FINOS
Fintech
Open Source
Foundation

Introduction to
Member Success

Getting the most out of
your membership

Confidential
The Member Success initiative

Introduces a new level of interaction with our members dedicated to maximizing value from all stages of engagement with FINOS.

We take an integrated approach working with our members to define their success criteria and path to achieving success across all FINOS programs.
Variety of member firms...

**Financial Firms**
- BNY Mellon
- Credit Suisse
- Tradeweb
- CITADEL
- Citi
- IHS Markit
- GreenKey
- J.P. Morgan
- Nomura
- Factset
- Morgan Stanley

**Technology Firms**
- GitHub
- OpenFin
- Symphony
- S&P Global
- IHS Markit
- IPREO
- BankEx
- NODESOURCE
- Cloud9
- ArconTech
- Fintech Studios
- ChartIQ
...at varying levels of Open Source maturity...

- **Ad Hoc**
  - Ad Hoc Consumption
  - No Contribution

- **Tracked**
  - Tracked consumption
  - No Contribution
  - Tracked consumption
  - Minor contribution

- **Managed**
  - Tracked Consumption
  - Minor contributions
  - Small proprietary contributions

- **Standardized**
  - Tracked Consumption and Contribution

- **Strategic**
  - Tracked Consumption and Contribution
  - All level of contributions including managing own open source software

**Consume** | **Contribute** | **Lead**
...with wide ranging interests ...

Applications
- VOICE
  Voice Technology
- SYM
  Symphony Ecosystem

Interoperability standards
- FDC3
  Financial Desktop Collaboration & Connectivity
- FOS
  Financial Objects Standardization

Middleware platforms
- HAD
  Hadouken Ecosystem
- PLEXUS
  Plexus Interoperability

Infrastructure
- FDX
  Finserv Developer Experience

Foundational
- OSR
  Open Source Readiness
...and different goals

- **TIME TO MARKET**
- **STAFF ATTRACTION**
- **MARKETING & VISIBILITY**
- **QUALITY IMPROVEMENT**
- **VENDOR FLEXIBILITY**
- **COST REDUCTION**
- **STAFF RETENTION**
- **INNOVATION**
The approach

Understand Current State

Understand the current state of open source consumption, contribution and awareness along with associated policies and processes as well as current activity in programs.

Identify Goals and Focus Areas

Clearly identify goals for engaging in FINOS and with open source more generally, understanding what "success" means for the specific member firm.

Define Approach

Define a roadmap that progressively moves the member firm towards “success” including specific milestones and a defined approach.

Drive Results

Execute on the approach, establishing appropriate metrics or reports to track progress and identify challenges or roadblocks sooner rather than later.
It’s an iterative process...

Culture eats strategy for breakfast.
...with a holistic approach

OPEN SOURCE READINESS

- Identify key projects that will help increase the motivation and drive to reach optimal Open Source Readiness.
- Proactive support to progress through the stages of Open Source Readiness to get full benefit from the Programs.

PROGRAMS

- Learn about the existing programs and which will help you achieve your goals and provide a high level of value.
- Identify new programs that are of interest to you and other Members.
- Find the right individuals in your organisation to engage in the working groups and projects.

OSR + PROGRAMS = MAXIMUM BENEFIT

Full Open Source Readiness enables you to get the most value out of the programs and community.
Identifying Opportunities

Trading protocols, analytics, reporting

Settlement, confirmation, reconciliation

KYC, AML, Document Management

Static, reference, market data
Now what?

Get in touch!

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