Demystifying Partnerships to Enable Competitive Advantage

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Panelists

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Session Overview

About Gateway Academy

Capacity Building Challenges & Partnership Opportunities

A Consortium-based Partnership Approach

Approach: Agile, Customer Centric, Design Thinking

Project Culture

Partnership Lessons Learned

Q&A
What is Gateway Academy?

A digital learning platform focused on financial inclusion

Improving staff performance in a rapidly changing financial inclusion industry by connecting financial institutions with leading training providers to offer cutting-edge learning solutions.

www.gateway.academy
Thom Sinclair | CGAP, Gateway Academy

Capacity building challenges
Facilitating Partnerships

Demand

Supply
Our Journey

What is the capacity building challenge?

How to bring on knowledgeable, collaborative partners?

How to develop a flexible, adaptive management approach?

Broader partnerships and collaboration
Financial Inclusion Sector: The Capacity Building Challenge

- Investing in capacity building at scale through digital learning
- Have low-barriers to usage for a variety of FSPs.
- Engage a variety of reputable training providers.
- Make training available to users globally in a cost-effective manner.
- Extend CGAP’s learning with providers beyond those with whom it partners directly.
- Identify capacity building models that are viable.
The Business Case for Capacity Building in this Sector

- **COST OF FACE-TO-FACE DELIVERY**
- **LIMITED ACCESS TO EXPERTISE IN NEW AREAS OF OPERATION**
- **HIGH LEVELS OF STAFF ROTATION**
- **LACK OF MEASURABLE RESULTS**
How to bring on knowledgeable, collaborative partners?
The Business Case for Capacity Building with Partners

- Procurement in a Bureaucracy
- Intellectual Property Management
- Strategic, Technical & Operations
- Limited Internal Capacity
Innovative Procurement Process: Competitive Dialogue

An interactive multistage procurement selection arrangement that allows for dynamic engagement with Proposers. - World Bank, 2017
# Competitive Dialogue Process

## Request for Expressions of Interest (REI)
- Project Approval
- REI invitation
- EOI due
- EOI Evaluation Committee

20 applicants

## Competitive Dialogue
- Invitation to Competitive Dialogue
- 1st Competitive Dialogue: presentation to vendors
- 2 Vendor oral presentations

3 proposers

## Request for Proposals (RFP)
- Issue RFP
- Submission of final proposals
- Evaluation Committee meeting

3 bidders

## Evaluation & Selection
- Award recommendation
- Vendor negotiations
- Legal review
- Vendor starts

1 consortium, 3 vendor partners
Capacity Building Challenge: Internal Insights

- We had a very creative procurement partners
- It’s a rigorous process
- Many internal dialogs
- Engage all stakeholders - think beyond silos
- Don’t stop at NO, Explore the “Maybes”
Capacity Building Challenge: Insights

- Demand Study
- FSP & TSP Needs Assessments
- In-Country Meetings & Workshops
- Collaboration & Co-Creation Workshop
- Training Service Provider Capacity Building
- Baseline & Endline Surveys
- On-Going Conversations with Diverse Stakeholders
How to develop a flexible, adaptive management approach?
How does a consortium-based partnership facilitate strategic, technical, and operational support to financial institutions?
Building the Consortium to Achieve Best-Fit

**Strategy**
- Leadership team
- Business modelling

**Design & Development**
- Technical guidance
- Digital learning experts
- Program development
- Hosting & Support Services

**Operations**
- Marketing & Branding
- Support Services
- Fiscal agent for contracts
- On-boarding users
How does agile management, design thinking, and customer-centricity approaches inform the process and products? The importance of shaping the "project culture"
What is Agile?

1. Agile software development meets Adaptive Management
2. Adopt the Silicon Valley approach and adapt it to a multi-year capacity building project
3. The approach works best in environments with lots of uncertainty and/or changing customer and audience dynamics
4. Accept that you are not optimizing for the first iteration--accept that you won’t get it right--build a process to be right over the long haul.
Approaches To Build Agile Culture

1. Start from the building and be consciously aware of building “culture”
2. Build transparency into your process
3. Technology helps [Slack, Google Drive, Zoom, Mural etc]
4. Shared accountability & management
5. Shorter units of work (2-week sprints)
6. Cross team / cross functional sprint teams
7. Create moments for reflection (smaller after each sprint, larger moments quarterly)
8. Focus on the work and the problems that arise not the people
9. Don't be afraid to throw things away (it’s not a waste if you have learned from it)
Suggested Reading

RUNNING LEAN
Ash Maurya
Iterate from Plan A to a Plan That Works

THE LEAN STARTUP
How Today’s Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses
ERIC RIES

SCRUM
The Art of Doing Twice the Work in Half the Time
JEFF SUTHERLAND
Co-creator of Scrum
J. J. SUTHERLAND

LEAN IMPACT
How to Innovate for Radically Greater Social Good
ANN MEI CHANG

SCRUM: A BREATHTAKINGLY BRIEF AND AGILE INTRODUCTION
by Chris Sims & Hillary Louise Johnson
authors of The Elements of Scrum

GATEWAY ACADEMY
Considerations for building a platform for this market
Considerations for Building a Platform

1. Core functionality is not dramatically different from other systems.
2. Build what you need, not more. Focus on design. Mobile-first & mobile centric approaches.
3. Build with your users (you are not the expert)
4. Make what you are building context specific
5. It’s about the experience, not the technology or the content
Discussion: Lessons Learned

Thom Sinclair | CGAP, Gateway Academy
Chris Proulx | Humentum
Scott Schafer | Bivee
Take a Tour: Gateway Academy Video

https://gateway.academy/tour
Learn More & Try a Demo

Get started on Gateway Academy

Learn more about what makes our platform different and become a part of our community.

Try a demo  Talk to us

Try a Demo - https://demo.gateway.academy

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