** **14:00-15:00 UK time**	fintechOS northstar **Lean Core Insurance Blocks** **14:00-15:00 UK time**

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Why are we here?

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FintechOS 22.R2 is Available

Since May 2022

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fintechOS

Platform   Industries   Ecosystem   Insights   About us   **Book a demo**
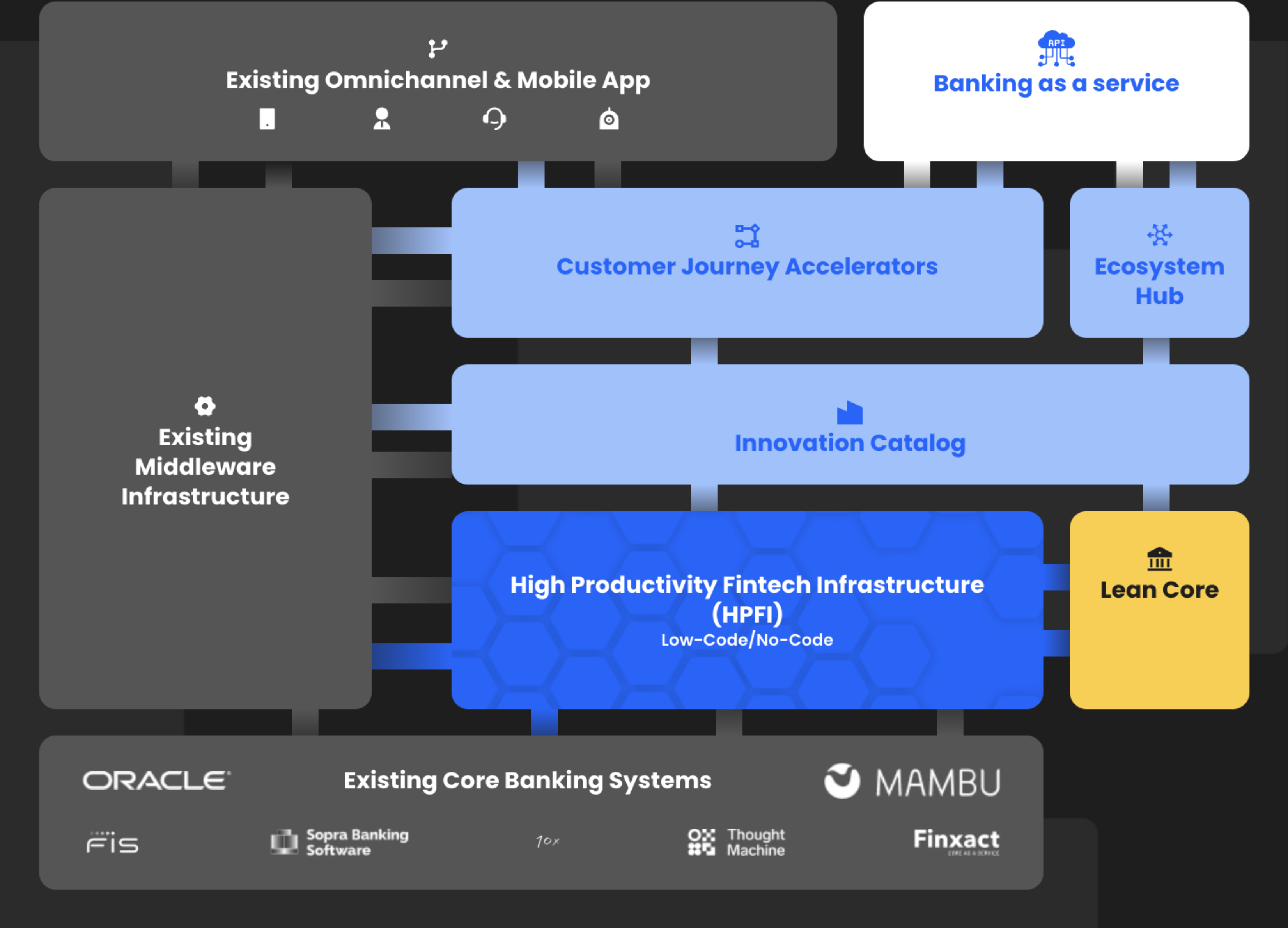
Build innovative financial services fast

The FintechOS platform empowers any organization to create innovative financial products that meet changing consumer needs.

Book a demo

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Welcome, Nick

Existing Omnichannel & Mobile App

Banking as a service

Customer Journey Accelerators

Ecosystem Hub

Existing Middleware Infrastructure

Innovation Catalog

High Productivity Fintech Infrastructure (HPFI)
Low-Code/No-Code

Lean Core

ORACLE   **Existing Core Banking Systems**   MAMBU

FIS   Sopra Banking Software   10x   Thought Machine   Finxact
CORE AS A SERVICE

FintechOS 22.R2 Brings More Value to Customers

fintechOS **lighthouse**

fintechOS **northstar**

Standard **Operational dashboards** for improved experience and productivity

Surface **new digital journeys** via **APIs** in your existing front-ends or Embedded in 3rd parties

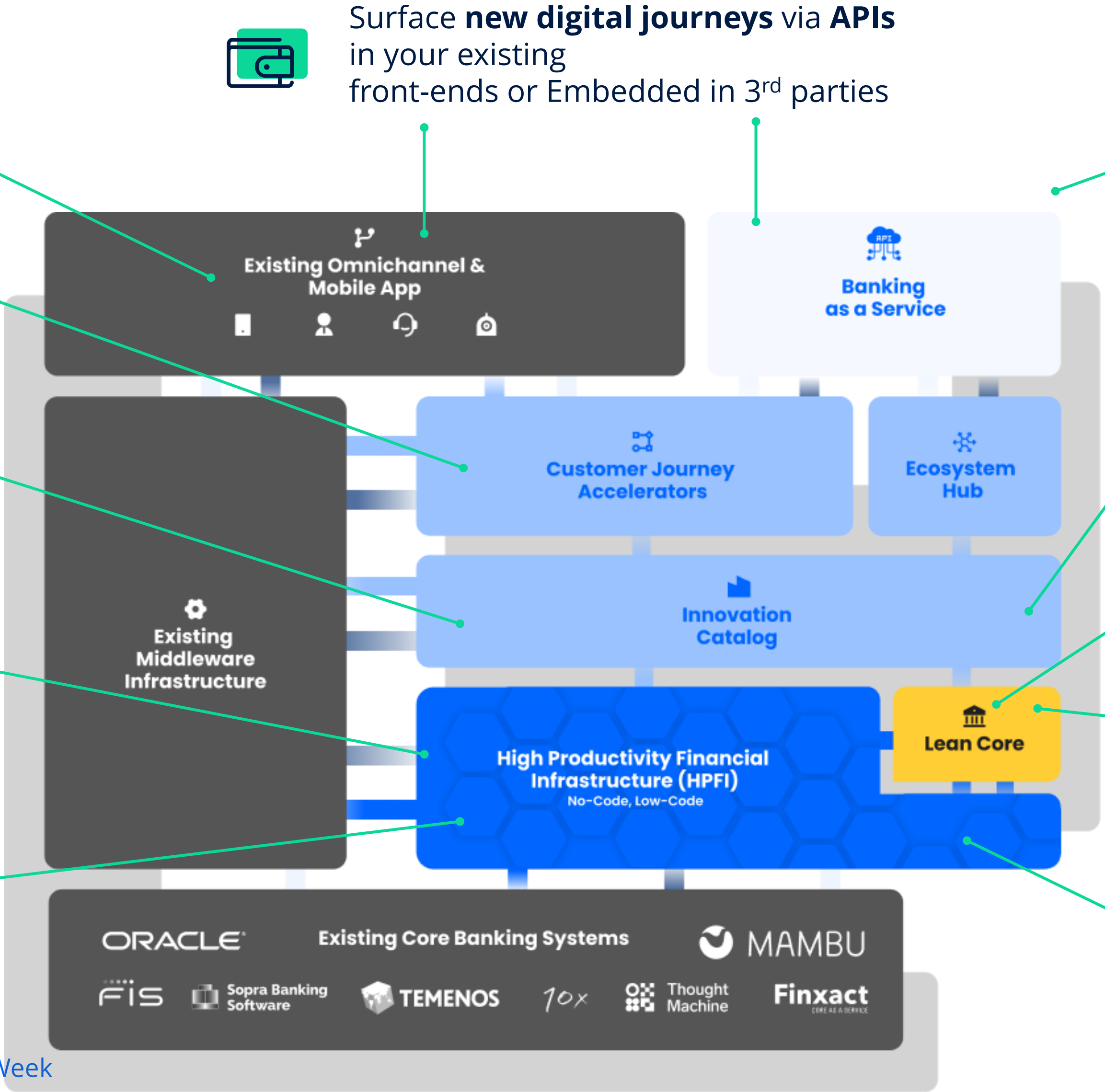**Academy** end2End Training and Innovation Studio **Usability** improvements for **faster learning curve**

