



2027 GUIDE · FOR LIFE SCIENCES COMMERCIAL TRAINING

How To Plan Your First AI Roleplay Pilot

Six working tools to choose the right first use case, build an HCP scenario your compliance team can approve, and agree on what success looks like before day one.

FEATURING RESULTS
AND PERSPECTIVES
FROM



Five Decisions Before Day One

An AI roleplay pilot rarely stalls on the technology. It stalls on decisions that were not made at the start. This kit takes you through all five, in the order they come up.

#	DECISION	THE QUESTION TO ANSWER	PAGE
1	The use case	Which team, which conversation, which deadline?	3
2	The scenario	What does good practice look like for our reps?	4
3	The yardstick	How will we judge the pilot, and any vendor in it?	6
4	The sign-offs	Who needs to say yes, and what will they ask?	7
5	The plan	Who does what, week by week?	8

What a Good Pilot Looks Like

- One team, one use case, one measurable outcome
- Built from content MLR has already approved
- Success criteria agreed before the first rep logs in
- A sponsor who will act on the result
- A fixed end date and a readout on the calendar

Also in This Kit

- Six ways pilots stallp. 9
- Success criteria and go/no-go p. 10
- Launch and certification results p. 11



“Quantified's AI personas enabled us to scale our training without pulling people out of the field. Our learners loved how intuitive and customizable the tool was, and it became a key part of our accelerated training schedule.”

Keenan Stare · Product and Disease Training Manager |  NOVARTIS

Choose One Use Case

Pick the use case with a deadline and a leader who is measured on the result.

STRONG FIRST PILOT

Launch readiness

Certify a field force on a new product or indication before launch.

Measure: time to certification, first-time pass rate
Watch for: MLR timelines on launch content

STRONG FIRST PILOT

Message or indication update

Recertify reps when messaging, safety information, or the label changes.

Measure: time to recertify, message accuracy
Watch for: content must be final before scenarios are built

GOOD FIT

Tenured-rep objections

Sharpen experienced reps on the objections they lose most often.

Measure: score change on target objections
Watch for: personas must be as tough as the real HCP

PLAN CAREFULLY

New-hire onboarding

Add practice and certification to an existing onboarding program.

Measure: time to readiness, pass rates
Watch for: a full class to read results, and wins that may not speak to the wider field

Your Pilot on One Line Each

Use case and product

Team and number of reps

Business result it supports

Deadline or catalyst

Executive sponsor

Approved content

☐ Approved

☐ In MLR review

☐ Not started



“The ability to scale training without sacrificing quality was a game-changer for us.”

Peter Frank · Director, Cardio Renal and Women's Health Franchise Training



Anatomy of an HCP Practice Scenario

A useful scenario is more than a script and an avatar. This example shows the six choices that turn approved content into practice that changes how reps sell. The brand, the HCP, and the clinical details are fictional.

EXAMPLE SCENARIO BRIEF

Launch Certification: Corvanta in Heart Failure

REP

Hospital account specialist, six years in territory

HCP PERSONA

Dr. Elena Ruiz, cardiologist at an academic medical center

SETTING

Between clinics, about five minutes

HER STARTING POINT

Satisfied with current care, skeptical of new entrants, frustrated by prior authorizations

REP'S OBJECTIVE

Agreement to consider Corvanta for appropriate patients, plus a booked access meeting

3

approved messages

3

objections

1

compliance moment

1 Start from approved content

Every message the rep should deliver, and every fact the persona can confirm, traces to MLR-approved material.

Why: scoring against approved messaging only works if the scenario is built from it.

2 Build the persona from the field

Specialty, setting, current habits, time pressure, and attitude come from field input, not the brand plan.

Why: experienced reps tune out a persona who is easier than the real HCP.

3 Use the objections reps are losing

Manager notes and field feedback choose the objections, not a generic list.

Why: practice time goes where performance is weakest.

4 Plant one compliance moment

The HCP asks about patients outside the label. The right answer is to decline and offer a medical information request.

Why: reps rehearse the policy before it comes up in the field, and compliance sees how it is handled.

5 Define good before anyone practices

Criteria and exemplars come from your top performers and your own coaching model.

Why: reps are scored against your standard, not a generic rubric.

6 Make feedback specific enough to act on

Each criterion gets a plain-language note tied to what the rep actually said.

Why: reps know exactly what to change on the next attempt.

What Good Practice Sounds Like

An excerpt from the same fictional scenario, with the scoring criteria and the kind of feedback a rep should get right after practice. Numbers in the margin point back to the six choices on page 4.

HCP

"I have about five minutes. My patients are stable on what they're on. Why would I change anything?"

