

Zoho CRM Plus Sales, Marketing, and Service Process Blueprints for Vietnam

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1 Introduction

This document outlines process blueprints for sales, marketing, and service operations using Zoho CRM Plus, tailored for Vietnam's SME-driven economy (98% of businesses) and digital landscape (73% internet penetration, 76% social media usage in 2024) [5]. Each blueprint leverages Zoho CRM Plus integrated apps (e.g., Zoho CRM, Zoho Desk, Zoho Social) and local platforms like Zalo to streamline operations, enhance customer engagement, and ensure compliance with Vietnam's regulations, such as VAT e-invoicing [6]. Diagrams illustrate each process for clarity.

2 Sales Process Blueprint

The sales process blueprint outlines lead generation to deal closure, leveraging Zoho CRM, Zoho SalesIQ, and integrations with Zalo and local payment gateways.

2.1 Process Steps

- **Lead Generation:** Capture leads via Zoho SalesIQ's website chat, Zoho Socials social media campaigns (Zalo, Facebook), and Zoho Forms embedded on websites. Use Vietnamese-language forms for accessibility [4].
- **Lead Qualification:** Use Zoho CRM's lead scoring (via Zia AI) to prioritize leads based on engagement (e.g., Zalo interactions, website visits). Assign leads to sales reps automatically [1].
- **Lead Nurturing:** Automate follow-ups with Zoho Campaigns, sending personalized emails or Zalo notifications (ZNS) with offers tailored to Vietnamese customers [2].
- **Deal Creation:** Convert qualified leads to deals in Zoho CRM, using VND currency and local pricing structures. Track deals via customizable pipelines [8].
- **Proposal and Negotiation:** Generate quotes in Zoho CRM, integrating with Zoho Books for VAT-compliant e-invoices (8% or 10% rates) [6].
- **Payment Processing:** Process payments via ZaloPay or MoMo integrations, syncing transaction data with Zoho CRM [7].
- **Deal Closure:** Finalize deals in Zoho CRM, automating contract generation and sending confirmation via Zalo or email [2].
- **Analytics:** Use Zoho Analytics to track sales performance, conversion rates, and ROI, with dashboards in Vietnamese [4].

2.2 Sales Process Diagram

3 Marketing Process Blueprint

The marketing process blueprint focuses on campaign creation, execution, and analysis, leveraging Zoho Campaigns, Zoho Social, and Zalo integration.

Lead Generation (SalesIQ, Social) —> Lead Qualification (CRM, Zia) —> Lead Nurturing (Campaigns, Zia)

Analytics (Analytics) <— Deal Closure (CRM) <— Payment Processing (ZaloPay, MoMo) <—

Hình 1: Sales Process Blueprint

3.1 Process Steps

- **Audience Segmentation:** Use Zoho CRM to segment customers based on demographics, purchase history, or Zalo engagement data [1].
- **Campaign Creation:** Design email and social media campaigns in Zoho Campaigns and Zoho Social, using Vietnamese-language content and cultural references [4].
- **Zalo Integration:** Schedule Zalo Diary posts or ZNS notifications for promotions, leveraging Zalos 77.6 million users in Vietnam [3, 5].
- **Multichannel Execution:** Launch campaigns across email, Zalo, Facebook, and YouTube, scheduling posts for peak engagement times (e.g., 21:00-22:30) [3].
- **Lead Capture:** Use Zoho SalesIQ to capture leads from website visits triggered by campaigns, syncing data to Zoho CRM [4].
- **Performance Tracking:** Monitor campaign performance with Zoho Analytics, analyzing open rates, click-through rates, and conversions in VND [4].
- **Optimization:** Adjust campaigns based on Zia AI insights, refining targeting for Vietnamese audiences [4].

3.2 Marketing Process Diagram

Audience Segmentation (CRM) —> Campaign Creation (Campaigns, Social) —> Zalo Integration (Social)

Optimization (Zia) <— Performance Tracking (Analytics)

Hình 2: Marketing Process Blueprint

4 Service Process Blueprint

The service process blueprint outlines customer support workflows, leveraging Zoho Desk, Zoho SalesIQ, and Zalo integration for efficient issue resolution.

4.1 Process Steps

- **Ticket Creation:** Capture customer inquiries via Zalo, email, phone (MiPBX/CloudPBX), or website chat (Zoho SalesIQ), creating tickets in Zoho Desk [2, 4].
- **Ticket Assignment:** Automatically assign tickets to agents based on expertise or workload using Zoho Desks workflows [2].
- **Customer Communication:** Respond via Zalo, email, or phone, using Vietnamese-language templates for culturally relevant interactions [2].
- **Issue Resolution:** Use Zoho Desks knowledge base and Zia AI to provide solutions, escalating complex issues to senior agents [4].
- **Feedback Collection:** Send post-resolution surveys via Zoho Survey, localized in Vietnamese, to gauge satisfaction [8].
- **Performance Analysis:** Track resolution times and customer satisfaction with Zoho Analytics, optimizing support processes [4].

4.2 Service Process Diagram

Ticket Creation (Desk, SalesIQ, Zalo) → Ticket Assignment (Desk) → Customer Communication (Zalo, Email, Phone)

Performance Analysis (Zoho Analytics)

Hình 3: Service Process Blueprint

5 Implementation Checklist for Vietnam

To implement these blueprints effectively:

- **Configure Zoho Apps:** Set up Zoho CRM, Desk, SalesIQ, Social, Campaigns, and Analytics with Vietnamese language and VND currency [1].
- **Integrate Zalo:** Install Zalo Channel in Zoho Desk and configure ZNS for notifications [2].
- **Enable VAT Compliance:** Use Zoho Books for e-invoices compliant with Vietnam's regulations [6].
- **Connect Payment Gateways:** Integrate ZaloPay and MoMo for sales transactions [7].
- **Set Up Telephony:** Link MiPBX or CloudPBX for service communications [2].
- **Test Workflows:** Use Zoho's Sandbox to test processes without affecting live data [9].

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- **Engage Local Partners:** Work with Optimus or MM Technology for 4-hour activation and localized support [9].

6 Conclusion

These sales, marketing, and service process blueprints for Zoho CRM Plus enable Vietnamese businesses to streamline operations and enhance customer experiences. By leveraging integrations with Zalo, local payment gateways, and VAT-compliant systems, SMEs can align with Vietnam's digital economy. For more details, visit www.iadcx.com or write to helpdesk@iadcx.com.

Tài liệu

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