Best-of-breed **digital journeys** for **Mortgages**, with Decision in Principle in less than 10 min

BNPL Products delivery time reduced up to 40%

Enhanced Insurance **Product and Services. Factory**

Extended **Core Policy Admin**, Direct debit and **Agency Management** for faster Time to Market
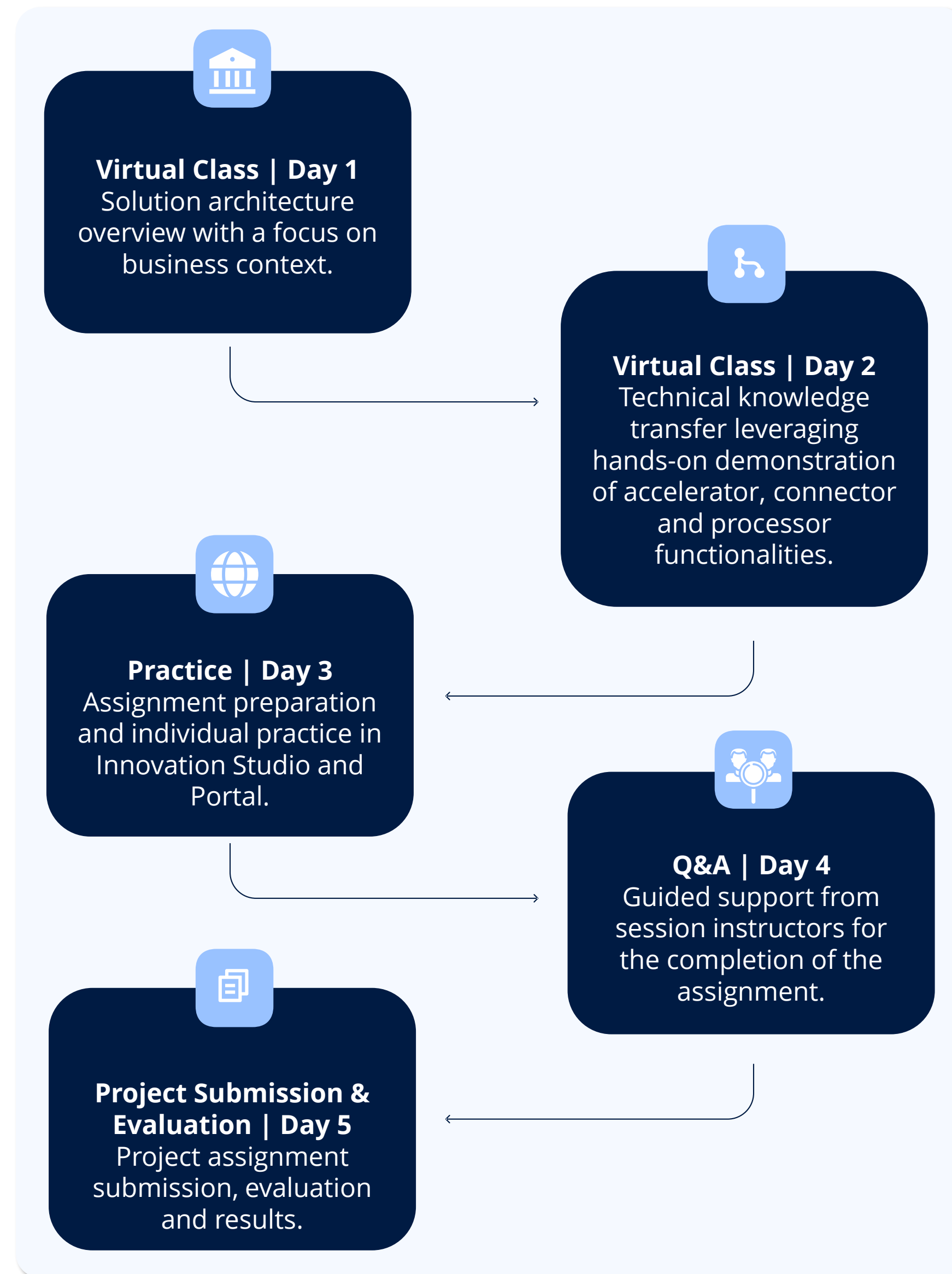
Journey Analytics to get insights on how to Optimize you Digital Journeys

Across **all product types**: return fees, late contract closing, early repayment with return interests/fees, reconciliation account.

Enterprise Grade with improved Stability, Performance and Security

New Integration Framework to integrate with anything

Diagram

Existing Omnichannel & Mobile App

Banking as a Service

Customer Journey Accelerators

Ecosystem Hub

Existing Middleware Infrastructure

Innovation Catalog

High Productivity Financial Infrastructure (HPFI)
No-Code, Low-Code

Lean Core

ORACLE **Existing Core Banking Systems** MAMBU

FIS   Sopra Banking Software   TEMENOS   10x   Thought Machine   Finxact

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How do you get up to Speed with 22.R2?

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How do you get up to Speed with FTOS?

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Virtual Class | Day 1
Solution architecture overview with a focus on business context.

Virtual Class | Day 2
Technical knowledge transfer leveraging hands-on demonstration of accelerator, connector and processor functionalities.

Practice | Day 3
Assignment preparation and individual practice in Innovation Studio and Portal.

Q&A | Day 4
Guided support from session instructors for the completion of the assignment.

Project Submission & Evaluation | Day 5
Project assignment submission, evaluation and results.

SME Lending Accelerator **Masterclass**

Format: Virtual class

Description: We're designing a fintech world where SMEs can access financing solutions within minutes. That's right. We're talking about end-to-end integrated lending solutions based on out-of-the-box loan origination journeys, data-rich insights and automation all throughout. Welcome to FintechOS mobile onboarding and lending accelerator for small and medium-sized enterprises (SMEs).

Prerequisites: Take the fast-track readiness exam or complete the training path.

Audience: Global

**Duration**: 5h virtual class, 1h Q&A, one-week access to Cloud practice environment

Instructors: Marius Mardale, Tatiana Vlad

Next session starting July 25th – 29th

fintechOS academy

What's a FintechOS masterclass?

It's an immersive one-week live online learning experience on advanced topics and moderated by experts. Like all FintechOS classes, it's delivered through a video conferencing system and leverages the interaction between trainers and attendees. You experiment in your individual practice environment, engage with technical FintechOS professionals, and design future-forward financial products.

It is as simple as that: you log in to FintechOS Academy, select one of the pre-scheduled masterclasses, and request a seat. Most virtual classes have enrollment conditions, so make sure you've completed the prerequisites. If that's the case, a trainer will confirm your registration.

FintechOS Academy ⤷

Attend the live sessions

Engage with like-minded professionals and build your hands-on expertise with the help of FintechOS technical trainers.

Earn a FintechOS diploma

Attend all sessions and successfully complete the daily practical assignments to earn your diploma. Don't forget to share it with your professional network!

Practice with Innovation Studio

Explore the FintechOS capabilities in a cloud practice environment provisioned with the latest version of the Innovation Studio. No local installation on your device is required. The cloud environment will be available daily, throughout the virtual class event.

BNPL Accelerator **Masterclass**

Format: Virtual class

Description: The Buy Now, Pay Later (BNPL) Accelerator is a digital experience that helps consumers get financing exactly when they need it. You can integrate the application procedure into your marketplace's checkout technology, so it's seamless and fast.

Your BNPL product can be up and running with a plug-and-play solution in fewer than three months, allowing you to compete in a demanding and rapidly expanding environment.

Prerequisites: Take the fast-track readiness exam or complete the training path.

Audience: Global

Duration: 5h virtual class, 1h Q&A, one-week access to Cloud practice environment

Instructors: Marius Mardale, Alex Burlan

First session coming mid-July

fintechOS academy

What are we releasing?