3 · Objection

Rep

"That's fair. Can I ask about the patients who are still being hospitalized despite treatment? That's the group Corvanta was studied in."

1 · Approved

HCP

"What about my patients on dialysis? Has anyone used it there?"

4 · Compliance

Rep

"Patients on dialysis weren't included in the clinical trials, so I can't speak to that. I can submit a medical information request so our medical team can follow up with you directly."

HCP

"Coverage is my other problem. Prior authorizations eat up my staff's time."

3 · Objection

Rep

"Understood. Our access support program helps with benefits verification and prior authorizations. Could I set up time for our access specialist to meet your office manager next week?"

1 · Approved

5 · SCORING CRITERIA	RESULT
Opens on the HCP's priority	Met
Efficacy message delivered accurately and in context	Partly
Required to pass: off-label question handled to policy	Met
Access objection answered with approved resources	Met
Secures a specific next step	Met

6 · EXAMPLE COACHING FEEDBACK

Strong handling of the dialysis question. You declined clearly and offered the medical information route.

Next attempt: when Dr. Ruiz says her patients are stable, ask how many were hospitalized in the past year before you bring in the efficacy message. Let her name the problem, then answer it.

Illustrative example. The brand, HCP, and clinical details are fictional. Scoring criteria, pass rules, and exemplars are set by each customer.

Judge the Practice, Not the Avatar

A realistic avatar is table stakes. Whether reps sell differently comes down to accuracy, compliance, scoring, and feedback. Use this to judge the pilot and any vendor in it.

CRITERION	WHAT TO LOOK FOR	WEIGHT	SCORE 1-5
Scientific and message accuracy	The persona stays inside approved content and never invents a clinical claim	20%	_____
Compliance behavior	Off-label and fair-balance moments are built in, compliance can review scenarios before launch, and every session leaves an audit-ready record	20%	_____
Scoring you can trust	Scored against your criteria and exemplars, consistent from rep to rep, and explainable to a manager	15%	_____
Feedback quality	Specific, tied to what the rep said, and available the moment practice ends	15%	_____
Authoring and updates	Time from approved content to a live scenario, how updates work when the label changes, and who does the work	10%	_____
Rollout support	A named team, a plan for managers and reps, and clear ownership of each step	10%	_____
Realism	A believable persona, a natural conversation, and the languages your teams need	10%	_____
Weighted total	Weight × score, summed	100%	_____

Five Questions to Ask Any Vendor

- 1. Can you show us a scenario built from our approved content, not a demo library?
- 2. What happens, in the scenario and in the record, when a rep answers an off-label question?
- 3. How long from approved content to a live scenario, and who does that work?
- 4. What will managers see, and who decides?
- 5. During rollout, what does your team own and what do we own?

Who Needs to Say Yes

Compliance and IT belong in the first conversation, not the last. Bring each group in during week zero and check off their questions as you go.

THE OWNER

Commercial training

- ☐ Use case, team, and dates confirmed
- ☐ Approved content and exemplars identified
- ☐ Success criteria drafted (page 10)

THE SPONSOR

Commercial or brand leadership

- ☐ Which business result does the pilot support?
- ☐ What result would justify expanding it?
- ☐ Who hears the readout, and when?

THE FIRST PARTNER

Compliance, legal, and MLR

- ☐ Review scenarios, personas, and scoring criteria before launch
- ☐ Agree how off-label questions are handled in practice
- ☐ Confirm where session records live, and for how long

START IN WEEK ZERO

IT and security

- ☐ Security review, including the vendor's SOC 2 report
- ☐ Single sign-on, data handling, and retention agreed
- ☐ Network allowlisting tested on the laptops and tablets reps actually use

THE MULTIPLIER

Frontline managers

- ☐ What managers will see, and what they won't
- ☐ How to use results in a weekly coaching conversation
- ☐ The time expected of them each week

THE USERS

Reps

- ☐ Why the team is piloting AI roleplay
- ☐ Who can see their sessions and scores
- ☐ That practice is a safe place to get it wrong before the field

"I love the ability for my reps to get practice without being concerned who is looking at the video—it's like a personal AI coach for each of them. And this saves me a ton of time!"

District Sales Manager · Global Pharma Company

Who Does What, Week by Week

A sample six-week plan showing what your team owns and where Quantified does the work. Adjust it to your launch calendar, your review cycles, and the size of your team.

