友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)	From:	Amy Chan
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shan / All Department Heads / ABDD Executives / CSBD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	30 April 2024	Total pages:	4 + Appendix

Subject: **(A240487) IVS 尊屬職場活動 -「友活力」工作坊（香港）之最新安排**
IVS Exclusive Workplace Activity – Latest Arrangement of AIAnergetic Programme (Hong Kong)

好消息！由於在第一季推出的**「友活力」工作坊（「活動」）**深受營業同事及客戶歡迎，尤其是最受客戶愛戴的**智能眼底分析活動**，有見及此，企業業務現再度推出新一輪活動讓營業同事為客戶預約。在新安排下，企業業務將以**贊助形式**協助營業同事舉辦智能眼底分析活動，把握與一眾團險成員面對面交流的機會，從而開拓更多個人保險客源。

請各營業同事細閱以下活動詳情。活動名額有限，先到先得。立即行動，聯絡您的客戶，**發掘更多 IVS「友得揀」銷售機會**！

「友活力」工作坊之最新安排

<table>
<tr><td>推廣期：</td><td>2024 年 4 月 26 日至 9 月 30 日</td></tr>
<tr><td>合資格客戶：</td><td>現有團體保險企業客戶</td></tr>
<tr><td>贊助形式：</td><td>於推廣期內，現有團體保險企業客戶可根據僱員人數而選擇活動次數及類型。
<table>
<tr><th>僱員人數</th><th>活動次數</th><th>贊助形式</th></tr>
<tr><td>21 - 50</td><td>一次
智能眼底分析</td><td>達到 (i) 或 (ii) 的要求即可豁免活動費用
(i) 於活動當天起計 7 日內完成至少 20 份有效問卷#；或
(ii) 於活動當天起計 2 個月內的 IVS ANP 達 HK$40,000 或以上</td></tr>
<tr><td>51 – 200</td><td>一次
包括智能眼底分析
或於活動列表中任選一項</td><td>豁免活動費用</td></tr>
<tr><td>201
或以上</td><td>2 次
包括智能眼底分析
及於活動列表中任選一項</td><td>豁免活動費用</td></tr>
</table>
#有效問卷是指最終上傳至 eAC 的問卷數目。</td></tr>
<tr><td>活動列表：</td><td>掃描以下二維碼查閱活動種類</td></tr>
<tr><td>費用：</td><td>如未能達到上述 (i) 或 (ii) 的要求，企業業務部將向營業同事收取 50% 活動費用（金額約由 HK$2,500 至 HK$4,000，視乎所選活動而定）。</td></tr>
</table>

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「友活力」工作坊流程

流程一:	**發送電郵至企業業務預約活動** 發送客戶資料及首選活動時間至 hk.cs-wellness@aia.com 進行預約。（請參考附件 1 – 預約活動電郵範本）
流程二:	**確認活動詳情** 企業業務將會透過電郵與您確認活動詳情，並提供網頁連結讓您作建立問卷二維碼之用。
流程三:	**於活動前建立問卷二維碼** 於工作坊或成員簡介會活動日前前往以下網頁，輸入您的財務策劃顧問編號及團體保險保單編號，即可建立問卷二維碼。請於活動當日展示此二維碼，邀請成員填寫其個人資料並就活動提供意見。
流程四:	**參加活動的僱員名單** 企業業務將會核對成員全名及出生月日，**如成員同意接收宣傳及市場推廣資料**，其有效的個人資料將於 3 個工作天內上載至 eAC，而營業同事則可透過 eAC 查看該僱員名單。 **路徑**： eAC > 競賽報告 > 推廣計劃 > 客戶名單（其他）> IVS「友得揀」- 工作坊 / 簡介會 / 服務台 – 客戶名單

一般規則及要求：

1) 此活動只適用於現有團體保險客戶。
2) 此活動只適用於團體保險銷售財務策劃顧問的客戶。
3) 客戶於活動當天必須仍為 AIA 團體保險客戶。
4) 必須符合最少參與人數要求的客戶及其員工才可參加活動。
5) 所有活動均由獨立第三方供應商提供，所提供的任何服務、產品及 / 或協商工作均並非由 AIA 銷售或推廣，AIA 概不負責或承擔任何責任。
6) 活動一經確認，如因改期或取消活動而產生行政費用，企業業務部將向財務策劃顧問收取相關的費用（如有）。
7) 如於活動日前 7 個工作天內無法達到最少參加人數要求，活動將會取消，企業業務部將向財務策劃顧問收取相關的費用（如有）。
8) 活動的確實日期和時間須視乎供應商的情況而定。
9) AIA 有權隨時修訂或取消此活動或服務供應商而毋須另行通知，並保留絕對酌情權。
10) AIA 對於活動提供的效益和活動的質素、適用性或適合性不承擔責任。
11) 活動過程中應遵守導師的指示，如因參與活動及參加者的身體狀況而導致任何損傷，AIA 概不負責或承擔任何責任。

如有任何查詢，歡迎與負責貴區之企業業務營業拓展部同事 / IVS 團隊聯絡。

祝　業務蒸蒸日上！

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Good news! Since the **"AIAnergetic Programme" ("Activity")** launched in the first quarter was well-received by agencies and clients, especially the **AI Fundus Analysis activity** that was the most popular amongst clients. In view of this, Corporate Solutions (CS) is now launching a new round of Activity, allowing you to make booking for your clients. Under the new arrangement, CS will help you organize AI Fundus Analysis activity **in the form of sponsorship**, providing you the opportunity of meeting a group of group insurance members face-to-face, thereby gaining more individual life insurance customers!

