



Case Study

Are the promises of 'Care' and 'Trust' truly selflessly kept in the Pet Care industry?

by Garima Bhardwaj

A contrasting case study of two pet clinics and their veterinary services offered in Gandhinagar, Gujarat (names changed). What is 'Passion' for one person could be 'Compassion' for another but the larger question is what follows after the two? What is service in its purest form and how can we attain it? Are enterprises in the services industry now solely focused on profit making even if it comes at the cost of a compromise in basic social principles of helping the needy and taking care of those facing adversities.

"Just few minutes, we are almost there! You will be healed in no time," said Mr. Murli, looking at his seven-month-old old pet Labrador 'Goldie,' with affection and parked his car outside the Zoho pet clinic, located in an urban neighbourhood of Gandhinagar, the capital of Gujarat. New to the city, he was looking for a clinic to get his pet checked for flu, which had been causing trouble for a few days now. Based on the great reviews on social media and Google, he picked Dr. Paresh, a young and popular veterinarian, whom many people had recommended for the treatment of young dogs. Murli found the perfect parking spot in front of the clinic and reached there with his wife, who sat on the passenger seat holding Goldie in her arms. They reached the clinic's entrance after removing their shoes, thereby following rules. Upon entering the clinic, they saw a narrow way to the reception with a small room with a store full of pet food, toys and accessories.

There were three seats present in the room, out of which two had already been occupied by other pet parents. Mrs. Murli sat on one of the vacant seats in the cluttered space while Mr. Murli talked to the receptionist, informing her about Goldie's ailment. 'Taking good care of your best friend,' said the message on the Zoho Pet Clinic leaflet, which Mrs. Murli picked and began reading while sitting idle with Goldie in her lap. The leaflet had information about the history of this five-year-old clinic and details of both founders, two young vets who aimed to provide better healthcare facilities to pets and build trustworthy relationship with pet parents. Reading the client testimonials comforted her worrisome mind. Mr. Patel, who had also been waiting for his turn in queue to get medicine for his dog, began a random conversation with Mr. Murli and his wife. He mostly cribbed about how long he had been waiting for his turn. In midst of the conversation, he looked at his watch and requested the



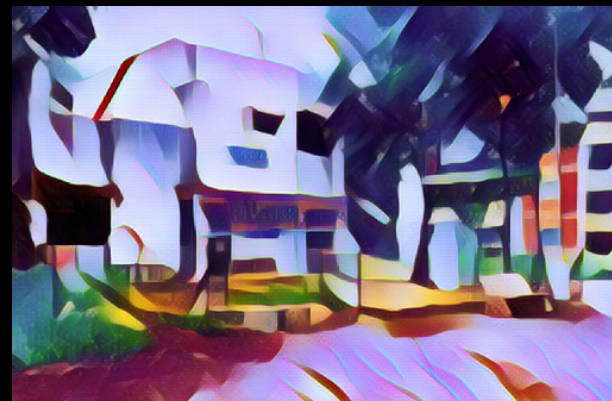


receptionist to reschedule his appointment for the next morning. He purchased a few food treats for his pet and left after bidding goodbye to Mr Murli. Goldie was taken to the treatment room, wherein it was checked by an assistant for temperature and pulse rate. Dr. Paresh entered the room and began examining Goldie as Mrs. & Mr. Murli held on to their pet dog, who was visibly uneasy, making it difficult for the couple. The doctor, meanwhile, asked other staff members to get the injection and medicines for the treatment. The staff member went from room to room collecting necessities and in haste, forgot about few. After nearly forty

minutes of struggle, Dr. Paresh was able to check Goldie, diagnose the problem and inject him with a medicine. Mrs & Mr. Murli were finally relieved but exhausted due to the fatigue caused in calming their respective pets. All four of them stepped out of the treatment room and Mrs. Murli started distracting Goldie from the pain with treats and toys available in the store while Mr. Murli took the prescriptions from Dr. Paresh, who was sitting in his exquisite cabin. At the reception, he was handed over an exorbitant bill detailed cost of the treatment, medicines and their miscellaneous purchases at the clinic.

Mr. Murli made the payment using a UPI application, following which the three of them left the clinic with the couple feeling content about an improvement in Goldie's health. Next day a small problem arose when Mrs. Murli got confused about the dosage of Goldie's medicines and their timings. Surprisingly, neither did the Murlis or anyone at the clinic deemed it necessary to mention dosage and timing of medicines. A slightly tensed Mrs. Murli rang the clinic but didn't get any response, after which she dialled a veterinarian, whom the family consulted in their previous city of residence.





