



CASE STUDY:

Bringing Service and Appointment Data Into HubSpot for a More Connected Customer Experience



INDUSTRY

Veterinary Services



COMPANY PROFILE

Dr. Kelly's Surgical Unit is a specialized veterinary practice providing affordable surgical, dental, spay/neuter, and preventive care for pets across Arizona. Founded in 2016, the organization focuses on making high-quality veterinary care more accessible through transparent pricing and convenient clinic locations.

Many businesses run early customer conversations through one system and execution, scheduling, or fulfillment through another, with no shared record connecting the two. Dr. Kelly's Vet faced that structural gap between Zendesk and ezyVet.

Dr. Kelly's Vet needed HubSpot to do more than store data. It needed to connect early lead activity in Zendesk with appointment activity in ezyVet so a small team could respond to customer intent without manual record work. Vonazon designed an associated HubSpot model for customers, pets, and

appointments, translated ezyVet status data into usable marketing signals, and validated follow-up logic against real records before activation.

The clearest proof came more than a year later: Dr. Kelly's returned to Vonazon to expand the same integration rather than replace it. In the interim, the team moved from asking whether data could reliably reach HubSpot to validating records, testing campaign audiences, and exploring repeat-client and lifetime-value reporting.

The Business Context

For Dr. Kelly's Vet, customer intent often appeared before a formal appointment. Prospective customers called or texted through Zendesk to ask about services, but some stopped responding before scheduling. If they never reached ezyVet, the veterinary and appointment system, the team had little ability to systematically bring them back into the conversation.

Dr. Kelly's wanted to keep both Zendesk and ezyVet.

HubSpot therefore had to become the point where early customer conversations and later appointment activity could be understood together. A lead who went quiet, a customer who scheduled, a financial cancellation, a no-show, and someone who had already rescheduled all required different follow-up.



THE CHALLENGE

This was not a simple API connection. Warm leads often entered Zendesk with only a phone number, while HubSpot relied heavily on email for contact matching. Repeat customers could later enter ezyVet with an email address, creating duplicate-management risk. At the same time, one customer could have multiple pets and each pet could have multiple appointments, so the data model had to preserve those relationships instead of flattening them onto a single record.

The source data also needed interpretation. Important ezyVet values arrived as IDs or codes, and appointment information did not initially provide the business distinctions the marketing team needed. Without reliable status and cancellation data, HubSpot could not tell whether a customer had completed an appointment, canceled, failed to show, or already scheduled something new.

“We want to be able to capture the intent when it’s there and move very quickly. Automation was our number one need in this project.”

– Allison Matherly

For a small team managing thousands of records, manual updates were not a workable fallback. More importantly, automation had to be accurate. A customer who had already rescheduled should not enter a cancellation sequence simply because an older appointment had been canceled.

Challenges at a Glance



Complex Data Matching

Phone-only leads created duplicate-record risks in HubSpot.



Inconsistent Source Data

ezyVet data required interpretation before HubSpot could use it effectively.



Accurate Appointment Status

HubSpot needed accurate appointment statuses to trigger the right actions.



Automation Had to be Reliable

Workflows needed to account for changing appointment circumstances

VONAZON'S APPROACH

01

Reverse-engineer the current operating process across systems before configuring anything new.

03

Translate raw operational data, codes and IDs into distinctions a marketing decision can actually use.

05

Tie enablement to the team's actual use cases rather than generic training.

02

Validate the data model before automating against it.

04

Validate automation and campaign logic against real records before activation.

Vonazon started by reverse-engineering the operating process before configuring HubSpot. The team traced how customer conversations, pet records, appointments, statuses, and cancellations were represented across Zendesk and ezyVet. That discovery separated data that could change a marketing decision from fields that would only add noise, and it established a clear rule: **validate the data model before automating against it.**

That decision shaped the architecture. Vonazon mapped ezyVet customers to HubSpot Contacts, retained the existing approach of representing pets as associated Company records, and used a custom Appointment object for individual appointments. Associations connected each appointment to the correct customer and pet, **preserving the one-to-many history so it could later support segmentation and reporting rather than sitting inert in the system.**



