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# Memo

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|---|---|---|---|
| Attn: | All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau) | From: | Victor Man |
| Copy: | Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives | Dept: | Corporate Solutions |
| Date: | 8 August 2024 | Total pages: | 4 + Appendix |
| Subject: | **(A240803) 推出全新「退休金」客戶 CRM 平台**<br>**Launch of New "Pension" CRM Platform** | | |

**好消息！**為了讓各營業同事能更有效率地向強積金 / 退休金成員提供服務，現誠意推出**全新「退休金」客戶 CRM 平台**，讓大家可以隨時隨地查看成員的個人及帳戶資料，從而提供適時的貼心服務及捕捉 IVS「友得揀」銷售機遇。

全新「退休金」客戶 CRM 平台將於 8 月 10 日正式上架，其主要功能包括：

| 功能 | 詳情（請參閱附件） |
|---|---|
| 1) **查看強積金 / 退休金成員的個人資料及賬戶資料** | **個人資料**包括：<br>性別、年齡、出生月份、手提電話、電郵、拒絕收取直接促銷訊息及聯絡狀況（如有）<br><br>**賬戶資料***包括：<br>計劃名稱 / 編號、賬戶總值、總供款金額、上次供款金額、上次供款日期、上次基金轉換日期及未實現收益 / 虧損 |
| 2) **根據使用者的要求篩選成員，以進行售後服務或捕捉 IVS 銷售機會** | 篩選要求包括：<br>**成員賬戶資料**<br>▪ 計劃名稱 / 計劃編號<br>▪ 賬戶狀況（生效 / 已終止 / 將終止）<br>▪ 同意發放賬戶資料（是 / 否）<br>▪ 人壽保單持有人（是 / 否）<br>▪ 人壽保單受保人（是 / 否）<br>▪ 持有退休樂賬戶（是 / 否）<br><br>**綜合賬戶資料***<br>▪ 成員賬戶總值<br>▪ 總供款金額<br>▪ 上次供款日期<br>▪ 上次供款金額<br>▪ 上次基金轉換日期<br>▪ 未實現收益 / 虧損<br><br>**基本資料**<br>▪ 性別<br>▪ 年齡<br><br>▪ 聯絡狀況（已聯絡 / 未能聯絡 / 未能接通 / 已約見 / 已會面....等等）<br>▪ 收取直接促銷訊息（拒絕 / 接受） |

*此功能只適用於**已授權**發放賬戶結餘及詳細分項予註冊中介人參考的強積金 / 退休金成員，對於並未予以授權的成員，則只會顯示計劃名稱 / 編號。

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**捕捉銷售機遇示例**

透過協助即將離職的企業成員將其現有供款賬戶轉為個人賬戶，將該企業成員轉化為自己的個人客戶，並在其後接觸此客戶進行 IVS「友得揀」銷售。

**如何獲知企業成員即將離職？**

1) 定期使用篩選功能，篩選出賬戶狀況為「將終止」及「已終止」的成員進行跟進。
2) 查看上述成員的賬戶資料，以獲知其離職日期

若營業同事**未能**將已離職企業成員於其離職後的 90 日內轉化為個人客戶，該成員的個人及賬戶資料**將不會繼續顯示**於該營業同事之「退休金」客戶 CRM 資料庫內。**請把握黃金 90 日，將離職企業成員轉化為個人客戶，創造銷售機遇！**

請大家善用全新「退休金」客戶 CRM 平台，適時為客戶提供貼心服務及將企業成員轉化為個人客戶，捕捉 IVS「友得揀」銷售機遇！

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 團隊聯絡或經 iEngage / PES 使用 LiveChat 查詢。

祝　業務蒸蒸日上！

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**Good News!** In order to let all Financial Planners to provide services to MPF/pension members in a more efficient manner, we are sincerely launching a **New "Pension" CRM Platform**, allowing all of you to view members' personal and account information anytime and anywhere, thereby providing timely and considerate services and capturing the IVS sales opportunities.

The New "Pension" CRM Platform will be officially launched on 10 August. Its main functions include:

| Function | Details (Please refer to Appendix) |
|---|---|
| 1) **View the personal information and account information of MPF/Pension members** | **Personal Information** includes:<br>Gender, age, month of birth, mobile number, email, opt-out for direct marketing messages and contact status (if any)<br><br>**Account information*** includes:<br>Plan Name/Number, Account Balance, Total Contribution Amount, Last Contribution Amount, Last Contribution Date, Last Fund Switching Date and Unrealized Gains/Losses |
| 2) **Filter members based on user requirements to provide after-sales service or capture IVS sales opportunities** | Filtering criteria include:<br>**Member Account Details**<br>▪ Plan name/Plan number<br>▪ Account status (Inforce/ terminated/ terminating)<br>▪ Consent to release Account Information (Yes/No)<br>▪ Life policy owner (Yes/No)<br>▪ Life insured (Yes/No)<br>▪ Member of Happy Retirement Savings Program (Yes/No)<br>**Comprehensive Information***<br>▪ Total Member Account Balance<br>▪ Total Contribution Amount<br>▪ Last Contribution Date<br>▪ Last Contribution Amount<br>▪ Last Fund Switching Date<br>▪ Unrealized Gains/Losses<br>**Basic Information**<br>▪ Gender<br>▪ Age<br>▪ Contact Status (contacted/Not Reachable/Deadtone/Appointment made/ Met with customer…etc.)<br>▪ Direct Marketing Messages (Opt-out/Opt-in) |

*This function is only applicable to MPF/pension members who **have authorised** the release of account balances and detailed breakdowns to registered intermediaries for reference. For members who have not granted their authorisation, only the Plan Name/Number will be displayed.