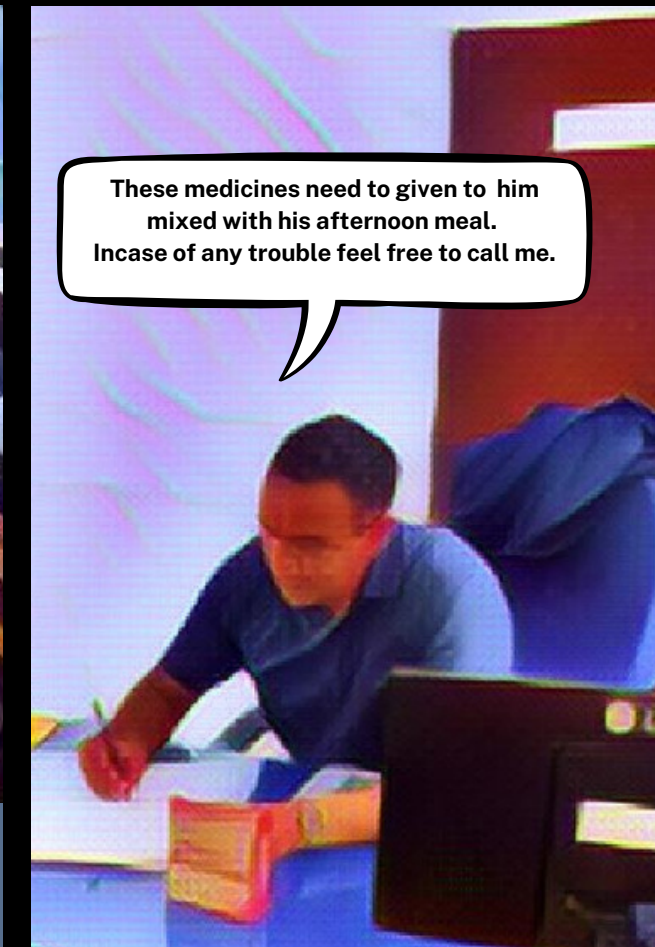
Mr. Murli and Goldie reach the place that his colleague had suggested for vaccination.



It's ok little boy, just hang in there!



Mr. Murli comforts Goldie and rubs his back with affection and then leaves to collect the prescription slip and bill from Doctor's cabin.



He also hands over a vaccination passport with a stamp of vaccine in it for record keeping.

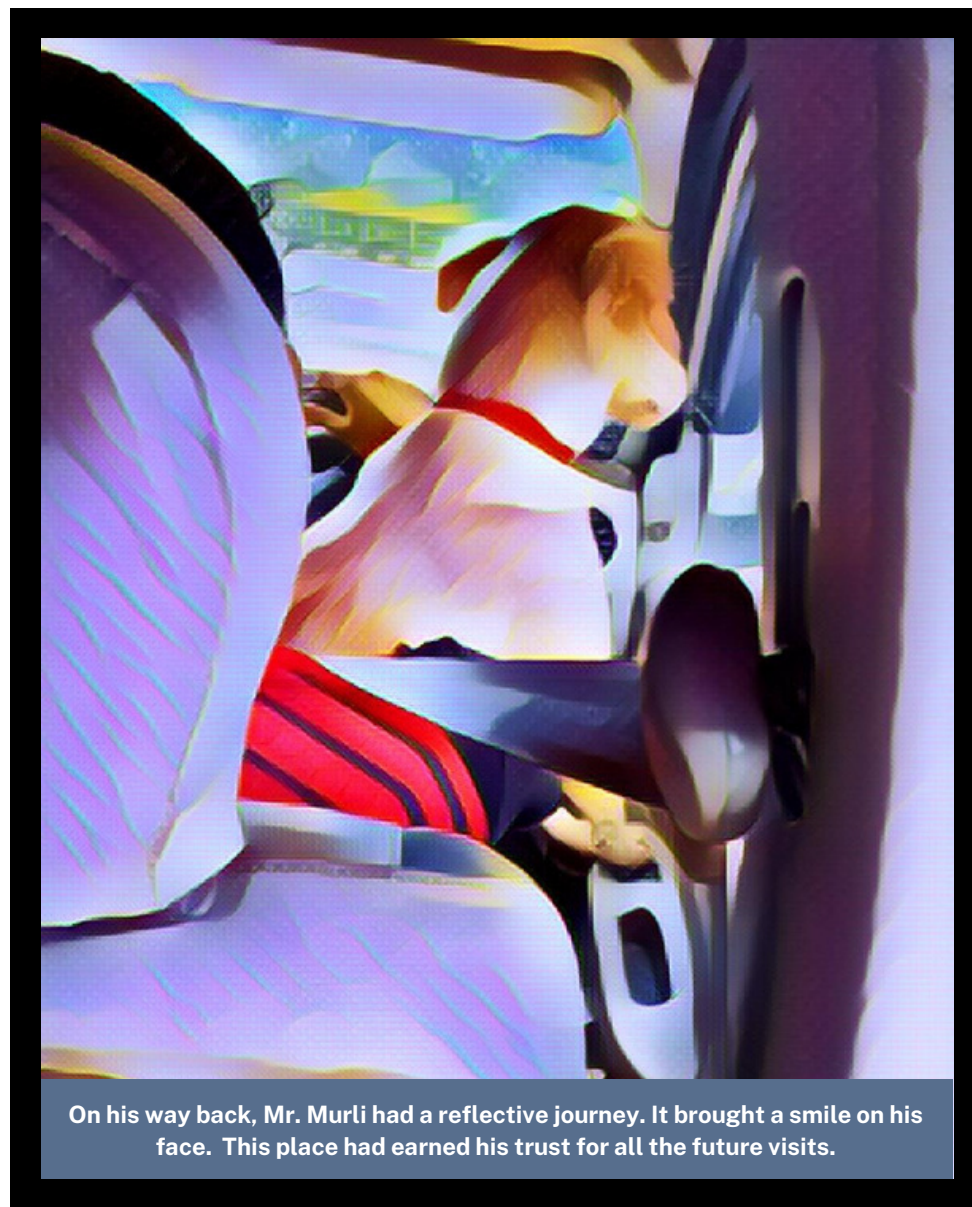
Almost two months had passed since Goldie last visited the pet clinic and it was time for his regular vaccination and health check-up. This time Mr. Murli engaged in detailed research and was advised by a colleague to visit Dr. Kamal, a renowned veterinarian working at a government pet hospital with more than 30 years of experience in the pet healthcare industry.

