JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

# Bank Innovation Pipeline and Stage-Gate Funding Training Course

30 August – 3 September 2027
London

# Bank Innovation Pipeline and Stage-Gate Funding Training Course

**Ref:** 2461_93063 **Date:** 30 August – 3 September 2027 **Location:** London **Fees:** 5800 GBP

The Bank Innovation Pipeline and Stage-Gate Funding training course is a 1-week course for innovation and strategy leads in banks, insurers and payment firms, who leave with a drafted innovation pipeline charter. Financial institutions now receive more fintech proposals, partner pitches and internal ideas than they can fund, so a disciplined route from idea to scaled product protects both capital and reputation. Jupiter Prime Training delivers this course on bank innovation pipelines.

## Why Bank Innovation Pipeline Matters Now

Three forces shape the bank innovation pipeline today. Fintech challengers and big technology platforms shorten product cycles, boards ask for evidence that innovation budgets produce returns, and supervisors increasingly offer sandbox routes that reward well-prepared applicants. An institution that runs its pipeline well kills weak ideas early, releases money in tranches against evidence and scales winners quickly. One that runs it badly scatters funds and loses partners to faster rivals. The course rests on stage-gate funding logic, lean experimentation and venture portfolio thinking, described in plain terms.

## Who Gains Most from Bank Innovation Pipeline

- Innovation office leads who own idea intake, screening criteria and the pipeline dashboard
- Strategy managers who link experiments to the bank's growth themes and capital allocation
- Business line heads who sponsor ventures and must decide when to adopt a tested product
- Corporate venturing and partnership managers who assess startups, accelerator cohorts and minority stakes
- Risk and compliance partners who review sandbox applications and pilot safeguards

Innovation committees gain most when the office lead, a sponsor and a risk partner attend together.

## Bank Innovation Pipeline Capabilities

Participants practise moving ideas through evidence-based gates and tranches.

- Design an idea intake funnel with scoring criteria — innovation committee screening decisions
- Specify stage gates with evidence thresholds and tranche sizes — funding release by sponsors
- Weigh build, partner, accelerate or invest routes for an opportunity — strategy and venture choices
-

Assess startup partners and accelerator cohorts against bank needs — partnership managers
- Build a sandbox application and pilot safeguard plan — risk partners and supervisors
- Communicate pipeline health through a portfolio dashboard — executive committee and board

## Key Bank Innovation Pipeline Terms

- Stage gate — a decision point where a venture shows agreed evidence before the next tranche of money and people is released.
- Kill criteria — conditions, set in advance, that stop a venture when a test fails, freeing funds for stronger ideas.
- Minimum viable product — the smallest working version of a product that tests whether customers will use or pay for it.
- Corporate venturing — a bank taking equity stakes in startups to gain strategic insight, partnerships or future acquisition options.
- Regulatory sandbox — a supervised setting where firms test new financial products with real customers under agreed limits and safeguards.
- Innovation accounting — measuring progress of early ventures through learning milestones and leading indicators rather than revenue.

## Bank Innovation Pipeline Day by Day

### Day 1: Forces Feeding the Pipeline

- Fintech Disruption Scan — Where Bank Revenue Pools Are Under Pressure
- Growth Theme Mapping — Which Opportunity Spaces Deserve Pipeline Capacity
- Horizon Portfolio Split — Balancing Core, Adjacent and Transformational Bets
- Innovation Operating Model Options — Central Lab Versus Embedded Business Teams
- Stakeholder Sponsorship Map — Who Funds, Adopts and Blocks Ventures

### Day 2: Idea Intake and Screening

- Idea Sourcing Channels — Staff Challenges, Customer Insight and Partner Pitches
- Opportunity Scoring Matrix — Ranking Ideas by Value, Fit and Feasibility
- Problem Statement Canvas — Framing Customer Pain Before Solutions
- Assumption Mapping — Identifying the Riskiest Beliefs to Test First
- Screening Committee Charter — Membership, Cadence and Decision Rights

### Day 3: Stage-Gate Funding and Experiments

- Gate Evidence Thresholds — What Each Stage Must Prove
- Tranche Funding Schedule — Releasing Money Against Validated Learning
- Experiment Design Cards — Choosing Tests for Desirability and Viability
- Innovation Accounting Metrics — Tracking Learning Before Revenue Exists
- Kill and Pivot Rules — Stopping Ventures Without Blame

## Day 4: Accelerators, Venturing and Sandboxes

- Build, Partner, Accelerate or Invest Matrix — Choosing the Venture Route
- Accelerator Cohort Selection — Matching Startups to Bank Problem Statements
- Corporate Venture Investment Thesis — Strategic Versus Financial Return Goals
- Startup Partner Due Diligence — Security, Resilience and Data Handling Checks
- Sandbox Application Pack — Test Scope, Customer Safeguards and Exit Plan

## Day 5: Practising the Innovation Pipeline Charter

- Pipeline Portfolio Dashboard — Reporting Stage Mix and Burn to Executives
- Scaling Handover Plan — Moving Proven Ventures Into Business Lines
- Gate Review Simulation — Applying Thresholds to Live Case Ventures
- Venture Route Case Clinic — Testing Partner and Investment Choices
- Innovation Pipeline Charter — Drafting Gates, Roles, Budgets and Metrics

## Applying Bank Innovation Pipeline After the Course

- Run a gate review on three live ideas using the evidence thresholds and kill criteria agreed during the course.
- Present the drafted charter's tranche funding schedule and scoring matrix to the innovation committee for adoption.

## Bank Innovation Pipeline Questions FAQ

### What is a bank innovation pipeline and why does it matter now?

A bank innovation pipeline is the governed route that moves ideas from intake through tested stages to scaled products. It matters now because fintech competition, board scrutiny of innovation spend and sandbox routes reward institutions that fund ventures in evidence-based tranches.

### Which roles gain most from bank innovation pipeline and stage-gate funding skills?

Innovation office leads, strategy managers, business sponsors, venturing managers and risk partners gain most. Shared criteria let them approve, pivot or stop ventures consistently.

### How does a bank innovation pipeline course differ from a general fintech strategy course?

It focuses on the mechanics of running ventures rather than on market trends. A fintech strategy course explains where the industry is heading; this one teaches gates, tranche funding, accelerator selection, venture investment and sandbox preparation inside a financial institution.

### What do you bring back from the bank innovation pipeline course?

You bring back a drafted pipeline charter. It sets intake channels, gate thresholds, tranche sizes, venture routes and roles for your innovation committee to adopt.

## Bank Innovation Pipeline: The Way Forward

The innovation pipeline charter first informs which current ideas receive their next funding tranche and which stop. Innovation committees, business sponsors and risk partners use it to judge every venture against the same thresholds. After the first full gate cycle, revisit tranche sizes and kill criteria, since early evidence often shows gates set too loose or too strict.