## Example of Capturing Sales Opportunities

By assisting corporate members who are about to leave their jobs to convert their existing contribution accounts to personal accounts, you can convert corporate members to your own individual customers, and you can then contact this customer for conducting IVS sales.

## How do you know a corporate member is about to leave the company?

1) Use the filtering function regularly to filter out members whose account status is "Terminating" and "Terminated" for follow-up.
2) Check the account information of the above-mentioned members and find out their date of departure.

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If Financial Planner **fails** to convert a departed corporate member to an individual customer within 90 days of his/her departure, the member's personal and account information **will no longer appear** in such Financial Planner's "Pension" CRM database. **Please grasp the golden 90 days to convert departed corporate members to individual customers and create sales opportunities!**

Please make good use of the New "Pension" CRM Platform to provide customers with considerate services in a timely manner and convert corporate members to individual customers to capture IVS sales opportunities!

If you have any questions, please contact your designated CS business development executives/IVS Team or enquire by using LiveChat in iEngage/PES.

We wish you every success!

Yours faithfully,



Victor Man
Head of CS Business Development
(Agency Distribution) - Corporate Solutions

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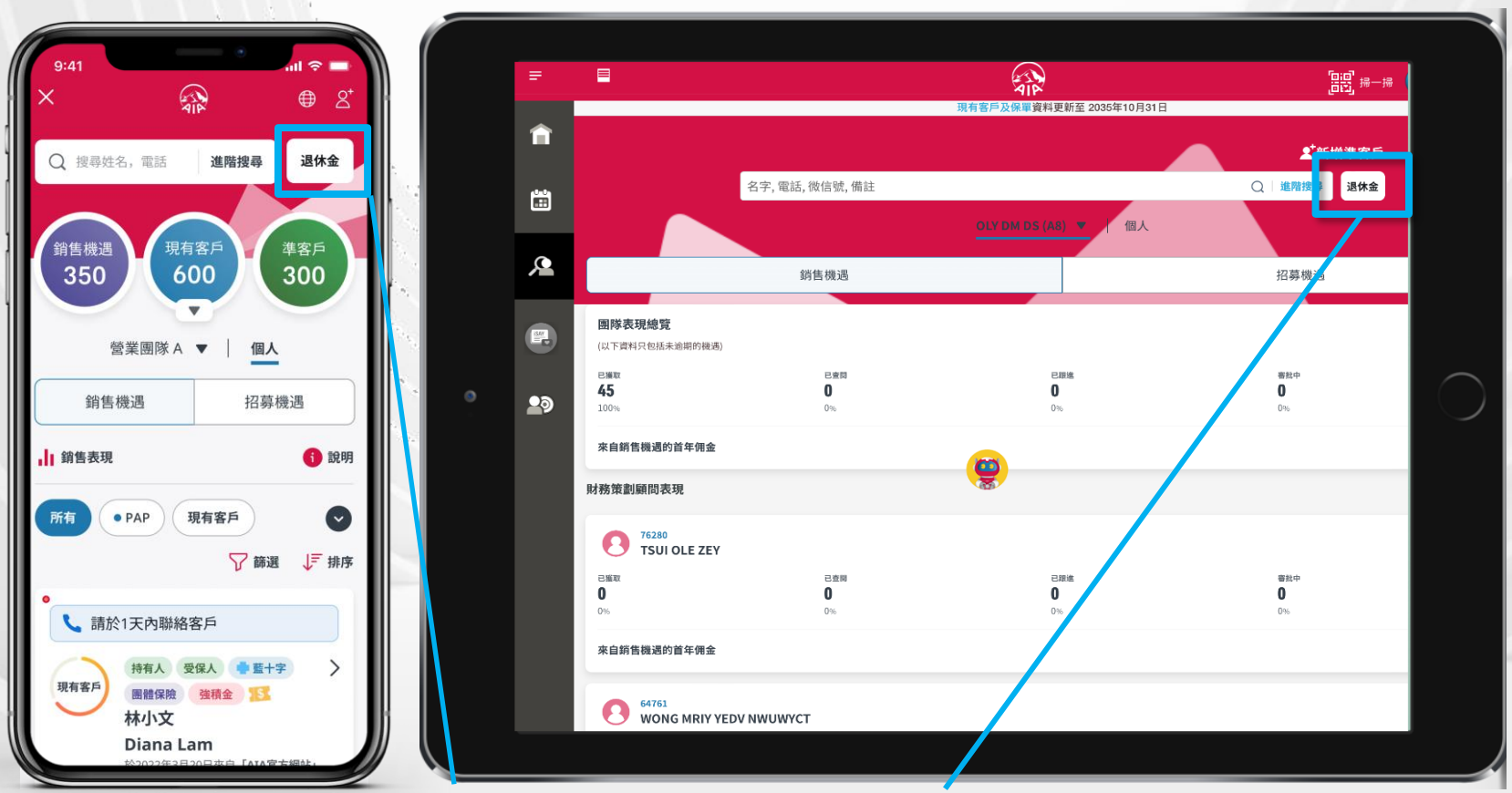
# 推出全新「退休金」客戶 CRM 平台