This time, Mr. Murli decided to take Goldie to the clinic at the government hospital by himself because the pet was uncomfortable getting into the car as it reminded his labrador of the previous visit. Taking the previous visit to Zoho clinic into consideration, even Mr. Murli was cynical about everything, right from the treatment to the cost. His concerns were legitimate but the previous experience was a result of minimal research and urgency of the situation.

An optimistic Murli, with Goldie, drove to the Pashushala and used Google Maps to reach using the best way to the hospital. The route to the pet hospital was unfamiliar to him but he reached there in no time. This clinic was government residential society, unlike the Zoho Pet Clinic, which was nestled in the middle of an upscale neighbourhood. The first sight of the location, Murli was immediately concerned about the hygiene and chose to wait in his car for a while. It was 11 AM and the hospital was fully operational with a team of assistant doctors along with the helping staff going about their routine of recording, diagnosing and treating animals, which included a wounded German Shepherd dog, goat and a cow in the porch area, which was designated for injured pet patients. This building was much bigger as compared to the Zoho pet clinic with minimal disparity of class.

Goldie was reluctant to step out of the car and kept moving anxiously, from one seat to another. The previous experience had left him scarred, resulting in nervousness. Mr. Murli was greeted by the assistant staff and details of the case were recorded while he was trying to calm down Goldie, who was sitting scared inside the car. The assistant staff updated the on-duty doctor about Goldie's case and himself walked down to the car for the check-up. His comforting touch eased Goldie immediately and he formed a bond with the scared young puppy in no time. Meanwhile, the assistant doctor handed over the injection to the doctor, administering the shot with utter ease and comfort for Mr. Murli's pet. Thereafter, Dr. Kamal soothed Goldie and spoke to his parent, instructing Mr. Murli about how to ensure his pet's welfare.





Mr. Murli went to the cabin to complete the payment and was astonished to see the bill and the amount he was expected to pay for the treatment.

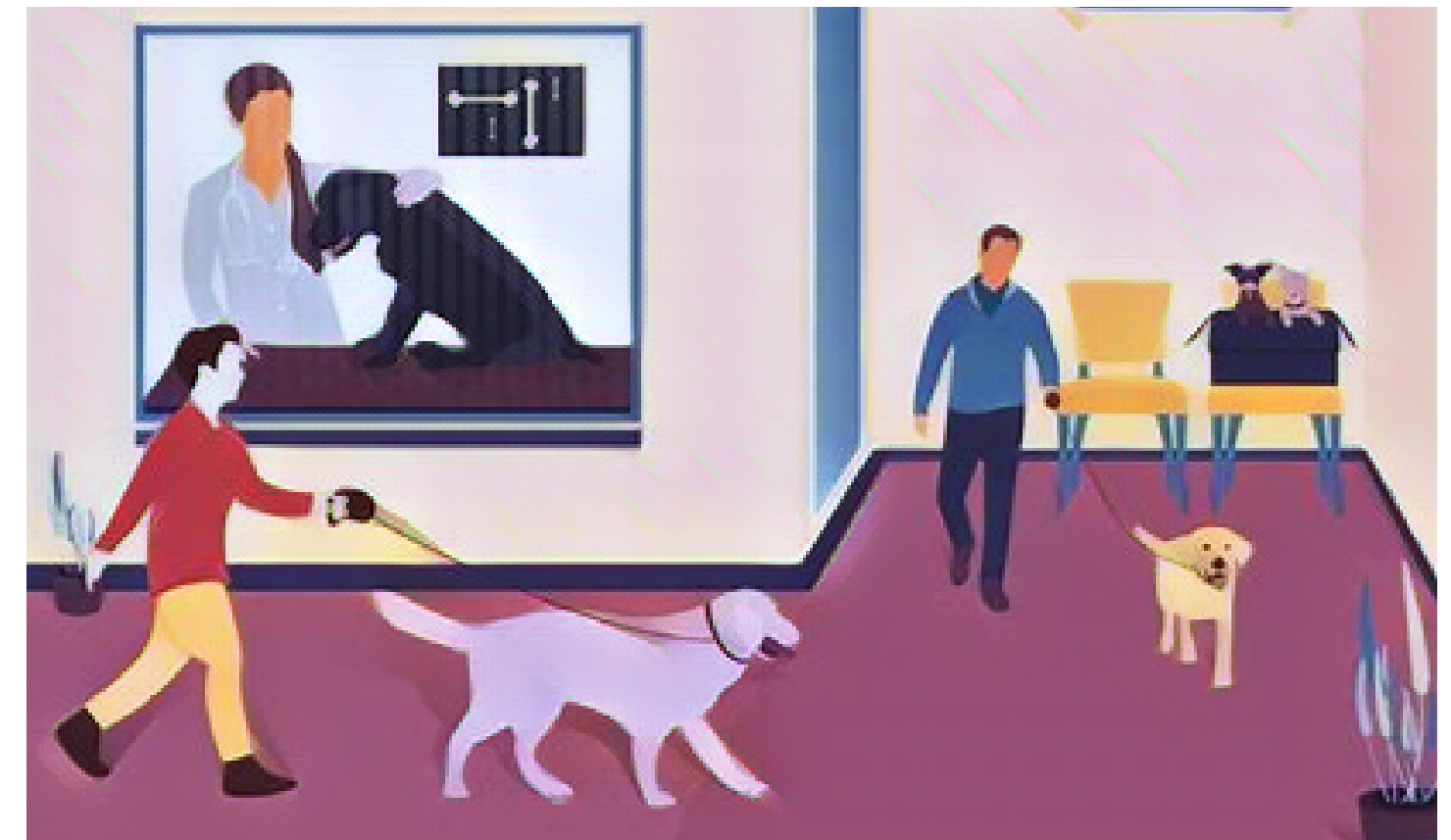
Dr. Kamal, entering the room, recorded the details in the prescription register himself while talking to Mr. Murli, explaining to him the Dos and Don'ts with respect to medicines. Furthermore, he handed over a vaccination record keeping passbook with a date stamp and a few shampoo samples for Goldie, asking Mr. Murli to give him feedback.

