ZOHO ONE CASE STUDY

Zoho One

Boys & Girls Clubs of Skagit County Protects Staff Capacity Through Zoho One Automation

Nonprofit Youth Services · Washington State, USA · 80-100 Employees

Boys & Girls Clubs of Skagit County is a Washington State nonprofit that serves children and families through childcare, activities, and youth programs, and it does so without a dedicated IT department. For years it relied on a federation-issued CRM that the organization could never fully fit to its work. What began in 2024 as a weekend search for a project management tool became a decision to move onto Zoho One, and the organization has rebuilt its operations one application at a time ever since. It started with a custom expense build, then automated volunteer onboarding and set up internal support for staff. Today it runs on Zoho across the organization, builds most of its new tools in-house with AI, and is working toward retiring its legacy CRM entirely.

THE CHALLENGE

A federation-issued CRM that could never be shaped to the work, with limited mobile and Spanish-language support, left a small team carrying a growing administrative load.

THE SOLUTION

Rather than a wholesale migration, the organization started with its most painful problem, proved the model, and then expanded across one connected suite, building more of it in-house over time.

THE RESULT

Administrative effort came out of the day-to-day, protecting capacity through a lean period and returning staff time to fundraising, programs, and the children the organization serves.

1.8 FTE

ROLES ABSORBED THROUGH AUTOMATION DURING BUDGET CUTS

~90%

OF NEW APPS AND SITE BUILDS CREATED WITH AI INSIDE ZOHO

13+

ZOHO APPLICATIONS RUNNING DAY-TO-DAY OPERATIONS

Zoho One

KEY APPS USED

Zoho CRM · Zoho Creator · Zoho Projects · Zoho Flow · Zoho Sign · Zoho Learn · Zoho Desk · Zoho WorkDrive

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ABOUT BOYS & GIRLS CLUBS OF SKAGIT COUNTY

Boys & Girls Clubs of Skagit County is a member of the national Boys & Girls Clubs of America federation, operating club sites across Skagit County, Washington. The organization serves children and families through both traditional and state-licensed childcare, activities, and community programs, tracking members, families, donors, volunteers, and community partners. It is among the larger clubs in the national movement: in the top 10% by budget, and operating at nearly $7 million a year. It also runs Peak Pursuits, a legally separate outdoor and experiential program for youth that the organization runs alongside its core operations.

Ron McHenry has been involved in the Boys & Girls Club movement since 2004 and joined the Skagit County organization as President and CEO in 2014. Sam Bigelow joined the organization in 2021 in an administrative role, expecting it to be a short-term career stopgap, but instead rose to the position of Vice President and Chief of Staff after falling in love with the organizational mission. While it is among the larger orgs geographically and by budget of the national movement, Skagit County remains a relatively small non-profit organization with no dedicated IT department.

The Challenge

Boys & Girls Clubs of Skagit County found itself facing problems across a number of fronts: they had issues with the existing systems for volunteer onboarding, project management, and expense tracking. The issues across these disjointed and inadequate systems were stacking to create significant administrative load.

A system built on a platform that never fit the work

For an organization whose purpose is to remove barriers for families, a system with this many of them worked directly counter to the mission. Boys & Girls Clubs of Skagit County did not start from a blank slate. The organization already ran on MyClubHub, the CRM its national federation, Boys & Girls Clubs of America, developed and serves as sales agent for. The problem was that MyClubHub was built on the Salesforce platform and had only been customized by the federation and its own administrative interests; it had never been truly configured to fit how a club actually operates. Data on members, families, donors, volunteers, and community partners all had to live inside a tool the organization could not meaningfully change. And, on top of this poor fit, the support for MyClubHub was limited, which compounded the team's dissatisfaction with it.

> "MyClubHub is a nightmare to work with... It's just never really been customized to fit what we want."
>
> SAM BIGELOW, VICE PRESIDENT AND CHIEF OF STAFF, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

The consequences showed up in the details of daily service. Registration could not be completed dynamically on a mobile device, which mattered because many of the families the organization serves reach the internet primarily through a phone. Language was a second barrier. About 60% of the children in one district come from homes where only Spanish is spoken, and the federation's platform would not prioritize Spanish support.

All of this landed during a period of rapid growth, as Boys & Girls Clubs of Skagit County moved from a small administrative team where a few people did many jobs toward a larger, more specialized organization.

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The Solution

A project-management search that turned into a platform decision

The move to Zoho did not begin as a grand strategy. Boys & Girls Clubs of Skagit County had settled on a project management tool, secured board approval to buy Monday.com licenses for everyone, and was ready to commit. On the weekend before signing, Ron McHenry, who leads strategy for the organization, researched alternatives and found Zoho. What changed the decision was scope. The organization realized that with Zoho, they could address the project management need and the CRM problem all within the same suite, and for the same spend that they were looking at for project management alone.

Proving the model on a single, painful problem first

Rather than attempt a wholesale migration, the organization looked for the most pressing pain point it could automate and started there. Expense tracking was the first target. Boys & Girls Clubs of Skagit County engaged Zappyworks, a Zoho partner, to build a custom expense application from scratch in Zoho Creator, because the standard expense tool did not match how the organization needed to work. That first build saved enough to fund the next set of implementations.