附件 Appendix

登入 AIA Smart / iEngage，透過**全新「退休金」客戶 CRM 平台**
隨時隨地查看成員的個人及帳戶資料，從而提供適時的貼心服務及**捕捉 IVS「友得揀」銷售機遇**。



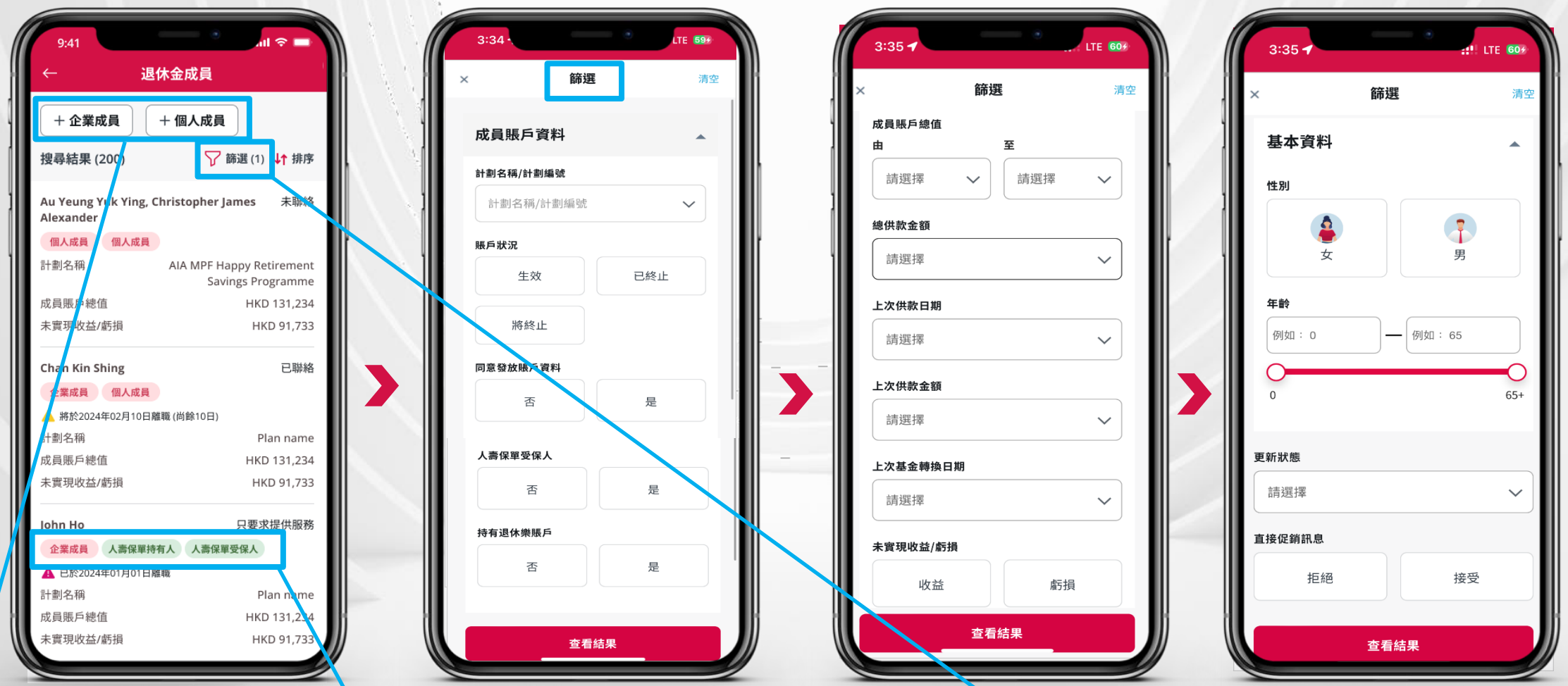

全新客戶 CRM「退休金」入口



詳情請參閱 A240803

# 推出全新「退休金」客戶 CRM 平台

附件 Appendix




可篩選「企業成員」及 / 或「個人成員」

有不同標籤方便查看
包括「企業成員」、「個人成員」及「人壽保單持有人 / 受保人」（您的現有客戶）

設有多項篩選條件
助您更輕鬆找到目標退休金成員

# 推出全新「退休金」客戶 CRM 平台

附件 Appendix













可顯示成員
已 opt-out 直接促銷

可透過短訊 / WhatsApp /
電郵直接聯絡退休金成員

可更新聯絡狀況
方便您進行跟進

如退休金成員有授權
發放賬戶結餘及詳細分項
將顯示成員之戶口詳情