Please read the Activity details in the table below carefully. The number of Activity is limited, first-come, first served. Contact your clients now and **seize more IVS sales opportunities**!

Latest arrangement of "AIAnergetic Programme"

<table>
<tr><td>Promotion Period:</td><td>26 April – 30 September 2024</td></tr>
<tr><td>Eligibility:</td><td>Existing group insurance corporate clients</td></tr>
<tr><td>Sponsorship:</td><td>During the Promotion Period, existing group insurance corporate clients can choose the number and type of activity based on the number of employees.
<table>
<tr><th>No. of employees</th><th>No. of Activity</th><th>Sponsorship</th></tr>
<tr><td>21 - 50</td><td>1 time
AI Fundus Analysis</td><td>Fee will be waived if the requirement of (i) or (ii) is met
(i) Complete at least 20 valid surveys# within 7 days from the day of the activity; or
(ii) Achieve IVS ANP of HK$40,000 or above within 2 months from the day of activity.</td></tr>
<tr><td>51 – 200</td><td>1 time
including AI Fundus Analysis
OR select any one activity from the activity list</td><td>Waiver of Activity Fee</td></tr>
<tr><td>201 or above</td><td>2 times
including AI Fundus Analysis
AND select one activity from the activity list</td><td>Waiver of Activity Fee</td></tr>
</table>
#Valid survey refers to the number of surveys finally uploaded to eAC.</td></tr>
<tr><td>Activity list:</td><td>Scan the QR code below to view the activity list.</td></tr>
<tr><td>Fee</td><td>If the above requirement (i) or (ii) is not met, CS will charge 50% of the Activity fee (The amount is approximately from HK$2,500 to HK$4,000, depending on the selected Activity).</td></tr>
</table>

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Flow of "AIAnergetic Programme"

1st Step:	**Send email to CS to book Activity** Send client's information and the preferred Activity time to hk.cs-wellness@aia.com to make a booking. (Please refer to Appendix 1 – Email Template for Booking Activity)
2nd Step:	**Confirm Activity details** CS will confirm the Activity details with you via email and provide a web link for you to generate the survey QR code.
3rd Step:	**Generate survey QR code before the Activity day** Please go to the below website before the Activity day or member's briefing day and generate the survey QR code by inputting your agent code and group insurance policy number. Please display this QR code on the Activity day to invite members to fill in their personal information and provide feedback for the Activity.
4th Step:	**List of employees participating in the Activity** CS will verify the full name and birthday of the members. Valid personal information of members **who have agreed to opt-in for direct marketing** will be uploaded to eAC within 3 working days. You can view such employee list in eAC. Path：eAC > Contests > Campaigns > Customer List (others) > IVS - Worksite – Client List

General Rules and Requirements:

1) This Activity is only applicable to existing Group Insurance corporate client.
2) This Activity is only applicable for Group Insurance producer agent's clients.
3) Clients must be an active AIA Group Insurance corporate client on the date of Activity.
4) Only clients which have fulfilled the requirement on minimum number of participants are eligible to participate in the Activity.
5) All Activities are provided by independent third-party vendors; any service, product and/or co-ordination work are provided by these independent third-party vendors and not provided, sold or marketed by AIA, and AIA shall not be responsible or liable for the same.
6) Once the Activity is confirmed, if administrative fees are incurred due to rescheduling or cancelling the Activity, CS will charge to financial planner for the relevant fees (if any).
7) If the minimum number of participants cannot be reached within 7 working days before the date of Activity, the activity will be cancelled, CS will charge to financial planner for relevant fees (if any).
8) The date and time for holding of the Activity is subject to vendor's availability.
9) AIA reserves the right to revise or cancel the Activity at any time without prior notice at its absolute discretion.
10) AIA is not responsible or liable for the quality, suitability, or fitness for purpose of the benefits and activities provided under the Activity.
11) During the Activities, the instruction provided by instructors should be followed. AIA shall not be responsible or liable for any injury caused by participation in the Activities and the body condition of the participants.

If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

We wish you every success!

Yours faithfully,

Amy Chan
Head of IVS
CS - Individual Voluntary Solutions

預約活動電郵範本

附件1
Appendix 1

發送以下資料至 hk.cs-wellness@aia.com 預約活動。

電郵主題: 預約活動
電郵內容:
財務策劃顧問姓名及編號:
團體保險保單編號:
客戶地址:
活動:
語言: 廣東話 / 英語
預計出席人數:
活動日期及時間首選:
活動日期及時間次選:
活動日期及時間第三選擇:

注意事項:
智能眼底分析活動可於活動前 5 個工作天申請。其他活動需於活動前 30 個工作天申請。

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[AIA – INTERNAL]