HEALTHIER, LONGER, BETTER LIVES

iPA 2.0
機遇轉化分析

[財務策劃顧問適用]

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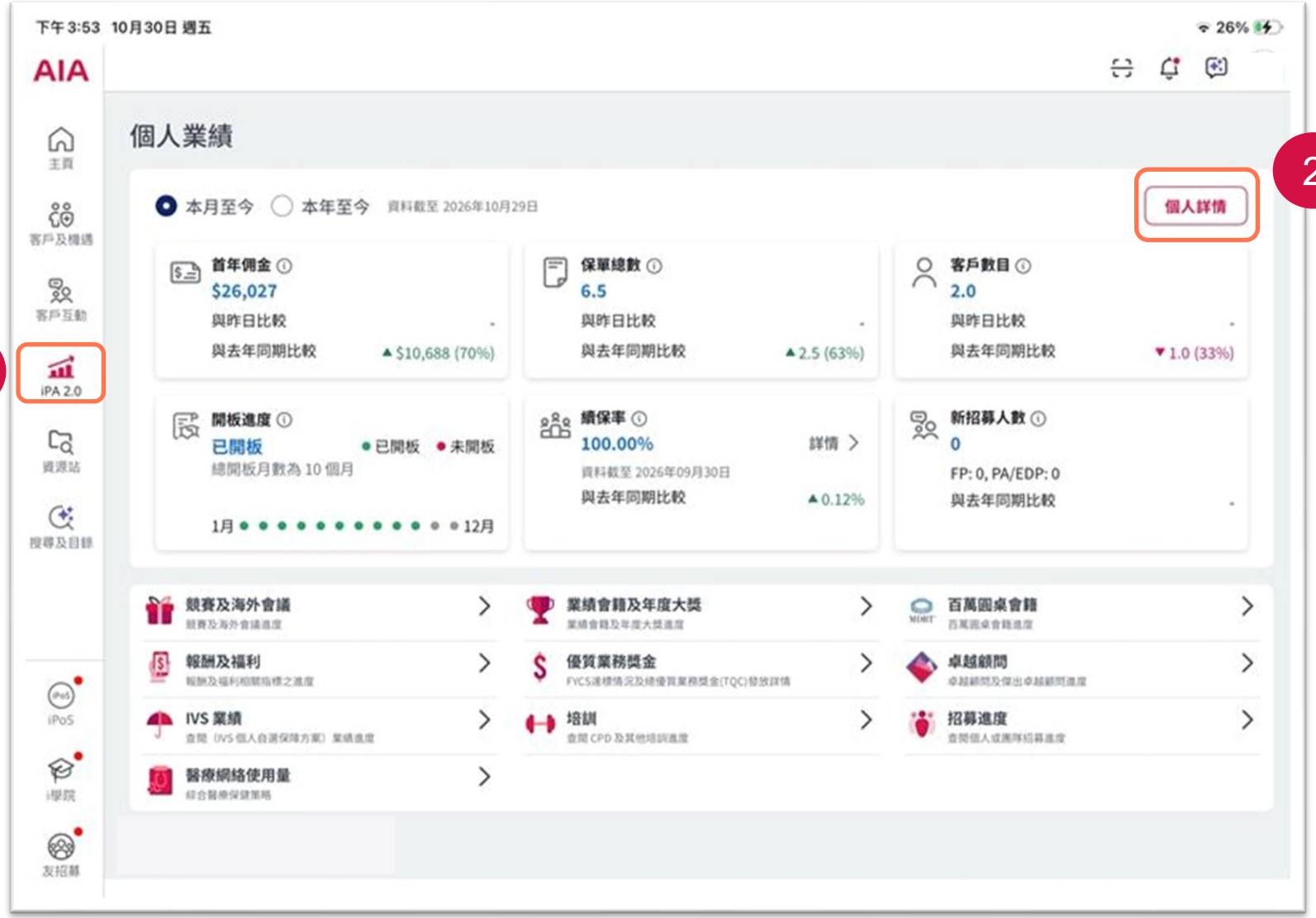
機遇轉化分析 – 入口

