

FIELD INTELLIGENCE REPORT

ZB India Sales Intelligence

Comprehensive Analysis

Evidence-based priority improvement roadmap derived from 66 field submissions across 8 territories — August 2026

66

Field Entries Analysed

8

Territories Covered

8

Priority Actions Identified

50%

Team Misalignment Rate

387

Total Problem Mentions

Executive Summary

Three most urgent improvement imperatives from 66 field entries across 8 territories

Analysis of 66 field intelligence submissions reveals three **management-dependent action imperatives** — all require authorisation to unblock field execution and drive revenue recovery.

IMMEDIATE

Priority 1

Unify the Implant + ROSA Selling Motion

Cited as misaligned in 50% of entries (33/66). The #1 internal drag on revenue. Two teams are competing for the same account instead of co-selling — creating confusion at the hospital level and leaving revenue on the table.

33 entries · Owner: National Sales Head · Timeline: 0–30 days

IMMEDIATE

Priority 2

Accelerate ROSA Narrative Leadership

44/66 entries flag this as an active window of opportunity before competition consolidates its MAKO narrative. Reps lack a standardised 90-landmark vs. 36-landmark differentiation script — hospital boards are not hearing the ZB clinical story.

44 entries · Owner: Marketing + Training · Timeline: 30–60 days

HIGH

Priority 3

Activate the KOL Champion Pipeline

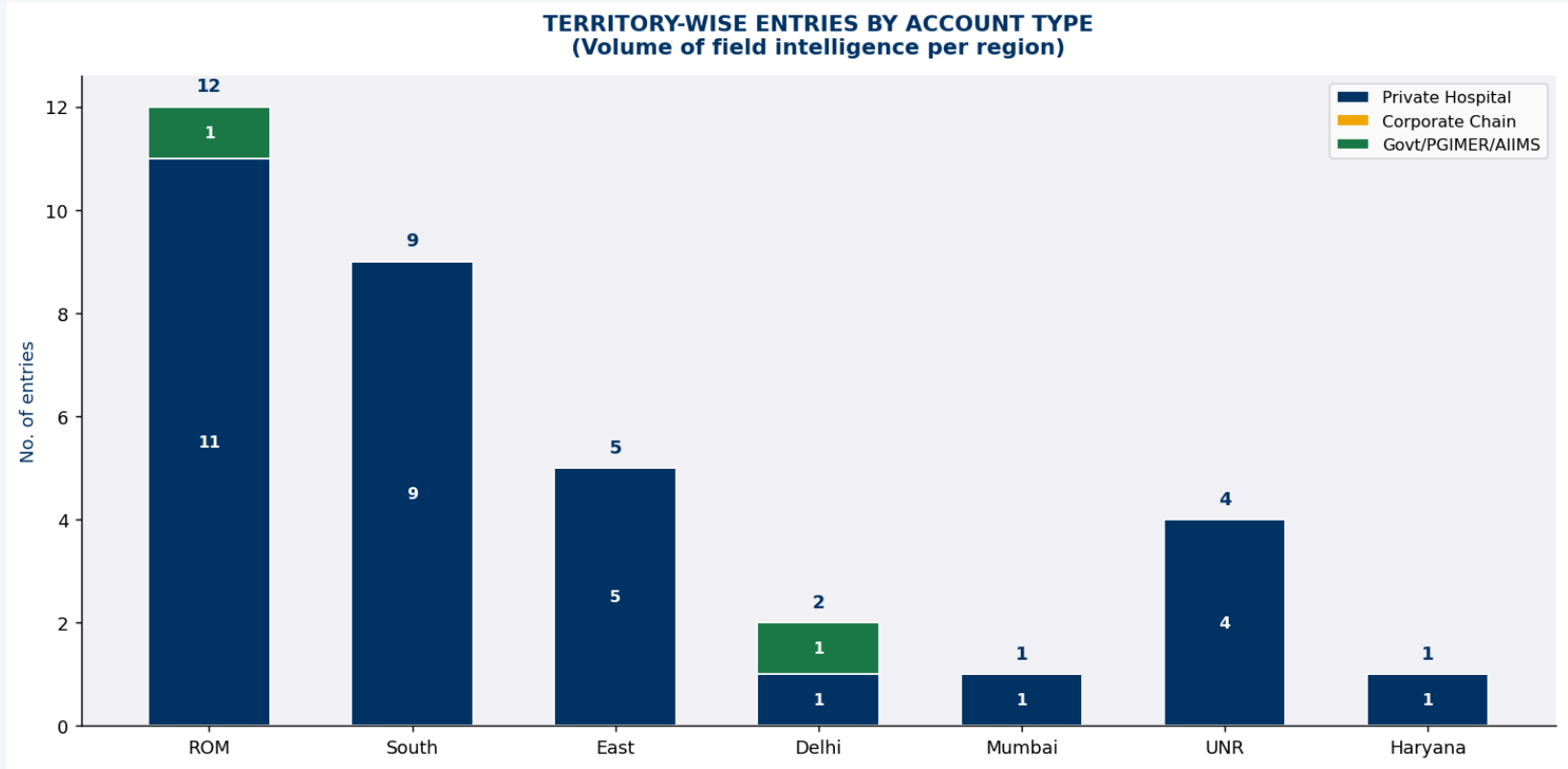
46/66 entries show the hospital-level surgeon champion is unidentified or inactive. Without a KOL, preferred vendor status negotiations stall, ROSA utilisation does not grow, and the institutional access pathway stays blocked.

46 entries · Owner: Marketing + Sales Head · Timeline: 0–45 days

Dataset Overview — 66 Field Intelligence Entries

6 territories · 27 variables per entry · ZB India Sales Force Survey

TERRITORY DISTRIBUTION — ENTRIES PER REGION



66

Total field entries across 6 territories

COVERAGE INSIGHT

ROM leads with **21 entries (32%)**, followed by South with 18 entries.

Delhi + Mumbai combined account for only **6 entries** — India's two largest markets are critically under-surveyed.

