AIA Hong Kong
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Memo

Attn: All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners

From: Jim Jan Zen

Copy: Mr. Alger Fung/
Mr. Louie Ho/
All Department Heads/ ABDD Executives

Dept: Management Team

Date: 2 January 2025

Total page: 7 + Appendix

Subject: **(A250116) 優越服務 預先行一步 Serve to Sales from CRM**

新一年，您有為自己定下新目標、建立良好的新習慣嗎? 是時候建立使用**「CRM 客戶關係管理平台」**的習慣，輕鬆尋找高潛力客戶，更有多重機會參與大抽獎，贏取豐富獎賞！

由 1 月 20 日起，於指定星期一將會上載**不同目標客戶名單**至「CRM 客戶關係管理平台」，只要營業同事於指定時間內透過 CRM 聯絡您現有的高潛力客戶，即可參與大抽獎，每星期均會抽出 **1 部 iPhone 和 1 部 iPad**，及一系列其他豐富獎品，完成額外任務要求有更多抽獎機會。

今年公司主題為「客戶為先 卓越領先」，客戶是我們重要的資產，公司鼓勵同事以優越服務，了建客戶需要，從而為他們提供最適切的方案。每一次的主動聯繫，不僅能增強客戶關係，更為自己業績奠下基礎。請立刻把握機會，登入「CRM 客戶關係管理平台」，聯絡您的高潛力客戶吧！

Beyond No. 1 客戶為先 卓越領先

有關競賽詳情請參閱下文。

Please refer to the details below.

Jim Jan Zen
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
JJZ/AL/CC/KT

BEYOND NUMBER ONE 客戶為先 卓越領先

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優越服務 預先行一步 Serve to Sales from CRM

競賽資格：

於「CRM 客戶關係管理平台」持有 **2025 優質客戶名單**、**[Recapture] 2025 年 1-3 月重點客戶名單**、**[Recapture] 2025 年加推重點客戶名單**、**[優易/簡易核保] 2025 重點客戶名單**的特選財務策劃顧問

競賽日期：

2025 年 1 月 20 日至 4 月 19 日

競賽規則及獎項：

競賽期間將會於**指定星期一**上載**不同目標客戶名單**至「CRM 客戶關係管理平台」，於**兩星期內完成**指定競賽要求，將獲得一次大抽獎機會，而完成額外競賽要求亦有更多抽獎機會，並於每星期抽出得獎者。如該星期未能獲獎，抽獎機會可累積至下一期繼續參與大抽獎。

競賽星期	**上載日期** (競賽期內**逢星期一**上載，1月27日除外)	**目標客戶名單**			
		A) 2025優質客戶名單 (包括但不限於過去3年未曾購買保單、高淨值客戶、已婚家庭等)	**B) [Recapture] 2025年1-3月重點客戶名單 (2025年內付清保費或期滿的特選保單持有人)**	**C) [Recapture] 2025年加推重點客戶名單 (2024年內付清保費或期滿的特選保單持有人)**	**D) [優易/簡易核保] 2025重點客戶名單**
1	1月20日	✔	✔	✔	✔
N/A	1月27日	N/A (農曆新年)			
2	2月3日	✔			
3	2月10日	✔	✔	✔	
4	2月17日	✔			✔
5	2月24日	✔			
6	3月3日	✔			
7	3月10日	✔	✔	✔	
8	3月17日	✔			
9	3月24日	✔			
10	3月31日	✔			

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競賽要求：

項目**	基本競賽要求	抽獎機會
1	於 2 星期內成功*使用 CRM 聯絡該星期名單上的客戶 (請參閱附錄 1 操作流程)	1
	額外競賽要求	**額外抽獎機會**
2	於 24 小時@內成功*使用 CRM 聯絡該星期名單上的客戶	1
3	客戶於 2 星期內成功下載及登記 AIA+帳戶	1
4	於 2 星期內成功發送 iFHC 報告# (請參閱附錄 2 操作流程)	1
5	於 2 星期內成功分享 iSay 文章+予客戶	1
6	於 2 星期內獲客戶於[項目 5]中分享的 iSay 文章+內按「聯絡我們」並成功提交	1
7	於 2025 年 4 月 19 日或之前約見目標客戶名單上的客戶，並透過 iChange 助客戶更新或確認聯絡資料	1
8	名單上的客戶於 2025 年 4 月 19 日或之前成功投保	1
9	名單上的客戶於 2025 年 4 月 19 日或之前成功「客戶轉介客戶」投保^	1

大抽獎禮品：

每個競賽星期設有大抽獎，每星期均會抽出 **1 部 iPhone 和 1 部 iPad，及一系列其他豐富獎品**，每星期約有 50 個得獎名額，而第 1 星期及第 10 星期得獎名額將會倍增至 100 名，豐富獎品如下：