財務策劃顧問適用



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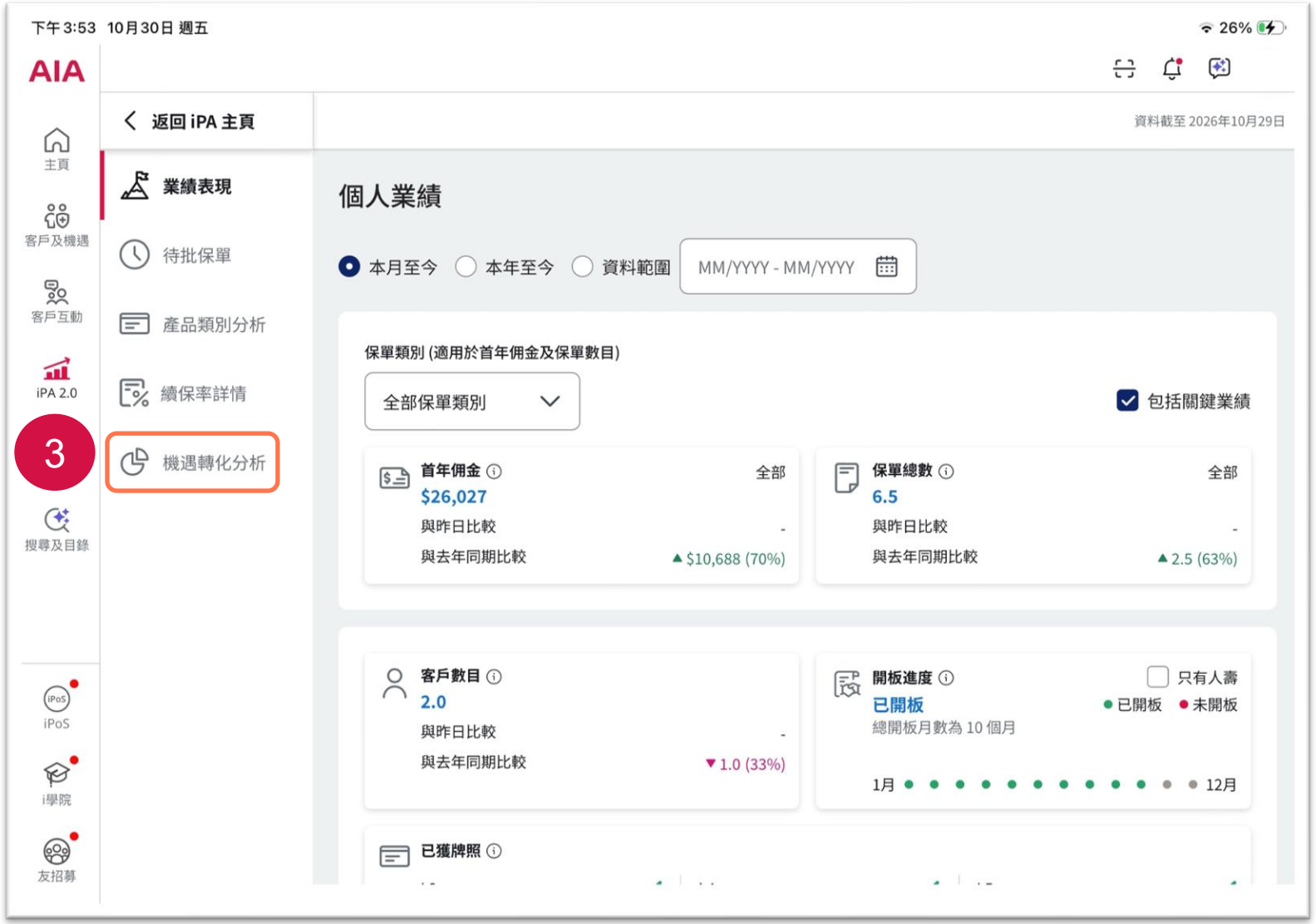
[AIA – INTERNAL]

機遇轉化分析 – 入口(續)