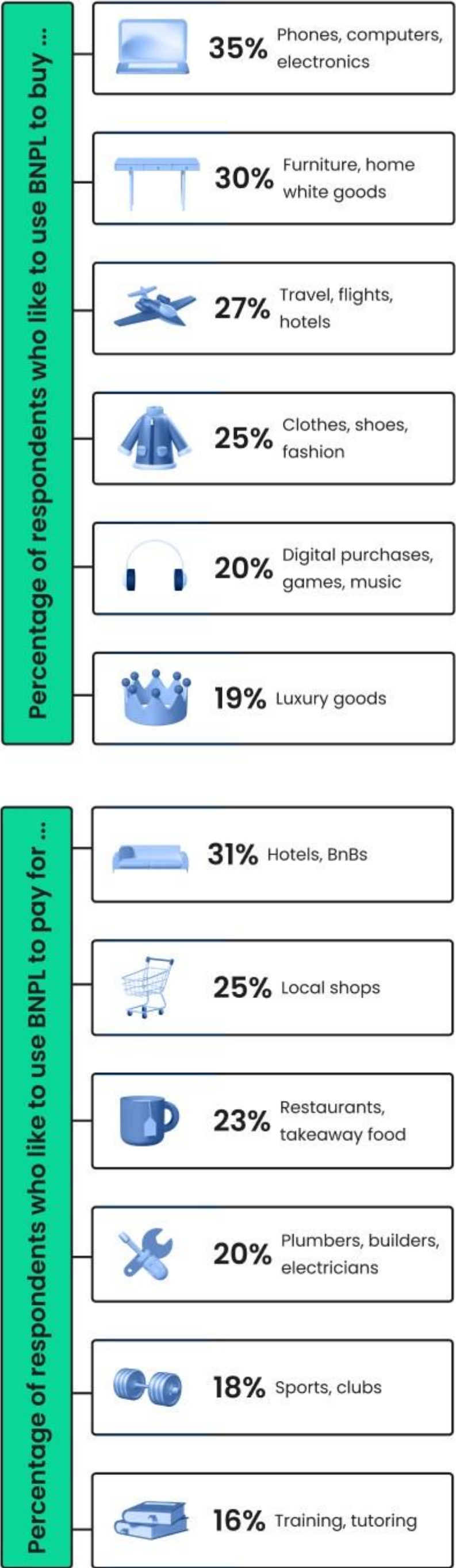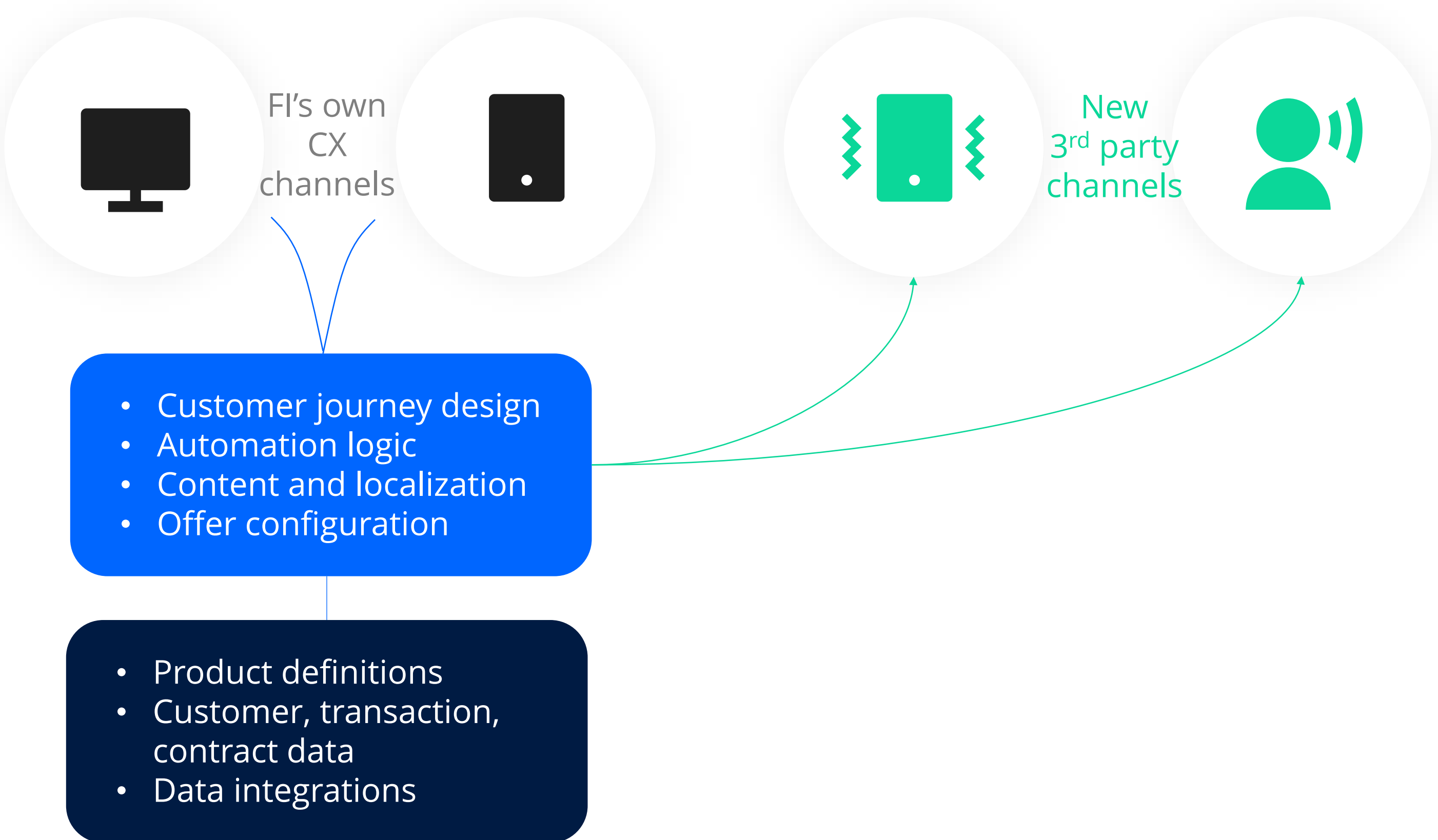fintechOS | Product Enablement Week

1. Journey Analytics

Built-in analytics help you understand if your digital journeys are effective
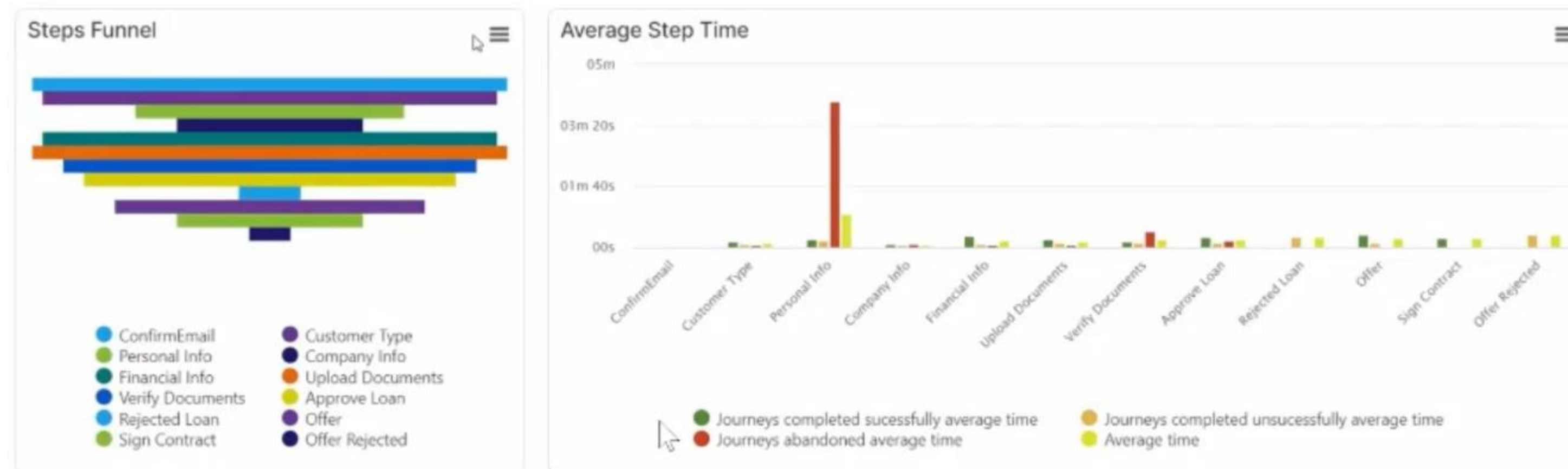
Visually identify where customers or prospects are dropping off and the time spent on each step.