The same judgment showed up in how Vonazon treated the raw ezyVet data. Once the relationships were sound, the team made the data usable rather than simply complete. When appointment records did not reliably distinguish scheduled, completed, canceled, and other states, the team returned to ezyVet with Dr. Kelly's to identify the correct operational fields rather than automate around an incomplete interpretation. Numerical cancellation values, which arrived as IDs with no meaning on their own, were translated into **readable HubSpot labels so financial cancellations, no-shows, and other scenarios could drive different treatment.**

Only after those values were mapped did Vonazon **validate campaign logic**. Dr. Kelly's checked real HubSpot records against ezyVet, including financial cancellations and no-shows, to confirm that the right customers were being identified. The team then examined **suppression logic** for future appointments so a customer who had already rescheduled would not receive irrelevant cancellation outreach.

I just don't want to be blasting people with content that doesn't apply to them.

– Nima Nadjafi



That same discipline shaped enablement. Rather than train the team on HubSpot in the abstract, Vonazon tied administration, navigation, data management, automation, and reporting instruction to the specific customer and appointment scenarios the integration now handled, so training doubled as a walkthrough of the system the team would actually run.

The clearest adoption signal came from the questions that followed:

- Nima began exploring repeat-client and lifetime-value reporting and wanted to test campaign qualification and update campaign links himself
- Allison wanted reporting definitions clear enough to carry back to the broader team as its use of HubSpot reporting grew



THE RESULTS:



Built to Scale

The original HubSpot data model proved durable, allowing Dr. Kelly's to expand it rather than replace it.



Smarter Automation

Validated cancellation data and tested suppression logic created a more controlled path to automation.



Connected Customer Insights

Linking customers, pets, appointments, and Zendesk activity made appointment behavior actionable for segmentation and follow-up.



Greater Team Adoption

The team moved from simply transferring data to actively validating records, testing campaigns, and exploring repeat-client and lifetime-value reporting.

THE RESULTS:

More than a year after the original implementation, Dr. Kelly's returned to Vonazon to extend the same Contact, Pet, Appointment, and association model, not to replace it. The architecture had held up well enough that the next question wasn't whether HubSpot could support the business, but how much more precise the team could make it.

That **outcome rested on a connected data model** that linked customer, pet, appointment, and Zendesk activity, and made appointment status and cancellation reasons usable for segmentation and follow-up. Instead of relying on disconnected operational signals, the marketing team could evaluate appointment behavior in the context of the customer relationship. Cancellation categories were

validated against real ezyVet records, and follow-up sequences were built around those distinctions. Activation was deliberately held until suppression logic was fully tested, giving Dr. Kelly's a more **controlled path to automation** rather than simply increasing message volume.

The team's behavior changed alongside the system. Users moved from asking whether data could be transferred into HubSpot **to validating records, testing campaign eligibility, and exploring repeat-client and lifetime-value reporting.**

That shift showed the integration was becoming part of how the team thought about customer engagement, not just a technical connection running in the background.

LOOKING AHEAD

By 2026, Dr. Kelly's had become more advanced in its use of HubSpot, and appointment type alone was no longer granular enough. The team wanted to distinguish the actual service performed, such as an amputation or mass removal, and add selected invoice, provider, location, and market context for more precise campaigns and reporting.

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We're trying to move from more like generalized broad content to like more specific, relevant where it makes sense.

– Nima Nadjafi

Vonazon has scoped that next phase to extend the existing integration while protecting the architecture already in use. The planned work includes procedure-level and selected financial data, richer operating context, and stronger synchronization monitoring and recovery. Those capabilities remain future-state work, but the expansion itself reflects the value Dr. Kelly's found in the original foundation.



Ready When You Are

If your team is deciding which operational data actually belongs in HubSpot, or whether data cleanup needs to happen before automation, you are dealing with the same kind of judgment this project required.

If customer intent in your business is spread across HubSpot and operational systems, Vonazon can connect them into data your team can segment, automate, report on, and use with confidence.

Talk with Vonazon about building a HubSpot integration around the way your business actually operates.



**Let's map out a
path forward.**



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