Though this was their first visit and interaction with Dr. Kamal, it didn't feel strange and that was visible due the ease Goldie felt at the government pet clinic. What started with a concern for hygiene quickly turned into a feeling of familiarity and a place he would want to visit again solely for the essence of service. He left the place truly satisfied, realising that there are factors beyond monetary transactions such as the pet's experience and a feeling of contentment. Mr. Murli realised that the purpose was not to sell and the promise made at first is kept till the end.

THE DIFFERENCE

Same trade with difference in their perspectives. One is driven the other indifferent. 'Passion' is the fuel that drives an individual or enterprise to immerse in work and deliver results while 'Compassion' is what you extend to others while being the manifestation of care and concern that one develops to extend services beyond monetary transactions. If one truly wants to deliver passion, i.e., to level up the results, one must do so with compassion - by recognizing and demonstrating one's belief and making the change that one keeps expecting from society. Services are intangible products, a means to provide care, and medical treatment in the pet care industry, dealing with processes that are experiences rather than consumer goods.

A stark difference in the abovementioned cases was that in the latter, the whole process had a rhythm to it, orchestrated by staff members who had well-defined roles and responsibilities with mutual trust that governed the flow, making it a robust and sustainable structure.



Unlike most of the pet clinics, Pashushala was genuinely concerned about the animal, who in his own words can't describe its feelings but just express through gestures, eyes and sounds. For once, it was actually about treating the problem and not selling services. The major difference was between providing a service for gratification by truly serving those in need rather than making profit through commoditization. It can, thereby, be said that, 'Passion' is often subjective and it can be the zeal one feels, while enjoying what they are doing and enjoy seeing its positive effects on the recipient. Compassion is nurtured from within but doesn't have any effect until one applies it to others. One demonstrates compassion by holding the organization accountable for delivering on its promises to its employees, customers and everyone associated with it.

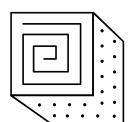



Figure & Facts

With the gradual growth in world's pet population in next five years, it is believed that the pet care market would expand into a larger scale in the three core business segments: pet food, pet products, and pet services, as the demand for pet care, is correlated to pet population positively. The USA, Brazil, Mexico, China, United Kingdom, Russia, Thailand, Canada, Argentina, and Japan are the top ten markets would have the highest pet care growth between 2016 and 2021.


COMPARATIVE ANALYSIS



ZOHO PET CLINIC

- Profit Driven
- Priced high
- Passion Project
- Less efficient
- Treats Pets only (dogs, cats, turtle, fishes)
- Sophisticated Infra
- Less footfall
- Users are upper-middle class
- Thrives on customer loyalty and reviews online
- Less exposure

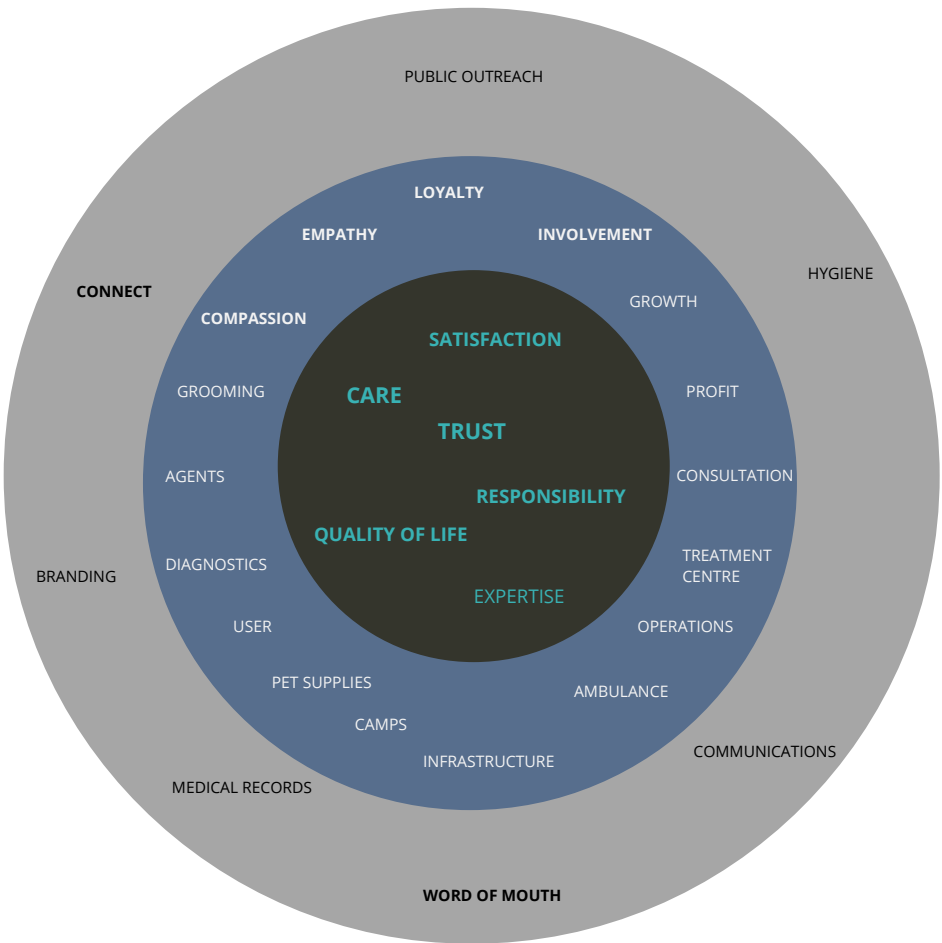
- Started as a passion project but focus shifted to building infrastructure and lab equipments.
- Evident difference between doctor and agents in terms of space allocated and intellect.
- No defined roles and responsibilities for the dedicated agents and an authoritative approach is followed throughout.
- Distinct hierarchy between doctor and support staff.
- Initial impression of the clinic is that of a store meant for selling not getting treated.
- Micro -management by the doctor/owner.
- The space can be better optimized to suit the needs of the service.
- The core of the service is diluted and now shifted to catering the outward aesthetics and grooming.
- Disparity in offering.
- The service is further aimed to bulge not grow in the coming years.