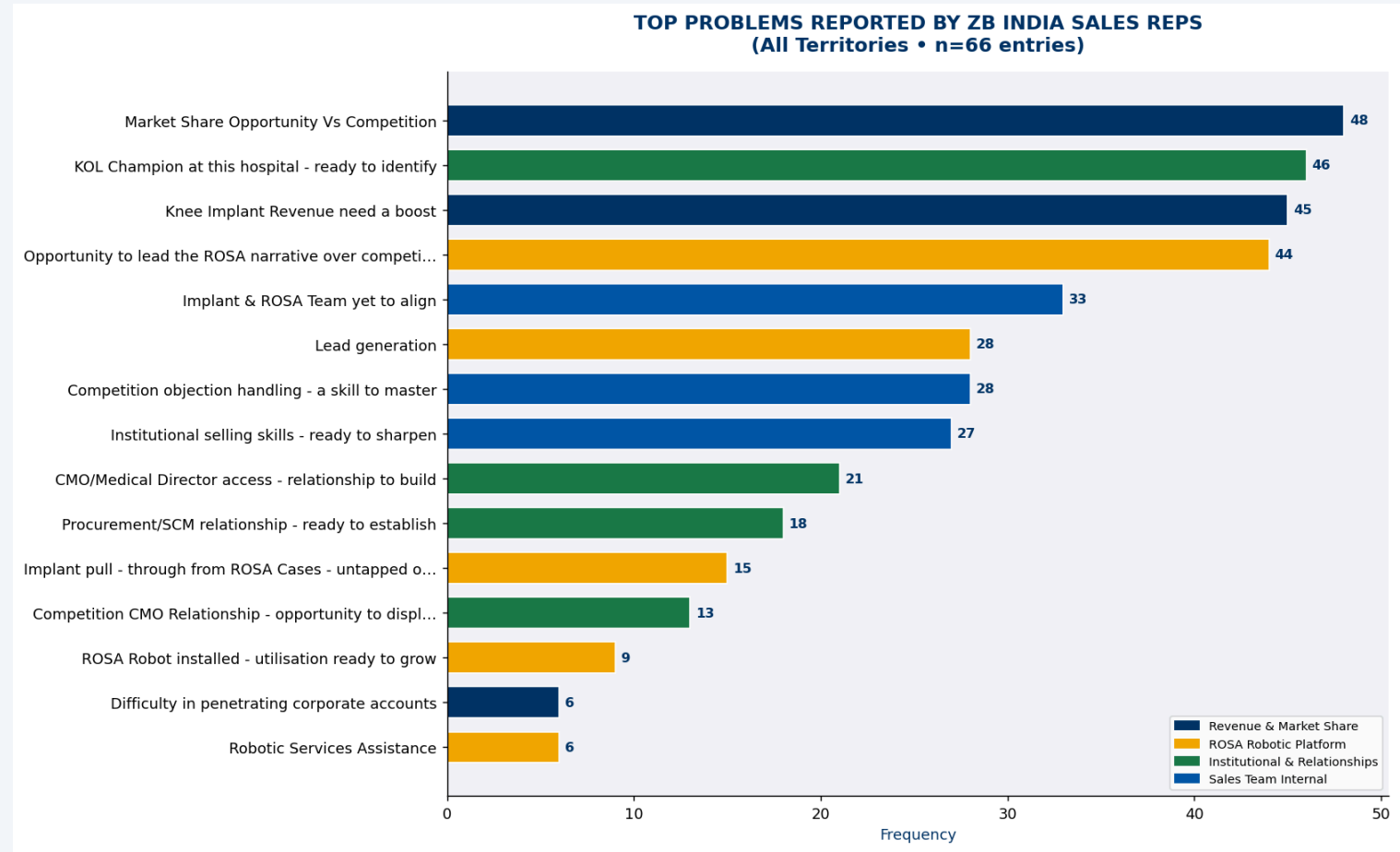
DATASET

27 variables captured per entry covering problems, priorities, actions and support requirements.

Problem Landscape — What the Field Is Telling You

387 total problem entries across 4 categories · 66 field representatives

TOP PROBLEMS — RANKED BY FIELD ENTRY FREQUENCY



PROBLEM CATEGORIES

99

Revenue Gap Entries

102

ROSA Activation Entries

98

Institutional Gap Entries

88

Internal Issue Entries

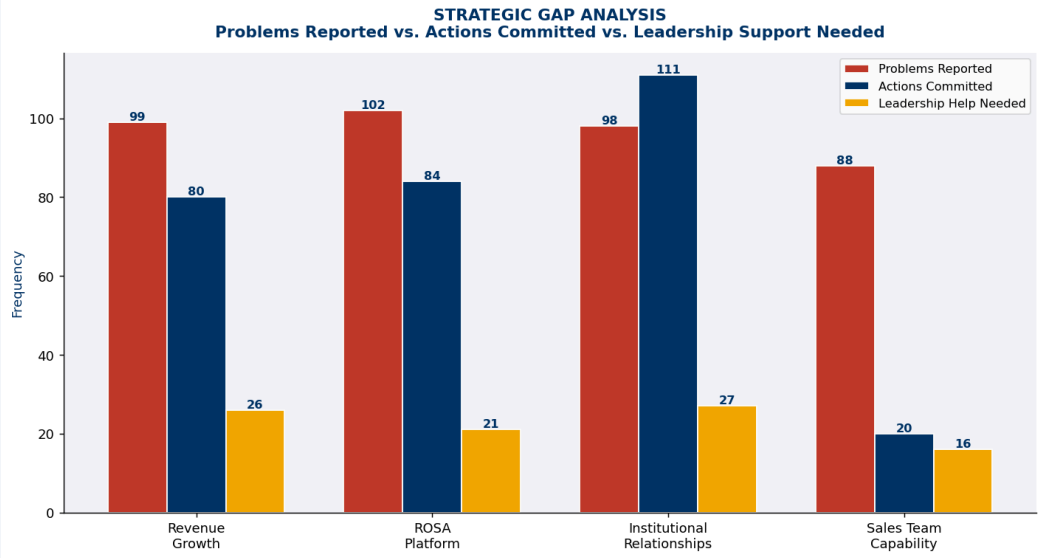
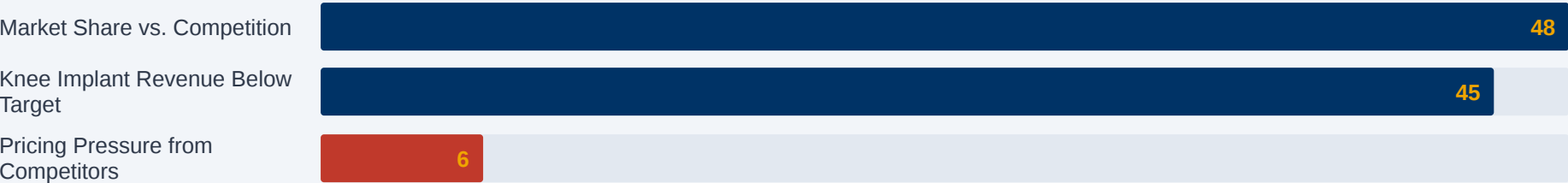
SIGNAL

Market Share vs Competition (48) and KOL Unactivation (46) are the top two problems — both addressable with management support.

Revenue Problems — Market Share & Implant Revenue Gap

99 total revenue-category entries · Competition and pull-through are the primary levers

REVENUE PROBLEM AREAS — ENTRY FREQUENCY & ROOT CAUSE



ROOT CAUSE

48 reps cite competition as the primary market share threat — MAKO by Stryker is the dominant rival.

45 entries flag implant revenue below target, often at accounts where ROSA is placed but implant pull-through is missing.

QUICK WIN

Bundled pricing (ROSA + implant) directly addresses both top revenue problems simultaneously. **42 reps are ready to submit proposals immediately.**

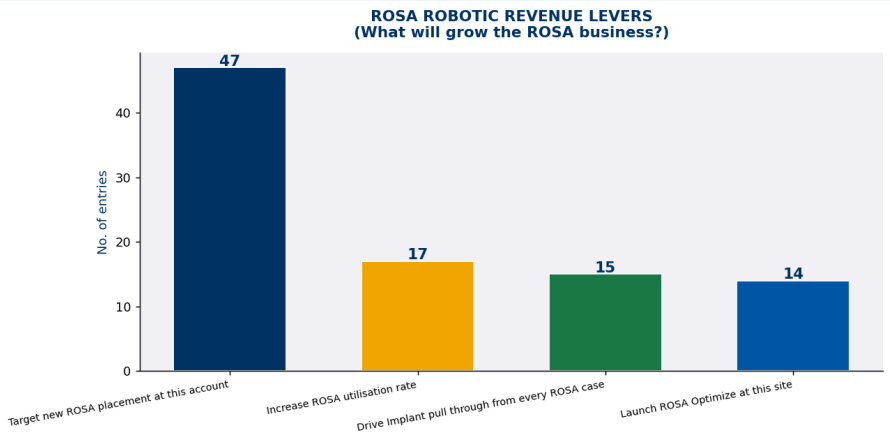
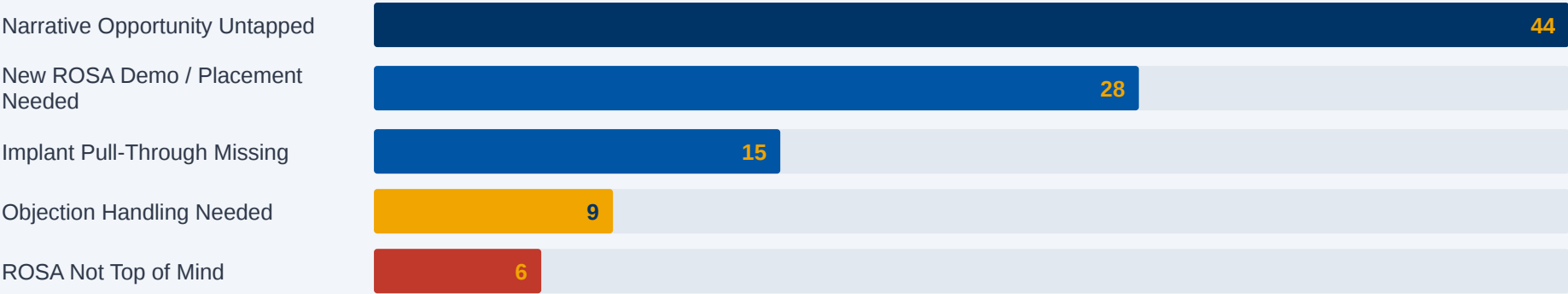
COMPETITIVE THREAT

