

Z Aidyn Call Planning R2 Release Preview

Staging Release: April 17, 2026

The R2 release helps managers and field teams create and refine call plans faster and with greater confidence. It introduces more flexible workload planning, clearer customer alignment visibility during plan generation and refinement, and bulk actions that speed up planning and review workflows. Overall, these updates make call planning more efficient, consistent, and easier to manage at scale.



Objective

Add support for **Calls per Day** in team-level guardrails, enabling **greater flexibility in defining daily call expectations**.

Enable **bulk call plan actions** across multiple workunits or territories within a team.

Introduce **Alignment Source** to help teams make more informed customer selection decisions during call plan generation and refinement.

Provide **clear visual cues and contextual guidance** to improve workload assessment during call plan review.



Impact

→ Enables **more nuanced workload planning** across teams, helping users better balance call volumes across reps and territories while staying aligned with HQ guidelines.

→ **Speeds up call plan review** by allowing managers to act on selective workunits during or after the refinement window to **address data refreshes or business changes**.

→ **Strengthens call plan accuracy** across generation and refinement by giving users clear visibility into HCP alignment for more informed planning decisions.

→ Supports **informed call plan adjustments** by helping reps quickly identify workload imbalances that may impact coverage or execution.

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Objective

Ensure **accurate visibility of customer alignment status** within the Add Customer workflow, regardless of alignment validation settings.

Improve the **Workunit selection experience** in Rep view by providing **more context** (like workunit ID and assigned sales rep) so managers can quickly identify the right workunit.

Enable field users to **review and refine call plans on an iPad** using the **Edge browser**, supporting flexible, on-the-go usage.



Impact

→ **Improves decision making** during call planning by providing accurate customer alignment context at the point of customer selection.

→ **Enhances call plan governance** by allowing managers to manage and review plans through a rep-centric view that mirrors field execution.

→ **Expands browser flexibility** for field users. This allows them to perform key call plan activities through their preferred device and browser.