



“Creating a successful partnership between a bank and a fintech requires more than a handshake. Mindsets must shift and cultures must change for alignment to occur in ways that benefit the consumer.”

- Joe Sullivan



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## Preparing Culture for Fintech Partnerships

As the financial landscape rapidly evolves, collaboration between traditional banks and innovative fintechs becomes more routine. Most financial institutions in the U.S. have explored or entered into at least one fintech partnership, and the year ahead will undoubtedly see more agreements generated and relationships forged. And while new regulatory guidance may offer a roadmap to ensure compliance, partnerships may fail to operationalize if cultures prove incompatible.

The best strategies and newest technologies will always fail if they conflict with how individuals or groups already believe or behave. This dynamic workshop aims to guide bankers in understanding and adapting their institution's culture to realize a seamless and mutually beneficial fintech partnership.

This session will share a framework for adjusting an institution's culture and building key characteristics that promote collaboration, innovation, and adaptability. With examples from throughout the financial services industry, participants will learn:

- 4 common reasons bank-fintech partnerships fail,
- 5 ways to assess and evaluate your current culture,
- steps to remove cultural aspects that inhibit successful partnerships, and
- ways to build the essential attributes a bank's culture should possess.

### About the Presenter

Joe Sullivan is the CEO and Founder of Market Insights, Inc. – a consulting firm with expertise in market research, strategy development and leadership training. As a consultant, psychotherapist, and professional speaker with over 30 years of experience, the themes of growth, innovation and motivation can be found throughout Joe's work.

He has been invited to share his insights with international, national, regional, and state trade associations as keynote and workshop presenter. Joe's passion, energetic style and practical approach engages his audiences and consistently makes him a top-rated speaker. His unique perspective comes from working side-by-side with executives and marketers around the U.S. in the development of successful growth strategies. Joe incorporates these frontline experiences into his presentations and offers insights that challenge conventional thinking, creating a sense of excited urgency with his audiences.