1. iPhone 16 Pro - 512 GB
2. iPad - 256 GB
3. AirPods Pro 2
4. Dyson - HD16 Supersonic Nural 風筒
5. Dyson Purifier Hot+Cool™ Gen1 三合一暖風空氣清新機
6. Marshall 馬歇爾 Monitor III 藍牙耳機
7. PHILIPS 飛利浦 ADD5981 冷熱過濾飲水機
8. 「友邦峻宇養生庭」禮券
9. Coldplay: Music Of The Spheres World Tour 演唱會門票 2 張
10. 酒店餐飲禮券，價值 HK$2,000
11. 星巴克咖啡禮券，價值 HK$300
12. 2 張「友邦嘉年華」門票(每張連 10 個代幣) (電子版本)[只限於第 1 星期]

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備註：

1. 客戶是指該星期**目標客戶名單**上的客戶。
2. *CRM 中「聯絡客戶」之燈號變成綠色，方能視作成功。（請參閱附錄 1）
3. #CRM 中提交「全保理財分析」(iFHC)" 之燈號變成綠色，方能視作成功（請參閱附錄 2）
4. 合資格的「全保理財分析」(iFHC) 報告必須於 iPoS「從 CRM 下載客戶聯絡資料」並以電郵發送。於競賽期內重複建立 iFHC 報告予同一客戶或準客戶，將以一份報告計算。於 1 月 20 日前發送的 iFHC 報告將不獲計算。
5. +透過「iSay 友分享」平台分享 iSay 文章是指使用「iSay 友分享」平台使用 "分享「一對一」專屬鏈結" 分享 iSay 文章給「目標客戶名單」內之聯絡人。已於目標客戶名單上載日期前於 iSay「友分享」之文章分享將不獲計算。
6. 同事透過 iSay 平台分享信息予客戶/準客戶前，請您必須檢查客戶/準客戶是否已選擇拒收訊息。
7. ^以該星期名單上的目標客戶所轉贈的電子保費現金券為記錄。
8. @24 小時是以當日下午 3:00 起開始計算。(例子：於 1 月 20 日的競賽星期的計算為當天下午 3:00 至 1 月 21 日的下午 3:00。)
9. 競賽要求如以 2 星期為限時，則由名單上載日起開始計算。
10. 每位名單上的目標客戶最高可產生 9 次大抽獎機會予該營業同事，而每位營業同事只可於每星期大抽獎中獲獎一次。如營業同事於該星期大抽獎中未能中獎，抽獎機會將可累積至往後期數持續參加大抽獎；如營業同事中獎，剩餘的抽獎機會亦可累積至往後期數。
11. **競賽要求項目 1-9 的大抽獎機會以最終競賽報告為準。
12. 獎品最終型號或與上述獎品名單不同而不作另行通知。

一般規則

1. 營業同事遞交保單申請予AIA，應預留充足時間確保有關申請已於截數前由AIA及/或已授權之單位收妥。
2. 營業同事進行銷售時必須根據客戶的需要及保費負擔能力作評估，從而介紹適合的保險產品，不得因獎賞而對客戶作特定銷售建議。
3. 所有獲獎者必須於獎賞發放時仍與AIA持有效合約。
4. AIA保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
5. 所有獎賞不可退換或轉換成以現金發放，安排均以 AIA 最終安排為準。
6. AIA保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
7. 如有任何異議，以AIA最後決定為準。
8. 此競賽將不接受上訴申請。

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Serve to Sales from CRM

Eligibility:
Selected Financial Planners who have been assigned following campaign lists in CRM: **2025 Quality Customer List**, **[Recapture] 2025 Jan–Mar Selected Customers**, **[Recapture] 2025 Extra Selected Customers** and **[Preferential/Simplified Underwriting] 2025 Selected Customers**

Contest Period:
20 January – 19 April 2025

Contest Rules & Awards
Different **Targeted Customers Lists** will be uploaded to the CRM on **designated Mondays** during the contest period. Winners will be drawn every week by completing required task within 2 weeks, extra lucky draw chances will be given by completing additional tasks. If you do not win a prize in that week, lucky draw chances can be carried over to the next draw.