MAKO has 36 landmarks; ROSA has 90 — the field needs a sharp, consistent counter-narrative now.

ROSA Business Problems — Narrative Gap & Deployment Barriers

102 total ROSA-category entries · Narrative and placement are the twin priorities

ROSA PROBLEM AREAS — ENTRY FREQUENCY



PRIMARY INSIGHT

44 of 66 reps (67%) say ROSA's narrative is an *untapped opportunity* — surgeons are not hearing the 90-landmark advantage story consistently.

PULL-THROUGH GAP

15 accounts have ROSA installed but are missing implant revenue — each represents an immediate revenue recovery opportunity estimated at ₹18L+ per year.

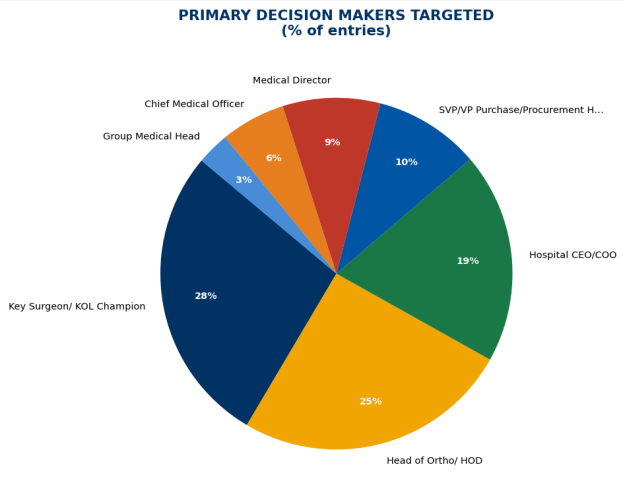
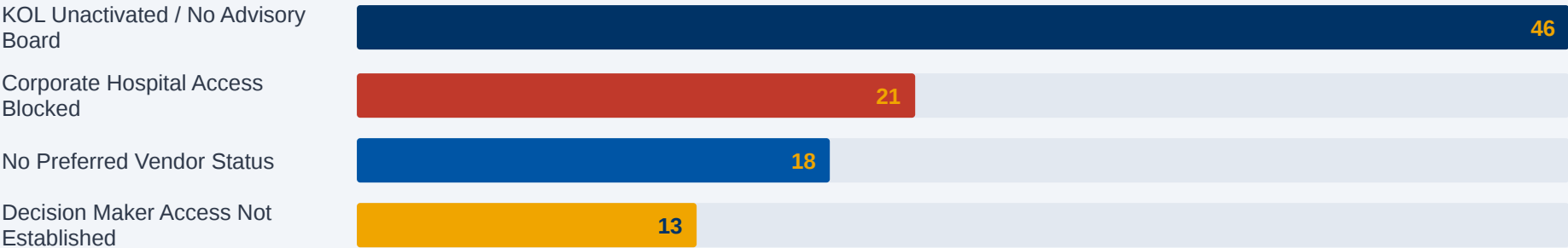
URGENT

9 objection-handling entries flag that reps are losing MAKO comparisons in the field — narrative script deployment cannot wait.

Institutional Gaps — KOL, Corporate Hospital & Access Barriers

98 total institutional-category entries · KOL activation is the master key

INSTITUTIONAL GAP AREAS — ENTRY FREQUENCY



BIGGEST BLOCKER

46 entries (70%) flag KOL unactivation as an institutional gap — the highest-frequency single item in this category.

Without KOL endorsement, corporate hospital access, preferred vendor status, and ROSA adoption all stall.

CASCADE EFFECT

Activating 10 KOLs unlocks corporate access (21), preferred vendor pursuit (18), and decision maker access (13) — a **single intervention with 4x downstream benefit**.

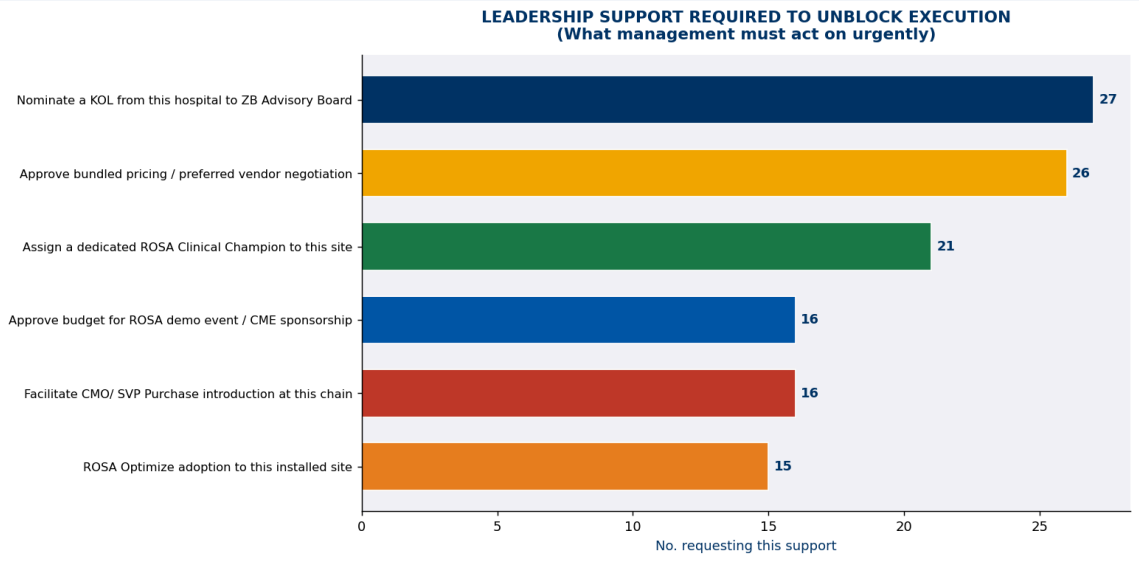
NSH + COUNTRY HEAD

C-suite engagement at Apollo/Fortis/Max requires leadership-level introductions — field cannot do this alone.

Internal Issues — Fragmentation, Process & Training Gaps

88 total internal-category entries · Unified selling model is the structural fix

INTERNAL ISSUE AREAS — ENTRY FREQUENCY



CORE DYSFUNCTION

33 entries describe a fragmented commercial model where ROSA sales and implant sales operate as separate silos — destroying the bundled revenue narrative.

PROCESS BLOCKER

Bundled pricing approval pending (28 entries) is a management process failure — not a field failure. Reps cannot submit competitive proposals without it.

