



FinTech Operating Model and Transformation Roadmap Training Course

26 – 30 July 2027
Montreux



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Overview

FinTech Operating Model and Transformation Roadmap Training Course is a five-day advanced course for banking, transformation, product, operations, risk, and technology-business professionals who leave with a FinTech Transformation Roadmap. The course connects market shifts, customer journeys, digital payments, open finance, platform models, use-case prioritization, partnerships, operating-model design, data governance, technology dependencies, risk controls, and execution sequencing. Agile Leaders Training Center delivers this course on FinTech operating-model transformation.

Who Should Attend

- Business leadership functions responsible for financial-services strategy and transformation outcomes
- Product functions responsible for digital propositions, journeys, roadmaps, and value realization
- Operations functions responsible for service design, process change, and operating controls
- Risk and assurance functions responsible for data, technology, third-party, resilience, and conduct risks
- Technology-business functions responsible for platforms, integration, architecture choices, and delivery dependencies
- Partnership functions responsible for evaluating FinTech providers and ecosystem relationships

The course assumes participants already support financial-services products, operations, risk, or technology change and leaves out software development, detailed cybersecurity engineering, and regulatory legal interpretation.

Departments and Industries

The course supports FinTech transformation across financial institutions, technology providers, and organizations delivering digitally enabled financial services.

- Strategy, transformation, innovation, and corporate-development departments
- Product, customer-experience, operations, and service-design teams
- Risk, compliance, data-governance, cybersecurity, and internal-audit functions
- Banking, payments, insurance, lending, and wealth-management organizations
- FinTech, cloud, software, analytics, and platform providers
- Retail, telecommunications, mobility, and marketplace organizations offering embedded financial services



Learning Objectives

By the end of this course, participants will be able to:

- Analyze FinTech trends, value pools, and business-model implications
- Map customer journeys and prioritize transformation pain points
- Evaluate digital-payment, open-finance, platform, and embedded-finance use cases
- Build target operating-model roles, capabilities, and decision rights
- Assess data, technology, partnership, and operational-resilience risks
- Build a sequenced transformation roadmap with governance and outcome measures

Course Agenda

Day 1: FinTech Landscape and Value

- FinTech Ecosystem and Participant Map
- Digital Finance Value-Pool Assessment
- Business-Model Shift Analysis Canvas
- Customer Need and Friction Evidence Map
- Transformation Ambition and Outcome Charter

Day 2: Journeys, Payments and Platforms

- Digital Customer Journey Blueprint
- Payment Experience and Process Map
- Open-Finance API Use-Case Canvas
- Embedded-Finance Opportunity Assessment
- Platform Proposition and Network-Effect Map

Day 3: Operating Model and Partnerships

- FinTech Capability and Maturity Heat Map
- Target Operating-Model Design Blueprint
- Product and Platform Decision-Rights Matrix
- Build-Buy-Partner Evaluation Scorecard
- Third-Party Partnership Lifecycle Map

Day 4: Data, Technology and Risk Governance

- Data Governance and Lineage Control Map
- Technology Dependency and Concentration Register
- Digital Operational-Resilience Scenario Matrix
- Customer, Conduct and Reputational Risk Screen
- Responsible Innovation Governance Gate



Day 5: FinTech Transformation Practice

- Suggested Exercise: Value-Pool and Journey Diagnosis
- Suggested Exercise: Use-Case Prioritization Decision
- Suggested Exercise: Operating-Model and Partnership Design
- Suggested Exercise: Data and Resilience Control Review
- Capstone Exercise: FinTech Transformation Roadmap

Practical Exercises

The course uses suggested activities to connect market opportunities, customer needs, operating choices, and risk evidence.

- Suggested activity: map a financial-services journey and identify measurable friction, value, and control needs.
- Suggested activity: compare payment, open-finance, platform, and embedded-finance use cases using a prioritization scorecard.
- Suggested activity: design capabilities, decision rights, partnership boundaries, and operating controls for a target model.
- Suggested activity: sequence initiatives, dependencies, governance gates, outcome measures, and resilience actions in the capstone roadmap.

FAQs

Who suits FinTech operating-model transformation training, and what does it assume?

FinTech transformation training suits professionals who already support financial products, operations, risk, data, technology, partnerships, or business change and need an integrated decision framework.

How does FinTech transformation differ from general digital transformation?

FinTech transformation applies digital change to financial products, payments, platforms, data, partnerships, customer trust, and operational resilience, while general digital transformation may cover any sector and operating context.

How should FinTech use cases be prioritized?

FinTech use cases should be prioritized against customer need, strategic fit, measurable value, data readiness, delivery feasibility, integration dependencies, risk exposure, control requirements, and operating capacity.



What belongs in a FinTech target operating model?

A FinTech target operating model should define propositions, journeys, capabilities, roles, decision rights, processes, data ownership, platforms, partnerships, controls, measures, and governance forums.

How can FinTech transformation protect operational resilience?

FinTech transformation protects resilience by mapping critical services, data and technology dependencies, third parties, failure scenarios, recovery needs, ownership, monitoring indicators, and tested response decisions.

Conclusion

Participants leave with a FinTech Transformation Roadmap containing value, journey, use-case, capability, operating-model, partnership, data, risk, and sequencing artifacts. The roadmap changes disconnected innovation ideas into a governed transformation portfolio. It supports transparent priorities, defined ownership, controlled dependencies, measurable outcomes, and resilience-aware execution.