

A large, stylized orange arrow with a 3D effect, pointing to the right. It is overlaid on a blue-tinted photograph of a dog and a cat. The dog is in the foreground, looking towards the camera with its tongue slightly out. The cat is in the background, looking to the left. The background is a mix of dark blue and black diagonal stripes.

# K-9 SMILE CASE STUDY

**K-9 Smiles**  
Enhances Pet Care Services  
with  
**Zoho and ZPortals**  
Integration

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# Executive Summary

K-9 Smiles, a Colorado-based provider of non-anesthesia dental cleaning and preventative care for pets, sought a scalable technology solution to improve operational efficiency and customer interactions. Catalyst Connect stepped in to implement an integrated platform using Zoho One, ZPortals, and Ring Central telephony, enabling K-9 Smiles to streamline scheduling, enhance client communication, and simplify reporting. The result? A more cohesive business model that empowers K-9 Smiles to focus on what they do best—caring for pets.



## About K-9 Smiles

With 86 locations across Colorado, K-9 Smiles specializes in stress-free dental care for cats and dogs. Their services include online scheduling, dental evaluations, preventative maintenance, and detailed “report cards” for pets post-treatment. As the business grew, K-9 Smiles needed to shift its marketing efforts from individual locations to a centralized strategy managed by their headquarters. They also required an integrated platform to track appointments, maintain treatment documentation, and engage potential customers effectively.

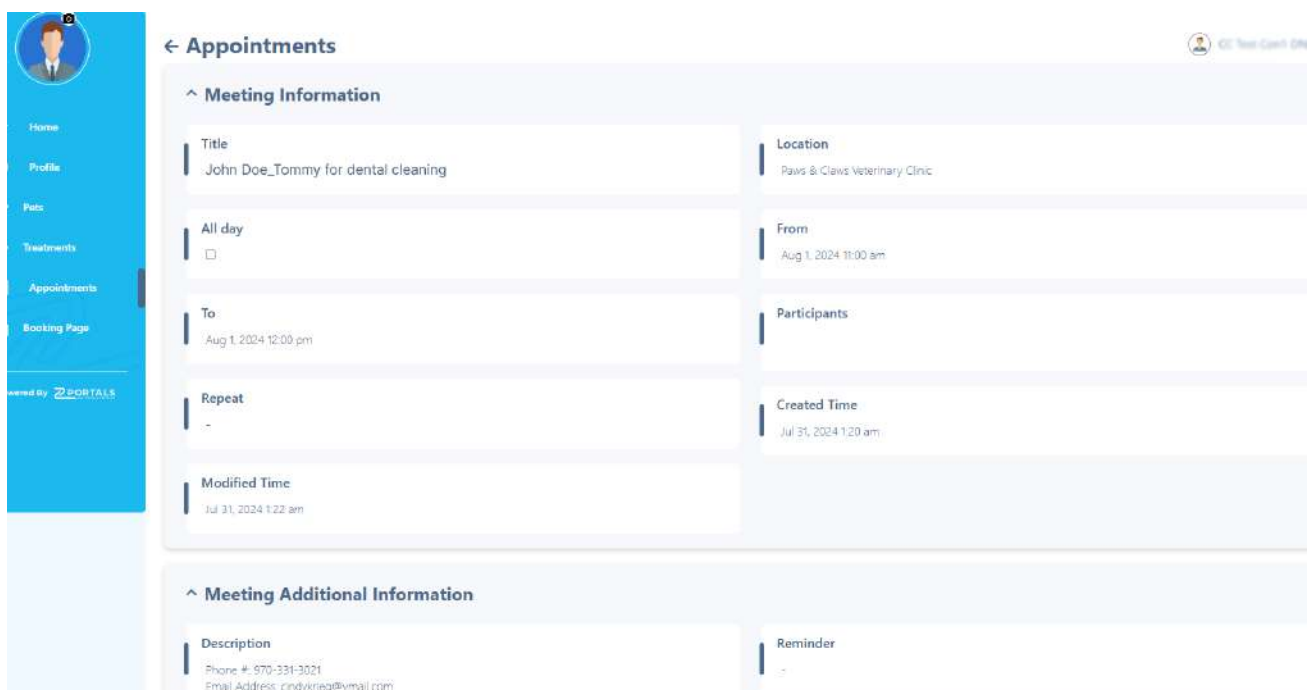


# The Challenge

K-9 Smiles faced several operational hurdles:

- Inefficient tracking of completed and upcoming pet appointments.
- Lack of a centralized platform for managing treatment reports and client communication.
- Difficulty marketing to potential customers visiting their website without booking.
- Disjointed operational systems, leading to manual data entry and errors.
- No client portal for updating pet information, booking appointments, or accessing billing details.