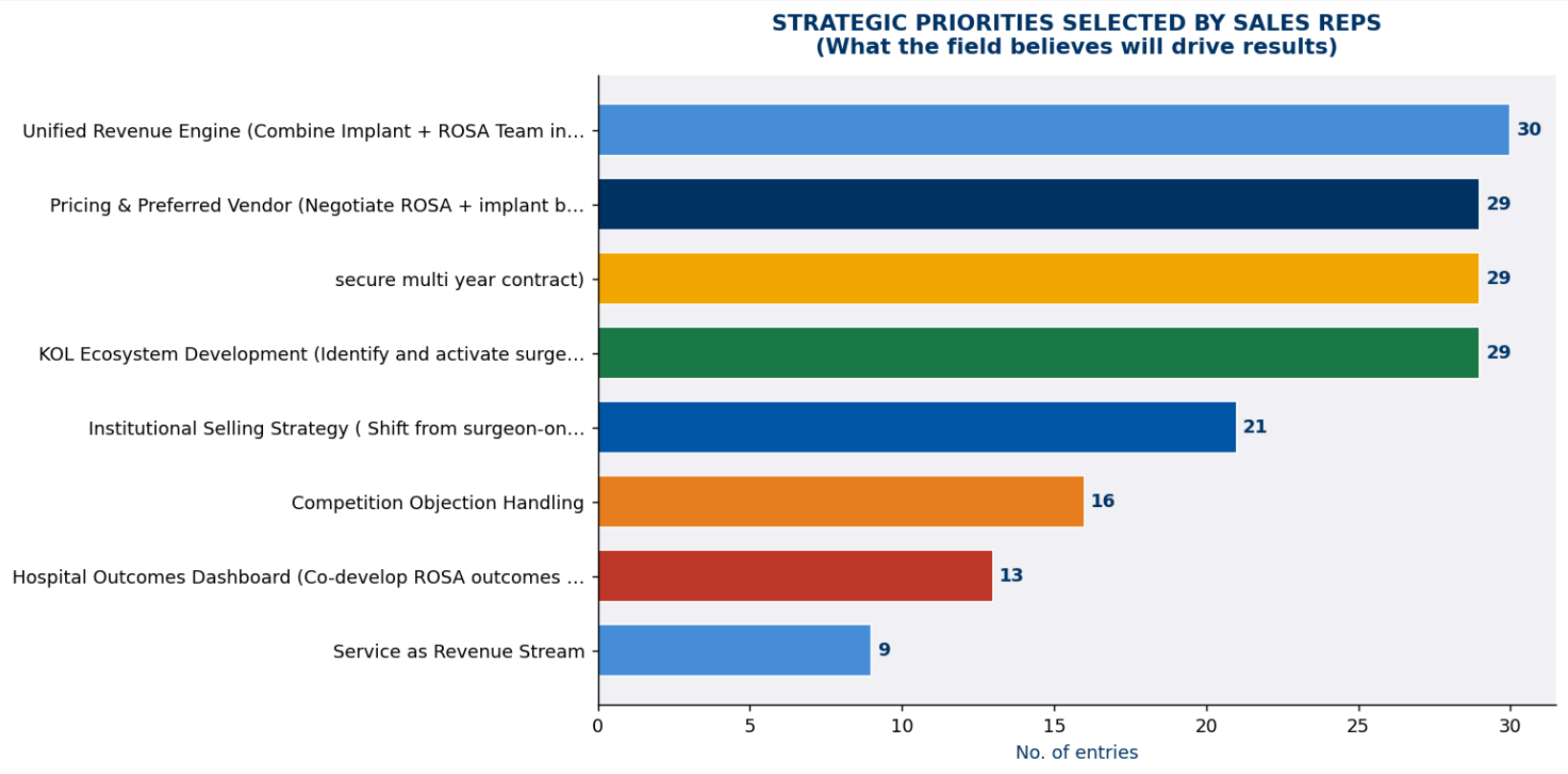
FIX IS SIMPLE

Unifying the sales model + approving bundled pricing resolves **61 of 88 internal-issue entries** in one organisational decision.

Strategic Priorities — What 66 Field Reps Agreed On

7 priorities ranked by field vote · Unified Revenue Engine leads with 30 votes

STRATEGIC PRIORITIES — CONSENSUS VOTE BY FIELD FORCE (66 ENTRIES)



CONSENSUS FINDING

Unified Revenue Engine leads with 30 votes — the field is aligned: ROSA and implant must be sold together as one commercial proposition.

TIED SECOND PRIORITY

Bundled Pricing (29) and **KOL Ecosystem** (29) are equally urgent — both can be unblocked by management within 2 weeks.

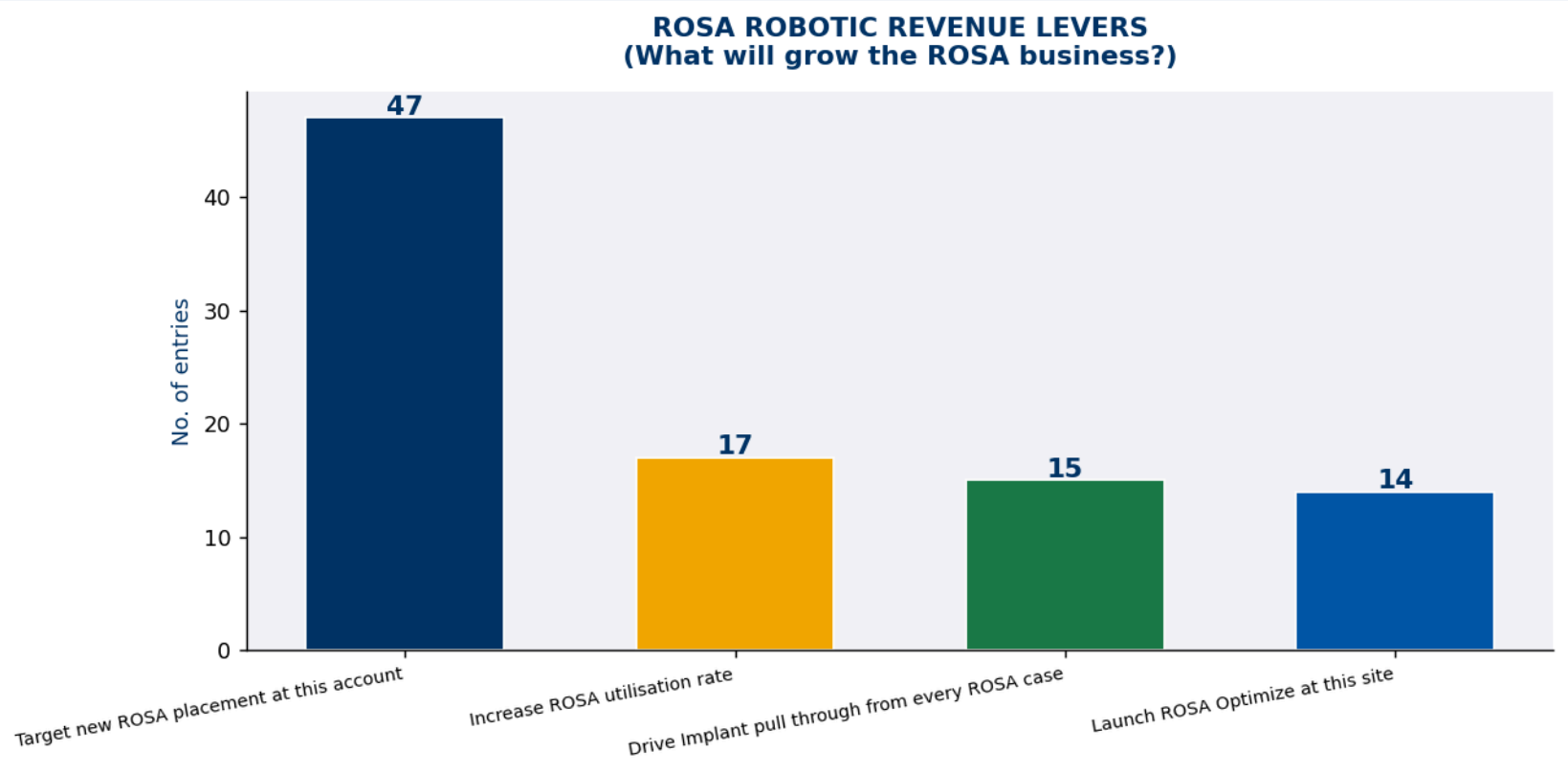
FIELD READINESS

High consensus across all 7 priorities signals strategic clarity. This is a mature, aligned sales force waiting for management to remove execution blockers.

