ZOHO

KRAMDEN | CARET GROWTH STRATEGIES

PARTNER + CUSTOMER CASE STUDY — ZOHO ONE

Proof for Funders: How Kramden Runs a Statewide Digital-Inclusion Mission on Zoho One

Nonprofit — computer refurbishment & digital literacy | Durham, North Carolina | Zoho customer since 2021

72,093
COMPUTERS DISTRIBUTED

18,276
PEOPLE TRAINED

80%
REVENUE GROWTH, 2022–26

16
ZOHO APPS IN USE

Caret Growth Strategies moved Kramden off a Salesforce setup no one could maintain and onto a single, connected Zoho system. Today the Durham nonprofit can show every funder exactly what its grants sponsored, down to the individual laptop and the six-month follow-up survey.

THE CHALLENGE

Spreadsheets, a generic Salesforce instance no one left could maintain, and QuickBooks disconnected from everything else — with grants, volunteers, students, and devices all tracked by hand.

THE SOLUTION

Zoho One, built one funded project at a time by a local partner who started as a volunteer: CRM and Creator first, then Books, then Desk, People, Survey, and a warehouse-connected production system.

THE RESULT

Live funder dashboards tied to each grant, class, laptop, and survey; one record per person and per device; and revenue up 80% since 2022.

PLATFORM
Zoho One

KEY APPS — CRM | Creator | Analytics | Desk

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ZOHO CUSTOMER: KRAMDEN INSTITUTE

Kramden started in June 2003 as a father-and-son project. Ned Dibner, then 13, suggested to his father, Mark, that they fix up old computers and give them to middle school honor-roll students in Durham who couldn't afford one at home. (“Kramden” is “Mark” and “Ned” spelled backward.) Within a year, every honor-roll student at the school had a computer.

Twenty-three years later, Kramden is a 501(c)(3) nonprofit refurbisher serving all of North Carolina. It collects donated computer equipment, refurbishes what can be saved, recycles what can't, and distributes devices to K–12 students and their families, low-income adults, and other nonprofits and community agencies. It also teaches: classes run in its Durham building and, through a train-the-trainer program, in senior centers, housing authorities, and partner sites across the state.

The organization runs on volunteers. More than 1,000 people a year sign up for shifts to spec, clean, test, and rebuild donated machines. That mix is what makes Kramden's data problem unusual: one person might show up as a volunteer, a donor, a class participant, and a computer recipient, and every one of those relationships has to be tracked, often against a specific grant.

ZOHO PARTNER: CARET GROWTH STRATEGIES

Caret Growth Strategies is an Authorized Zoho Partner based in Durham. Founder Mike Simpson started in technical operations and IT, worked as an independent Salesforce consultant, and founded Caret in 2020 to bring CRM, custom development, and support to small and midsize organizations. He remains Salesforce-certified, which helps when prospects want a straight comparison, but he hasn't worked with a Salesforce client in about three years. In July, Caret hired its first full-time developer.

Mike's connection to Kramden predates Caret. He volunteered on the refurbishment line — opening machines, checking RAM and drives, installing the operating system — and answered the occasional Salesforce question for staff while he was there. Kramden became his first large implementation as a Zoho partner: more than 10 users, built from scratch.

> *“They had a lot of disconnected processes, which required people and not technology to bring together. Zoho has streamlined those inputs and how they're tracked, so they can focus on providing customized care for external partners.”*
>
> **MIKE SIMPSON** · FOUNDER, CARET GROWTH STRATEGIES

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KEY RESULTS

- **72,093 computers and 18,276 people trained** since 2003, with current figures pulled directly from Kramden's own Zoho dashboard.
- **Outcomes for 8,921 Computer Basics graduates** — pre-, post-, and six-month follow-up — tied to the grant that paid for each class and the laptop each graduate earned.
- **Bulk device orders** moved off phone calls and spreadsheets into a grant-funded production management system connected to the warehouse.
- **16 Zoho apps** across programs, the warehouse, tech support, development, and HR, under one Zoho One subscription.
- **Funder reporting moved** from a macro-heavy master spreadsheet to live dashboards. On one county-wide project, the funder got its own password-protected view.
- **One click** converts a computer application into a contact and a deal; the invoice, online payment, and pickup booking follow automatically.
- **Finance moved from QuickBooks** to Zoho Books, integrated with CRM, giving clean tracking for federal reimbursement grants.
- **Revenue grew 80%** from 2022 to 2026, which Kramden connects directly to its ability to prove program impact.

01 The Challenge

Before Zoho, Kramden ran on spreadsheets, then on a Salesforce instance that was never shaped around how the organization worked. Individual computer applications went into a spreadsheet. Class outcomes lived in a master spreadsheet full of macros. Staff tracked sick time and vacation in yet another spreadsheet. Accounting sat in QuickBooks, disconnected from everything else.

Cari DelMariani, who has been with Kramden since 2010 and now oversees its programs, events, and volunteers, was there for the switch. She describes the Salesforce setup as too generic to be effective and too isolated from the tools Kramden used for email campaigns and outreach. “It was just very segmented,” she says. Looking back, she is careful not to put all the blame on the software: “Maybe that was on us a little bit too.” Either way, it wasn't doing much beyond tracking contacts and volunteers.

