

Field training platform scorecard: five handoffs

A platform that fails any pass-or-fail question leaves the evaluation. Score each handoff after every demo.

Platform A

Platform B

Platform C

1. Pass or fail Clear the first two with Legal and Privacy before any demo that records your reps

Question	What passes	A	B	C
Model training	A written answer, in terms Legal and Privacy accept, on whether your content and reps' practice recordings train any AI model	☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Pass ☐ Fail
Recordings	Privacy has approved how practice recordings are stored and who can see them	☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Pass ☐ Fail
Required statements	A missed required statement, such as fair balance, fails a certification attempt	☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Pass ☐ Fail

2. The five handoffs Score 1 to 5, multiply by the weight, then add up. Agree on weights before the first demo

Handoff and lead reviewer	Weight	What to test in the demo	A	B	C
1. Approved content to practice Commercial training and MLR	20%	A scenario built from the message you sent, with who built it and how long it took			
2. Practice to certification Commercial training and compliance, with a recently certified rep	25%	Feedback that flags the moment, and a trainer review step before a certification counts			
3. Certification to the field Onboarding lead	15%	Certification status by brand, and a 90-day path with gates			
4. Ride-along to next practice First-line and regional managers	25%	A phone form, an assignment with a due date, and the rescored practice			
5. One rep record Compliance, Legal, Privacy, IT security and AI governance	15%	The same record opened for compliance, a regional director and the LMS owner			
Weighted total	100%				

3. Brief, agenda and notes Send every vendor the same brief two weeks before its demo

The demo brief

1. Build one scenario from our approved message
2. Let our rep run two attempts, one without fair balance
3. Show a ride-along form and the practice it assigns
4. Open that rep's record for each of our reviewers

The 90-minute agenda

Handoff 1	15 min	Handoff 2	20 min
Handoff 3	10 min	Handoff 4	20 min
Handoff 5	15 min	Questions	10 min

Notes

Each lead reviewer scores their own handoff. Weights and timings are illustrative; adjust them to your program.

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