Template

Mobile field training planner

Team or brand _____ Rural and metro reps _____ Pilot dates _____ Owner _____

1 Day map One unit per moment, labeled for where it fits

Moment	Unit	Mode	Minutes	Works offline	Approved version
Before the first call At home or parked		☐ Silent ☐ Spoken		☐ Yes ☐ No	
Parked between calls Spoken practice fits here		☐ Silent ☐ Spoken		☐ Yes ☐ No	
Waiting room or lobby Silent units only		☐ Silent ☐ Spoken		☐ Yes ☐ No	
After a ride-along The manager's assigned refresher		☐ Silent ☐ Spoken		☐ Yes ☐ No	
End of day Longer modules, certification		☐ Silent ☐ Spoken		☐ Yes ☐ No	
Driving Company distracted-driving policy	**No training: no screen or spoken units**				

2 Approvals before the pilot

Approver	Name	Date	Done
IT and security App on company devices, sign-on, lost-device data			☐
Privacy Voice recordings: consent, access, retention			☐
MLR or PRC Claims in each unit, retiring old versions			☐
Fleet safety No unit or reminder asks for use while driving			☐
AI governance How AI scores spoken attempts, who reviews a score			☐
Learning and LMS owners Mobile attempts land in the training record			☐

3 Pilot measures By territory type

Measure	Rural, month 1	Rural, month 2	Metro, month 1	Metro, month 2
On-time completion				
Units stalled before syncing				
Attempts by time of day				
Attempts to first pass				
Certification on time				

Check which unit types work offline before you place them in the day map.

4 Notes for the next rollout

An illustrative template. Adjust the moments, units and approvers to your company's policies, including its distracted-driving policy.