There was also a maintenance problem. The staff member who had built and run the Salesforce setup left the organization, and no one remaining understood what he had built. And the finance gap was a daily irritant for program staff.

> *“Every time I had to invoice a client or somebody, I would have to ask our office, ‘Has this been paid?’ It was just not a fluid system at all.”*
>
> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

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Kramden had reached the point where, in Cari's words, “we couldn't just get away with these simple spreadsheets and systems anymore.” It had too many kinds of constituents, too many grants, and too much growth ahead.

02 Choosing Zoho and Caret Growth Strategies

Kramden secured grant funding for the move and did its due diligence. It looked at several platforms and interviewed several consultants. Mike had already earned some trust as a volunteer, but the organization wanted to see what else was available.

Two things decided it. The first was integration: Zoho One put CRM, finance, forms, surveys, scheduling, support, and reporting on one connected platform, which Mike argued would open up far more than a standalone CRM could. The second was the partner.

> *“We interviewed a lot of different groups, different platforms, different consultants, and it just made sense because we knew Mike would be so hands-on. He's also local.”*
>
> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

03 Implementation

Phase One: CRM, Grants, and Volunteers

Mike started with Zoho CRM, rebuilding Kramden's records with separate pipelines for grants and donations. Alongside it he built a volunteer system in Zoho Creator, replacing an earlier version he had made in Salesforce as a volunteer. By his estimate, the initial implementation took three to four months.

Volunteers register online through Eventbrite, receive a confirmation letter via Zoho Forms, and come into CRM, where staff verify their contact records. When they arrive for a shift, they sign in at a kiosk running the Creator app. The app finds their record or registers them, collects the waiver, and logs their time. Every volunteer's hours roll up to their CRM contact, and every volunteer event is a CRM campaign. Staff can pull a report on anyone's volunteer history at any time. One longtime volunteer is about to pass 1,000 hours.

Phase Two: Moving the Books

Zoho Books came later, on purpose. “At least at the time, every nonprofit used QuickBooks,” Cari says, and the team was cautious about changing accounting systems. Mike addressed it one concern at a time. For each thing QuickBooks was doing for them, he showed them how Zoho Books would handle it, including budgets.

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"It was a hurdle to get us over," Cari says, "but the more we use Zoho, the more we were comfortable with that." Once Books was connected to CRM, program staff could see invoice and payment status without asking the office coordinator. That became more important over the last two years, as Kramden took on federal reimbursement grants, where the organization spends first and is reimbursed only for spending it can document.

> *"The fact that all our finances could also be in Zoho Books, which was integrated into the CRM, that was a huge thing for us."*
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> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

Growing Into Zoho One

Since then, the system has grown the way most nonprofit technology grows: one funded project or one solved problem at a time. Kramden often can't start a project until a grant comes through, so the relationship with Mike works as an ongoing conversation. Kramden brings him problems, and he tells them what has become possible.

- Zoho Desk handles tech support for the thousands of people who receive devices. Every distributed computer is tracked as an asset in CRM. Recipients get 90 days of free support and low-cost support for as long as they own the device, and tickets come in online, by phone, or by email.
- Zoho People replaced the sick-time and vacation spreadsheet after Mike showed the team what it could do.
- Zoho Social came on after Kramden asked Mike whether they should be using it.
- Zoho Survey collects individual computer applications and every class's pre-, post-, and follow-up surveys.
- Zoho Forms handles equipment pickup requests from donors. Each request creates a CRM lead and notifies the team.
- Zoho Learn is used as a resource hub for Kramden's digital navigation project.

Phase Three: The Production Management System

Kramden's most recent project with Caret was grant-funded and finished in March of this year. It took on the hardest part of the operation: bulk orders and the warehouse. When a partner such as the Chatham Literacy Council needed 30 laptops for its own digital literacy classes, the request used to arrive by phone or email. Ian Templeton, Kramden's Business Strategist, handled much of that by hand.

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> *"I used to do a lot of the order management stuff in a spreadsheet, and folks would call me and say, 'Hey, we want 150 laptops,' and there was so much back and forth. This has cut that out. It's saving us a lot of time."*
>
> **IAN TEMPLETON** · BUSINESS STRATEGIST, KRAMDEN

Now, schools and nonprofits submit a bulk request through a Zoho Creator form on Kramden's website. The form creates an order and a CRM lead with its own layout. The lead converts to a deal that moves through to completion, with quoting and invoicing along the way. The order also connects to the warehouse, so the tech team can see what's coming and plan when they have capacity to fill it. "He created this entire production management system," Ian says. "I love it. It's really changed."

The warehouse side needed care. Kramden tracks every donated monitor, desktop, laptop, tablet, phone, and server individually, from intake through refurbishment, recycling, or distribution. Most inventory systems it evaluated group items by SKU and type, so the team chose Sortly, a dedicated asset-tracking tool, for the warehouse floor.

