

Field Team Readiness Checklist

Swipe to see 5 areas
to review before the next
commercial push →



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CRM Access

Can teams capture and view activity clearly?

- ✓ HCP records are accurate and current
- ✓ Field activity can be captured in real time
- ✓ Offline access is available when needed
- ✓ Call notes and interactions are easy to enter
- ✓ Segmentation supports smarter outreach
- ✓ Dashboards show what reps need most
- ✓ CRM workflows match field team behavior
- ✓ User support is easy to access

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Hardware Readiness

Are devices deployed, secure,
and supported?

- ✓ Devices are configured before deployment
- ✓ Users have secure access to key platforms
- ✓ Inventory is tracked across the device lifecycle
- ✓ Updates and patches are managed consistently
- ✓ Lost or damaged devices have a replacement path
- ✓ Support teams can troubleshoot quickly
- ✓ Field teams are not slowed by hardware issues
- ✓ Device management supports compliance needs

Sampling Visibility

Can teams track inventory, movement, and accountability?

- ✓ Sample inventory is visible and current
- ✓ Transfers and shipments are documented
- ✓ Field teams understand program rules
- ✓ Reconciliation is built into the workflow
- ✓ Exceptions can be identified quickly
- ✓ PDMA compliance requirements are supported
- ✓ Reporting shows what is moving
- ✓ Teams can act before issues escalate

Data Confidence

Are reports helping teams
prioritize action?

- ✓ Data sources are connected and reliable
- ✓ Reports answer real commercial questions
- ✓ Teams can see performance trends clearly
- ✓ Gaps and opportunities are easy to identify
- ✓ Insights support smarter territory planning
- ✓ Leadership can monitor program health
- ✓ Field teams know what to act on next
- ✓ Data supports decisions, not just reporting



Build Readiness into Every Engagement

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