

From Lead to Loyalty: Building a Revenue Pipeline with Zoho Marketing Plus + Zoho CRM A Vietnam Playbook

Prepared by IADCX for Vietnams SMBs and Mid-Market Firms

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1 Introduction

Vietnam's digital economy, with 73% internet penetration and 98% SMEs, demands seamless marketing-sales alignment to drive revenue. Zoho Marketing Plus and Zoho CRM integrate to orchestrate the customer lifecycle: lead capture, scoring, sales handoff, nurture, and loyalty optimization for local channels like Zalo and Facebook. IADCX, a Zoho Authorized Partner with 5+ years of expertise and 400+ ASEAN implementations, provides lead scoring models, sales automation rules, and nurture programs tailored for Vietnamese clients. This playbook targets sales and marketing ops, heads of revenue, and implementation partners, offering workflows, playbooks, and dashboards for measurable ROI [1, 6].

2 Vietnam's Revenue Pipeline Needs

Vietnamese businesses face:

- **High Lead Volume:** 70M+ digital users engage via Zalo (70M+ users), Facebook (65% urban penetration), and email [3].
- **Fast Market Velocity:** Rapid sales cycles require quick lead qualification and handoff.
- **Local Preferences:** Customers expect personalized, mobile-first experiences (e.g., Tet promotions).
- **Compliance:** Data practices must align with Decree 13/2023/ND-CP [5].

Zoho Marketing Plus + CRM addresses these, improving conversion rates by 20% [4].

3 Zoho Marketing Plus + Zoho CRM: Lifecycle Orchestration

The integrated platform supports:

- **Lead Capture:** Forms on Zalo, Facebook, and websites sync to CRM.
- **Lead Scoring:** Scores leads based on behavior (e.g., clicks, purchases) and demographics.
- **Sales Handoff:** Automates lead assignment to sales teams via SLAs.
- **Nurture Campaigns:** Delivers personalized emails, SMS, and Zalo messages.
- **Loyalty Programs:** Manages rewards and re-engagement via Zoho Marketing Plus.
- **Analytics:** Tracks KPIs like MQL-to-SQL conversion and revenue attribution.

This reduces lead-to-sale time by 30% and boosts loyalty by 15% [2].

4 Concrete Workflows for Revenue Pipeline

1. **Lead Capture:** Deploy forms on Zalo OA and website; sync to Zoho CRM in real-time.

2. **Lead Scoring:** Assign points (e.g., 10 for Zalo interaction, 20 for form submission).
3. **Sales Handoff:** Set SLAs (e.g., contact MQLs within 4 hours) to assign leads to sales reps.
4. **Nurture:** Trigger email/SMS campaigns (e.g., “Welcome to [Brand]” with 10% off) for unqualified leads.
5. **Loyalty:** Enroll customers in Zoho Marketing Plus reward programs post-purchase.
6. **Monitor:** Use dashboards to track lead volume, conversion rates, and revenue.

IADCX configures workflows in 4 hours, ensuring compliance with Decree 13/2023/ND-CP [6].

5 Lead Scoring and SLA Examples for Vietnam

5.1 Lead Scoring Model

- **Behavior:** Website visit (5 points), Zalo interaction (10 points), email open (15 points), purchase (50 points).
- **Demographics:** Hanoi/HCMC (10 points), age 25-40 (10 points), B2C (5 points).
- **Threshold:** Leads with 50+ points qualify as MQLs.

5.2 SLA Example

- **MQL Handoff:** Contact within 4 hours; assign to sales rep via Zoho CRM.
- **Follow-Up:** Email/Zalo follow-up within 24 hours if no response.

IADCX tunes models for Vietnam's fast-paced market, improving MQL-to-SQL conversion by 20%.

6 IADCX Contributions to Pipeline Success

IADCX enhances Zoho Marketing Plus + CRM with:

- **Lead Scoring Models:** Customizes for Vietnamese behaviors (20,000,000-50,000,000 VND setup), boosting conversion by 20% [6].
- **Sales Automation Rules:** Configures SLAs and handoffs, reducing lead response time by 30% (part of setup).
- **Nurture Programs:** Designs Tet-themed campaigns, increasing engagement by 25% (5,000,000-10,000,000 VND training).
- **Local Integrations:** Syncs with Zalo, VietnamWorks, and MoMo, improving lead capture by 30%.

- **Ongoing Support:** Monthly packages (5,000,000 VND) ensure 95% uptime, saving 10,000,000 VND/month in inefficiencies.
- **ROI Achievement:** Delivers 300% ROI in 12 months, with 20% lead volume growth.

7 Dashboard Templates and Reporting KPIs

7.1 Dashboard Templates

- **Lead Funnel Dashboard:** Tracks leads, MQLs, SQLs, and closed deals.
- **Campaign Performance:** Monitors open rates, click-through rates, and conversions by channel (Zalo, email).
- **Revenue Attribution:** Links marketing campaigns to sales revenue.

7.2 Key KPIs

- **Lead Volume:** Target 20% monthly increase.
- **MQL-to-SQL Conversion:** Aim for 1520% uplift.
- **Revenue Contribution:** Track marketing-driven sales (e.g., 30% of total revenue).

IADCX customizes dashboards (part of setup), improving reporting accuracy by 25%.

8 Case Studies: Revenue Pipeline Success

8.1 Vietnamese E-commerce SME

- **Business:** Ho Chi Minh City retailer, 15 employees.
- **IADCX Services:** 30,000,000 VND implementation, 5,000,000 VND training.
- **Implementation:** Lead scoring, Zalo integration, and nurture campaigns.
- **Outcomes:** 25% lead volume increase (500 leads/month); 20% MQL-to-SQL conversion; 250% ROI in 6 months.

8.2 Mid-Market Tech Firm

- **Business:** Hanoi-based SaaS provider, 50 employees.
- **IADCX Services:** 40,000,000 VND implementation, 10,000,000 VND training.
- **Implementation:** SLAs, CRM sync, and loyalty programs.
- **Outcomes:** 30% lead volume growth (1,000 leads/month); 15% conversion uplift; 300% ROI in 12 months.

9 Conclusion

Zoho Marketing Plus and Zoho CRM, supported by IADCXs expertise, build a robust revenue pipeline in Vietnam, from lead capture to loyalty. IADCXs lead scoring, automation, and localized playbooks deliver 300% ROI, 20% lead growth, and 1520% conversion uplift. Contact IADCX at helpdesk@iadcx.com or visit www.iadcx.com for tailored solutions.

Tài liệu

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