PASHUSHALA

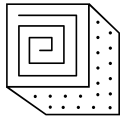
- Not for profit
- Price Low/Free
- Compassion driven
- Efficient
- Treats all animals (Pets, domestic, strays)
- Basic Infra
- Higher footfall
- Diverse userbase
- Thrives on affordability and efficiency
- More exposure

- Started as a passion project but transformed into compassion.
- Distinction between operational spaces but flexible with respect to situation.
- Record entry and maintenance needs upgradation i.e. digitalization.
- Hygiene, cleanliness and sanitation of the space is not up to the mark making it less inviting.
- No defined roles and responsibilities for the doctor (record keeping and diagnosis)
- Insufficient disposal of medical waste.
- Repels the higher-economic strata of society due to its inclusive, open to all nature.
- Transactions made at emotional level but can go higher levels.
- Everyone is given equal attention, care and importance.
- The service is aimed to provide service selflessly and with no ulterior motives.



SERVICE ECOSYSTEM

Compared to private clinics and public hospitals, there aren't many veterinary clinics available for pets What matters is that after every interaction, the customer is pleased and puts a smile on his or her face. It is a must to meet or even exceed customers expectations to ensure continued patronage and at the same time, enhance the level of satisfaction.

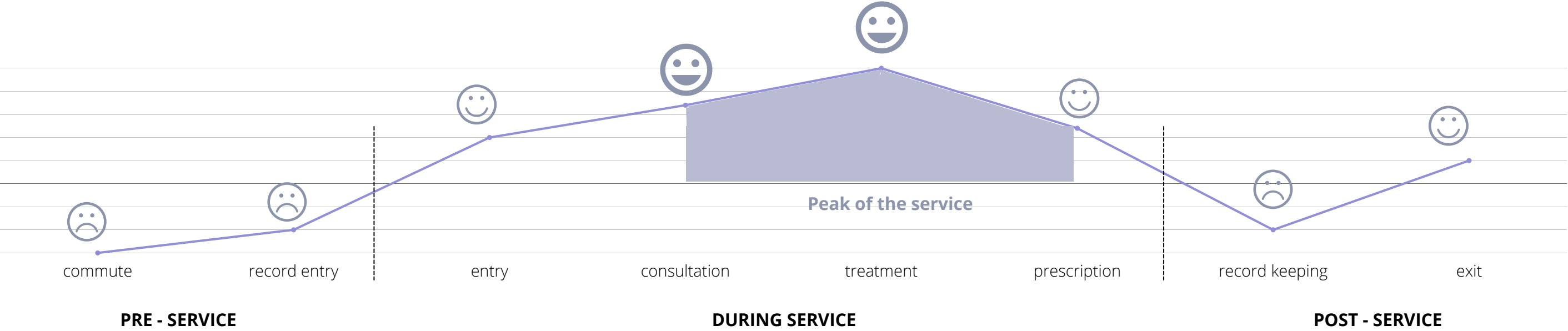


Research Tools used :

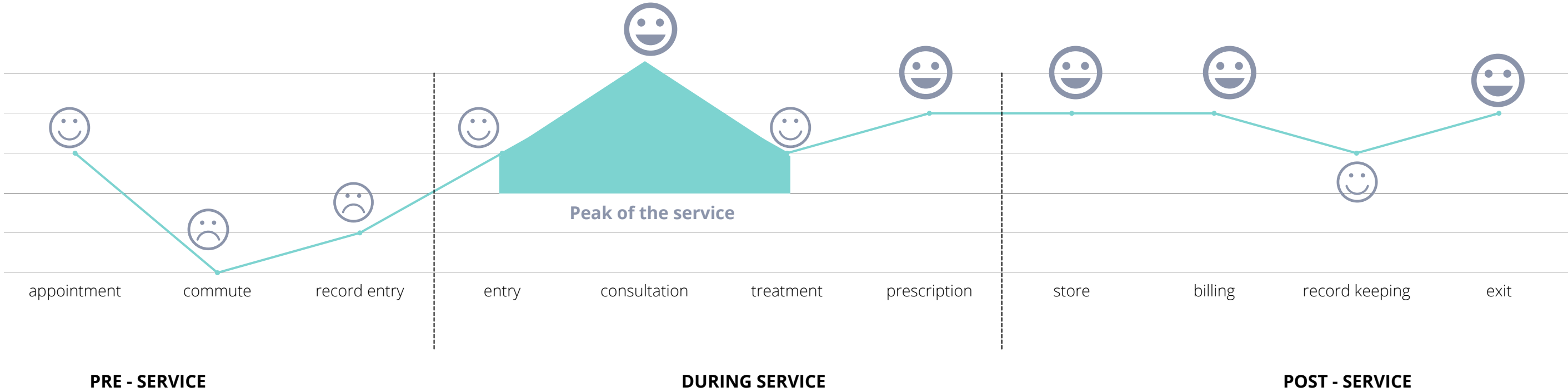
Auto-ethnography, Interviews, role reversal and Shadowing.



