

WEBINAR

## Demystifying Partnerships to Enable Competitive Advantage



**27 February 2019**  
**8 - 9 am (U.S. Eastern)**

# Panelists



**Penina Lam, PhD**  
Consultant, CGAP

**Moderator**



**Thom Sinclair | CGAP,  
Gateway Academy**

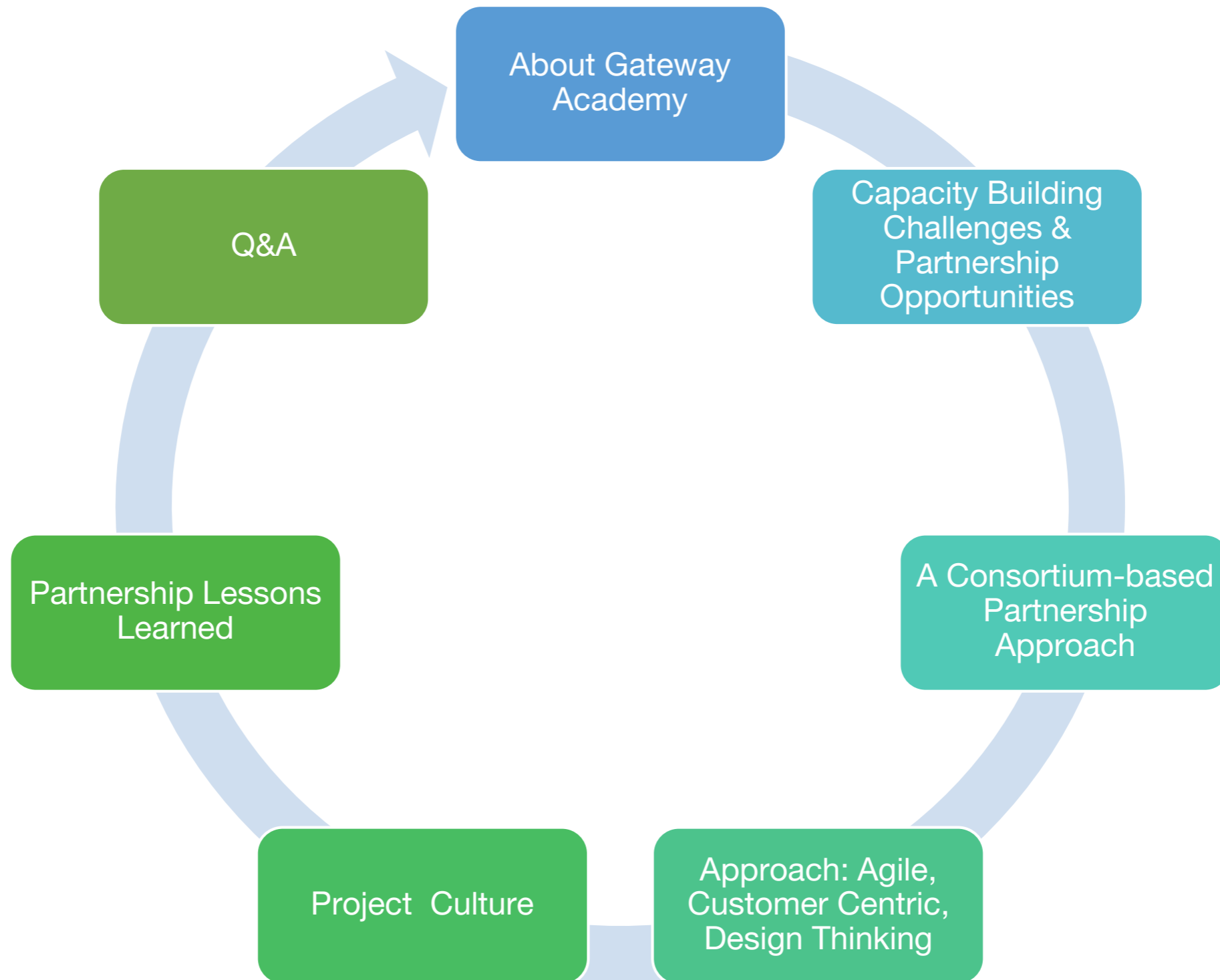


**Chris Proulx | Humentum**



**Scott Schafter | Bivee**

# Session Overview





# GATEWAY ACADEMY BETA

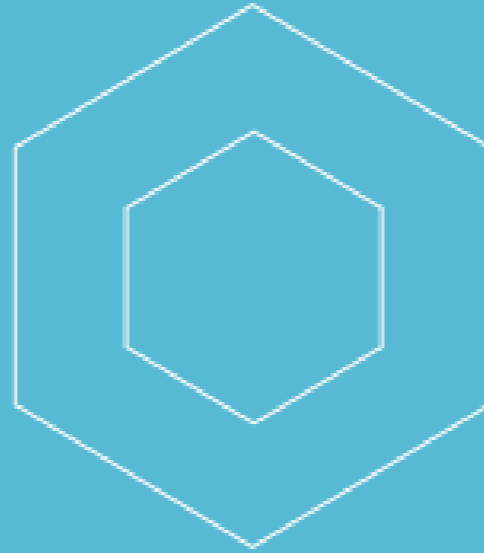
A digital learning platform focused on financial inclusion

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](http://www.gateway.academy)



**Thom Sinclair | CGAP,  
Gateway Academy**