WEEK	YOUR TEAM	QUANTIFIED
Week 0 Align	Name the sponsor, confirm the use case and team, open the IT and security review	Kickoff and scoping session, draft success criteria, security documentation
Week 1 Build	Share approved content, top-performer exemplars, and the objections reps are losing	Turn approved content into scenarios, personas, and scoring criteria
Week 2 Review	MLR and compliance review, a test run with two or three managers	Revise scenarios, set up visibility and accounts
Week 3 Launch	Sponsor message to reps, manager briefing	Launch support, rep onboarding, help for the first sessions
Weeks 4 and 5 Practice	Managers coach from results, reps practice toward certification	Track adoption, share a weekly readout, adjust scenarios that aren't landing
Week 6 Read out	Go/no-go decision with the sponsor	Results against the agreed criteria, and a plan for the next team

What to Have Ready for Week 1

Approved content Core messages, the label, and any approved objection handlers	Two or three exemplars Recordings or write-ups of what your best reps sound like	Field objections The pushback managers hear most, in the HCP's words
An MLR reviewer With review time held in weeks 1 and 2	An IT contact For single sign-on, allowlisting, and device testing	A rep roster Names, managers, and regions for the pilot team

Six Ways Pilots Stall

None of these are about the technology. Each one is avoidable if you catch it in week zero.

#	WHERE IT STALLS	HOW TO PREVENT IT
1	Success is defined afterward The pilot ends with a debate instead of a decision	Agree on metrics, targets, and the decision rule with your sponsor before launch (page 10)
2	Content isn't approved in time Scenarios wait in the MLR queue while the launch date holds	Build only from content that is already approved, and book review time for weeks 1 and 2
3	Reps think it's a test They practice once, play it safe, then stop	Set visibility up front, explain it in the sponsor's launch message, and position practice as a safe place to get it wrong
4	Managers sit it out Results pile up and no one coaches from them	Brief managers before launch and give each one a single coaching action to take every week
5	IT surprises on launch day A firewall or device setting blocks audio and video	Open the security review in week zero and test on the actual laptops, tablets, and networks reps use
6	The use case is too safe It works, but nobody senior is measured on the result	Tie the pilot to a launch, a label change, or a certification deadline a leader already cares about



“

It was super easy to use for the learners...the managers were able to start coaching right away.

Chrissy Richards
 Director of Commercial Training, Sanofi

sanofi

Agree on Success, Then Start

A pilot is only as convincing as the yardstick agreed in advance. Fill in today’s baseline, set each target with your sponsor, and record the result at the readout.

METRIC	HOW IT IS MEASURED	BASELINE	TARGET	RESULT
Time to certification	Days from content release to full certification	_____	_____	_____
Certification rate	Share of the pilot team certified by the deadline	_____	_____	_____
First-time pass rate	Share certifying on the first attempt	_____	_____	_____
Practice volume	Practice sessions per rep before certification	_____	_____	_____
Message accuracy	Average score against your approved criteria	_____	_____	_____
Assessment hours	Trainer and manager hours spent assessing	_____	_____	_____
Rep confidence	Pre- and post-pilot survey	_____	_____	_____

The Decision at Week 6

GO

Targets met. Expand to _____ by _____.

ADJUST

Adoption strong, targets partly met. Change _____ and run _____ more weeks.

STOP

Adoption and targets both missed. Record why, and what would have to change.

After a go, teams usually add a second team, a second use case, or certification gates on every launch.

Executive sponsor

Commercial training lead

Date agreed

Launch and Certification, at Scale

Three programs run with Quantified, each a version of the use cases on page 3.



LAUNCH CERTIFICATION

100%

of a 500-rep field force
certified in five days, with four
trainers

80% certified within 48 hours
250 trainer hours saved



LAUNCH CERTIFICATION

97%

mastery rate across a launch
team of more than 500 reps

500+ reps certified
4,500+ practice sessions
logged



ONBOARDING AT SCALE

95%

first-time pass rate for new
sales specialists

150+ sales specialists
onboarded
59% increase in training
efficiency



“

Reps told us they felt more prepared walking into HCP conversations. They weren't just certified—they were confident.

Kathy Driscoll
Associate Director, Brand Franchise Training, Bayer



ACROSS QUANTIFIED CUSTOMERS

6×

more rep practice

40%

reduction in time to readiness

+19%

increase in good selling outcomes



YOUR NEXT STEP

Bring Us One Training Use Case

In a 45-minute working session, we'll map the scenario, the coaching criteria, and a pilot plan with you, using the templates in this kit.

Book a Working Session

quantified.ai/demo-request

Quantified

Quantified is the AI Sales Coaching Platform for life sciences and regulated commercial teams. Trusted by the world's largest life sciences companies.

Quantified is used by 55,000+ field reps at 30+ enterprise customers, including more than 10 of the top global pharmaceutical companies.