

ZAIDYN Call Planning R1 Release Preview

Staging Release: December 20, 2025

The first release of Zaidyn Call Planning expands the Zaidyn Field Planning platform by bringing Segmentation, Alignment, Roster, and Call Planning in a single data-driven ecosystem for global markets. This integrated experience helps teams create precise, compliant call plans faster, supported by intuitive refinement tools and built-in governance to drive agile, market-responsive field operations.



Objective

Allow teams to design **omnichannel call plans** by leveraging HCP segmentation and optimized channel mix to improve coverage efficiency and resource utilization.

Simplify the call plan creation process by **using prior cycle plans** to reduce setup time and effort.

Integrate **externally generated call plans** for seamless brand mix alignment and customer coverage optimization.

Empower field teams to **refine call plans** across HCP segments, channels, and brands with business-rule guardrails to ensure compliance and strategic alignment.



Impact

➔ Strengthens **HCP engagement** and enhances **brand presence** by ensuring precise targeting through the most effective channels.

➔ **Accelerates call plan creation** by leveraging prior cycle plans, enabling efficient resource allocation, territory alignment, and compliance with segmentation standards.

➔ Delivers unified, **cross-platform call plan management** that strengthens strategic brand planning, improves HCP targeting precision, and streamlines execution.

➔ **Fosters stronger field collaboration and enables** more informed adjustments that keep plans aligned with omnichannel strategies and commercial objectives.

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Objective

Provide clear **business-rule guardrail checks** ensuring field reps remain within brand strategy alignment and segmentation compliance during refinement.

Enable structured, **multi-tier call plan approvals** through configurable governance workflows to ensure compliance and alignment across all stakeholders.

Enable users to validate **call plan accuracy** at every stage (before and after refinements) and gain actionable insights through **interactive summaries**.

Enable multiple reps to **collaboratively** refine a single call plan, ensuring **smooth teamwork** and controlled updates within a shared workspace.

Impact



→ Reduces errors, improves call plan adherence, and **strengthens field user confidence** by ensuring compliance with organizational and brand standards.

→ **Strengthens governance** and compliance through transparent, cross-functional review, ensuring **co-promotion synergy** and confidence in final call plans.

→ Empowers teams to **validate plans faster**, identify **optimization opportunities earlier**, and allocate resources more effectively, leading to stronger call plan execution.

→ Improves **cross-team collaboration** in shared workunits, eliminating redundancies and accelerating submissions for precise, compliant call plans.