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# ZEAL MOTORS CASE STUDY

Catalyst  Connect

How **Zoho** and **ZPortals**  
Transformed Dealer Management:  
Streamlining **Zeal Motor's** Network  
with a Custom Portal

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# Executive Summary

Zeal Motors, a Canadian automotive manufacturer specializing in off-road utility vehicles, needed a better way to manage hundreds of dealers across North America. They struggled with onboarding, supporting, and communicating with their extensive dealer network. By implementing Zoho CRM, Zoho Desk, and a customized Zportals dealer portal, Catalyst Connect revolutionized Zeal Motors' dealer management. As a result, they achieved streamlined operations, faster response times, and improved dealer satisfaction—transforming their entire support experience.



# The Client

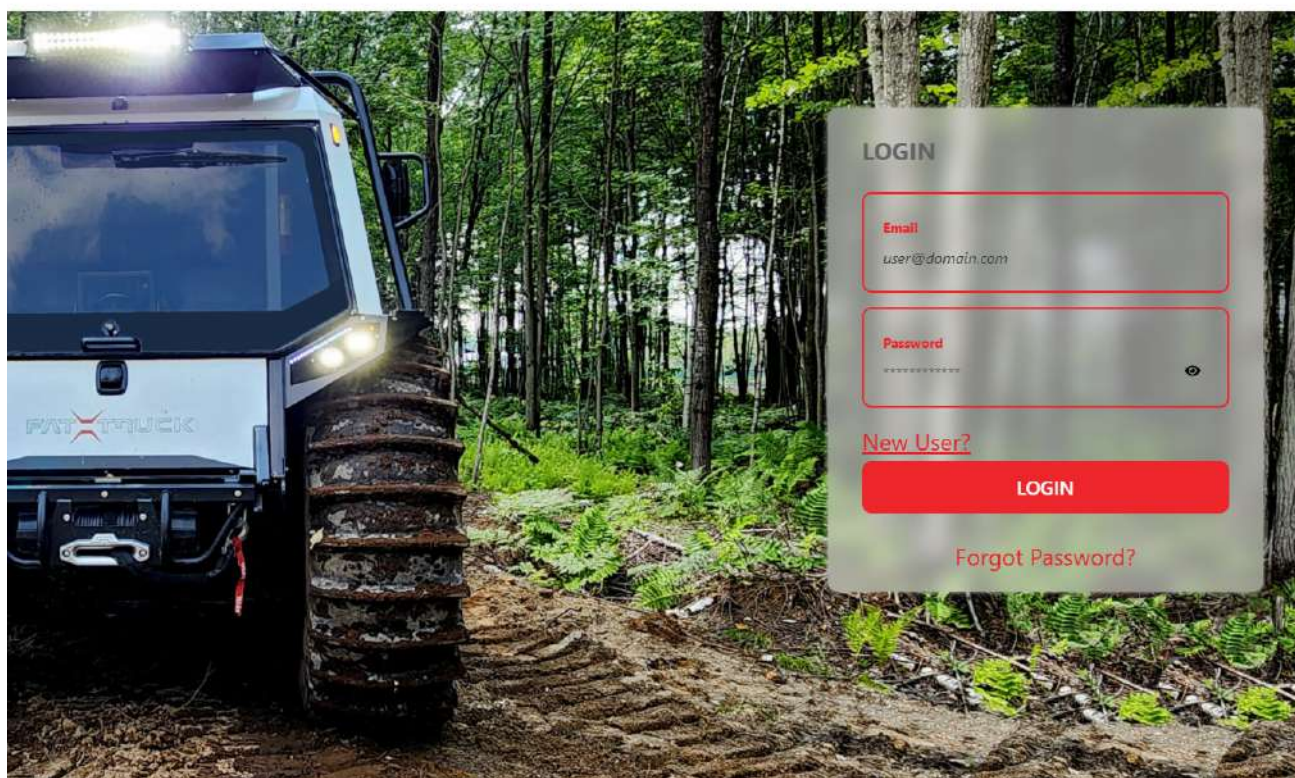
**Client Name:** Zeal Motors

**Location:** Canada

**Industry:** Automotive

**Business Model:** Zeal Motors manufactures highly specialized off-road vehicles designed to handle harsh terrains and meet the needs of industries like oil and gas, search and rescue, defense, recreation, and mining. Each vehicle is built to order based on a common base model, then delivered through a dealer network. Dealers finalize delivery to the end customer, provide front-line maintenance and support, and rely on Zeal Motors for technical expertise and parts. To scale effectively, Zeal Motors needed a robust system to support hundreds of dealers and keep their entire network informed and equipped

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# The Problem or Business Need

With a growing network of hundreds of dealers, Zeal Motors struggled to maintain seamless communication and efficiency. They faced:

- Dealer onboarding and contact management
- Inefficient communication via scattered emails
- Difficulty providing up-to-date product specs, marketing materials, and technical documents
- Time-consuming parts catalog management and RMA (Return Merchandise Authorization) handling
- Limited visibility into common product issues and trends due to disorganized data
- Over-reliance on phone calls and manual tracking methods, resulting in slower response times and repeated information requests

Without a centralized technology solution, these challenges consumed valuable time, slowed support responses, created confusion, and hindered the dealer experience.