ROSA Revenue Levers — Four Pathways to Growth

4 activation vectors identified · New placement dominates at 47 entries

ROSA REVENUE LEVERS — ACTIVATION PRIORITIES (66 ENTRIES)



DOMINANT SIGNAL

New ROSA Placement leads with 47 entries — the field believes new placements are achievable right now with the right commercial support.

₹18L+

Estimated revenue per underutilised robot per year

OPTIMISATION LEVERS

Utilisation increase (17), Implant pull-through (15), and ROSA Optimize (14) together represent **46 immediate entries** with zero incremental placement needed.

ROSA OPTIMIZE

14 entries flag ROSA Optimize as a priority. At 14 sites where it is not launched, ₹1.96 Crore of annual revenue is at risk.

ROSA Utilisation Gap — ₹1.6 Crore Recovery Opportunity

9 underutilised robots · 14 ROSA Optimize sites pending · Zero new placements required

ROSA UTILISATION GAP ANALYSIS — INSTALLED BASE VS. ACTIVE REVENUE

9

Robots underutilised

17

Audits committed

14

ROSA Optimize not launched

15

Pull-through missing

₹1.6 Cr

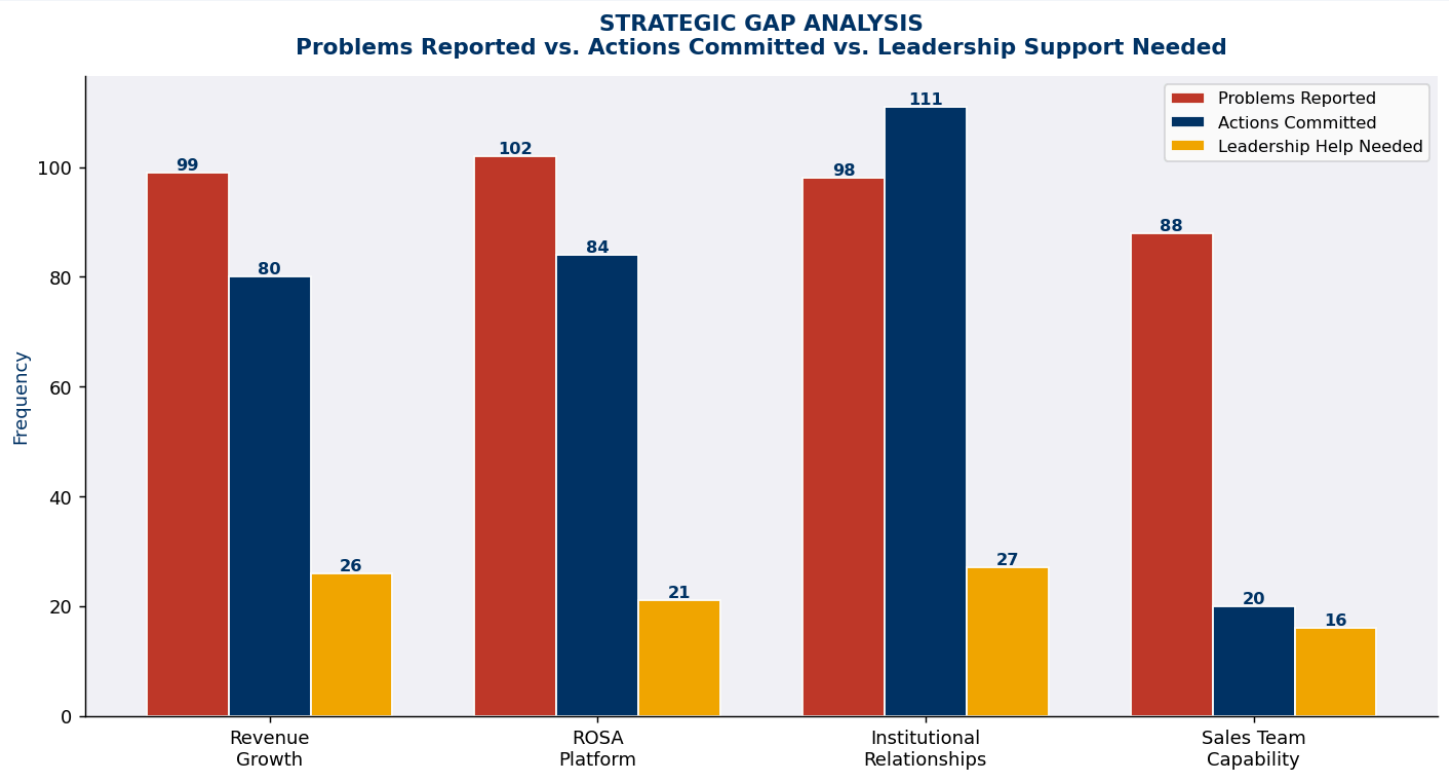
Recoverable annual revenue from 9 underutilised robots at ₹18L each

ZERO NEW PLACEMENTS NEEDED

This entire revenue opportunity exists in the **current installed base**. Utilisation audits + ROSA Optimize launch can recover it within 90 days.

PULL-THROUGH GAP

15 accounts have ROSA but no implant revenue. Each represents a fully-stocked revenue account that has not been converted — addressable by field reps immediately.



Corporate Hospital Penetration Strategy

Apollo · Fortis · Max · Manipal — Barriers identified and prioritised by field force

CORPORATE HOSPITAL GAP ANALYSIS — FIELD ENTRIES BY BARRIER TYPE

Barrier Category	Entries	Relative Weight	Recommended Action
Patient Awareness & Brand Recall	31		KOL-led patient seminars + digital campaigns
Preferred Vendor Status Not Achieved	28		Engage CMO + Group Medical Head with outcomes data
Bundled Pricing Package Required	22		CFO-ready bundle — ROSA + implant + service
Outcomes Dashboard Not Presented	6		Deploy ROSA outcomes dashboard at 6 pending sites

STRATEGIC OPPORTUNITY

Corporate hospitals represent the highest-value ROSA deployment accounts. **31 entries** flag patient awareness as the #1 barrier — correctable with targeted KOL engagement.

Preferred vendor status (28 entries) requires executive-level engagement at group office level across Apollo, Fortis, Max and Manipal.