財務策劃顧問適用



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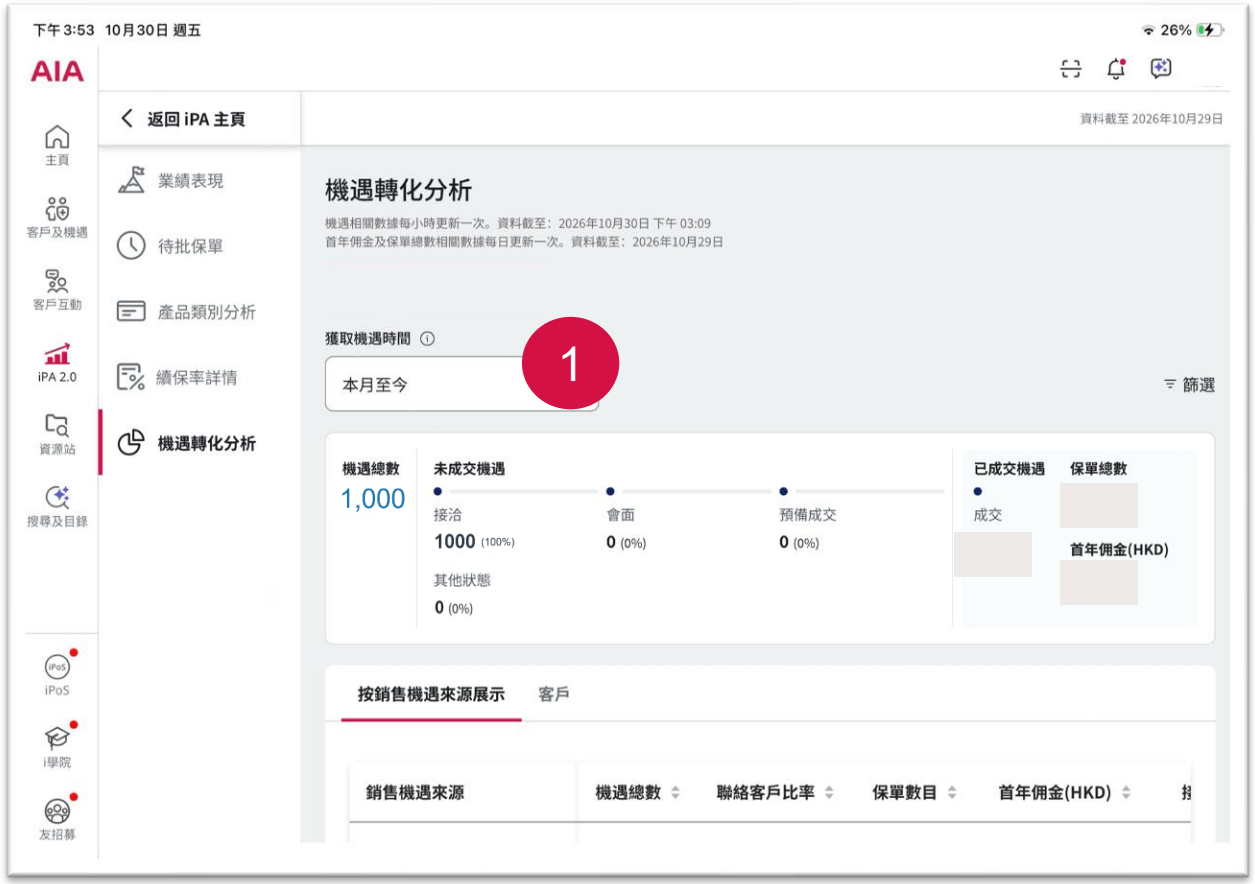
機遇轉化分析 – 總覽

財務策劃顧問適用



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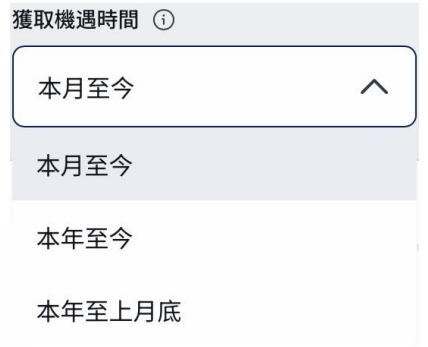

請注意:

- 機遇相關數據每小時更新一次。
- 首年佣金及保單總數相關數據每日更新一次。

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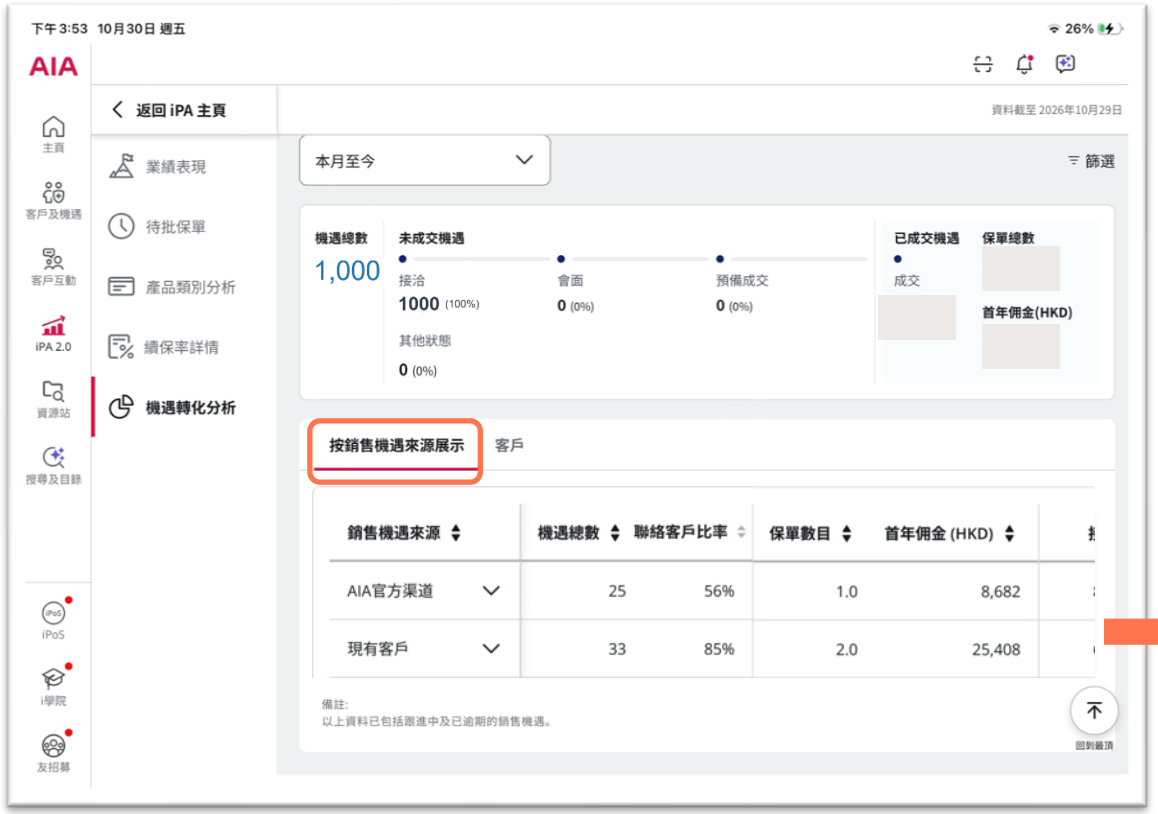
[AIA – INTERNAL]

按銷售機遇來源展示

財務策劃顧問適用



銷售機遇來源	機遇總數	聯絡客戶比率	保單數目	首年佣金 (HKD)	接洽	會面	預備成交	成交	其他狀
AIA官方渠道	25	56%	1.0	8,682	8 (50%)	1 (6%)	0 (0%)	1 (6%)	6 (
現有客戶	33	85%	2.0	25,408	6 (32%)	8 (42%)	0 (0%)	1 (5%)	4 (
保單分配	18	92%	0.0	0	2 (13%)	5 (31%)	0 (0%)	0 (0%)	9 (
iSay友分享	33	73%	0.0	0	8 (40%)	8 (40%)	0 (0%)	0 (0%)	4 (
友得揀/企業業務	24	90%	1.0	84,357	6 (35%)	5 (29%)	0 (0%)	1 (6%)	5 (
藍十字	35	94%	0.0	0	4 (50%)	2 (25%)	0 (0%)	0 (0%)	2 (
PAP	44	62%	0.0	0	8 (47%)	5 (29%)	0 (0%)	0 (0%)	4 (
P100	12	63%	0.0	0	5 (26%)	8 (42%)	0 (0%)	0 (0%)	6 (