# Evaluation of the Problem

Catalyst Connect, a Zoho Premium partner, took a comprehensive approach to determine the best solution:

- **Interviews:** Conducted in-depth discussions with key departments at Zeal Motors to understand workflows and bottlenecks.
- **Data Architecture Diagrams:** Created clear data flow charts to understand how information moved between teams, dealers, and systems.
- **Workflow Diagrams & Mockups:** Illustrated proposed processes and interfaces to ensure alignment with Zeal Motors' requirements.
- **Business Flow & Requirements Specification:** Documented clear, step-by-step outlines of how data should be managed and accessed.
- **Dealer Portal Wireframes:** Designed a user-friendly, branded interface to provide dealers with a seamless online experience.
- **Automation Setup:** Identified opportunities to eliminate redundant data entry and streamline key workflows, ensuring accuracy and efficiency.

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# The Solution

Catalyst Connect implemented a fully integrated Zoho ecosystem coupled with a customized Zportals dealer portal. This solution brought together CRM, support, and resource management into one unified platform.

## Key Components

- **Zoho CRM:**
  - Centralized dealer account and contact management.
  - Custom modules to track each vehicle delivered to a dealer.
  - Seamless management of RMA requests, linked directly to the dealer's account and corresponding vehicle records.
- **Zoho Desk:**
  - Integrated with Zoho CRM to ensure every support ticket is automatically connected to the correct dealer and vehicle.
  - Automated escalation of issues from support tickets to RMA processes.
- **Zportals Dealer Portal:**
  - A secure, branded online platform where dealers can access their vehicle records, manuals, tech specs, training guides, and marketing collateral.
  - Self-service support ticket creation and tracking, providing real-time status updates.
  - Full parts catalog and documentation repository to eliminate repeated requests for information.
  - Multi-factor authentication and mobile optimization for secure, convenient access.
  - This solution gave Zeal Motors a flexible, scalable system that enhanced the dealer experience, reduced administrative overhead, and brought clarity to previously tangled processes.