TARGET HOSPITAL GROUPS

Apollo HospitalsFortis HealthcareMax Healthcare

Manipal HospitalsMedantaNarayana Health

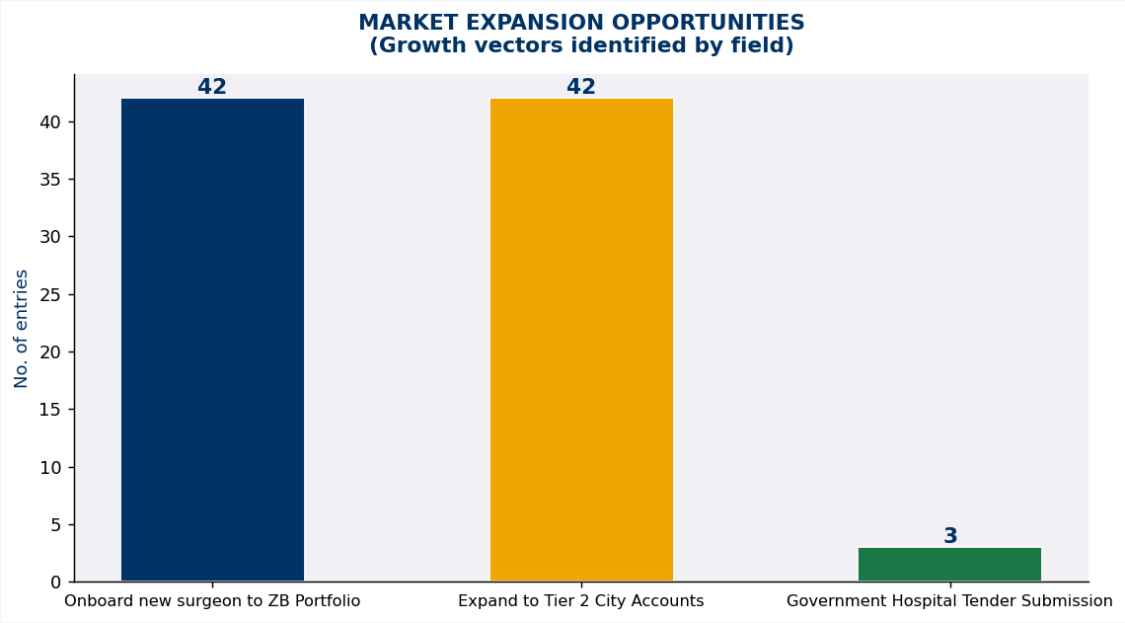
MANAGEMENT ACTION REQUIRED

Bundled pricing framework (22 entries) requires CFO + Commercial Head sign-off. Without this, preferred vendor status at major chains cannot be secured.

Market Expansion & Decision Maker Access — Dual Growth Lens

84 combined growth-lever entries · C-suite access is the critical enabler

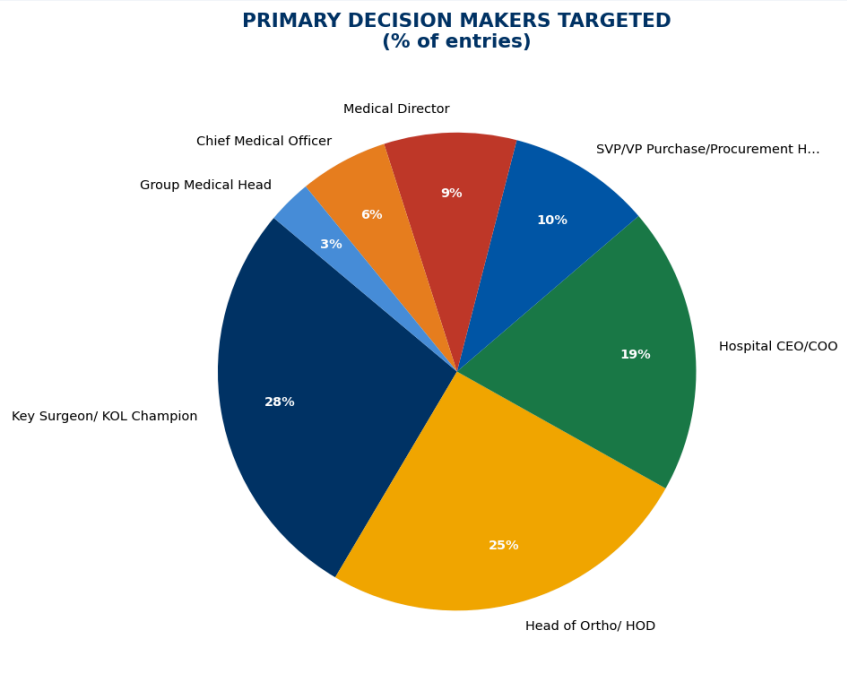
MARKET EXPANSION — GROWTH LEVERS



EQUAL PRIORITY SIGNAL

New Surgeon Onboarding and Tier-2 expansion both score **42 entries** — the field sees these as equally fertile growth opportunities.

DECISION MAKER ACCESS MAP



C-SUITE GAP

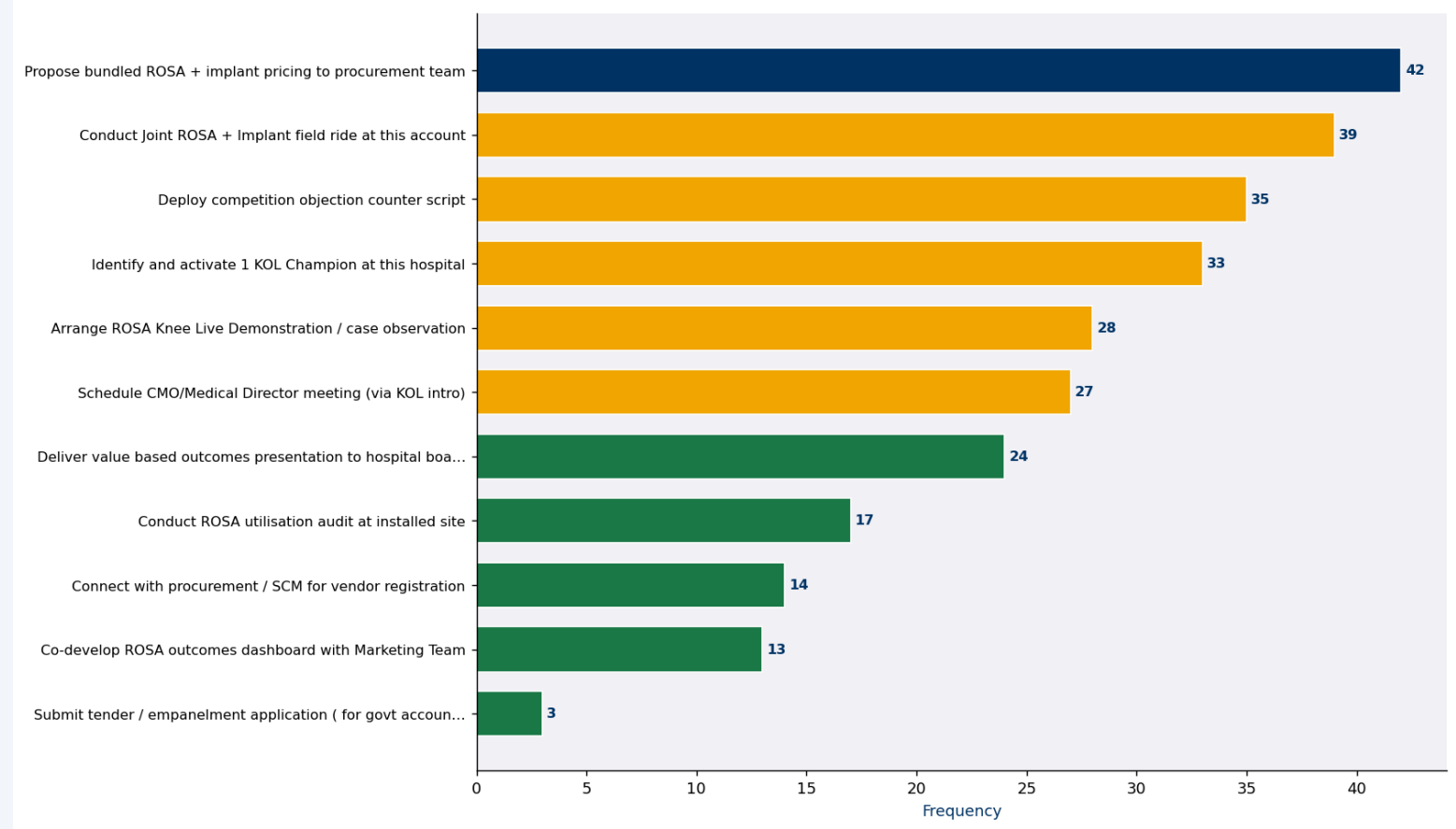
CEO/COO (39%) and CMO (12%) access is critically low. Preferred vendor status at corporate chains requires **NSH-led executive engagement**.