ZOHO PET CLINIC



PASHUSHALA

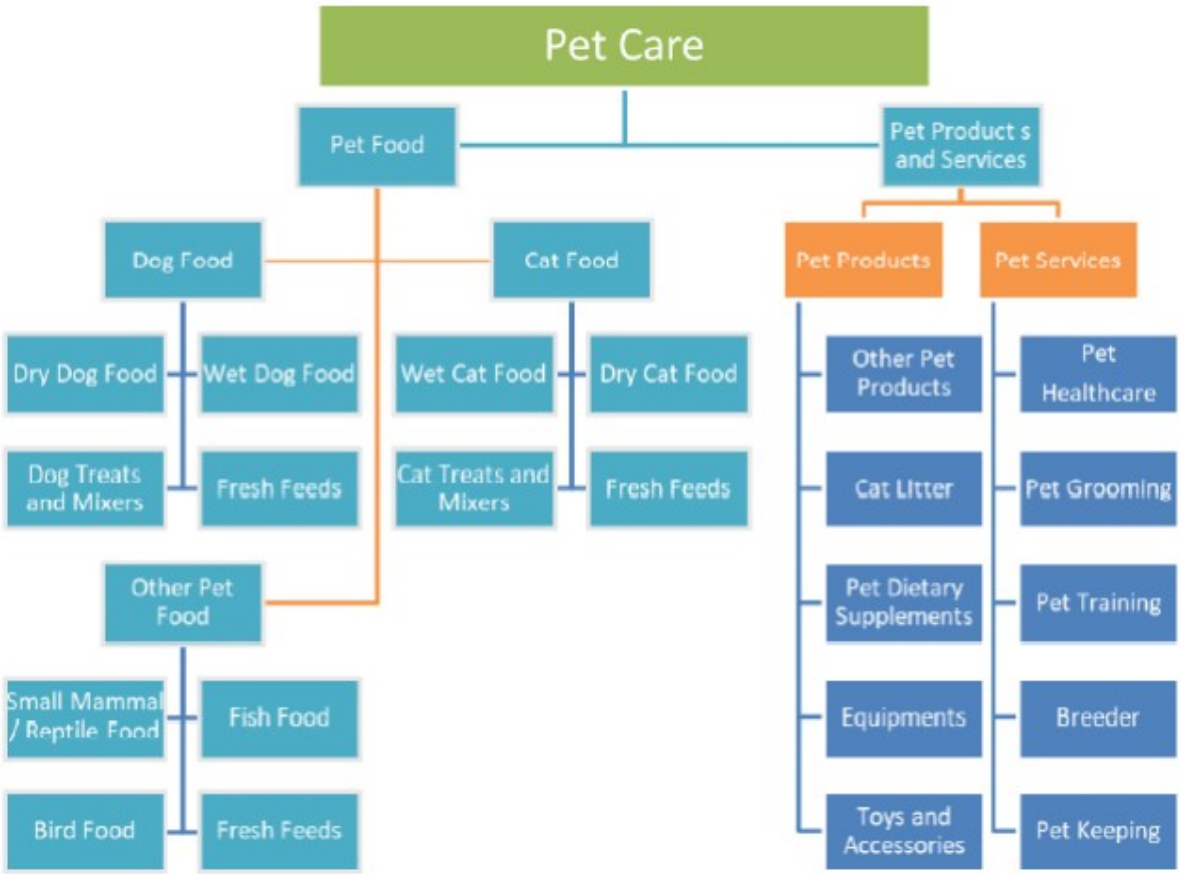


PET CARE INDUSTRY TODAY

Just like the human medical system, veterinary services provide integrated medical care and hospitalization for ailing pets and animals. The typical structure of a veterinary service is formed by animal hospitals, veterinary clinics, and mobile veterinary service. There are distinct medical services offered by different veterinary service bodies. Veterinary clinics should be the most popular choice for pet owners for medical treatment, preventive care and health examination. Most ordinary veterinary clinics provide comprehensive preventive care, including vaccinations, parasite control treatment, dental care, nutritional and behavioural counselling services along with body examination.

With various medical facilities and staffs, usually vet clinics would help many of the cases but some pets require specific medical treatments, such as cardiology, oncologic surgery and minimally invasive procedures. Thus, veterinary specialty hospitals and animal hospitals are the backup support for clinics. It is because veterinary hospitals have complete professionals and equipment usually, in order to offer diverse medical treatments for every type of diseases and illnesses.

Pet care industry is expanding and changing as a global presence in the third decade of the 21st century. It is because of the growth of pet population, trends inspired by pet humanization as well as the evolving demand of pet care in developed and emerging markets. Common pet care business paradigms are found, which are pet food, pet product, and pet service.