# Capacity building challenges

# Facilitating Partnerships



# 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.



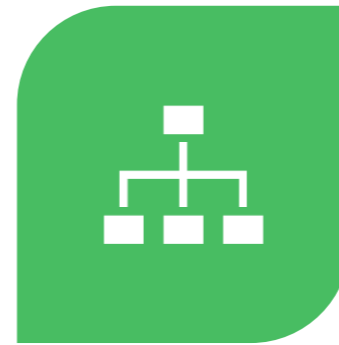
# The Business Case for Capacity Building in this Sector



COST OF FACE-TO-FACE DELIVERY



LIMITED ACCESS TO EXPERTISE IN NEW AREAS OF OPERATION



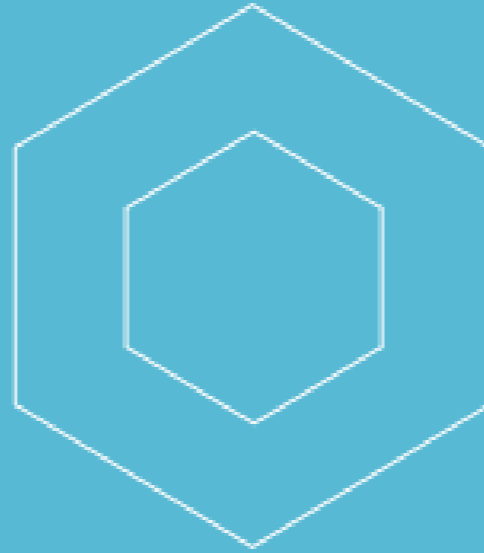
HIGH LEVELS OF STAFF ROTATION



LACK OF MEASURABLE RESULTS



**Thom Sinclair | CGAP,  
Gateway Academy**



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



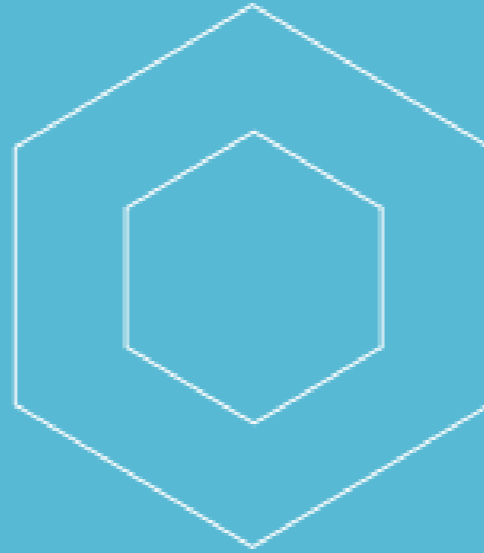
BASELINE & ENDLINE  
SURVEYS



ON-GOING  
CONVERSATIONS WITH  
DIVERSE STAKEHOLDERS



**Thom Sinclair | CGAP,  
Gateway Academy**



How to develop a flexible, adaptive management approach?



