Platform Banking Training Course

Professional Development Training Course Outline

Category	Banking Institute	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

The global financial landscape is undergoing a radical paradigm shift as Platform Banking transforms traditional institutions into dynamic, interconnected digital ecosystems. By leveraging Open Banking APIs, Banking-as-a-Service (BaaS), and cloud-native infrastructure, organizations can transcend legacy limitations, effectively embedding financial services directly into customer journeys. Platform Banking Training Course empowers professionals to lead this transformation, moving from product-centric models to customer-centric orchestration that drives exponential growth and long-term competitive advantage.

As financial boundaries blur, the capacity to harmonize Fintech collaboration, data-driven insights, and embedded finance becomes a prerequisite for success. Participants will gain a strategic mastery of the platform economy, learning how to build scalable, secure architectures that foster hyper-personalization and real-time responsiveness. Through a rigorous focus on digital transformation and agile innovation, this program provides the practical framework to navigate the complexities of modern finance and emerge as a leader in the next generation of banking.

Programme Curriculum

Platform Banking Training Course

Introduction

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Course Duration

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Course Objectives

1. Master the strategic shift from product-based to ecosystem-based banking models.
2. Analyze the role of Open Banking in driving innovation and market connectivity.
3. Design and implement API-first architectures to facilitate seamless third-party integration.
4. Develop expertise in Banking-as-a-Service (BaaS) to expand reach via non-bank partners.
5. Leverage Agentic AI and machine learning to create hyper-personalized customer experiences.
6. Navigate the regulatory and compliance challenges inherent in decentralized financial ecosystems.
7. Optimize cloud-native scalability for rapid product deployment and operational resilience.
8. Implement real-time treasury and programmable payment solutions for corporate agility.
9. Enhance fraud defense mechanisms using advanced digital identity and biometrics.
10. Monetize data assets while ensuring sovereign data privacy and ethical standards.
11. Cultivate an innovation-first culture to manage the "10x bank" talent paradigm.
12. Build resilient cybersecurity frameworks for multi-partner, distributed environments.
13. Execute successful platform orchestration to capture value from secondary markets and adjacent industries.

Target Audience

- Chief Digital Officers (CDOs) and Innovation Leads.
- Product Managers.
- Fintech Entrepreneurs.
- Enterprise Architects.
- Banking Executives.
- Risk and Compliance Officers.
- Customer Experience (CX) Designers.
- Treasury and Payment Specialists modernizing settlement processes.

Training Modules

Module 1: Foundations of the Platform Economy

- Evolution from legacy systems to platform-based business models.
- Understanding the "Orchestrator" vs. "Participant" strategic choices.
- Value exchange dynamics in digital ecosystems.
- The role of network effects in scaling financial services.
- **Case Study:** Analysis of DBS Bank’s transition to an "invisible" platform model.

Module 2: Open Banking and API Strategy

- Designing robust, developer-centric API catalogs.

- Security standards for open financial data sharing.
- Managing API lifecycle and developer relations.
- Interoperability frameworks for cross-industry connectivity.
- **Case Study:** The impact of PSD2 and Open Banking on European challenger bank adoption.

Module 3: Banking-as-a-Service (BaaS)

- Deconstructing core banking into modular service components.
- Building a white-label infrastructure for non-financial brands.
- Strategic pricing and revenue-sharing models in BaaS.
- Governance frameworks for managing third-party partners.
- **Case Study:** Green Dot’s transformation into a leading BaaS provider for major retail brands.

Module 4: Embedded Finance Architectures

- Integrating banking services into non-bank user journeys.
- Point-of-sale financing, insurance, and investment embedding.
- Reducing friction in user acquisition through contextual finance.
- Managing operational risks in embedded deployments.
- **Case Study:** Shopify Balance and the integration of financial tools into merchant platforms.

Module 5: AI-Driven Customer Intelligence

- Deploying Agentic AI for automated, context-aware advice.
- Hyper-personalization at scale using predictive analytics.
- Ethical AI, transparency, and bias mitigation in lending.
- Building "intent engines" to predict user financial needs.
- **Case Study:** Capital One’s use of AI/ML to revolutionize customer engagement and fraud prevention.

Module 6: Resilience, Risk, and Security

- Zero-trust architecture in distributed cloud environments.
- Real-time fraud detection and digital identity verification.
- Automated regulatory reporting and compliance monitoring.
- Managing systemic risk in interconnected digital networks.
- **Case Study:** Lessons from J.P. Morgan’s multi-cloud resilience and real-time payment security.

Module 7: Transforming the Bank Workforce

- The "10x Bank": Human-AI collaboration models.
- Agile methodologies for rapid product development.
- Upskilling for a digital-first, data-fluent workforce.
- Leadership strategies for managing cultural shift.
- **Case Study:** How Goldman Sachs utilized internal digital academies to reskill for a platform-led future.

Module 8: Scaling and Future Trends

- Tokenization, stablecoins, and the future of programmable money.
- Sustainable finance platforms
- Hyper-connectivity
- Strategic roadmap for long-term ecosystem maturity.
- **Case Study:** The rise of China's WeChat/Alipay "Super App" model and its global influence.

Training Methodology

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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