

Value analysis rehearsal planner

One fictional account and one AI Roleplay persona for each step, rehearsed in order. Fill in one copy per committee date.

1 Account brief Fictional, shared by all personas

Health system, type and size

Device and its cleared or approved indications

Product it would replace, and the contract it sits on

Clinical champion and the request

Value analysis lead

Approved materials the team may use

Submission deadline	Committee date	Vendor slot (minutes), or champion briefing
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Off limits in every scenario Patient information and uses outside the indications. Pricing stays with the strategic account manager.

2 Pass gates Miss one and the attempt fails

- ☐ **Every rehearsal** Claims stay within the cleared or approved indications
- ☐ **Every rehearsal** No patient information enters the conversation
- ☐ **Rep and clinical specialist** Price and contract terms go to the strategic account manager; cost claims come only from the approved cost model
- ☐ **Strategic account manager** Terms stay within approved pricing guidance

3 Reviews, in order

- ☐ **IT security and AI governance** The vendor, once, before any content reaches it
- ☐ **Privacy** Session storage and access; no patient information in scenarios
- ☐ **Compliance** Company policies and, if adopted, the AdvaMed Code
- ☐ **Legal and contracting** Scenarios that touch pricing, GPO contracts, trial terms or capital terms
- ☐ **Dry run** Trainers and two or three experienced reps
- ☐ **Promotional review (PRC)** Persona briefs, required statements, claims, feedback; each version dated
- ☐ **Quality** Training records, if your quality system treats them as quality records

4 The path and the rehearsal calendar Count back from the submission deadline and the committee date

Step	Lead	When	Persona	Rehearse by (date)	Manager review
Champion conversation	Rep	Before the submission deadline			
Evidence packet call	Rep, for the champion's submission	Before the submission deadline			
Committee step	Rep and clinical specialist	2 to 3 weeks before, plus a final run in the last week			
Contracting	Strategic account manager	After the decision			
Implementation and in-service planning	Clinical specialist	After the decision			

5 Readiness by stakeholder Report by account team before the committee date

Conversation	Practice measure	Field measure	Status
Champion	Score on the champion persona	Manager rating from the joint visit	
Evidence packet	Score on the value analysis lead persona	Accepted without a request for missing information	
Committee step	Score, and time against the slot	Questions the team couldn't answer	
Contracting	Score on the supply chain persona	Terms agreed within approved pricing guidance	
Implementation	Score on the in-service planning persona	In-services done before the first case	

Vendor credentials current before on-site meetings ☐ Rep ☐ Clinical specialist ☐ Strategic account manager