**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



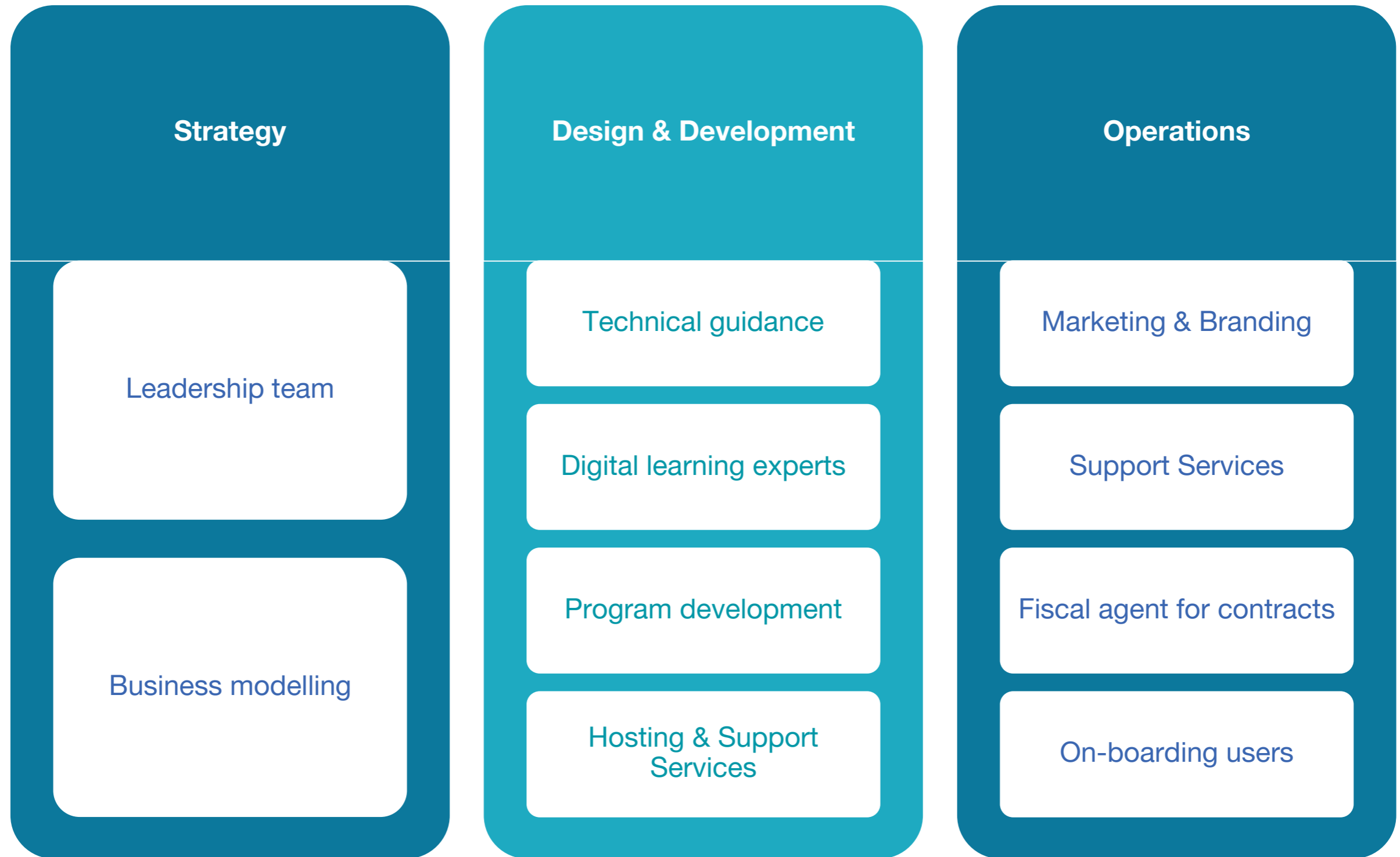
**Chris Proulx | Humentum**



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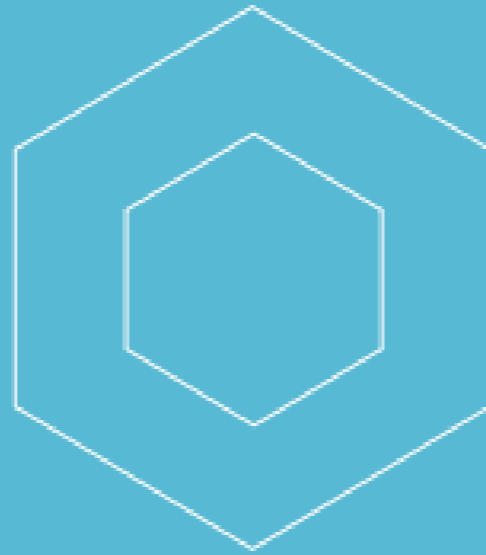
How does a consortium-based partnership facilitate strategic, technical, and operational support to financial institutions?

# Building the Consortium to Achieve Best-Fit





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How does agile management, design thinking, and customer-centricity approaches inform the process and products? The importance of shaping the "project culture"