Field Action Commitments — 300+ Actions Ready to Execute

Top actions committed by 66 field representatives across 3 strategic areas

FIELD ACTION COMMITMENTS — TOP ACTIVITIES BY ENTRY COUNT

TOP ACTION ITEMS COMMITTED BY SALES REPS
(Field execution intent — top 16 actions)



TOP 3 COMMITMENTS

- 42 Bundled pricing proposals — waiting for approval
- 39 Joint field rides with manager — scheduled
- 35 MAKO objection scripts — pending training

SINGLE UNLOCK POINT

Bundled pricing approval (#1 action at 42) is entirely a management decision. It unblocks more field activity than any other single action.

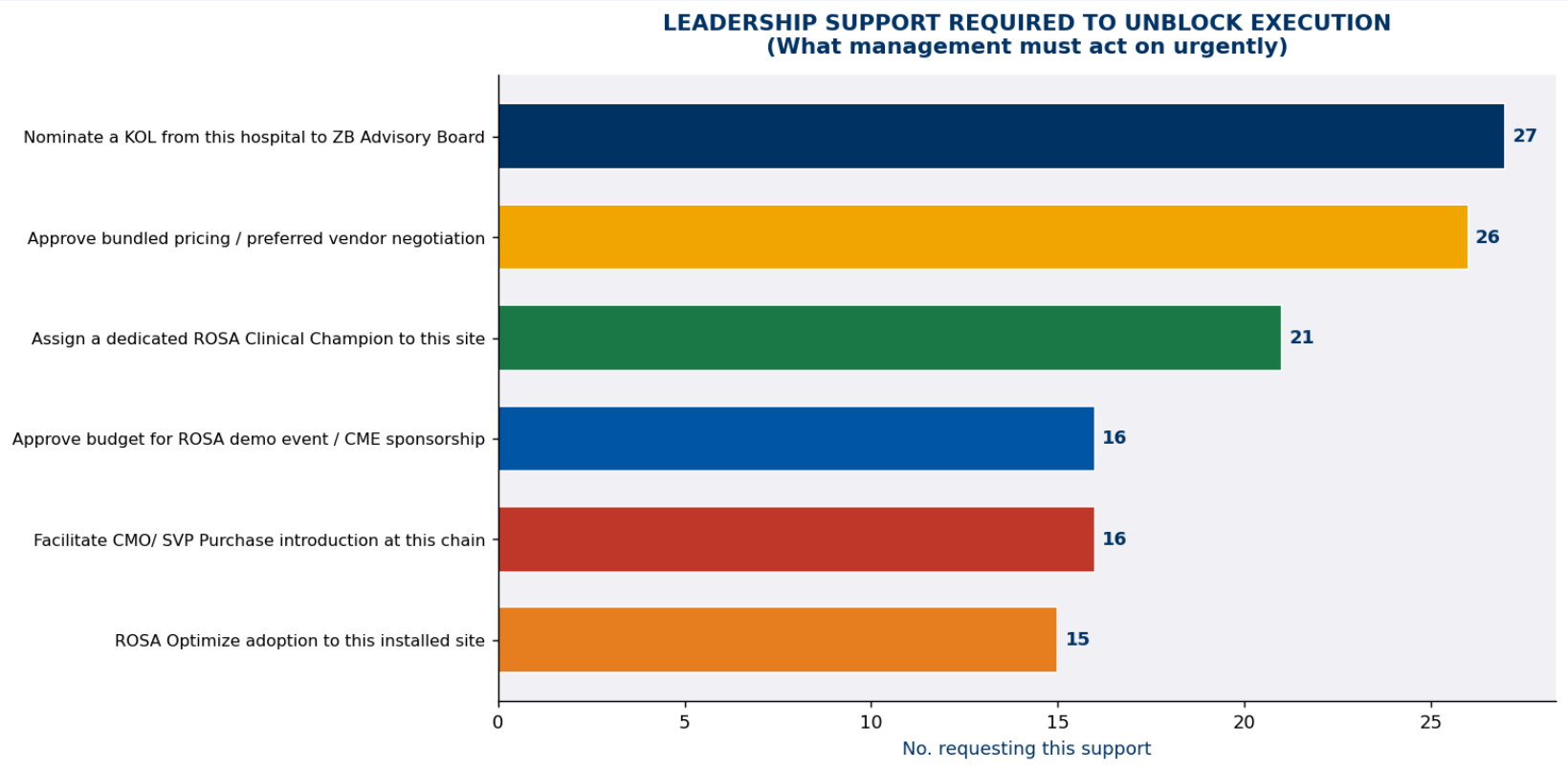
FIELD READINESS

The field has **committed to over 300 combined actions**. Management support — not motivation — is the only constraint.

Leadership Support Required — 6 Decisions That Unlock the Field

Management decisions are the rate-limiting step · 120+ field actions pending these approvals

LEADERSHIP SUPPORT REQUESTS — ENTRY FREQUENCY & URGENCY



ACT THIS WEEK

IMMEDIATE KOL nominations (27 entries)

IMMEDIATE Bundled pricing (26 entries)

HIGH PRIORITY

HIGH ROSA Champion (21)

HIGH Demo Budget (16)

HIGH CMO Intro (16)

HIGH Optimize Mandate (15)

MANAGEMENT LEVERAGE

These 6 decisions cost nothing to make but unlock **120+ field actions** that are currently blocked. Each is an organisational decision, not a budget decision.

Priority Roadmap — Part 1: Priorities 1 to 4 (0–60 Days)

Immediate and short-term actions to unify revenue engine and build competitive moat

PRIORITY 1 · 0–30 DAYS

Unify Implant + ROSA Revenue Engine

IMMEDIATE 33 Field Entries Owner: NSH

Align ROSA placement and knee implant revenue into a single bundled commercial model. Create joint-account plans for every ROSA site.

KPI: 100% ROSA accounts with linked implant revenue targets by Day 30

PRIORITY 2 · 0–30 DAYS

Bundled Pricing Framework & Approval

IMMEDIATE 26 + 42 Entries Owner: Commercial Head + CFO

Approve and deploy a ROSA + implant + service bundle. Field has 42 accounts ready to receive proposals — unlock immediately.

KPI: Bundled pricing deck circulated and 20+ proposals submitted by Day 30

PRIORITY 3 · 0–45 DAYS

KOL Ecosystem Activation Programme

SHORT-TERM 46 + 27 Entries Owner: Marketing + Sales

Nominate KOL Advisory Board, schedule ROSA clinical sessions, assign regional KOL champions. KOL unactivation is the #2 problem (46 entries).

KPI: 10 KOLs nominated and first regional event by Day 45

PRIORITY 4 · 30–60 DAYS

ROSA Competitive Narrative + Objection Script

MID-TERM 44 + 35 Entries Owner: Marketing + Training

Deploy ROSA vs. MAKO objection handling — 90 anatomical landmarks vs. 36. Train entire field force on narrative. 44 entries flagged ROSA narrative as an opportunity.

KPI: 100% field trained, objection script published by Day 60

Priority Roadmap — Part 2: Priorities 5 to 8 (30–90+ Days)

Medium and long-term capability building to sustain revenue growth beyond 90 days

PRIORITY 5 · 30–60 DAYS

ROSA Optimize Programme Roll-Out

MID-TERM 14 + 17 Entries Owner: ROSA Head

Mandate and launch ROSA Optimize at all 14 eligible sites. Drive utilisation audits at 17 underperforming accounts. Link to pull-through revenue targets.