向右滾動以查看更多

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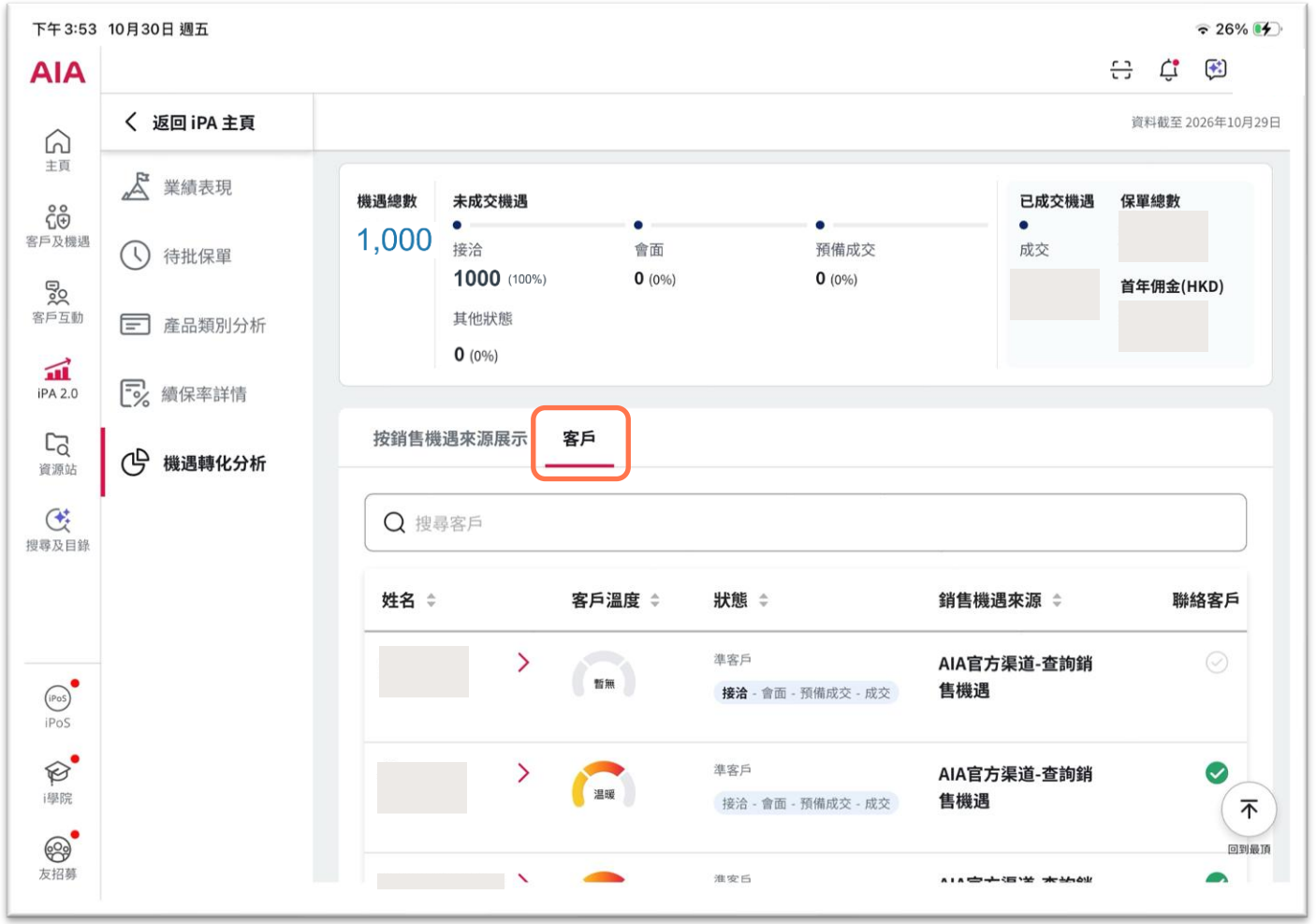
按客戶展示