2. Digital journey APIs

Digital construction teams can now expose digital journeys via APIs, making it easier to set up digital journeys for bank's own frontend, third party CMS, embedded etc.

FI's own CX channels

New 3rd party channels

- Customer journey design
- Automation logic
- Content and localization
- Offer configuration

- Product definitions
- Customer, transaction, contract data
- Data integrations

Percentage of respondents who like to use BNPL to buy ...

%	Category
35%	Phones, computers, electronics
30%	Furniture, home white goods
27%	Travel, flights, hotels
25%	Clothes, shoes, fashion
20%	Digital purchases, games, music
19%	Luxury goods

Percentage of respondents who like to use BNPL to pay for ...

%	Category
31%	Hotels, BnBs
25%	Local shops
23%	Restaurants, takeaway food
20%	Plumbers, builders, electricians
18%	Sports, clubs
16%	Training, tutoring

3. Raising the **HPFI** Enterprise bar

Security & Compliance

FintechOS Identity Services

Identity broker implementation provides consistent approach to different security providers and the ability to map the provided claims with FintechOS security roles.

Key Management

Moving system and configuration parameters to secure key management and storage

Observability.

New unified logging infrastructure stores a contextual log for applications and links every event with business data context for corelated events

Automation Blocks

More compliance with eIDAS and ADR

Performance & Stability

Improvements for Jobs

Execute FintechOS jobs in parallel multiple jobs queues

Overall Performance

Average 10% - 15% Performance Improvement

750 Defects Resolved!

no known critical nor major issues

Data & Integration

Integration Framework

Integrate to 300+ systems with standard and scalable connectors, and create your own

Document Export

Export business date to CSV, XLS or PDF

4. **HPFI** Usability, Extensibility & More

Usability

Improvements for Jobs

Execute FintechOS jobs in parallel multiple jobs queues

Innovation Studio

New UI components, menu, and homepage redesign

SDK Regular Upgrades

Mobile and Browser updates quarterly

Digital Assets

Give developers better control over delivery cycle

Analytics

Digital Journey Analytics

Understand the digital journey performance with a built-in graphical data representation

Ecosystem

CODAT Connector

Offers easily integrating with companies accounting, banking, eCommerce, PoS, and payment software.

Extensibility

Digital Journey API.

Expose digital journey orchestration through APIs so the digital journey can be consumed by external applications

Standard Open API

Redesign of FintechOS open API to be swagger compliant and with the addition FintechOS IDP authentication functionality.

5. BNPL: Best-of-breed Journey Accelerator

BNPL Accelerator UI
covers both mobile
and desktop browser
form factors

New customer
journey can begin
with BNPL app
onboarding, or cover
this mid-checkout
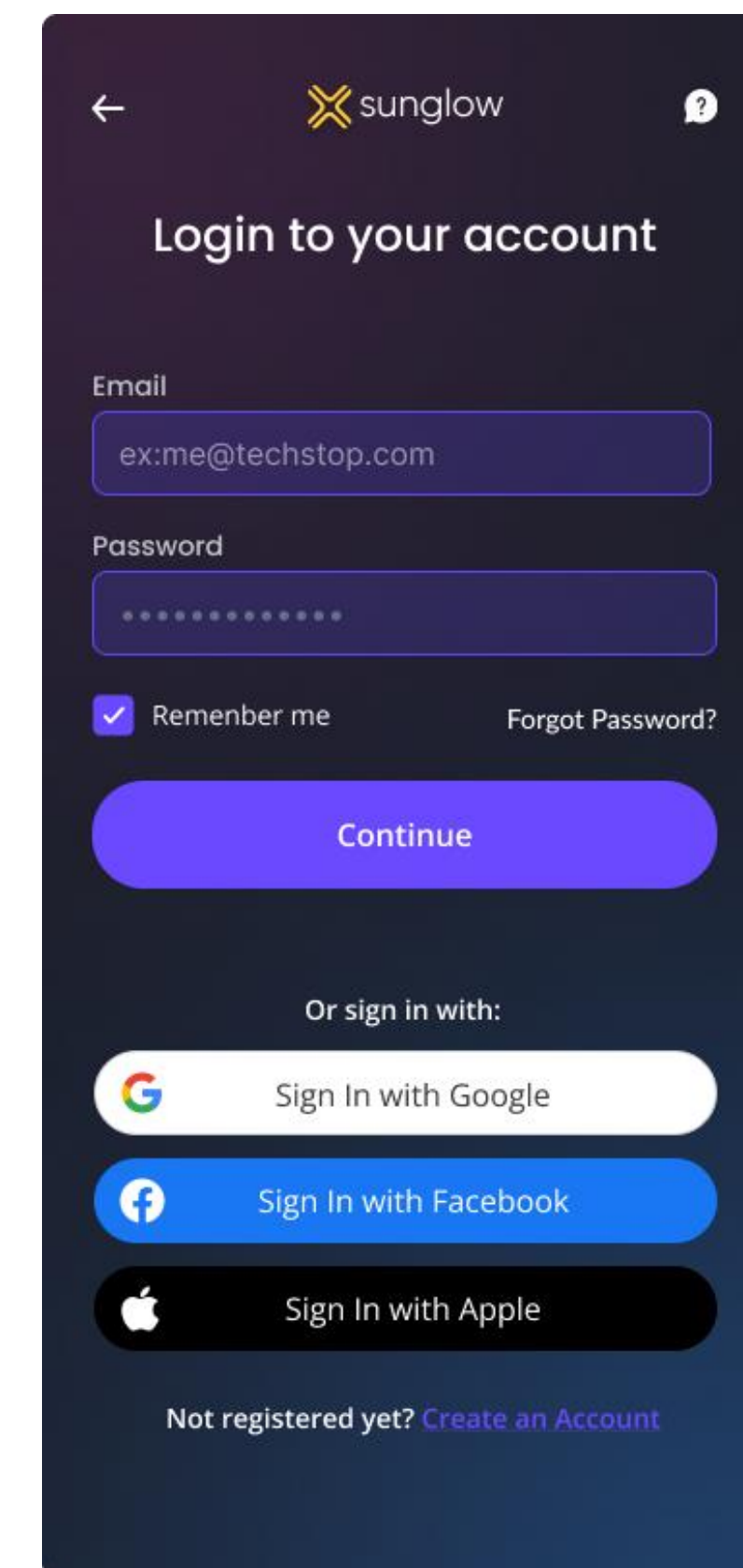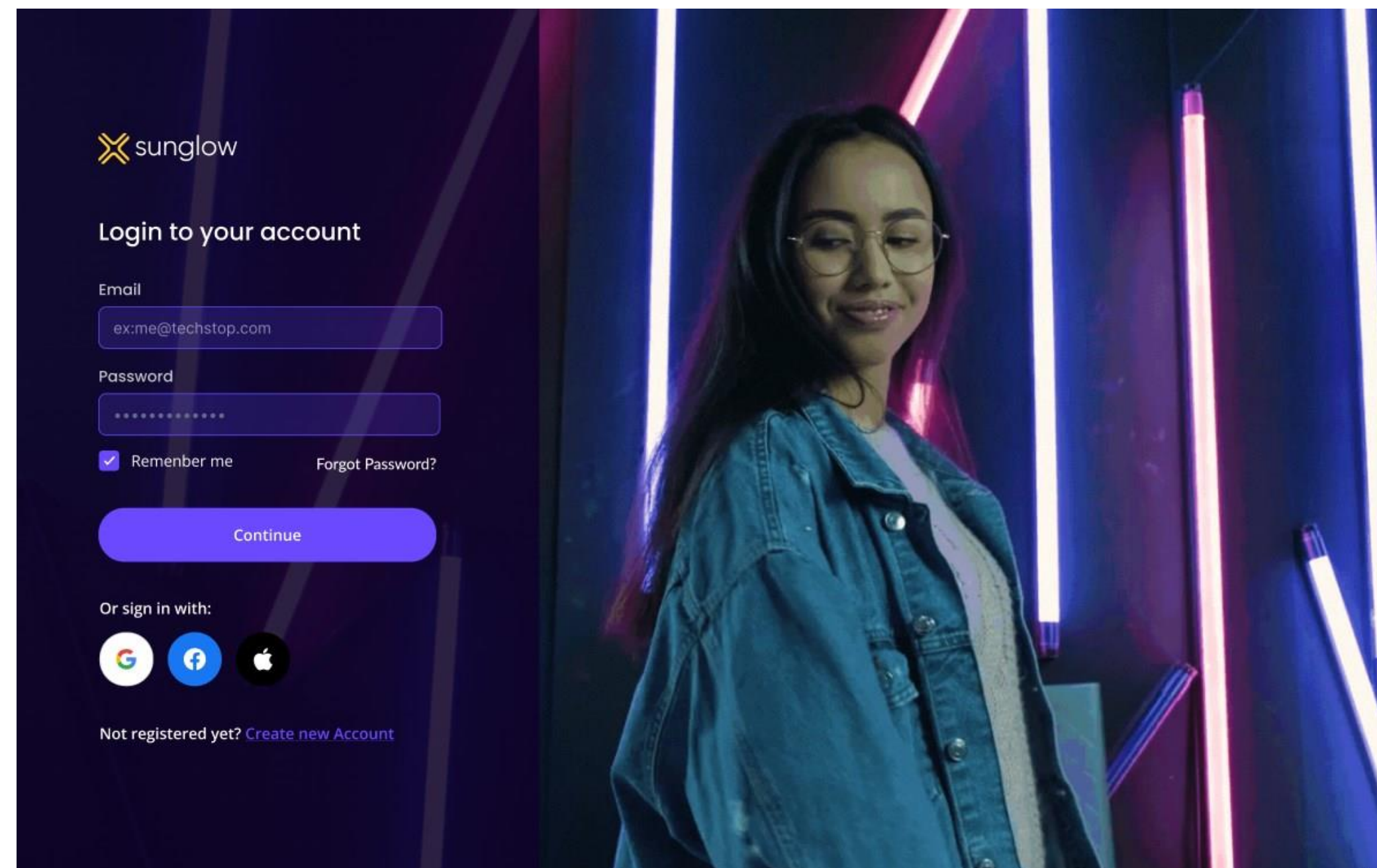
5. BNPL: Highly configurable offer parameters