To grow their business, K-9 Smiles needed a tailored solution to link Zoho CRM records properly, streamline workflows, and provide a seamless experience for pet owners.



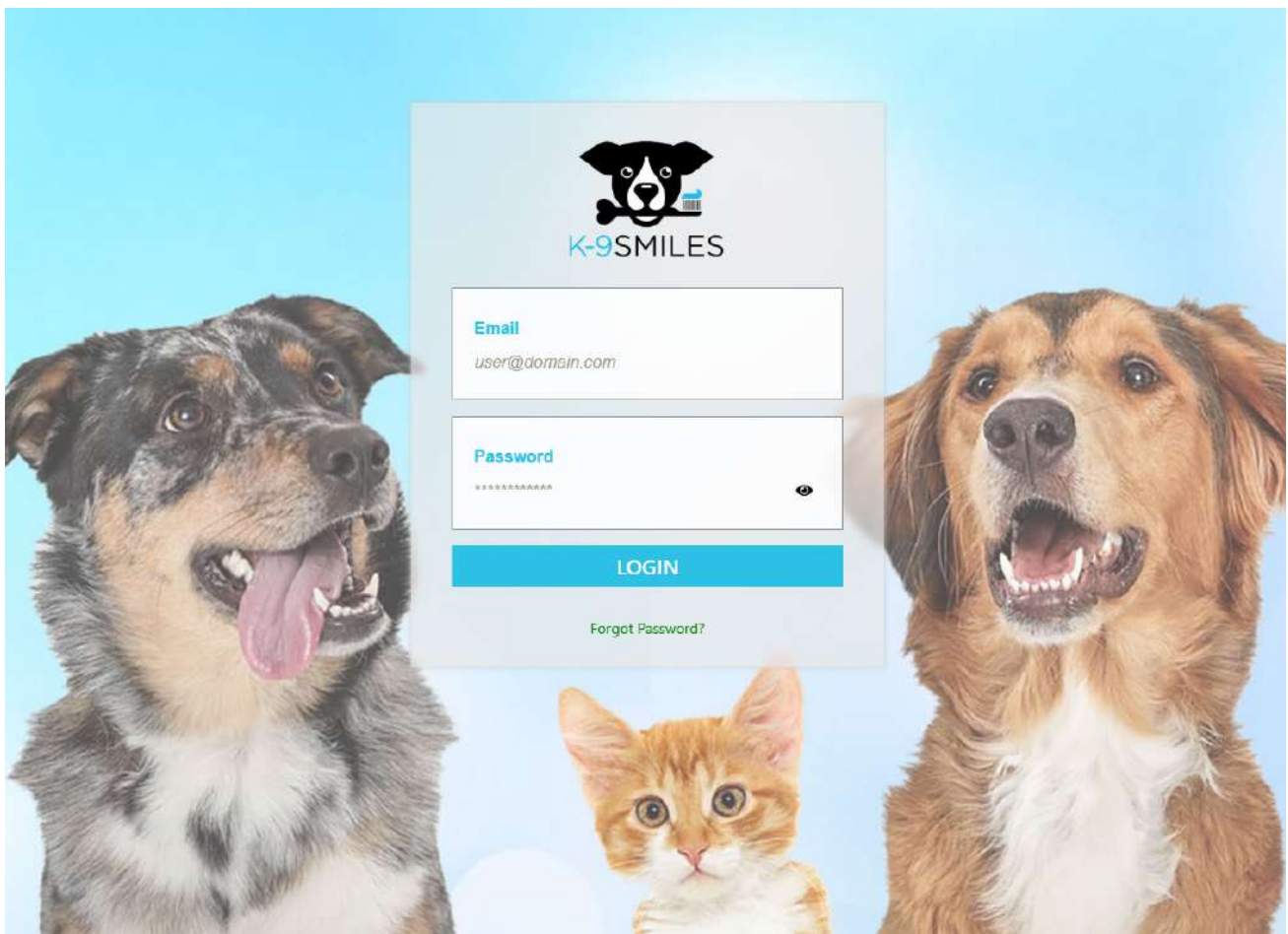


# Catalyst Connect's Approach

To address these challenges, Catalyst Connect conducted a comprehensive evaluation of K-9 Smiles' processes, including:

- Interviews with key departments to identify pain points and requirements.
- Development of detailed data architecture and workflow diagrams.
- Creation of mockups to visualize proposed solutions.
- Specification of business flows and functional requirements.

