Sales Training Pilot Charter and Review

Plan a bounded test that informs a documented continue, adapt or stop decision.

Your reusable working template 1/2

> **1.** Agree the decision and evidence before selecting a course or announcing rollout.
> **2.** Include conditions that resemble rollout and document who the pilot does not represent.
> **3.** Keep paired assessments, missingdata and application opportunities visible; use comparisons only when defensible.
> **4.** Review the complete package and make a documentedcontinue/adapt/stop decision; seek evaluation expertise for causal claims.

Scale decision, pilot question and training need

Cohort variation, inclusion, exclusions and participant information

Training-and-support package, owners and protected time

Baseline task, equivalent follow-up task and rubric calibration

A practical Tibyan working aid, not a validated assessment. Example is hypothetical; adapt decisions and figures to your context. Do not enter sensitive information in a shared copy.

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Your reusable working template 2/2

Process evidence, workplace opportunities and missing-data record

Illustrative schedule, resources and cost assumptions

Pre-agreed expansion conditions, critical issues and stop/adapt rules

Review findings, limitations, decision owner and next evidence step

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Completed hypothetical example 1/2

Scale decision, pilot question and training need

Decide whether to expand discovery-summary practice. Skill need: buyer-checked problem statements rather than unsupported savings claims.

Cohort variation, inclusion, exclusions and participant information

Eight sellers and two managers; inspect experience, language and sales context; communicate developmental purpose and individual data access. This is a feasibility cohort, not statistical justification.

Training-and-support package, owners and protected time

Focused practice, short job aid and planned manager follow-up; sponsor owns decision; facilitator and evidence coordinator named before launch; reserve time for everyone.

Baseline task, equivalent follow-up task and rubric calibration

Collect baseline before session; comparable new scenario afterward; same behavior criteria and observer calibration. Do not train only to the exact test answer.

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Completed hypothetical example 2/2

Process evidence, workplace opportunities and missing-data record

Six paired records from eight participants; two missed one assessment when time was not protected. Two of six meet the criterion before, four afterward; three have eligible work situations. Record all gaps.

Illustrative schedule, resources and cost assumptions

Illustrative six weeks: week 1 baseline; week 2 practice; weeks 3–5 application; week 6 review. Track facilitator, manager and learner effort and access costs.

Pre-agreed expansion conditions, critical issues and stop/adapt rules

Correct critical errors, ensure each language works, verify support capacity and interpretable evidence. Agree any needed threshold before assessment; no threshold invented after results.

Review findings, limitations, decision owner and next evidence step

Adapt before scaling: protect time, check task comparability and extend workplace observations. Sponsor documents limitations; no causal revenue claim from these fictional small counts.

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