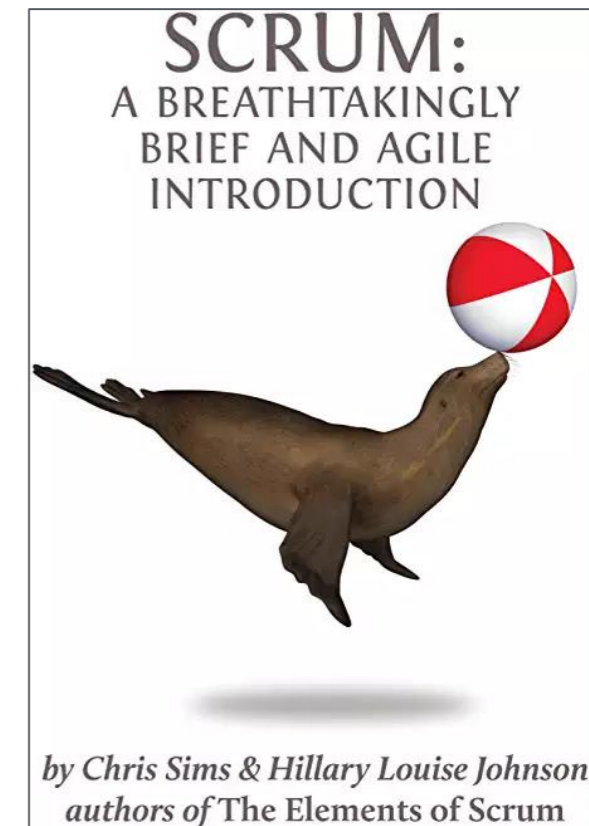
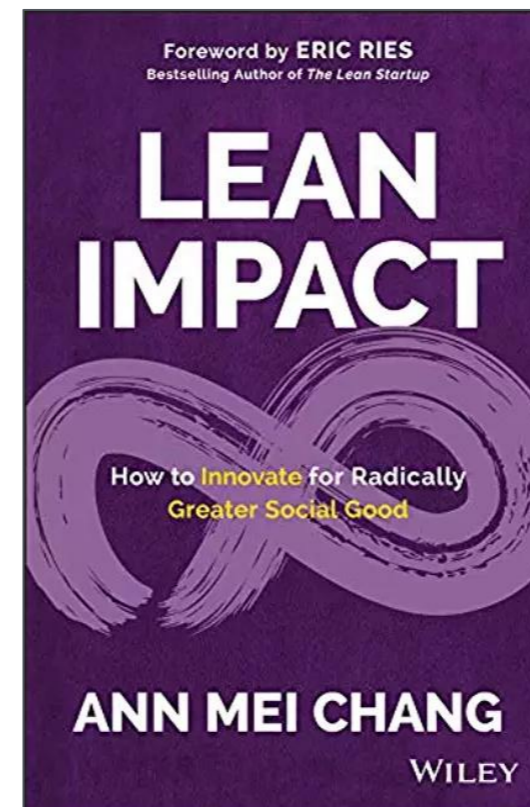
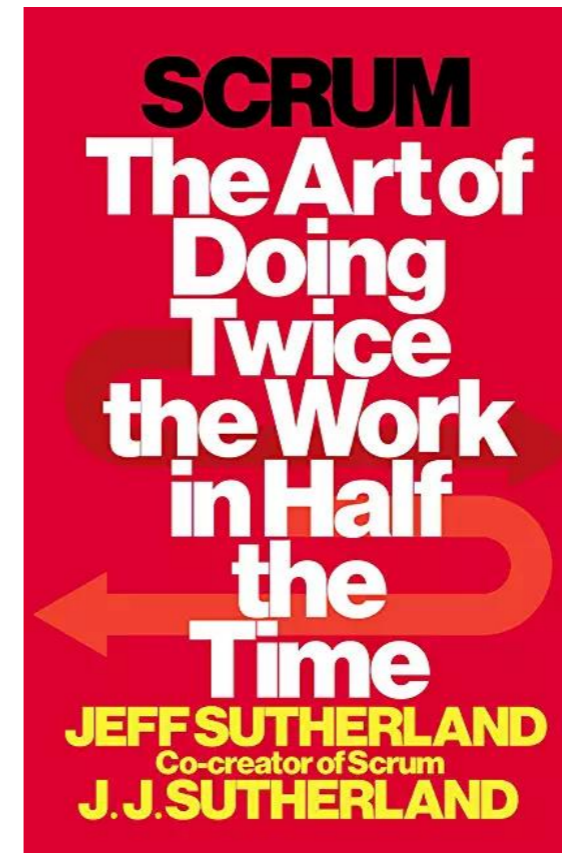
