Template

Onboarding platform pilot scorecard

Brand or franchise _____ Class start date _____ Vendor _____ Owner _____

1 Field release

Every check a new hire passes before working alone

Check	How it's verified	Owner

Same bar for both groups. One live certification, scored by trainers who don't know the group.

2 Pilot setup

Pilot group size _____

Comparison group ☐ Split class ☐ Previous class

Field release target date _____

Decision date (day 30 in the field) _____

3 Approvals before day one

Approver	What they clear	Date
☐ **Privacy**	where voice recordings are stored and who can open them	
☐ **IT**	single sign-on, ISO/IEC 27001 and accounts before day one	
☐ **LMS owner**	completions in the system of record	
☐ **MLR or PRC**	scenarios built from approved content	
☐ **Quality (medtech)**	how training records are kept	

4 Measures

Count from each new hire's start date

Measure	Target	Pilot group	Comparison
Days to field release (median)			
Days to certification (median)			
First-attempt pass rate			
Review time (hours to a decision)			
Build time (hours per scenario)			
Day-30 field rating			

5 Volume tests

Run during the pilot, with the whole class

Test	What you saw	Passed
Review queue at class start Peak attempts waiting, and hours to a decision on the busiest day		☐ Yes ☐ No
Content change mid-class Version loaded on day ___; the right new hires assigned the update		☐ Yes ☐ No
Records for approvers Compliance, the LMS owner and, in medtech, credentialing get what they need		☐ Yes ☐ No

6 Decision

☐ **Move the next class to the platform** ☐ **Run a second pilot class** ☐ **Stop**

Reason _____

For the next class _____