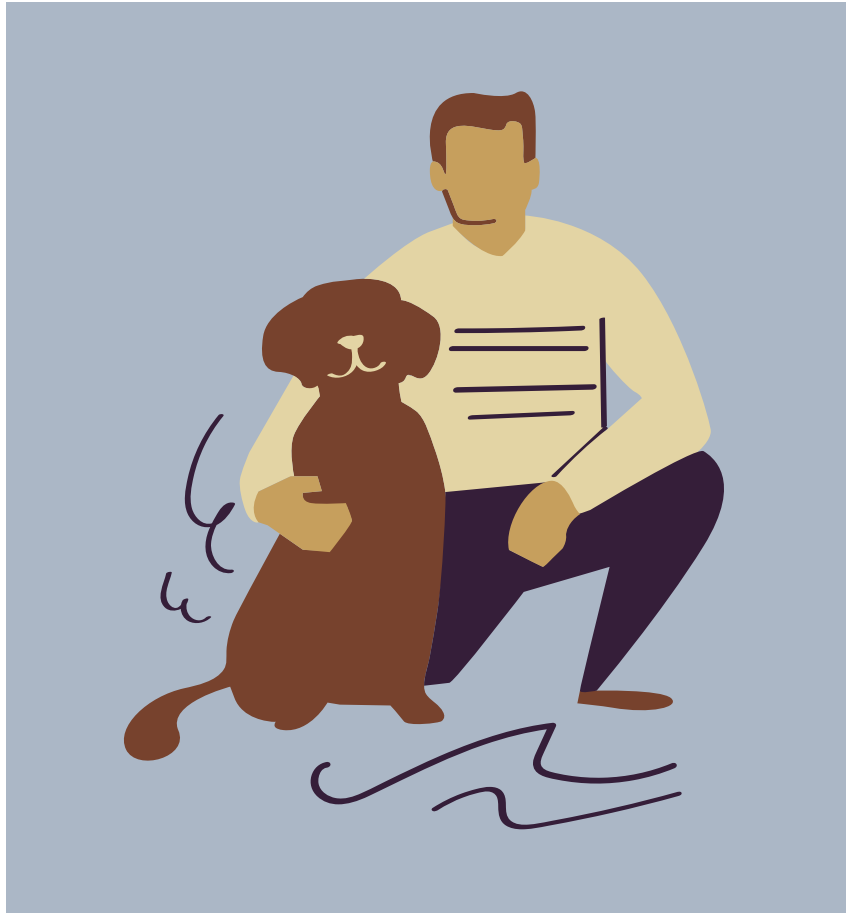


WHY COMMERCIALIZE?

Veterinary clinics are the core distribution channel in the non-retailing area of the pet care industry. Moreover, the highly skewed pets per veterinarian as well as the vet clinic reveals the tension between supply and demand of veterinary service; more qualified veterinarians and licensed vet clinics are needed to provide enough medical service and related facilities for better service for pets however, the need for 'more profit making' and 'to meet the ends' these veterinary clinics knowingly capitalize on retailing aspects as well. For the common pet care business paradigms, the pet care companies develop a comprehensive range of commodities and services in pet food, pet care products as well as pet services. The pet clinics have identified this particular gap and started incorporating retail segment with the services being offered to make profits.

As pet humanization trend becomes a global one, there is a rise in the numbers of consumers requiring natural, premium-graded pet food. Therefore, a part of the consumer base is purchasing premium pet food instead of the mid-priced items. Simultaneously, the consumers in emerging markets exhibit a higher demand for economic options, including mid-priced pet food, as those pet owners change the table scraps feed to packaged food for their pets. The product segment has a relatively smaller share in the entire pet care industry but also has a wider range of product offers in different divisions and functions. The pet care products in the market could fulfil all needs for pets and pet parents. For examples, preventive care medicines for pets, cage cleaners for pet owners, consumable goods such as litter and shampoos for pets, etc. In addition, Pet owners could use pet care products to create a personalized style for their pets and to have more interaction while playing toys with pets. Furthermore, there has a diverse and distinctive pet service paradigm in the current pet care industry. In the view of common pet services on the recent market, it is mainly separated into two sections: services for just pets; and services for pets and pet owners. Veterinary service is the core and typical pet service for pets; other than that, rest of the common pet care services are designed for pets and pet owners basically. For those pets and pet owners' services, they are targeting the needs of busy, working pet owners as they do not have sufficient time for taking care of their pets; or addressing on the wants and desires of pet owners toward their pets, for instances, pet training and pet traveling service. In addition to, the common marketing strategy of pet care business is digital marketing. Pet care services are using social media and advertisements to promote themselves and expand.





What is service in its truest form ? And how can it be achieved ?

The day one feels motivated in the morning to get up and serve by will and not compulsion is when the selfless aspect becomes prominent. The delivery of service shall not be bound by any form of notions be it time, class, social stigmas, money or any form of hindrance. The purpose of job is not limited to what is expected from one but what more does that person wish to offer to enhance the experience for others but most importantly for oneself.

In addition, to the above there is also a need to build a robust self-sustaining system wherein, the personality of an individual does not govern the role they are serving at rather the system in itself is built.

A fully combined public-private effort, with accountability will deliver the best result for the people. As an organization be it private or public strengthens with each other's support than competing against each other specially, when the purpose is for collective betterment of the society. Service is co produced, everyone performs their individual roles as employees, customers, organizations, government or whole system.

It is not just about providing excellent service to one customer but creating a recurring system of multiple excellent offerings for everyone. Ultimately, by doing so we won't end up discriminating against the very customers we strive to serve.

From self-centered, it innately evolves to selflessness. It can start with transaction but it should evolve.

Interaction points remain mere means to communicate unless one designs the moment during those interactions and converts them into touch points casting a longer good impression in the minds of it's customers.