Mike connected the two. When a refurbished device is moved into a distribution folder in Sortly, an API call creates a matching asset record in Zoho, keyed to Kramden's unique "K number." Mike built the connection on Zoho Catalyst with a queuing system to stay within Sortly's API limits. When a recipient picks up their computer, a staff member enters the K number in a Creator app. The app assigns that exact device to the recipient's deal and updates their contact record.

Ian, who joined Kramden in 2021 and has used Zoho more heavily since 2024, is now the backup administrator for the Creator apps. He uses Zoho CRM daily to manage device sales, donor follow-up, and donor acquisition.

3–4 months	1,000+	1 K number
INITIAL CRM + CREATOR BUILD	VOLUNTEERS TRACKED PER YEAR	PER DEVICE, WAREHOUSE TO SUPPORT

04 Zoho One in Practice

From application to laptop

Cari walked through what happens when a low-income adult applies for a computer on Kramden's website. The application, built in Zoho Survey, lands in CRM as a lead. Each week, Cari opens her queue and starts with the oldest applications. One click runs a macro Mike built, which creates the contact, creates the deal, and moves the applicant into the right process.

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From there, the system does the work. The applicant gets an automatic email with an invoice they can pay online, or a number to call if they can't. Payment triggers a Zoho Bookings link to schedule pickup, with instructions for coming in. At pickup, the K-number assignment ties the specific device to the applicant's record. If that computer has a problem a month later, the Zoho Desk ticket links back to the same contact.

Proving outcomes, class by class

Kramden's standard class is an eight-hour Computer Basics course taught in four sessions. It's free, and graduates earn a laptop. At the first session, each participant completes a pre-class survey that captures demographics and rates their confidence on a Likert scale. They take a post-class survey at the end and a follow-up survey six months later. Community technology instructors teaching Kramden's curriculum around the state send their assessments back so the same data comes in.

In CRM, each grant is set up as an "initiative." Each class is a campaign under it, and every participant, survey response, device, and support ticket is associated with the right records. Cari can choose a grant, such as one from the Central Pines Regional Council, and see every class it paid for, who attended, their pre- and post-test results, and their six-month follow-ups. Mike built the dashboards in Zoho Analytics.

> *"It really is amazing for a group our size to be able to have all this data.... We used to keep this in spreadsheets, and I used to have this master spreadsheet that had all these macros. It was insane. And now I can pick the initiative, this grant, what were the outcomes?"*
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> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

For Digital Bridges Forsyth, a county-wide contract, Kramden went a step further. It published a password-protected view of the dashboard and gave it to the funder, who could check class counts and participant demographics as the project ran. "They're always so impressed," Cari says. She recently presented the setup at a conference.

05 Benefits and ROI

80%
REVENUE GROWTH, 2022–2026

8,921
GRADUATES WITH TRACKED OUTCOMES

27
STAFF RUNNING A STATEWIDE MISSION

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Impact that funders can see. For a grant-funded nonprofit, proving results is how the work gets paid for. Kramden can now hand a funder outcome data at the level of a single class or participant, without a staff member rebuilding a spreadsheet. That's rare for an organization of 27 people.

> *"Zoho has helped us be more efficient because everything is within one system. The fact that we can now track our programs and show the impact is how we get more grants. And I definitely think that they are related."*
>
> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

Growth, and a reason for it. Kramden's revenue has grown 80% from 2022 to 2026. Cari is careful not to credit all of it to software, but she connects the two directly: better tracking produces better impact reporting, and better reporting wins more grants.

Compliance for reimbursement grants. With Zoho Books connected to CRM, Kramden can track spending cleanly enough to manage federal grants that reimburse only documented costs.

Staff time returned to the mission. One-click application conversion, automatic invoicing and booking, and self-service bulk ordering remove steps that used to need a phone call, an email, or a question to the office.

One record per person and one per device. Volunteers, donors, class participants, and recipients now each have a single contact record in Zoho CRM. Every distributed computer carries its own asset record from pickup through tech support.

A partner who answers the same day. "I ping him so frequently and just have an answer within the day," Ian says. Cari adds that Mike is "always so responsive… always willing to help."

What's next

Kramden has a back-stock of laptops running an open-source operating system alongside its standard Windows 11 machines. Cari's next request to Mike will let individual applicants choose which type they want. Mike is also exploring OCR to read the paper class surveys volunteers currently type in by hand, so volunteers only need to review the results.

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CONCLUSION

Kramden has distributed 72,093 computers and trained 18,276 people, and today it can show funders exactly what each grant paid for and what changed as a result. That precision comes from a connected system built over several years, one funded project at a time, by a partner who started out as a volunteer on Kramden's refurbishment line. For a nonprofit that has to prove its impact to keep doing the work, that record has become one of its most valuable assets.

> *"Having that ability to show our funders exactly what they sponsored and the impact on our clients has taken us to the next level. That's what funders want. They want you to be able to show your results."*
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> **CARI DELMARIANI** · PROGRAMS DESIGN AND DELIVERY DIRECTOR, KRAMDEN

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