> "We actually did a custom build right out of the gate, and that alone saved enough money where we were able to start putting resources towards looking at some of these other functions."
>
> RON MCHENRY, PRESIDENT AND CEO, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

Automating the work that surrounds the programs

From there, the organization tackled their most developed workflow, volunteer onboarding, which the organization calls its Club Mentor process. Anyone who works with children has to clear the same background checks and safety steps as staff, a lengthy process that used to consume a coordinator's time. Boys & Girls Clubs of Skagit County rebuilt this as an automated sequence. A coordinator enters an applicant into a Zoho Projects board, and from there Zoho Flow drives the correspondence, triggers a Zoho Sign request, routes the applicant to orientation either by video or through a self-paced Zoho Learn course, and updates the project status at each step, with error alerts if any automation fails. Supporting documents are saved in WorkDrive throughout the process.

Standing up internal support for the Zoho platform

The rollout was not smooth at first. While testing, McHenry accidentally migrated the organization's email from Gmail to Zoho Mail before staff were ready, and for a time no one but McHenry and Bigelow could reach their inboxes. Bigelow had to restore access on the fly, and the abrupt change created real frustration. That experience produced a durable fix. Bigelow built an internal help desk in Zoho Desk so staff could get organization-specific answers quickly, from someone who understood the goal, instead of routing every question to Zoho support. Bigelow became the organization's go-to administrator, learning the suite mostly by troubleshooting, reading help articles, and following support threads.

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> "I'm the go-to for everything about the platform. All the apps are largely built the same, so I know how to look around and figure it out."
>
> SAM BIGELOW, VICE PRESIDENT AND CHIEF OF STAFF, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

Widening the footprint and building in-house

With the pattern established, the organization spread across the suite. Zoho Cliq became the primary internal messenger and replaced a large share of email. Campaigns and Social carry marketing out to club sites, WorkDrive holds the organization's files in department and club folders, and Projects and Sprints coordinate senior leadership and initiative work. The organization built its newest venture, Peak Pursuits, entirely inside Zoho from day one, with its website on Zoho Sites. Increasingly the builds are done in-house and with AI. McHenry estimates that roughly 90% of the organization's new builds are now created with AI inside Zoho.

How the platform supports the mission on its own terms

For McHenry, the deciding qualities were adaptability and reach. Where the federation's Salesforce-based system was expensive and hard to change, the organization needed software it could bend to a world that centers on children and has to stay flexible. Multilingual support mattered as much as anything.

> "Zoho is the most equitable software suite that there is. The fact that you have so many different languages supported, that was a big driver for us."
>
> RON MCHENRY, PRESIDENT AND CEO, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

The organization is candid that a single platform has tradeoffs, and that individual apps do not always interconnect as tightly as the team would like. Its own conclusion is that the adaptability and breadth outweigh any friction.

The Results

Capacity protected during budget cuts

The clearest result is one the organization can name precisely. Automation has reduced manual entry equivalent to 1.8 full-time roles, and it did so at a moment when the organization was facing budget cuts. Absorbing that reduction with almost no disruption, McHenry said, was remarkable given the timing.

1.8 FTE	~90%	13+
ROLES ABSORBED	BUILDS CREATED WITH AI	ZOHO APPS IN DAILY USE

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Staff time returned to program quality

The point of removing that administrative load was never the headcount number by itself. It was what the recovered time made possible. Bigelow pointed to the Club Mentor workflow. A coordinator who carries fundraising targets had been spending hours tracking each volunteer step, sending every email, and running every orientation. Moving orientation into a self-paced Zoho Learn course and automating the handoffs gave that time back to fundraising and program work.

> "Taking away the things that annoy our staff and volunteers really allows them to focus on program quality, which is better for our kids."
>
> RON MCHENRY, PRESIDENT AND CEO, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

Scaling without scaling headcount, and a lighter cost base ahead

Zoho also helped the organization keep pace as it grew. Bigelow described a transition from a small generalist team into a more specialized organization with true departments, and credited the suite with helping meet those demands as the work got bigger.

What comes next

The organization frames the current state as "mid-journey". It intends to finish the custom Zoho CRM build-out with Zappyworks and retire MyClubHub, to migrate its finance system to Zoho Books in 2027 after an audit delay pushed back the original timeline, and to fold state-mandated childcare compliance tracking into the CRM so it can drop another separate system. Ron McHenry projects that, if the build goes to plan, the organization will be fully integrated on Zoho across its products by January 1, 2028. Looking further out, the organization intends to license its configured instance to peer clubs, turning what it built for itself into something other organizations could adopt.

Conclusion

Boys & Girls Clubs of Skagit County set out to replace a system it could not control with one it could shape to its own work, and in the process it turned a small nonprofit with no IT department into an organization that builds its own software. The organization automated the administrative work around its programs, absorbed the equivalent of 1.8 full-time roles during budget cuts, and was able to free up valuable staff hours and divert them more directly back to the children they serve. A customized CRM is still in progress and several migrations remain ahead, but the direction is set and the organization is doing the work itself, and seeing the rewards in real time.

> "Zoho gets the work done, so more meaningful work can happen."
>
> RON MCHENRY, PRESIDENT AND CEO, BOYS & GIRLS CLUBS OF SKAGIT COUNTY

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