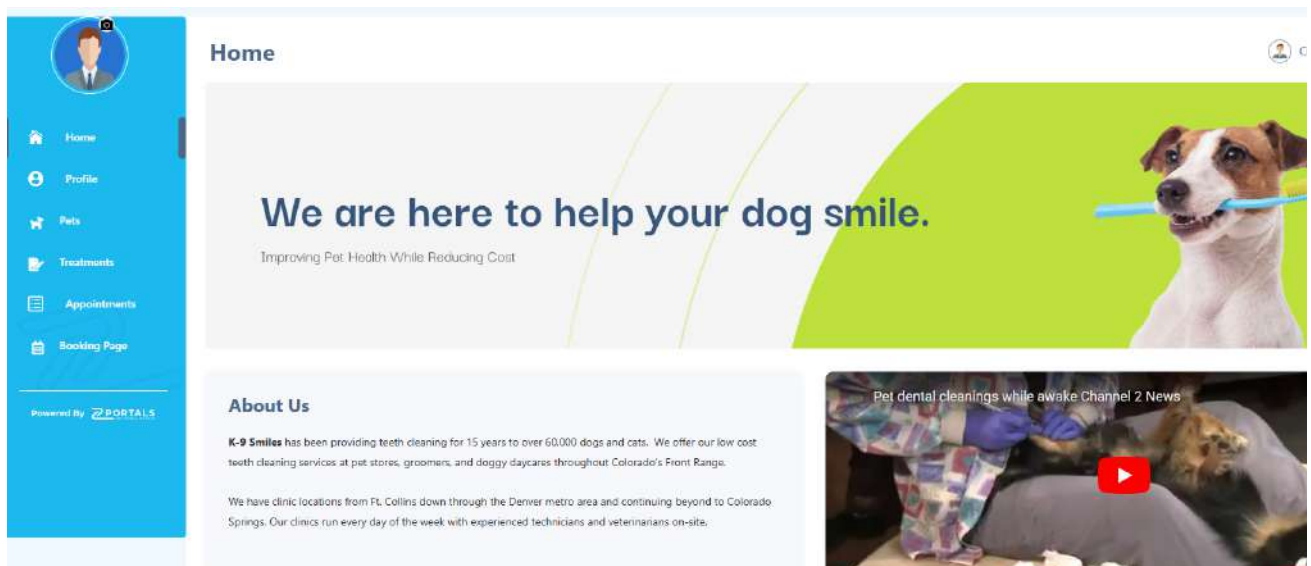
This collaborative approach ensured that the solution would meet the unique needs of K-9 Smiles and its clients.



# The Solution

Catalyst Connect implemented an integrated system using Zoho One and ZPortals to deliver a seamless experience for both staff and pet owners. Key features included:

- **Client Portal:** A custom ZPortals solution allows clients to book, reschedule, and view upcoming appointments. Clients can also update contact information and pet details directly within the portal.
- **Automated Workflows:** Each appointment booking generates a Meeting record in Zoho CRM, visible in both the CRM and ZPortals, ensuring consistent record-keeping.
- **Treatment Reports:** After each appointment, vets complete a form that creates a Treatment (Deal Record) in Zoho CRM. A professional PDF, including treatment notes and signatures, is automatically generated, stored in the portal, and emailed to the client.
- **Integrated Marketing:** Zoho Campaigns enables targeted marketing efforts to website visitors who haven't yet booked, turning interest into action.






# Implementation and Challenges

Weekly meetings with the K-9 Smiles team ensured open communication and timely resolution of challenges, such as:

- Resolving email notification issues.
- Addressing website timezone discrepancies.

Catalyst Connect's proactive project management approach ensured that the implementation was completed smoothly and on schedule.

## Disclaimer Form



**Pet Owner Name \***

John Doe  Lead20231018\_4

First Name Last Name

**Pet Owner Email \***

amin@catalystconnect.com

**Pet Name \***

Tommy

**Pet ID \***

7915

We reserve the right to turn down any pet with heart conditions, severe gum disease and/or loose teeth, or behavior issues such as biting and overly stressed.

By signing this agreement, you agree to release Well Animal Care LLC dba K-9 Smiles, its veterinarians, and all of its employees harmless from any and all claims. This includes the hosting clinic and all of their employees.