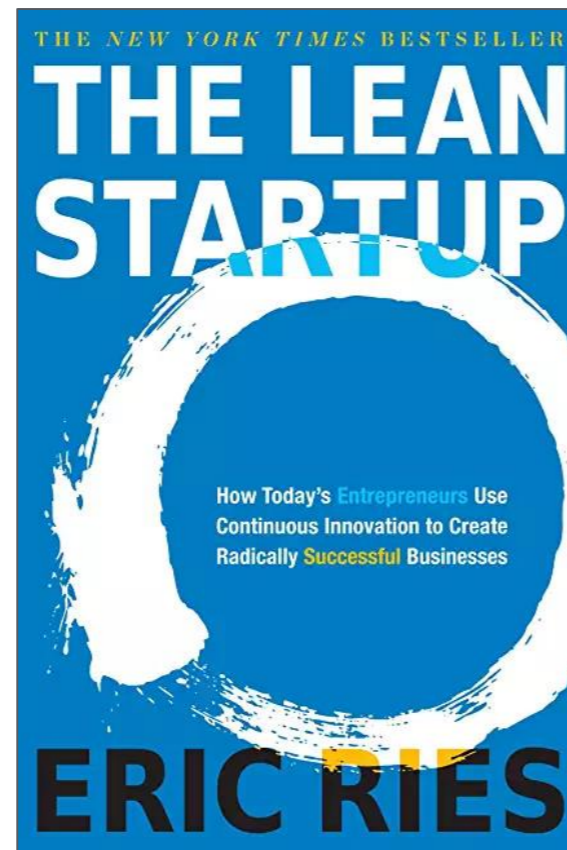
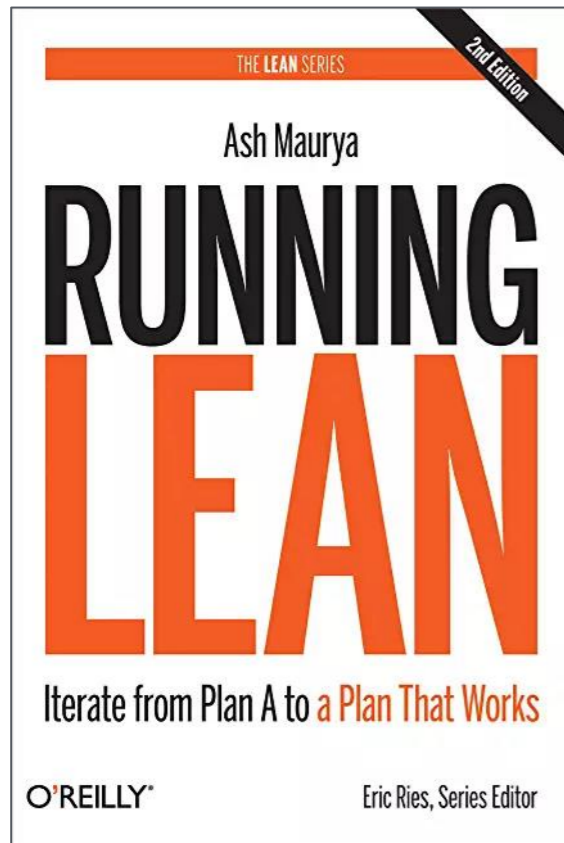
# What is Agile?