Determine where (if) BNPL offers are shown in ecommerce site
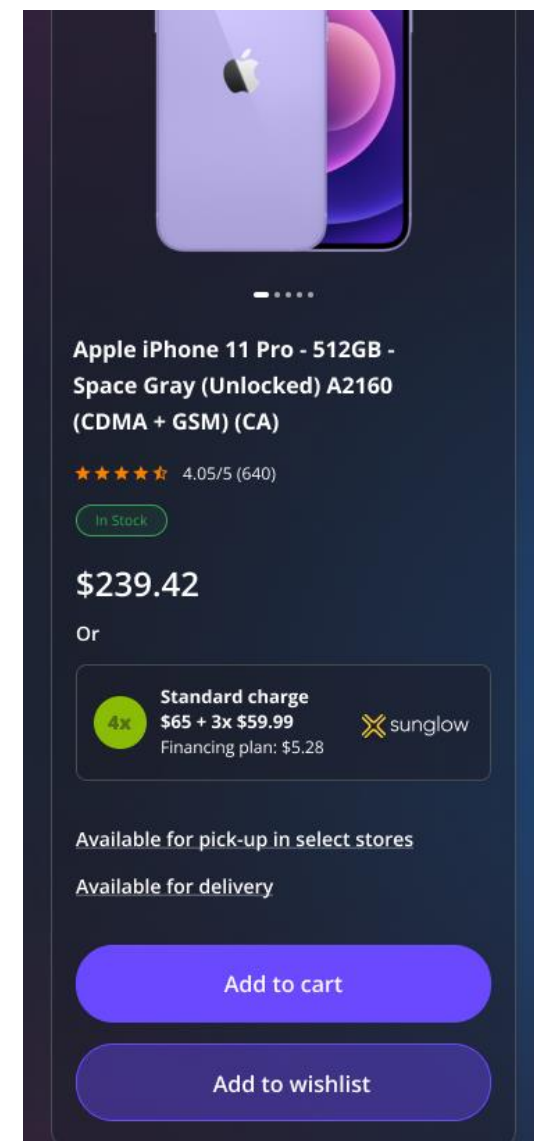
Tune eligibility / credit / affordability checks to balance risk vs convenience
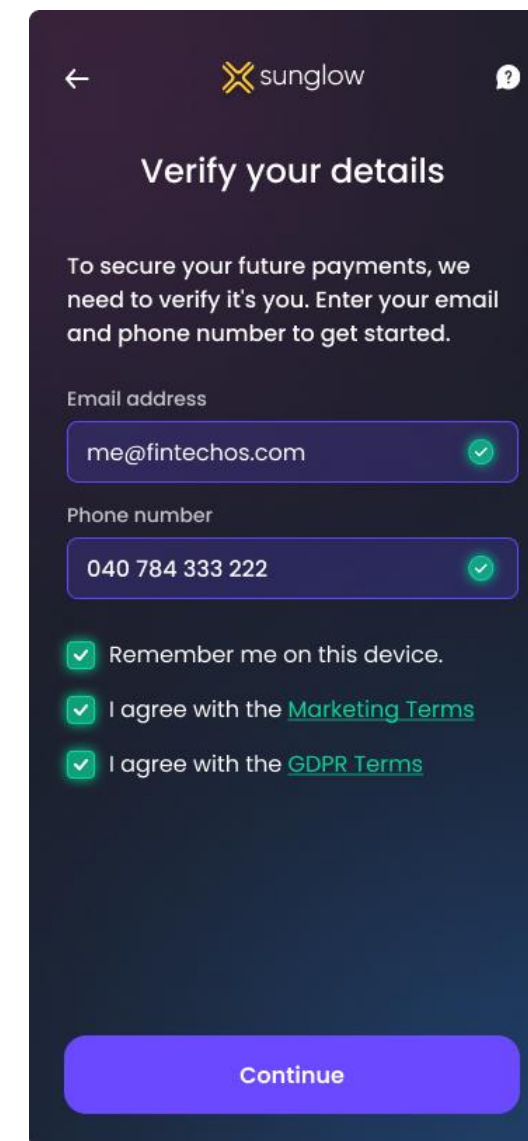
Cover after sales (e.g. repayment) journeys in chosen portal and branding
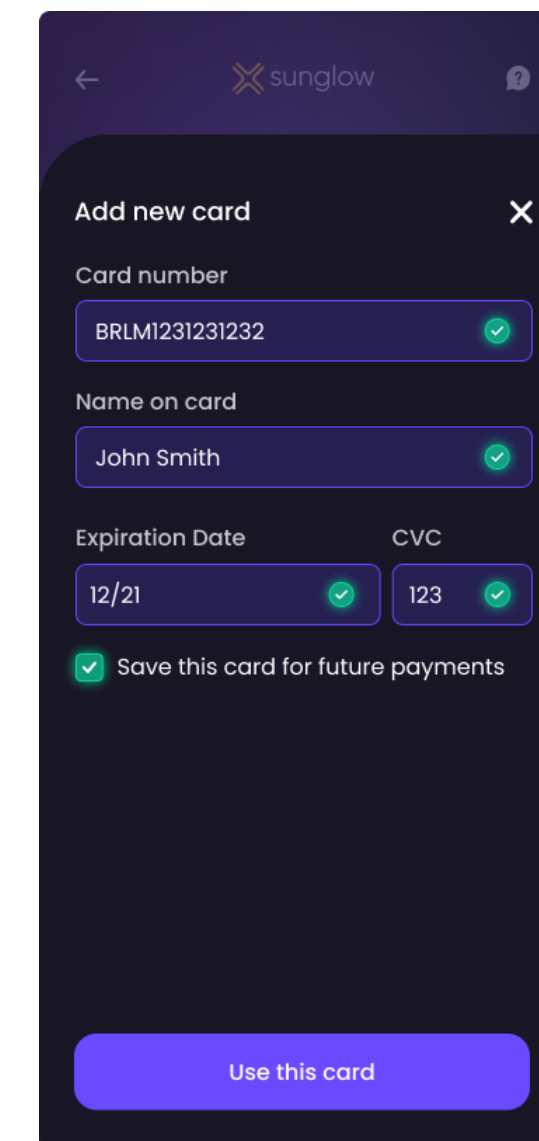
Offer more choice, or more fixed terms, in BNPL checkout options
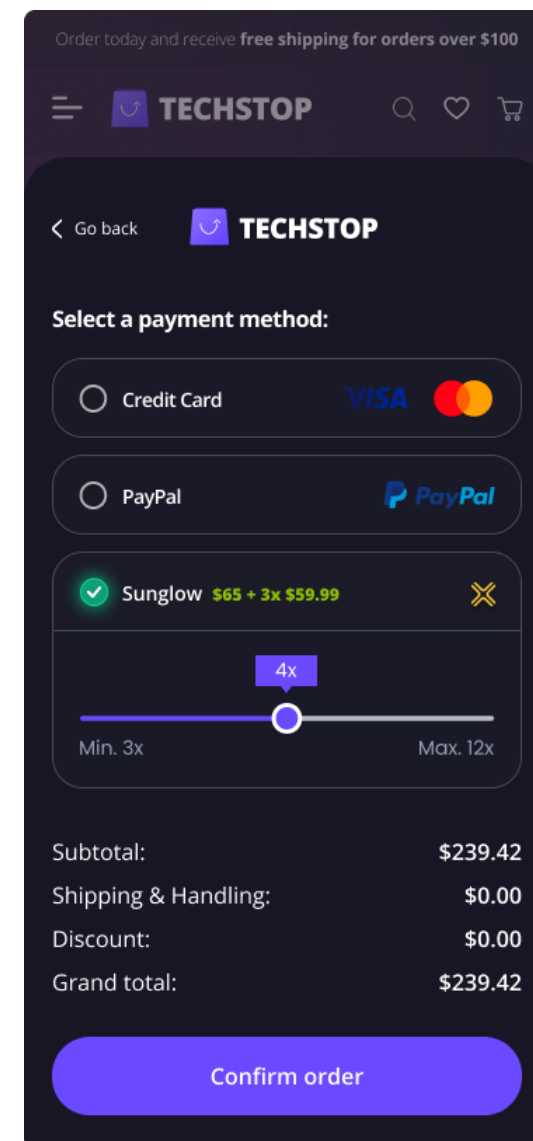
Define how returning users are handled
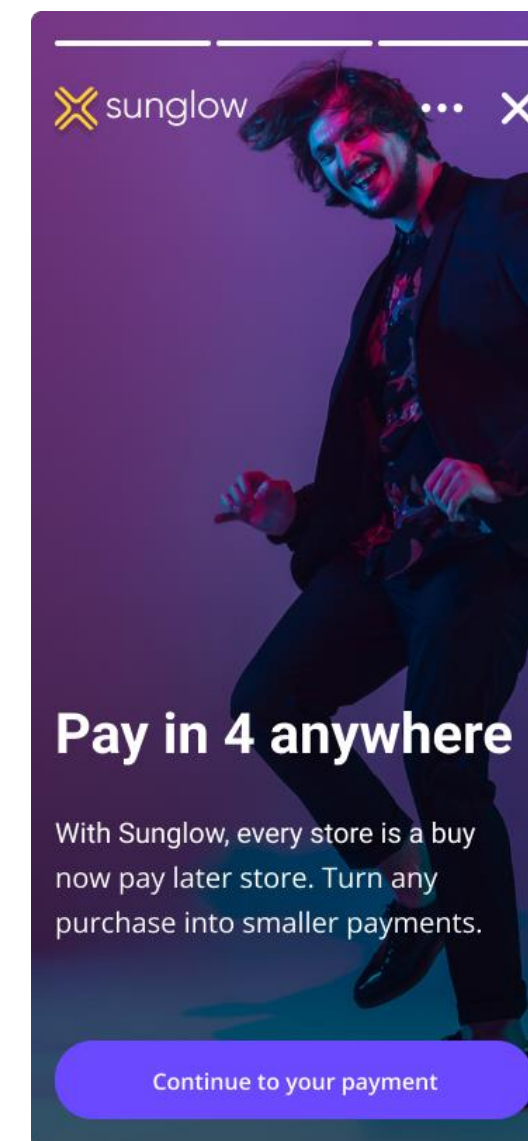
6. Lean Core: Automated, flexible BNPL servicing & repayment

