

NSM readiness planner

Count the cycle from your meeting date. Fill in one copy per brand (pharma) or franchise (medtech).

Brand or franchise

NSM dates

Owner

1 Calendar Set each date from the meeting date

Milestone	When	Date	Owner
Platform review (IT security and AI governance)	Before any content is built		
Privacy approval of recordings and consent	Before the dry run		
Dry run of slides and scenarios	Before submission for review		
MLR or PRC approval (content lock)	Review turnaround plus one round of changes		
Pre-work sent	2 to 3 weeks before the meeting		
Knowledge check closes	A few days before travel		
Practice breakouts	Meeting days		
Certification window closes	Day 14		
Readout by district	Day 30		
Readout by district	Day 90		
Next POA (pharma) or franchise refresh (medtech)	Carry the results into its planning		

2 Certification gates Miss one and the attempt fails

- ☐ **Pharma** Fair balance on every benefit claim
- ☐ **Pharma** Off-label questions referred to Medical Information
- ☐ **Medtech** Claims within the cleared or approved indications
- ☐ **Medtech** Off-label questions referred to clinical or medical affairs

Passing score _____ · Window closes on day ____

3 Who certifies

- ☐ **Pharma** Reps and key account managers (MSLs train separately in Medical Affairs)
- ☐ **Medtech** Reps, and clinical specialists with added setup and technique criteria
- ☐ **Both** Reps who missed the NSM and reps hired after it

4 Reviews, in order

- ☐ **IT security and AI governance** The practice platform, reviewed once
- ☐ **Privacy** Practice recordings, who can see them and how reps consent
- ☐ **Dry run** Trainers and two or three experienced reps test slides and scenarios
- ☐ **MLR or PRC** Slides, pre-work, persona briefs, required statements, feedback wording; versions dated
- ☐ **Quality (medtech)** Certification records, if training records are quality records

5 Measures by stage Set targets before the meeting; report by district

Stage	Measure	When	Target	Actual
Prepare	Pre-work completion and knowledge check score	Before travel		
Practice	Breakout pass rate on each gate; most-missed objections	Meeting days		
Certify	Share of reps certified, by district	Day 14		
Reinforce	Field ride rating on the new message	Day 30 and day 90		

An illustrative template. Adjust the dates, gates, reviews and measures to your program and your company's policies.

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