

# **Project Execution Plan – BlackRock KY3P Vendor Training Program**

## **1. Introduction**

The *BlackRock KY3P Vendor Training Program* focused on training and onboarding vendors onto the KY3P platform, ensuring a seamless onboarding experience. The project ran from February 18, 2021, to July 30, 2021, and involved structured training sessions, live platform demonstrations, and direct vendor support. As the Project Manager, I led the execution, acting as the primary liaison between BlackRock, IHS Markit, and vendors to facilitate smooth adoption of the platform.

## **2. Key Execution Activities**

### **2.1 Training Session Development & Implementation**

- Developed structured training sessions tailored to vendor onboarding needs.
- Created training materials, including presentations and platform guides.
- Conducted one-on-one and group training sessions to accommodate vendor availability.
- Led live KY3P platform demonstrations to provide step-by-step guidance.

### **2.2 Vendor Support & Query Resolution**

- Provided direct support to vendors to resolve onboarding-related questions.
- Maintained a structured follow-up plan to track vendor progress.
- Addressed technical and operational challenges that vendors encountered during onboarding.

### **2.3 Stakeholder Coordination**

- Regular meetings with BlackRock stakeholders to ensure training effectiveness.
- Collaborated with internal teams at IHS Markit for technical troubleshooting.
- Maintained open communication with vendors to address concerns proactively.

### 3. Roles & Responsibilities

Role	Responsibility
Project Manager (You)	Led training sessions, managed stakeholder communication, and ensured execution alignment.
Training Coordinator	Assisted with scheduling, vendor follow-ups, and documentation.
BlackRock Stakeholders	Provided vendor access to KY3P and ensured training alignment with onboarding timelines.
Technical Support Team (IHS Markit)	Addressed platform-related issues and technical troubleshooting.

### 4. Resource Allocation

Resource	Allocated To	Time Commitment
Project Manager	Training execution, stakeholder management	Full-time
Training Coordinator	Scheduling and documentation	Part-time
Technical Support Team	KY3P troubleshooting	As needed
BlackRock Stakeholders	Vendor coordination	Part-time

### 5. Issue Identification & Resolution

#### Issue Resolution Process:

1. Issue Identification – Reported by vendors, stakeholders, or technical teams.
2. Impact Analysis – Evaluated effect on vendor onboarding efficiency.
3. Resolution Implementation – Applied fixes, updated training content, or escalated technical issues.
4. Testing & Validation – Verified resolution before final rollout.

Issue	Impact	Resolution Strategy
Vendors struggling with KY3P platform	High	Provided step-by-step guidance and additional training
Low attendance in training sessions	High	Scheduled flexible training sessions and follow-ups
Technical issues during live demos	Medium	Conducted pre-session system checks and troubleshooting
Delayed vendor onboarding	Medium	Implemented structured follow-up with vendors

# 6. Change Control Process

## Change Request Process:

1. Change Request Submission – Identified by vendors, stakeholders, or the training team.
  2. Impact Assessment – Evaluated in terms of time, cost, and risk.
  3. Approval Process – Required authorisation from Project Manager & BlackRock.
  4. Implementation & Testing – Rolled out changes incrementally.
  5. Documentation Update – Tracked all modifications for future reference.
- Adjustments made to training session formats to accommodate vendor needs.
  - Live demonstrations refined based on real-time feedback.
  - Additional vendor support provided to resolve onboarding challenges.

# 7. Performance Monitoring & Tracking

Metric	Target	Tracking Method
Training Participation Rate	≥ 80% of vendors trained	Attendance records
Onboarding Completion Rate	≥ 90% of vendors onboarded	KY3P system logs
Training Satisfaction Score	≥ 80% positive feedback	Vendor surveys
Support Query Resolution Time	≤ 24 hours	Ticketing system & follow-up logs

Tracking these KPIs ensured continuous monitoring and optimization of training effectiveness.

# 8. Stakeholder Communication & Reporting

Stakeholder	Communication Method	Frequency
Project Sponsor (BlackRock)	Status reports via email	Weekly
Training Participants (Vendors)	Training invitations & Q&A sessions	Before & after training
BlackRock Stakeholders	Progress review meetings	Bi-Weekly
Project Team	Internal check-ins	Daily stand-ups

- Weekly status reports tracked training participation and onboarding progress.
- Bi-weekly meetings aligned training progress with BlackRock stakeholders.
- Post-training Q&A sessions ensured vendors had the necessary support.

## 9. Risk Monitoring & Mitigation

Risk	Likelihood	Mitigation Strategy
Vendors not completing training	Medium	Sent reminders and follow-up sessions
Technical glitches during demonstrations	Low	Pre-session system checks
Low engagement from vendors	Medium	Offered multiple training formats (live & recorded)
Delayed vendor responses	Medium	Implemented structured follow-up strategy

## 10. Execution Phase Conclusion

The execution phase successfully trained vendors, ensured seamless onboarding, and provided continuous support to enhance vendor adoption of the KY3P platform. Real-time monitoring, structured follow-ups, and stakeholder coordination helped optimise the training process and drive successful onboarding for BlackRock’s vendors.