Return process and fees with early closing of the contract

Merchant management, invoicing & reconciliation process

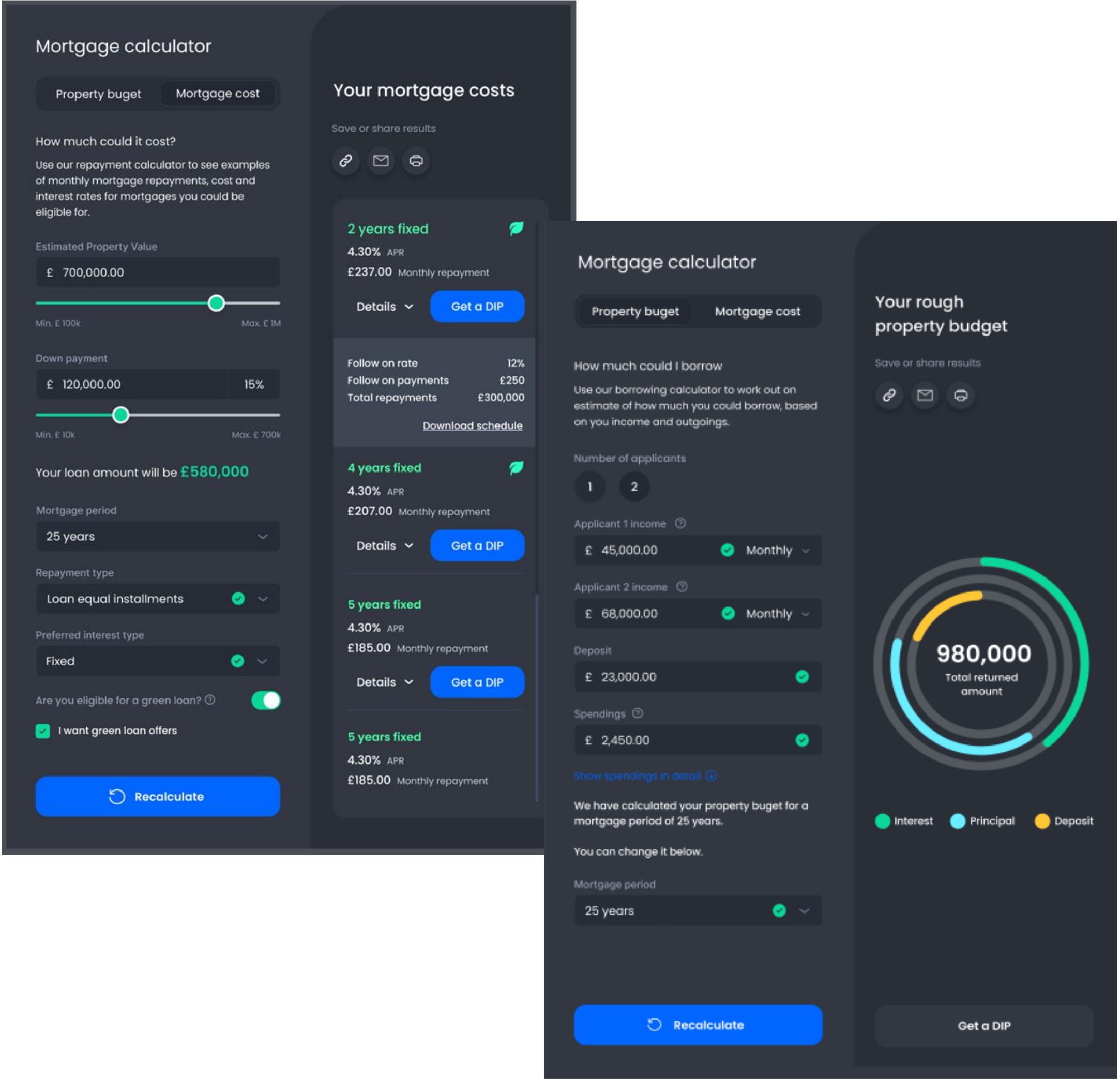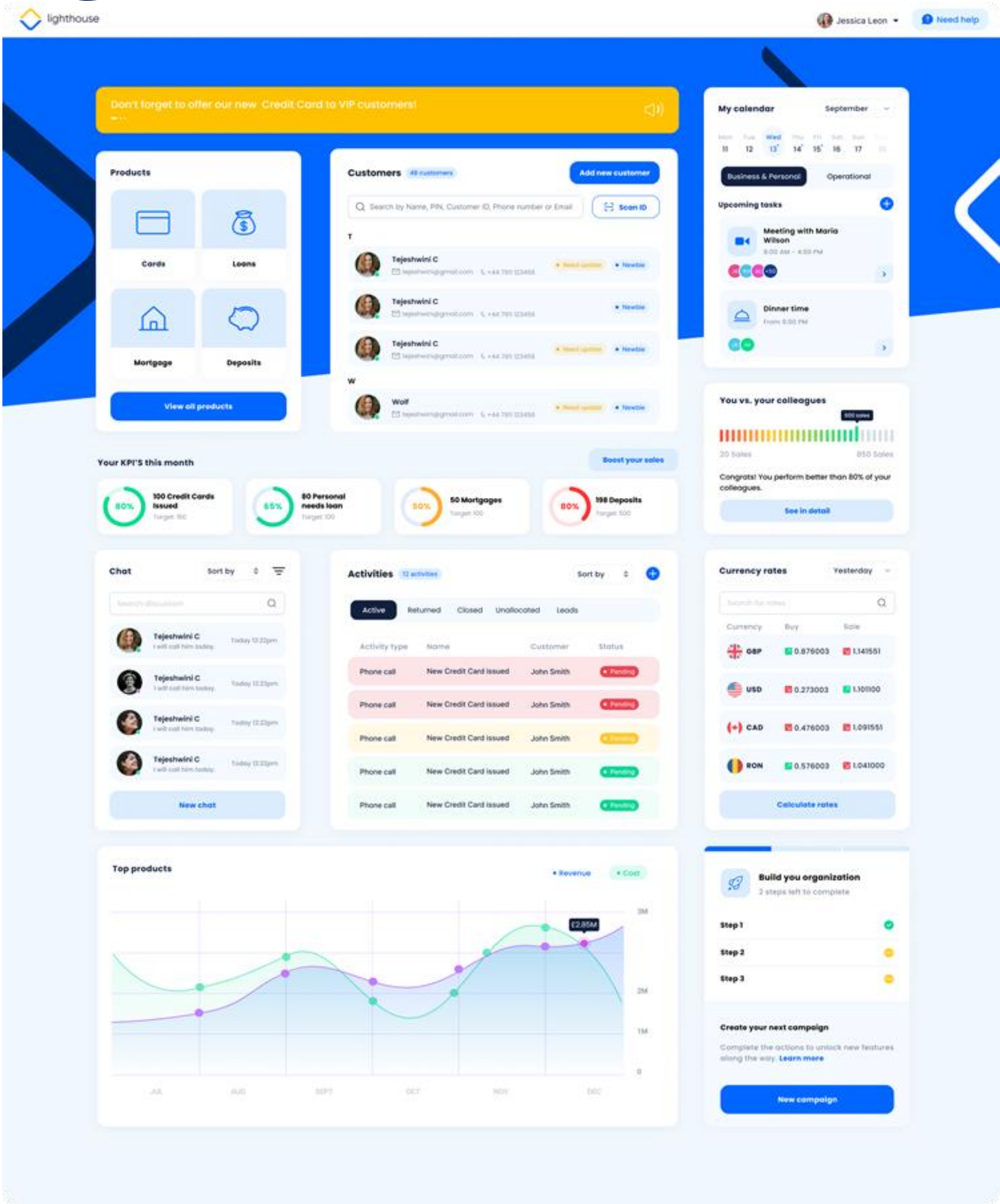Extended API