財務策劃顧問適用



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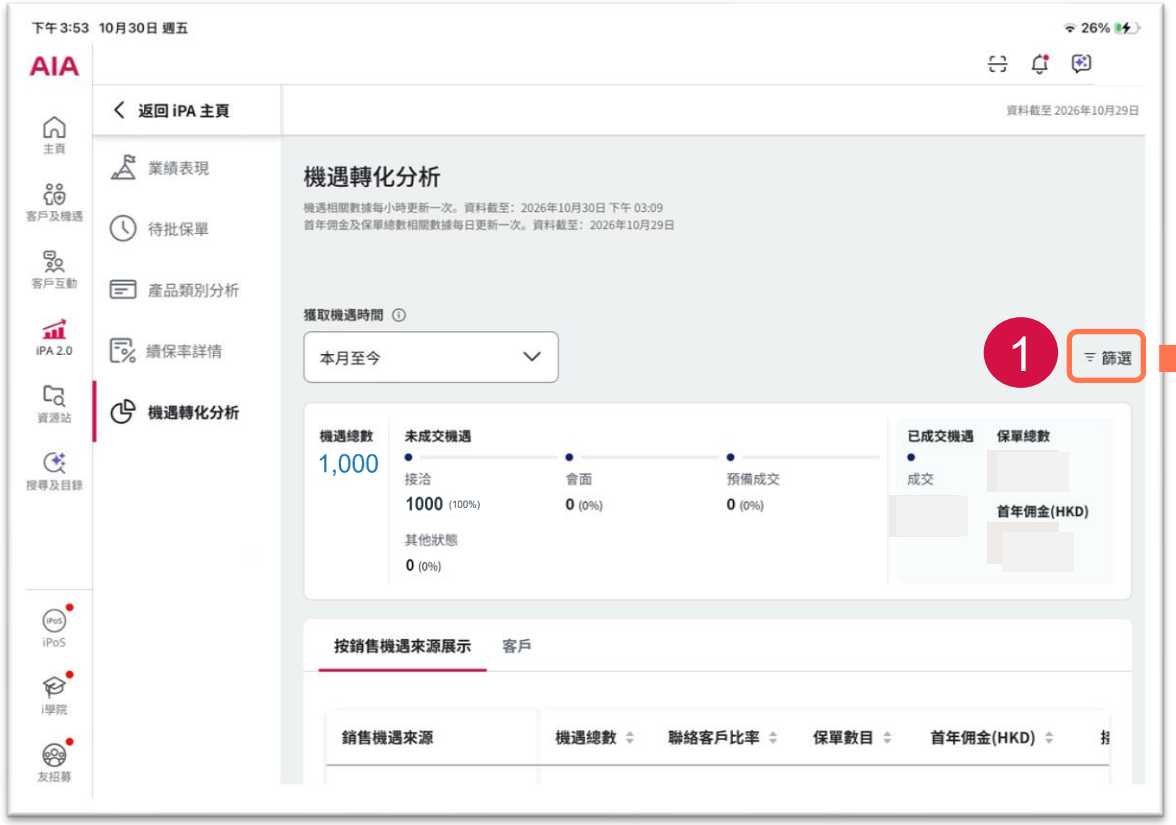
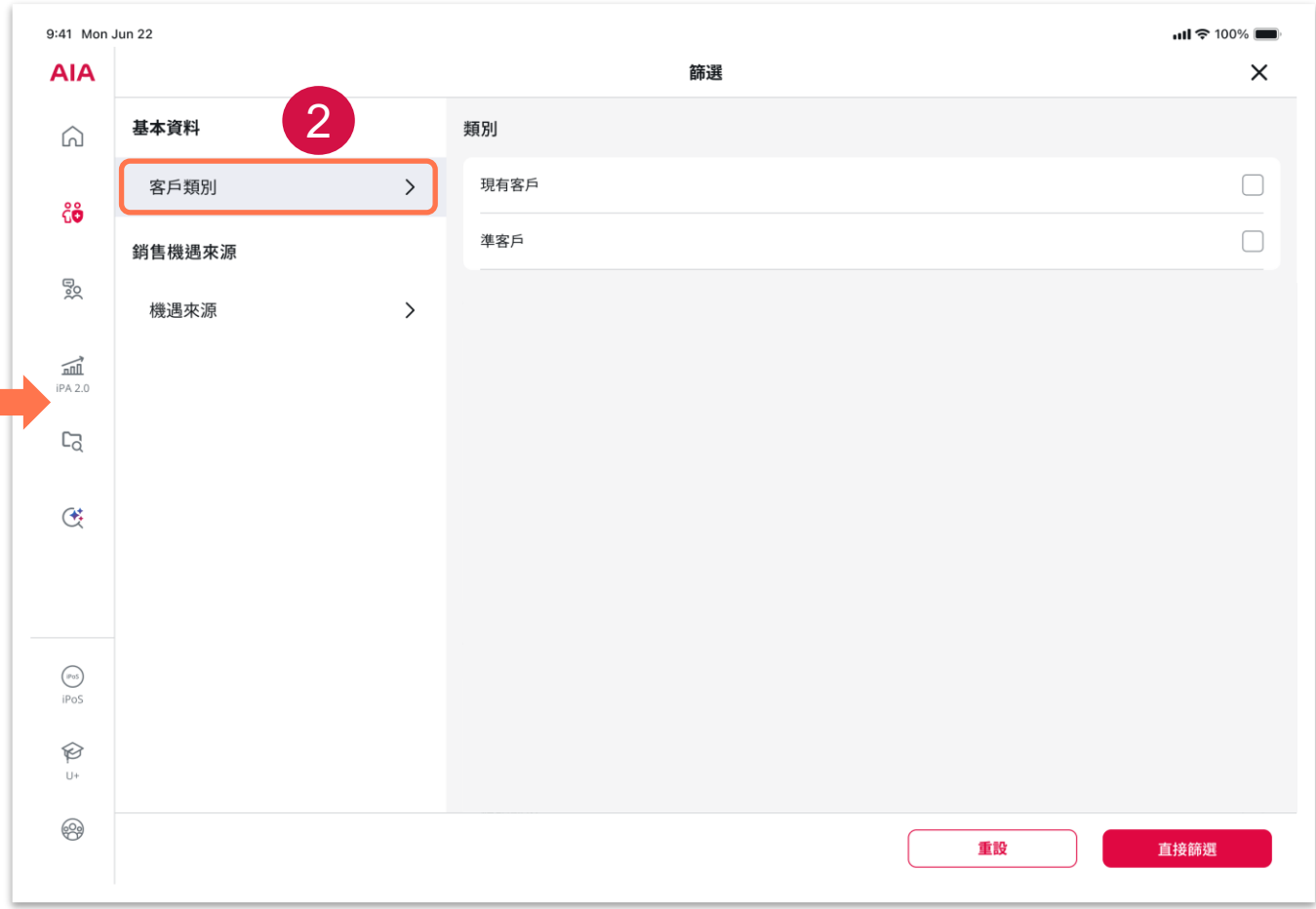
篩選 – 按客戶類別