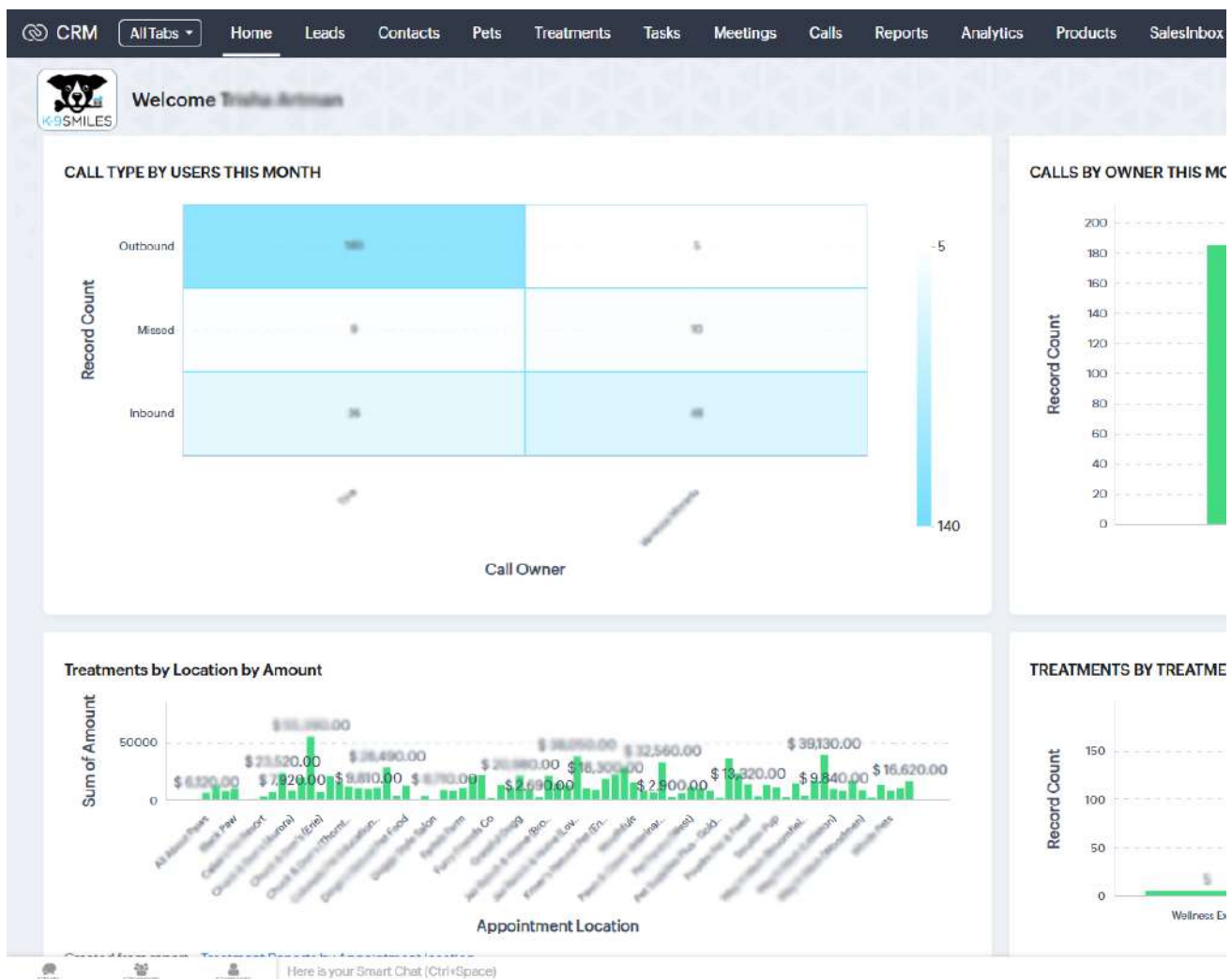
You understand that a non-anesthetic dental exam and cleaning may not be as thorough as an anesthetic dental exam, cleaning, and x-rays, but rather is just one part of a complete dental care plan for your pet.

# Results

The integrated Zoho and ZPortals solution delivered measurable benefits for K-9 Smiles:

- Enhanced appointment tracking and reporting capabilities.
- Reduced administrative workload, allowing the team to focus on expanding partnerships with pet shops and clinics.
- Improved client experience through the user-friendly portal.

As a result, K-9 Smiles has been able to allocate more resources to sales and marketing, fueling business growth.



# Client Testimonial



"Anna and the Catalyst implementation team have been instrumental in getting our Zoho setup streamlined and efficient. We highly recommend their project management approach and Zoho expertise and consultation."

– **Trisha, K-9 Smiles**

# Conclusion

By understanding K-9 Smiles' unique business needs and leveraging the power of Zoho, ZPortals, and WordPress, Catalyst Connect delivered a solution that simplified daily operations and improved customer satisfaction.

**Ready to transform your business  
with Zoho and ZPortals?**

Connect with our sales team today  
[hello@catalystconnect.com](mailto:hello@catalystconnect.com)