7. **Mortgages:** Decision in Principle with Seamless CX
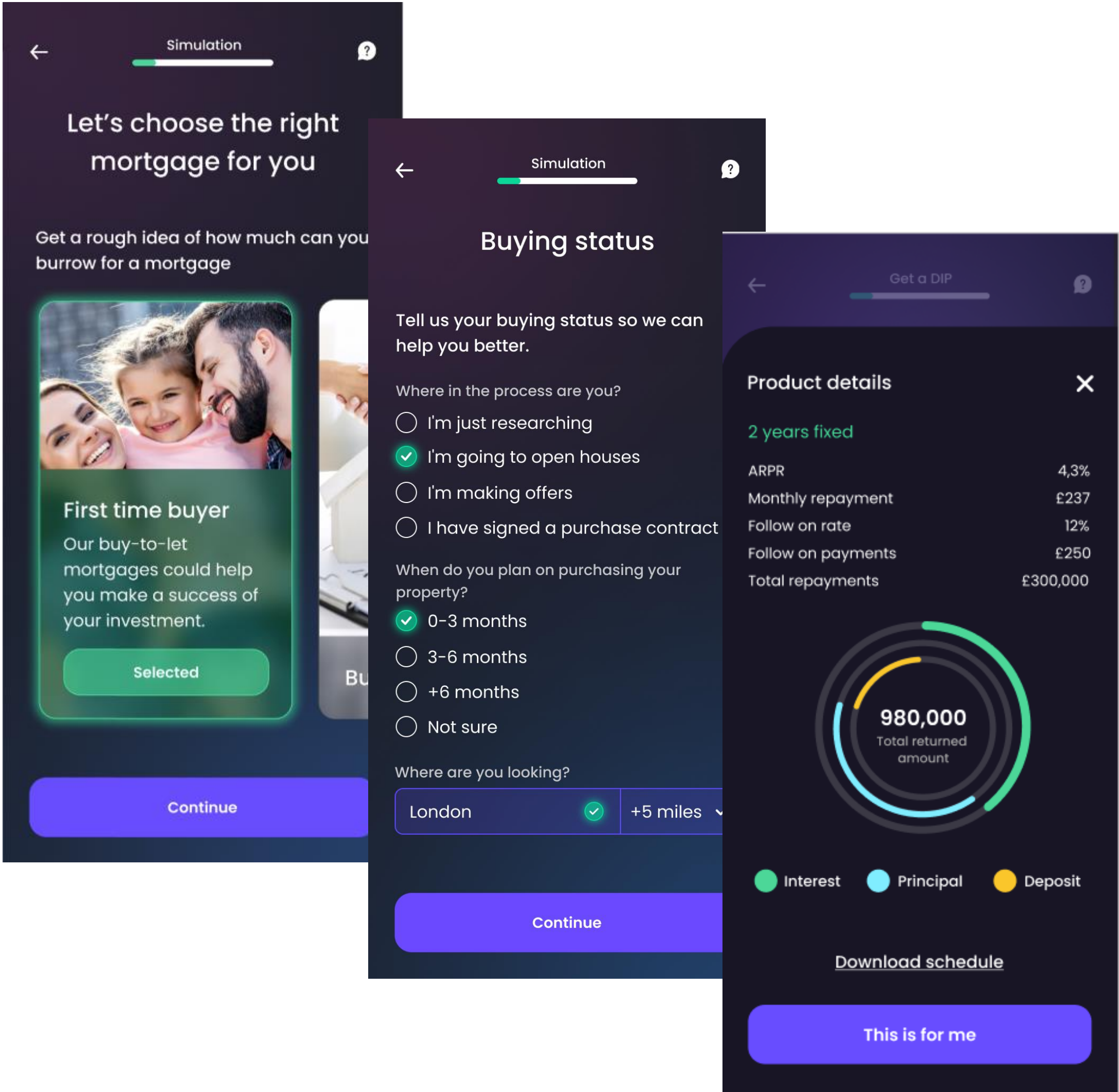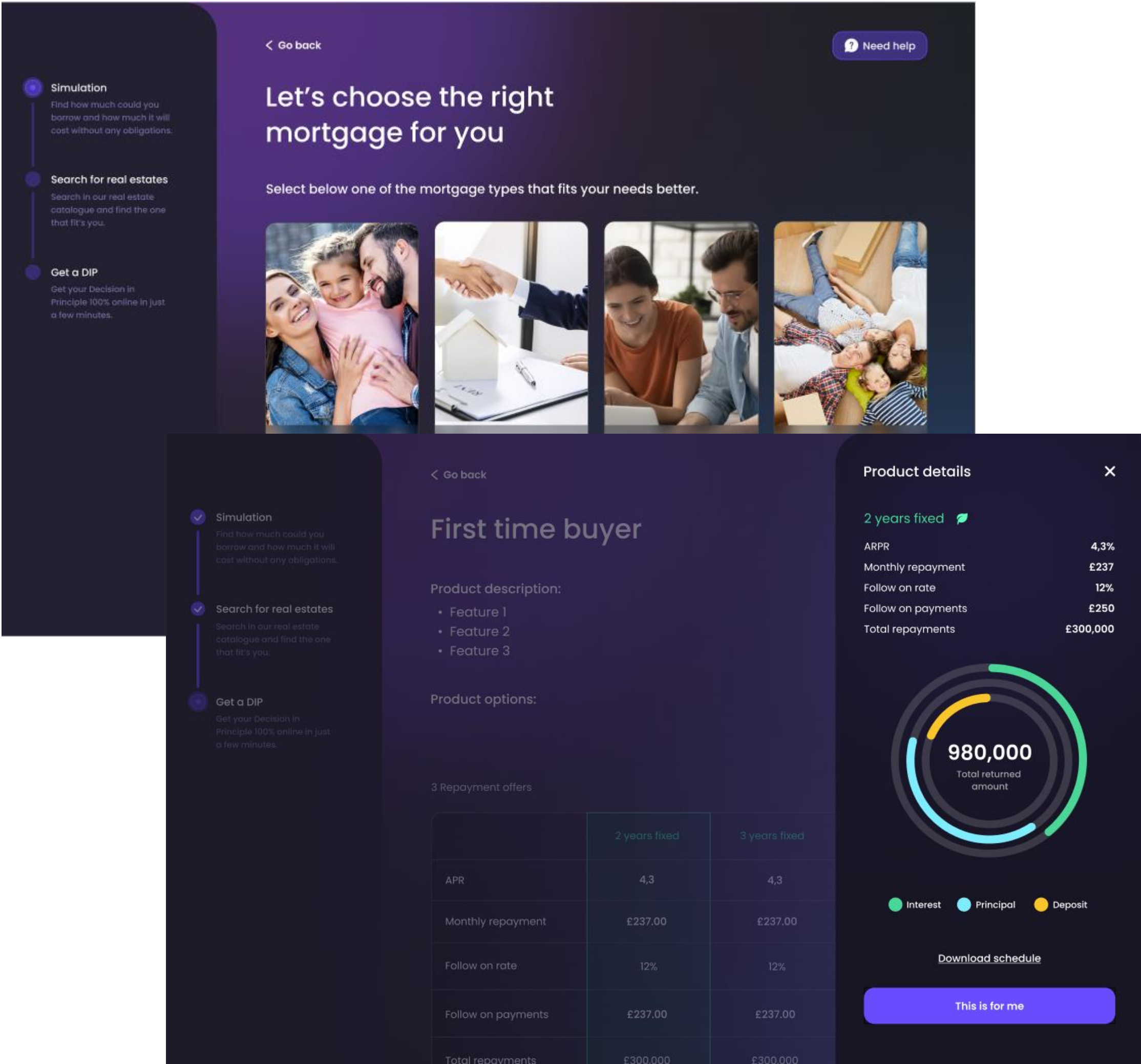
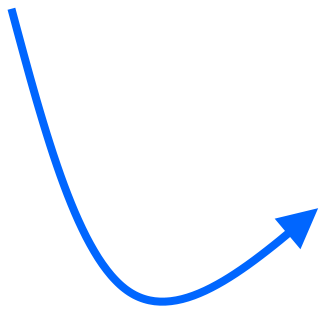# 7. **Mortgages:** calculator
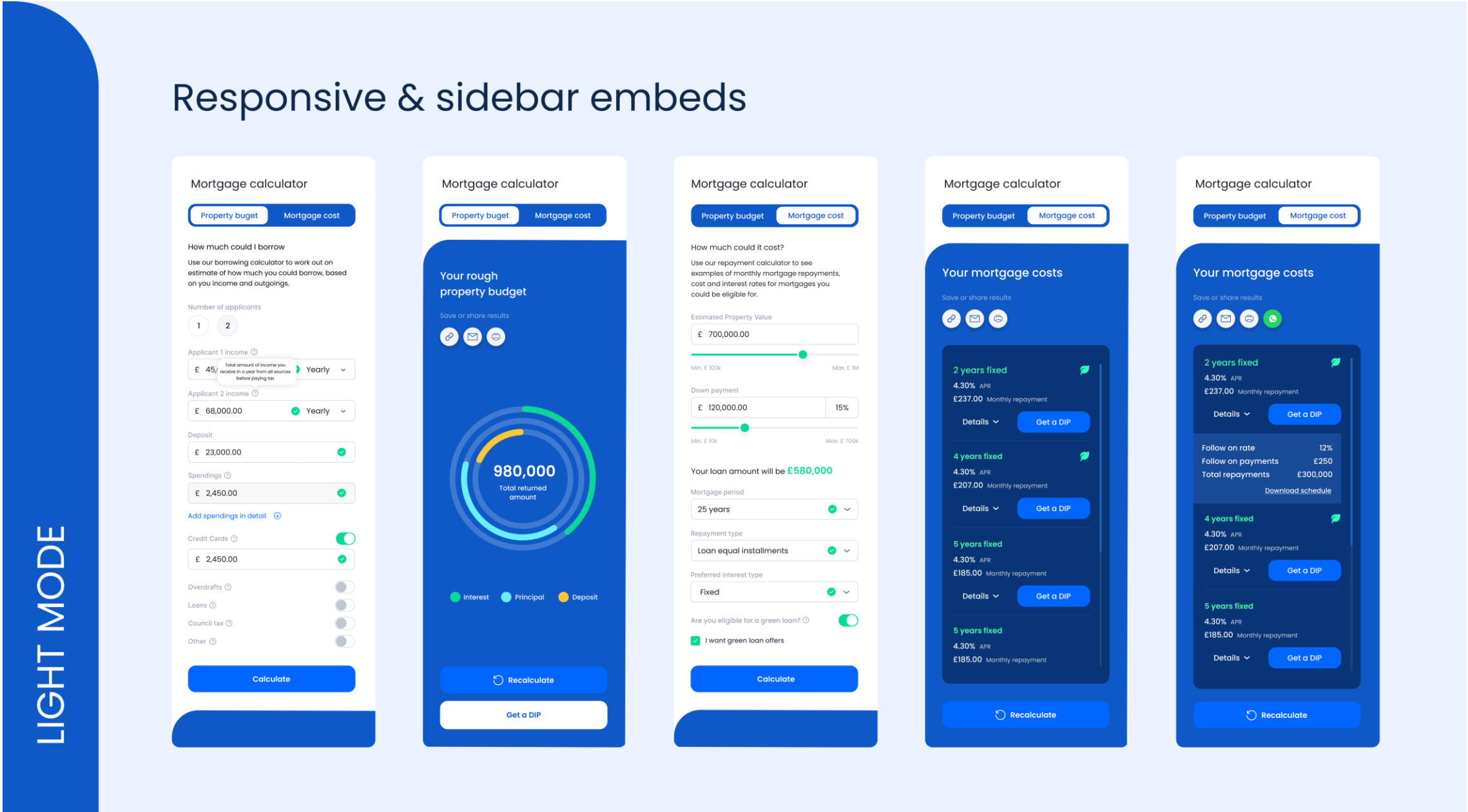
8. Relationship Manager Dashboard