Contest Week	Upload Date (Mondays within contest period, except 27 Jan)	Targeted Customer Lists			
		A) 2025 Quality Customer List (including but not limited to Customers haven't purchased policy in the past 3-year, HNW, Married family, etc.)	B) [Recapture] 2025 Jan – Mar Selected Customers (2025 paid up or maturity selected customers)	C) [Recapture] 2025 Extra Selected Customers (2024 paid up or maturity selected customers)	D) [Preferential/ Simplified Underwriting] 2025 Selected Customers
1	20th Jan	✔	✔	✔	✔
N/A	27th Jan	N/A (Chinese New Year)			
2	3rd Feb	✔			
3	10th Feb	✔	✔	✔	
4	17th Feb	✔			✔
5	24th Feb	✔			
6	3rd Mar	✔			
7	10th Mar	✔	✔	✔	
8	17th Mar	✔			
9	24th Mar	✔			
10	31st Mar	✔			

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Contest Requirement:

Item**	Basic Requirement	Lucky Draw Chance
1	Successfully contact* customers on list of the week via CRM within 2 weeks (Please refer to Appendix 1)	1
	Additional Requirement	**Extra Lucky Draw Chance**
2	Successfully contact* customers on list of the week via CRM within 24-hour@	1
3	Customers successfully download and register AIA+ within 2 weeks	1
4	Successfully send iFHC report# to customers within 2 weeks (Please refer to Appendix 2)	1
5	Successfully shared iSay article+ to customers within 2 weeks	1
6	Customer successfully click and submit "Contact us" inside the [Item 5] shared iSay article+ within 2 weeks	1
7	Meetup the customer on list on or before 19th April 2025 and help customer update or confirm contact information on iChange	1
8	Customer on list successfully repurchase on or before 19th April 2025	1
9	Customer on list successfully "Member get Member" purchase policy^ on or before 19th April 2025	1

Lucky Draw Prize：

There will be lucky draw for each contest week, **1 iPhone and 1 iPad will be drawn every week, together with a series of other prizes.** There will be about 50 prizes each week and the number of prizes in the 1st and 10th week will be doubled to 100 prizes. The prizes are as follows:

1. iPhone 16 Pro - 512 GB
2. iPad - 256 GB
3. AirPods Pro 2
4. Dyson - HD16 Supersonic Nural Hair Dryer
5. Dyson Purifier Hot+Cool™ Gen1 Purifying Fan Heater
6. Marshall Monitor III Bluetooth Headset
7. PHILIPS ADD5981 All-in-One Water Dispenser
8. AIA Alta Wellness Heaven Voucher
9. 2 tickets of Coldplay: Music of The Spheres World Tour
10. Hotel Dining Voucher, valued HK$2,000
11. Starbucks Vouchers, valued HK$300
12. 2 "AIA Carnival" tickets (with 10 tokens) (By eTicket) [Only available for the 1st week]

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Remarks:

1. Customer is referring to those on the **Targeted Customer Lists** on CRM.
2. *"Contact customer" light in CRM turned green is considered successful. (Please refer to appendix 1)
3. # "Submit iFHC" light in CRM turned green is considered successful. (Please refer to appendix 2)
4. Qualified iFHC report must be done after downloading customer profile from iPoS and sent via email. iFHC reports generated under the same customer or prospect customer within the contest period will be counted as one report and iFHC reports conducted before 20 Jan 2025 will not be counted.
5. +iSay Share refers to producers sharing iSay contents via "Share 1-on-1 unique link" button to unique customer / prospects who are selected from 'CRM' via iSay platform within the contest period. Shared iSay content on or before Targeted Customer List upload date will NOT be counted.
6. Financial Planners should check if customer/prospect have opt-out from company information before sharing post(s) via iSay platform.
7. ^Tracked by ePremium Coupon transferred by Customer on list.
8. @24-hour is counted from 3:00 pm of the assigned date. (E.g. The calculation in the Contest week of 20 Jan is from 3pm that day until 3pm of 21 Jan.)
9. If "within 2 weeks" contest requirement is applied, the date will be counted from the date of list uploaded.
10. Each targeted customer on list will provide maximum 9 lucky draw chances for the financial planner, each financial planner will be awarded once only in each week's lucky draw. If the financial planner is not awarded in that week, the lucky draw chances will be carried forward to the next rounds, if awarded, the remaining lucky draw chances will also be carried forwarded to the next rounds.
11. **Result of lucky draw chances of Requirement item 1-9 is subject to final contest report.
12. Prize' model may be different from the abovementioned list without prior notice.

General Rules & Regulations

1. For case applications submitted to AIA, producers are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorized vendor before the cut-off time.
2. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
3. Qualifiers must be inforce with AIA at the time the awards are paid out / redeemed.
4. AIA reserves the right to retract the award based on adjusted results and any substantiated violations of required sales conduct.
5. All privileges and awards are not transferrable and payable, program is subject to AIA's final decision.
6. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
7. In the event of dispute, AIA's decision is final and conclusive.
8. Appeal is not entertained in this contest.

