Planner

Role-based coaching track planner

One competency framework, one AI Roleplay track per field role. Print it and complete it before the pilot.

1 Target level on each competency

Foundation, Proficient, Advanced or Not targeted

Competency	New reps	Tenured reps	Hospital reps	KAMs	Managers
Fair balance and off-label referral	**Pass gate**	**Pass gate**	**Pass gate**	**Pass gate**	**Pass gate**

2 Track cards

Review each card at every POA cycle

Track	Customers and personas	Scenarios	Cadence	Manager rhythm	Extra review
New territory reps					
Tenured territory reps					
Hospital reps					
Key account managers					
First-line managers					

3 Manager calibration

POA cycle 1 session _____

POA cycle 2 session _____

POA cycle 3 session _____

After a rubric change _____

Recorded attempts each manager scores _____

Feedback window for flagged attempts (hours) _____

4 Reviews, in order

- ☐ **IT security and AI governance:** The vendor, once, before any content reaches it
- ☐ **Privacy:** How practice recordings are stored and who can replay them
- ☐ **MLR:** Persona briefs, required statements and feedback wording; each version dated
- ☐ **Medical Information:** Off-label questions and the referral wording
- ☐ **Legal and Compliance:** KAM scenarios that touch pricing or contracting

5 Metrics by role

Read each track against its own target

Track	Practice measure	Field measure	Target	Last quarter
New territory reps	Days from start date to certification	Field ride rating on key messages		
Tenured territory reps	Score on scenarios refreshed after each POA	Field ride rating on the new messages		
Hospital reps	Score on specialist and pharmacist scenarios	Manager rating on new hospital accounts		
Key account managers	Score on rehearsals before major meetings	Manager review after the meeting		
First-line managers	Spread of scores in calibration	Flagged attempts reviewed within the window		