Increased productivity and adoption for all key stakeholders

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9. Insurance step forward for Product Factory and Backend

Lines of Business/ Use Cases

Develop New Products and Services

Deploy New Digital Journeys

Administer Products and Services

Term Life

(Updated) **Term Life Quote & Apply** Assisted Journey

All Insurance

Product Factory

- **Line of Businesses Admin**
- **Tariff calculation update** (On product vs On coverage)
- **UW Rules** - On product vs On coverage
- **Data mapping updated** (Quote/ Policy)
- **Product Integrations History**

Proposal Configurator

- **Single Product Configuration**
- **Proposal Cards API**
- **Card versioning**
- **Quote Config versioning**

Core Policy Admin

- **Policy Excesses**
- **Policy Claim Data**
- **Policy MTAs and Renewal** updated with the new Data Mapping functionality
- **Master Policy Cancellation**
- **Master Policy MTAs :** Change Frequency| Due Date | Payment Type

Billing & Collection

- **UK Direct Debit**
  - ✓ Processing AUDDIS Files
  - ✓ Manually Add, Edit and Cancel a Mandate

Agency Management

- **Network Management -** creating and managing an organizational hierarchy

3 Ways <u>You</u> Can Help!

1   **Attend** the detailed product enablement sessions June 28 - 30

2   **Get up to Speed** with our Academy training

3   **Collaborate** with FintechOS to Upgrade our customers

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22.R2 is Here.
Enable.Upgrade.Grow

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Thank you

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