財務策劃顧問適用





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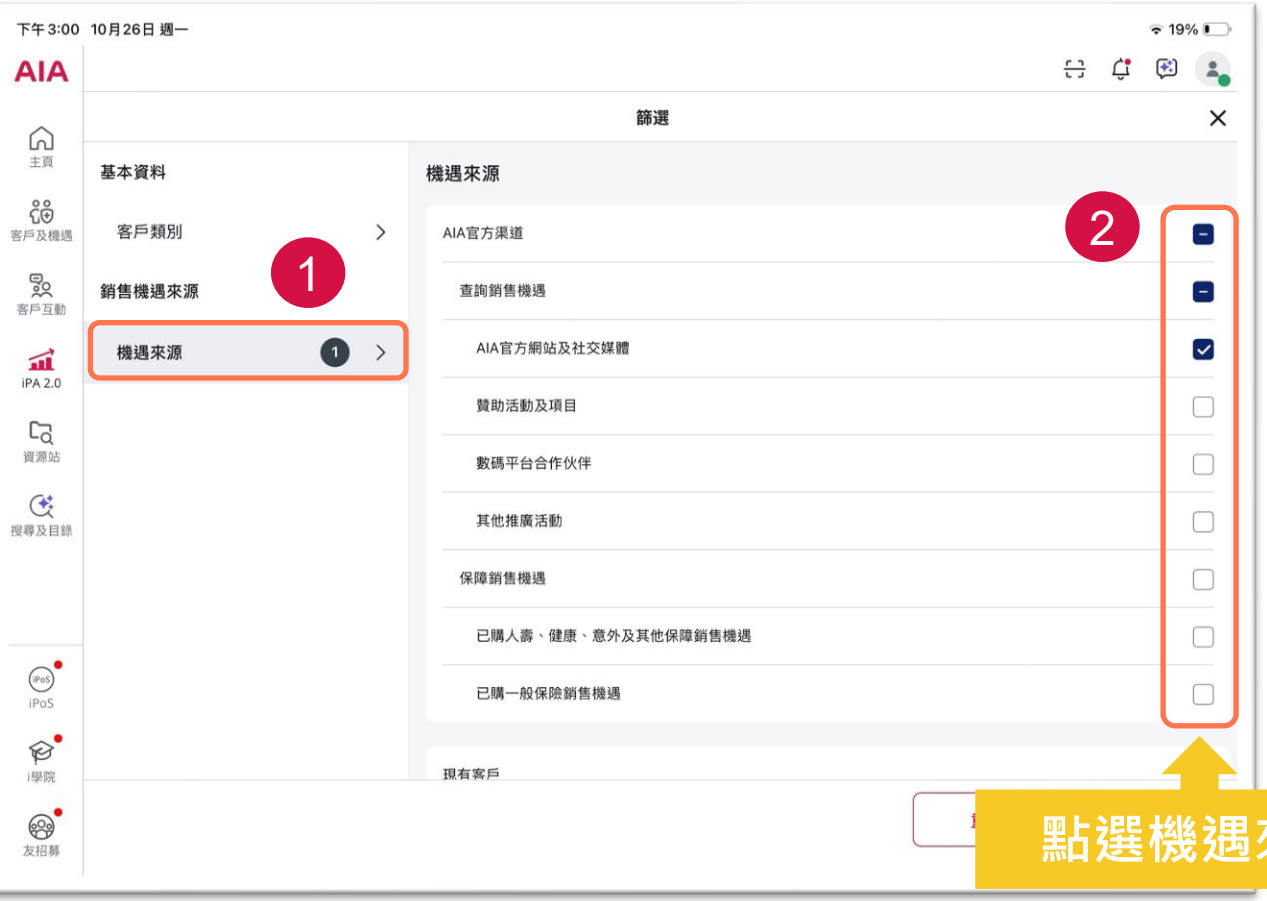