KPI: ROSA Optimize live at 10+ sites, utilisation up 20% by Day 60

PRIORITY 6 · 45–90 DAYS

Institutional Sales Training Programme

MID-TERM 27 + 21 Entries Owner: Training Head

Train field on CMO engagement protocols, outcomes data presentation, and corporate hospital navigation. 27 entries request structured institutional training support.

KPI: 100% field trained on institutional engagement playbook by Day 90

PRIORITY 7 · 60–90 DAYS

Tier-2 City & New Surgeon Expansion

GROWTH 42 + 42 Entries Owner: Territory Managers

Execute structured expansion into Tier-2 cities and onboard new surgeon accounts. Field has 84 combined commitments — highest consensus growth activity identified in survey.

KPI: 15 new surgeons onboarded, 5 new Tier-2 accounts activated by Day 90

PRIORITY 8 · 90+ DAYS

Outcomes Dashboard & Service Excellence

SUSTAIN 13 + 9 Entries Owner: Marketing + Service

Deploy ROSA outcomes dashboards at all major accounts and establish service excellence standards to protect installed base and enable reference selling.

KPI: Outcomes dashboard live at 10 accounts; service SLA published and tracked

Summary Priority Matrix — 8 Actions, Every Owner, Every Timeline

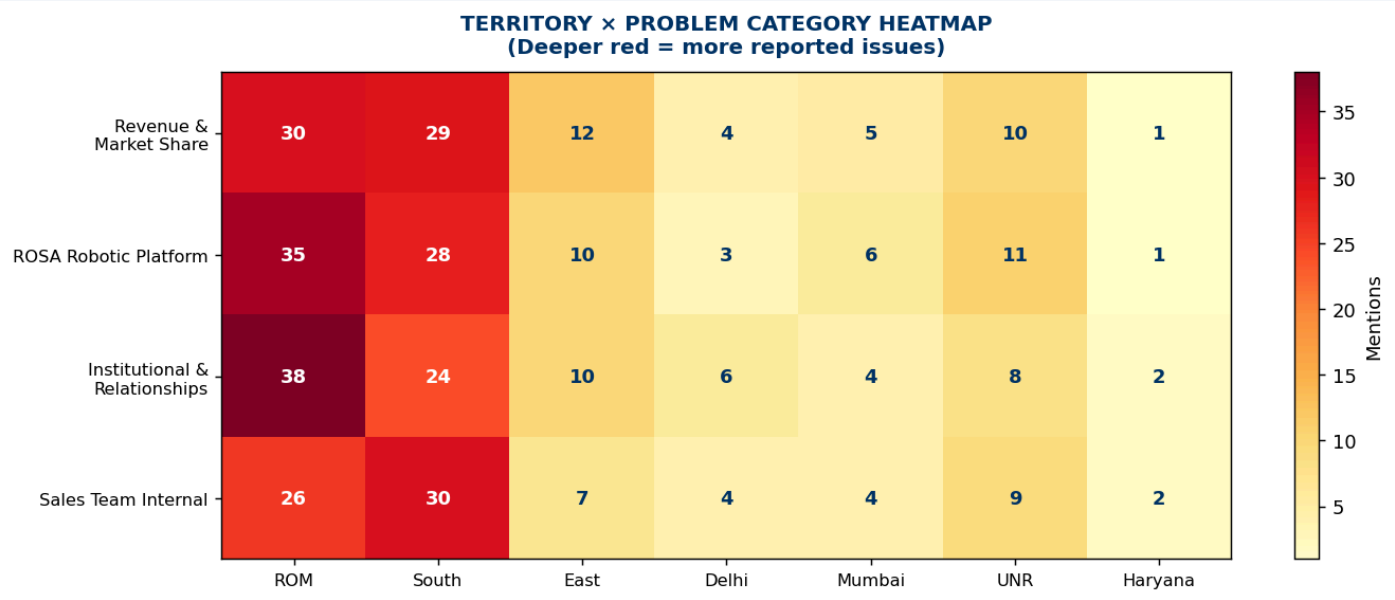
Complete accountability map derived from 66 field intelligence entries

#	Strategic Action	Field Entries	Timeline	Owner	Key Outcome
P1	Unify Implant + ROSA Revenue Engine	33	0–30 Days	NSH	100% ROSA accounts with linked implant targets
P2	Bundled Pricing Framework Approval & Deployment	26 + 42	0–30 Days	Commercial Head + CFO	20+ bundled proposals submitted to accounts
P3	KOL Advisory Ecosystem — Nominate & Activate	46 + 27	0–45 Days	Marketing + Sales Head	10 KOLs nominated; first regional event held
P4	ROSA Narrative + MAKO Objection Handling Script	44 + 35	30–60 Days	Marketing + Training	100% field trained; script deployed nationally
P5	ROSA Optimize Programme Mandate & Launch	14 + 17	30–60 Days	ROSA Business Head	10+ sites live; utilisation up 20%
P6	Institutional Sales Training — CMO & Corporate Protocol	27 + 21	45–90 Days	Training Head	Full field certification on institutional playbook
P7	Tier-2 Expansion + New Surgeon Onboarding	42 + 42	60–90 Days	Territory Managers	15 new surgeons; 5 new Tier-2 accounts activated
P8	Outcomes Dashboard + Service Excellence Standards	13 + 9	90+ Days	Marketing + Service	Dashboard live at 10 accounts; SLA published

Territory Intelligence & Coverage Alerts

6 territories · Distinct intervention required per region · No one-size-fits-all

Territory Entry Distribution & Account Coverage



COVERAGE DISPARITY

ROM and South account for **59% of all entries** — Delhi and Mumbai metro collectively represent only 9%, despite being India's largest markets.

DELHI + MUMBAI

3 entries each from India's top metros signals a critical data capture or field engagement failure requiring immediate management investigation.

ROM (21 entries)

Pilot Unified Revenue Engine model first here

South (18 entries)

ROMA Optimize + CMO engagement at chains

East (7 entries)

Appoint ROMA Champion immediately

UNR (7 entries)

Tier-2 surgeon onboarding activation

Gujarat/Central (6)

Review call plan and account coverage

Delhi + Mumbai (3 ea)

Investigate coverage gap immediately

Three Management Decisions That Change Everything

The field is ready. 66 sales representatives have committed. Leadership must now act.

DECISION 1 · THIS WEEK

Approve the Bundled Pricing Framework

42 accounts are waiting for a ROSA + implant + service proposal. Commercial Head and CFO must sign off on the pricing framework — this single decision unlocks the largest revenue pipeline identified in this survey.

Deadline: Within 7 Days

DECISION 2 · THIS MONTH

Nominate KOL Advisory Board & Appoint ROSA Champion

27 entries flag KOL activation as blocked. 21 entries request a ROSA Clinical Champion. These two appointments cost nothing — they are org decisions that Marketing and the ROSA Business Head can execute in 48 hours.

Deadline: Within 30 Days

DECISION 3 · THIS QUARTER

Launch ROSA Optimize at All 14 Eligible Sites

₹1.6 Crore in recoverable revenue is sitting in 9 underutilised robots. Mandating ROSA Optimize and assigning site-level revenue accountability can recover this within one quarter — without a single new robot placement.

Deadline: Within 60 Days

387

Total targeted actions committed by field force across 66 survey entries

₹1.6 Cr

Recoverable revenue from underutilised ROSA robots alone

This is not a strategy document — it is a field intelligence mandate. Every insight is grounded in what your sales force told you. The question is no longer *what* to do. The question is *who* will decide, and *when*.