

CRM-to-scenario worksheet

One copy per AI Roleplay scenario. Work from segment-level patterns across many HCPs.

1 The pattern

Brand and HCP segment

CRM report and date range

Call stage, such as second calls

HCPs behind the pattern (minimum agreed with privacy: _____)

2 Before you pull the report

- ☐ Privacy agreed on the minimum number of HCPs per pattern
- ☐ Commercial Operations confirmed the data license covers training use
- ☐ Medical Information agreed to the use of request topics

3 Leave out of the scenario

- ☐ HCP names
- ☐ NPI numbers
- ☐ Practice names and addresses
- ☐ Individual prescribing volumes
- ☐ Verbatim call notes (summarize the themes)

4 Persona card

Specialty and practice setting

Segment or decile band

Access

Cares about

Objections, in the order reps meet them

- 1 _____
- 2 _____
- 3 _____

Off-label question the rep refers to Medical Information

Good outcome

5 Rubric Weights add up to 100

Weighted criterion	Weight

Pass gates. Miss either and the attempt fails.

- ☐ Required statements, with fair balance for any benefit claim
- ☐ Off-label question referred to Medical Information, without discussing it

Pass score _____, with both gates met

6 Reviews, in order

Group	What they check	Signed off
Privacy	Aggregated patterns, minimum group size	
Commercial Operations	Data license covers training use	
Medical Information	Use of medical information request topics	
IT security and AI governance	The vendor before content is shared, and any CRM connection	
Dry run	Trainers and two or three experienced reps	
MLR	Persona card, content, required statements, feedback	
Medical Information	Off-label question and referral wording	

7 Measurement Set before the class starts

Metric	Class before	This class
Time to certification (days)		
Score on CRM-flagged moments		
Referral accuracy		
Field ride rating		
Call plan attainment, first 90 days		

What else changed between the classes

8 Refresh

Next POA cycle

Re-pull sooner after a label update, a formulary change in a large account or a competitor launch. Send every changed scenario back through MLR.