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

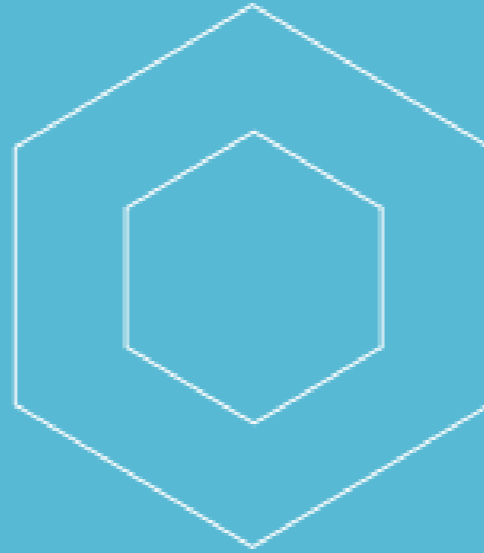
1. Start from the building and be consciously aware of building “culture”
2. Build transparency into your process
3. Technology helps [Slack, Google Drive, Zoom, Mural etc)
4. Shared accountability & management
5. Shorter units of work (2-week sprints)
6. Cross team / cross functional sprint teams
7. 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





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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



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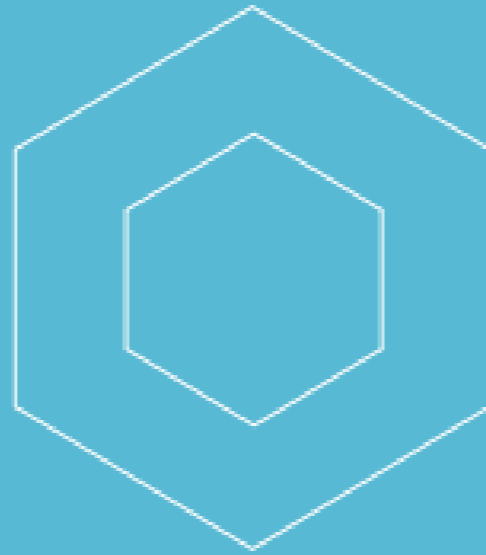