SERVING SELFLESSLY

As Mahatma Gandhi rightly said, "the best way to find yourself is to lose yourself in the service of others." And providing great service requires the right people and optimum service tools. A good service may just meet the needs of the customer, meeting expectations as required. However, a great service will go the extra mile just to ensure the customer's satisfaction. And a satisfied customer is the best business strategy of all. What makes it special is that it is run by people not formulas.

The hands of the system i.e., the agents, helping staff, doctors are soul of the healthcare body and absolutely vital for its proper functioning to serve with raising one's inner self to serve with passion, compassion and striving for higher orders of selflessness. Anyone working in the service industry also aims at earning a livelihood but its true essence can be experienced when the soul is gratified due to high quality work.

MAKING A DIFFERENCE

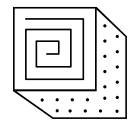
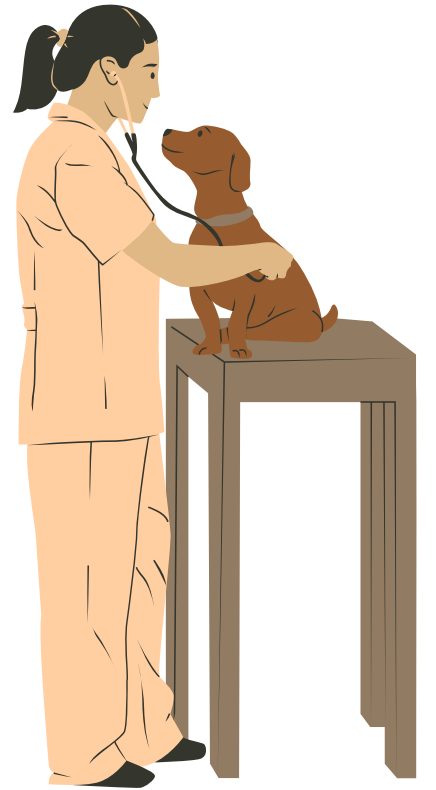
Here we will focus on some of changes in services that providers like 'Zoho Pet Clinic' should aim at delivering to pets and their parents in order to improve credibility and become a truly high-class enterprise.

1. Look through the customer's eyes

How a customer feels about you requires a perspective of 'customer's mindset' i.e., his/her centricity. This starts with understanding the current strategy and moves into understanding one's customer. A strategic move from insights to empathy by stepping into the shoes of customer and employees to design pragmatic steps in the customer journey. Service organizations should be more customer centric and humanized, in pet industry it needs to be pet humanized as well.


2. Co-create with all stakeholders

Involvement of everyone is important at every step that includes Doctors, assistants, helping staff, pet parents with sheer dedication and responsibility. Pet owners are ultimately responsible for their pet's health and well-being. In order for them to be good pet owners, they need to be fully aware of their pet and their needs.



Expectations from a pet service :

- Quality
- Value
- Care and Love
- Humbleness
- Good behavior
- Hygiene and maintained
- Relative trust and satisfaction
- Variety and diversity of service
- Supportive
- Responsiveness
- Organized
- Reliability
- Affordability
- Personal touch
- Customized care



An organization is built on shared ownership and responsibilities. If everyone shares the responsibility, the task for each individual becomes easier as it's shared ownership and responsibility, making the experience pleasant and holistic.

3. Deliver the 'Promise'

Trust is built through the 'Promise' made and its value is based on good communication but trust is retained by how the 'Promise' is delivered time and again. The 'Promise' is not just for the customer but within the organization as well. It is vital to make sure that it withholds the value within as much as it withholds outside. The customers and employees are part of the process and are all in the same team.

4. Design the 'Moments'

Sequence of the services should be visualized as a sequence of interrelated actions. The moment maybe short lived but it's impact resonates for a longer time. These instantaneous moments can only be anticipated and hence, requires designing of these design moments to cast a positive impact every time.

5. Look at Service in a holistic form not periphery

When we look at an action, we keep improvising but a combination of those actions produces an overall series of improvised actions. It could be implemented on a tiny scale or across an entire corporation but little things can make a big difference. This helps in closing the gap between what the customer dreams about their experience and what is delivered to them. We are emotional beings who make decisions based not just on a service gratifying rational needs but emotional ones as well. If this is aspect is taken care of, then the overall service and experiences are enhanced.

WAY FORWARD

Strategizing the design of a Service is a holistic way to show how empathetic one is towards the customer's needs. It is all about making the customer journey tangible by offering consistent and high-quality customer experiences.

1. Offering qualitative services at an affordable price.
2. Every customer is important and requires attention as the other without disparity.
3. Aligning of agents by developing a sense of belongingness towards the organization and proper role bifurcations.
4. Recast the impression on customers if needed.
5. Each case is unique and requires customization of interaction points and control over the variables.
6. Meaningful and mindful decisions need to be taken and timely revisited for adherence.
7. Save and respect time of oneself and everyone part of the journey.
8. Make things a little easier not complex or unapproachable for the customer.
9. Don't frustrate and alienate them
10. Anticipate and delight them by Surprising them.



HOW TO KNOW IF IT IS WORKING?

1. Happy customers are loyal customers and that brings in the advantage of word of mouth marketing assuring sustainable growth and relationships with the customers and building new customers as well.
2. Holistic growth can be seen within the service domain.
3. Less absence from work of staff indicating a healthier work environment.
4. With minimal efforts great results are achieved through cohesive efforts.
5. More productivity and increase in efficiency within the organization.
6. Short goals set for the day or week are achieved giving satisfaction to one and all.

At the end of the day, if the pet patient automatically develops that sense of belongingness with the pet clinic then the degree of success of the services offered becomes unmeasurable and elated.

