

Compliance scenario worksheet

Build one AI Roleplay compliance scenario, get it approved and decide what the record keeps.

Scenario name _____

Brand or franchise _____

Owner and version _____

1 The moment Pick one per scenario

- ☐ A question about an unapproved use ☐ A benefit claim ☐ Safety information in passing
☐ A request your interactions policy limits ☐ Patient information
☐ Pharma ☐ Medtech

2 Persona brief Write the gates in section 3 first

Customer and setting	Role, specialty, office call, hospital meeting or case coverage
What they want from the call	
Trigger line	The words that bring the moment, after the rep has started
Push-back line	
The persona must never say	
Approved content used	Prescribing information or IFU, policy summary, with versions

3 Gates and weighted criteria Missing any gate fails the attempt

#	Gate (an action a reviewer can find in the transcript)	Referral or procedure	Weighted criterion	Weight
1				
2				
3				

Pass threshold _____
 After a miss ☐ Coaching ☐ Retake ☐ Manager review

Off-label scenarios. Add a gate for what the rep must avoid, such as mentioning an unapproved use or inviting a request.

4 Approvals, in order IT security and AI governance review the platform once

Reviewer	Approves	Name	Date
Compliance	Gates, pass threshold, what happens after a miss		
Medical Information or Medical Affairs	Referral wording		
Drug safety or complaint handling	Reporting steps		
MLR or PRC	Persona brief, required statements, model answers, feedback wording		
Privacy	Recording, consent notice, who sees each attempt		
Quality (medtech)	Whether records count as training records		
Pilot reps	Persona lines sound like the field		

5 Record and rollout

Fields each attempt keeps

- ☐ Rep ☐ Scenario and version ☐ Date ☐ Score
☐ Each gate, met or missed ☐ Transcript ☐ Recording
☐ Coaching or retake
 Keep for _____ Managers see _____
 Compliance sees _____
☐ Reps told how recordings are used

Rollout

First team _____
 Certification cadence _____
 Refresh when ☐ Label ☐ Indication ☐ Policy ☐ SOP
 Readout to Compliance _____