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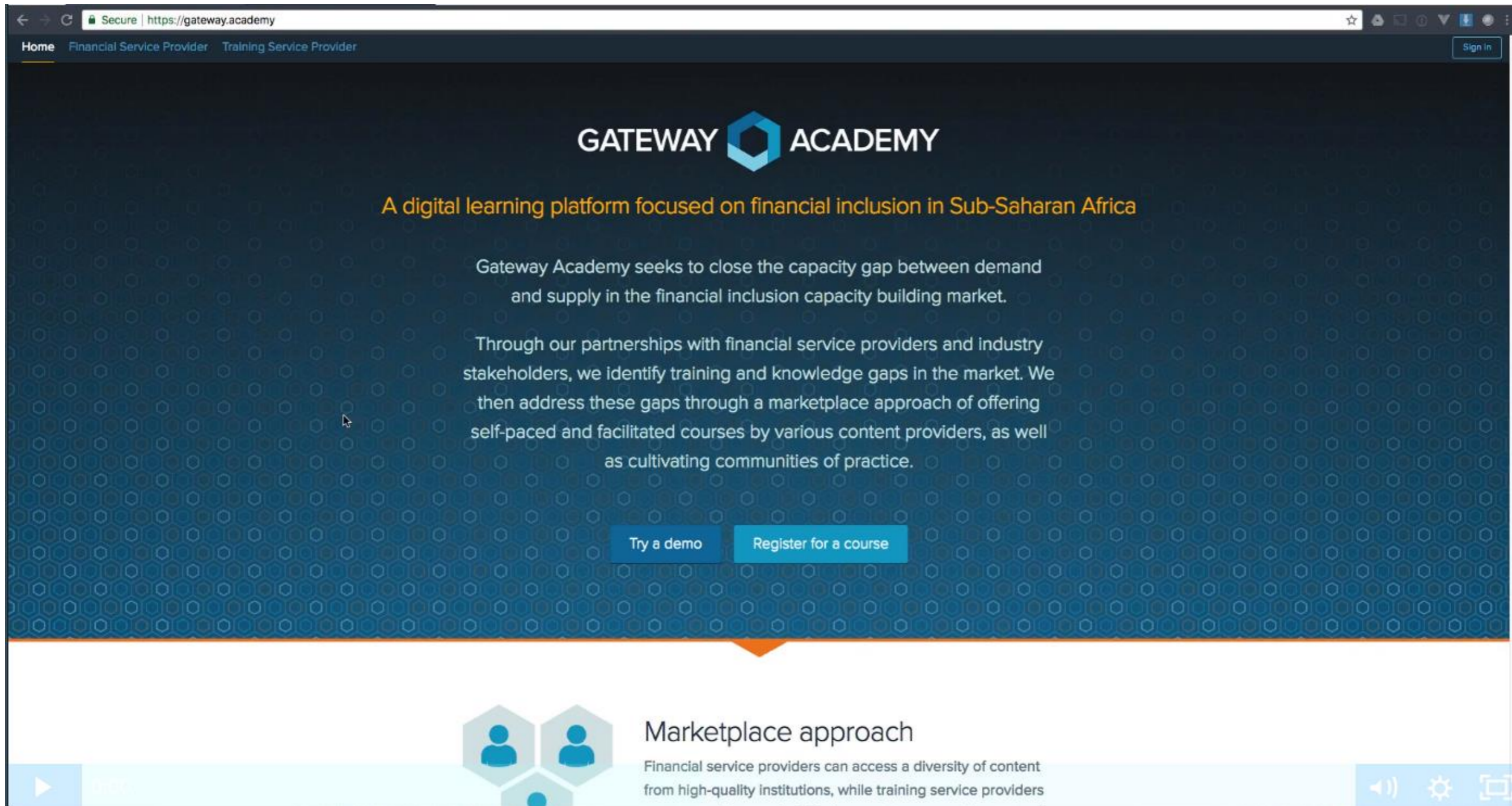
## Discussion: Lessons Learned



# GATEWAY ACADEMY: OPEN

Q & A

# Take a Tour: Gateway Academy Video



The screenshot shows the Gateway Academy website. The browser address bar displays "Secure | https://gateway.academy". The navigation menu includes "Home", "Financial Service Provider", "Training Service Provider", and a "Sign In" button. The main heading is "GATEWAY ACADEMY" with a logo consisting of a blue hexagon. Below the heading is the tagline: "A digital learning platform focused on financial inclusion in Sub-Saharan Africa". The main text describes the academy's mission: "Gateway Academy seeks to close the capacity gap between demand and supply in the financial inclusion capacity building market. Through our partnerships with financial service providers and industry stakeholders, we identify training and knowledge gaps in the market. We then address these gaps through a marketplace approach of offering self-paced and facilitated courses by various content providers, as well as cultivating communities of practice." Two buttons are visible: "Try a demo" and "Register for a course". At the bottom, there is a section titled "Marketplace approach" with an icon of three people and the text: "Financial service providers can access a diversity of content from high-quality institutions, while training service providers".

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Home Financial Service Provider Training Service Provider Sign In

## GATEWAY ACADEMY

A digital learning platform focused on financial inclusion in Sub-Saharan Africa

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Through our partnerships with financial service providers and industry stakeholders, we identify training and knowledge gaps in the market. We then address these gaps through a marketplace approach of offering self-paced and facilitated courses by various content providers, as well as cultivating communities of practice.

Try a demo Register for a course

### Marketplace approach

Financial service providers can access a diversity of content from high-quality institutions, while training service providers

<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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