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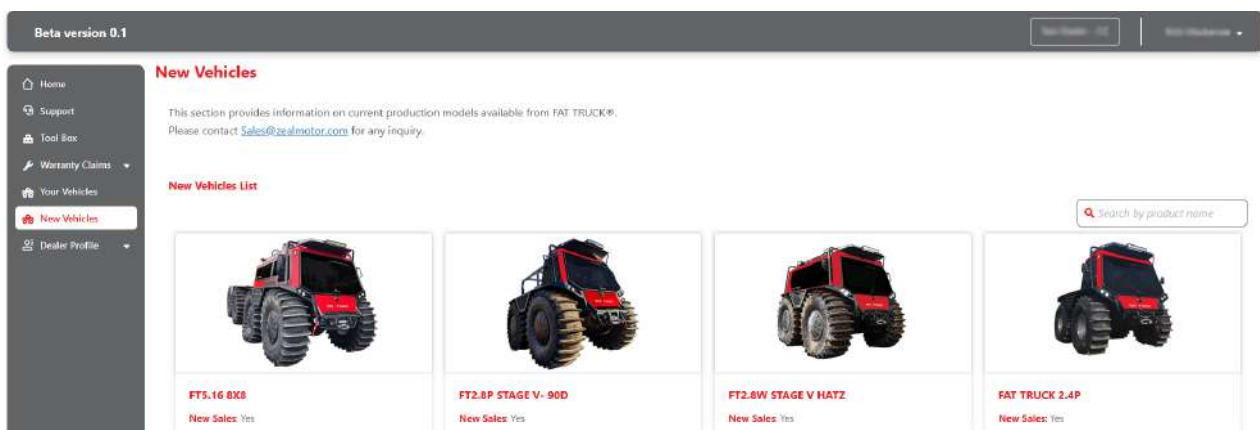


# Implementation

Implementing the solution required careful orchestration and continuous communication:

- **Challenge:** Integrating multiple applications to ensure a support ticket could seamlessly trigger the RMA process and update inventory levels.
- **Solution:** Catalyst Connect created automated workflows within Zoho that linked Desk tickets submitted through the Dealer Portal to vehicles stored in the CRM. This was achieved by matching a VIN number from a ticket to the Vehicle in CRM. If a support ticket warranted a parts replacement a user could click a button to initiate an RMA record to be created in the CRM. A custom function was written to automatically generate a zero-dollar sales orders in Zoho Inventory to adjust inventory levels once the RMA was processed in the CRM. Dealers were kept up to date on RMA statuses through the Dealer Portal
- **Challenge:** Delivering a mobile-optimized dealer portal that matches Zeal Motors' branding and user experience standards.
- **Solution:** Developed responsive designs and user-friendly navigation, tested extensively across devices, and fine-tuned the interface to reflect the company's brand identity.

By addressing these challenges head-on, Catalyst Connect ensured a smooth rollout of the new system.



# Results

After going live with the integrated Zoho and Zportals solution, Zeal Motors achieved:

- **Enhanced Efficiency:** Employees handled a significantly higher volume of dealer onboarding and service requests without increasing headcount.
- **Improved Dealer Satisfaction:** Dealers found information easily, reducing repeated inquiries and speeding up support response times.
- **Fewer Support Tickets:** Dealers accessed manuals, documentation, and marketing materials through the portal, decreasing the volume of repetitive requests.
- **Streamlined Communication:** Centralized records and automated workflows eliminated back-and-forth emails, preventing information from getting lost.
- **Insightful Reporting:** Clear visibility into common issues allowed Zeal Motors to improve products and refine their knowledge base.

Overall, Zeal Motors saw faster turnarounds, happier dealers, and fewer “dropped balls,” culminating in a more professional and efficient dealer management process.



# Client Testimonial



"Catalyst Connect is a great partner to elevate and/or develop your Zoho One suite integration. A dealer portal is also offered by them to improve your customer experience. Friendly and very skilled staff makes the overall process simple and joyful."

**-David, Zeal Motors**

## Conclusion

By leveraging Zoho and a custom dealer portal, Catalyst Connect helped Zeal Motors transform a scattered, time-consuming dealer management process into a streamlined, user-friendly system. This enhanced platform not only improved communication and reduced response times but also empowered dealers with instant access to information—ultimately boosting satisfaction and supporting Zeal Motors' long-term growth.

Ready to revolutionize how you manage your dealers, customers, or distribution channels? Contact Catalyst Connect today. Let's discuss how our Zoho-based solutions can streamline your operations, maximize efficiency, and elevate your customer experience. Get in touch now to start transforming your business.

**Let Catalyst Connect help  
your business thrive.**

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Take the next step toward innovation—start your journey today!