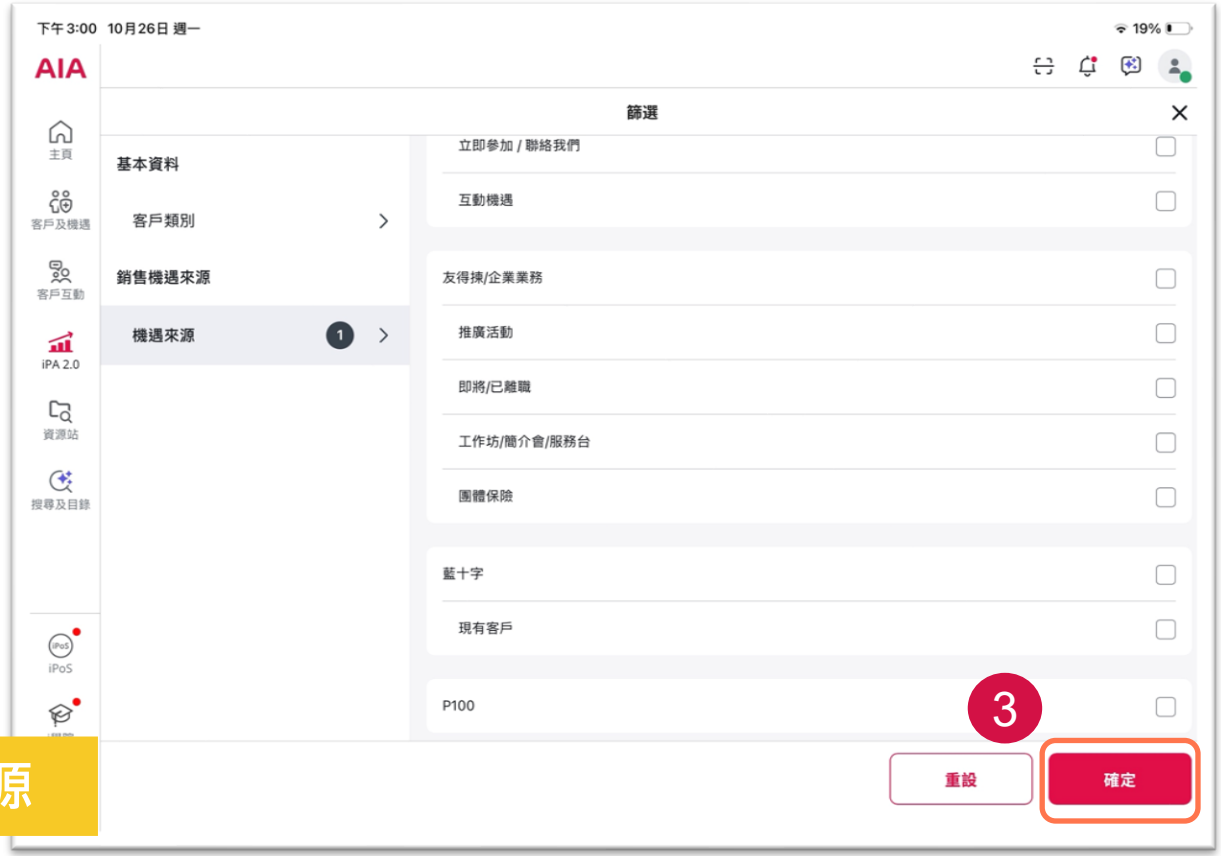
篩選 – 按機遇來源

財務策劃顧問適用





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