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附錄 1: 使用CRM聯絡當星期名單上的客戶
Appendix 1: Contact or Update Status in CRM



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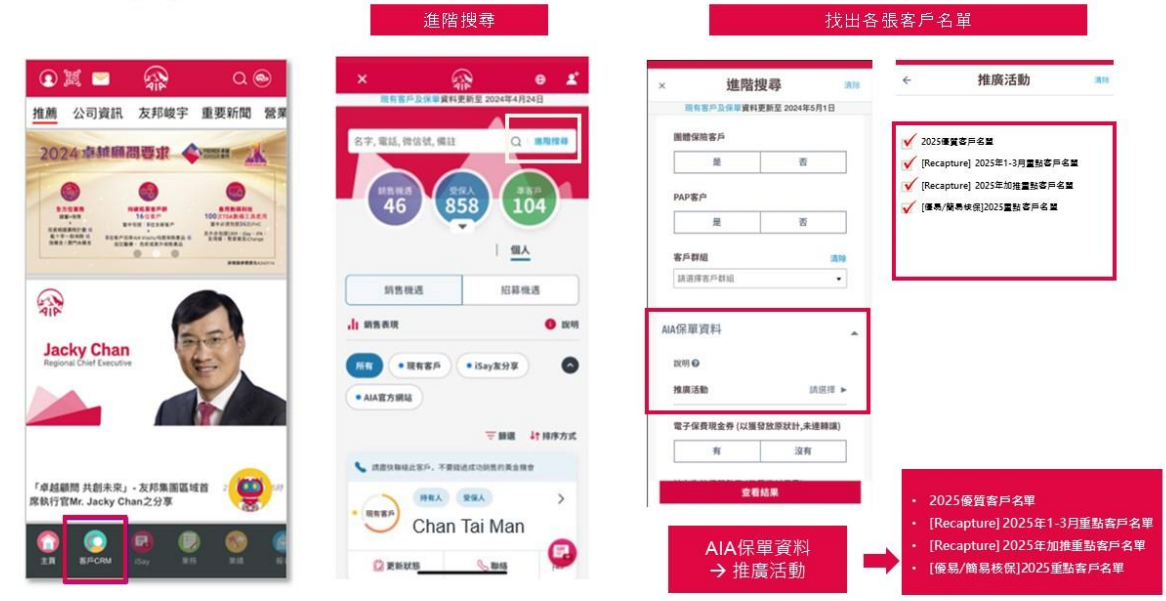
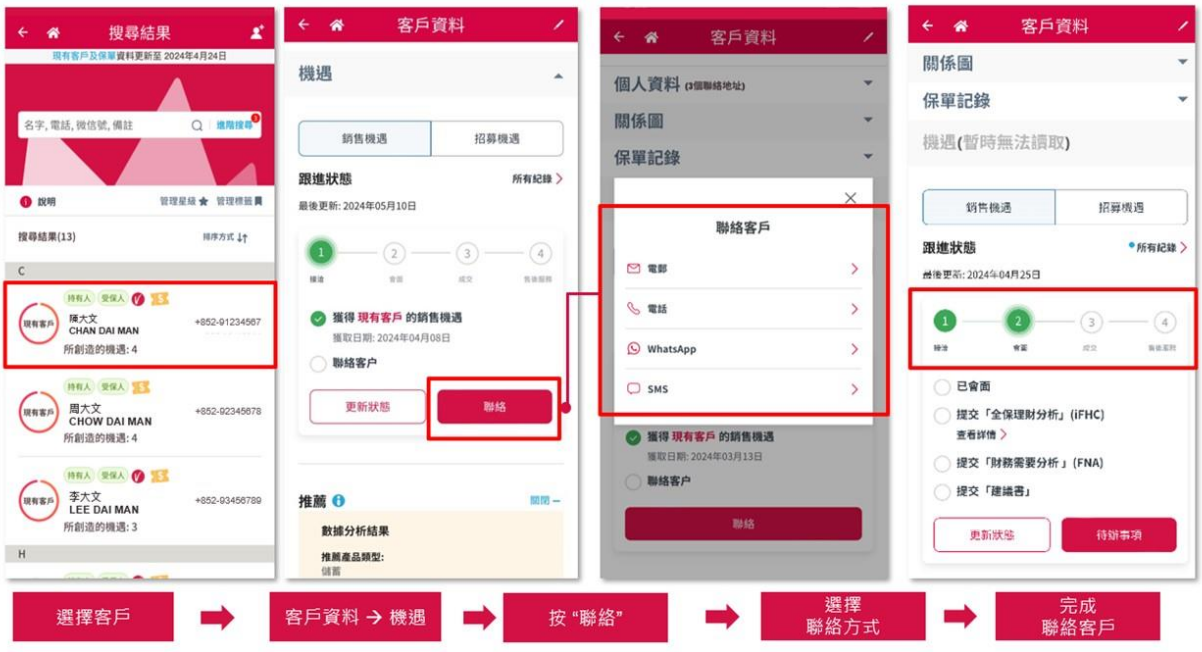
登入 iEngage 的「客戶CRM」 → 進階搜尋 → 找出各張客戶名單



方法 (1) – 直接於CRM聯絡客戶



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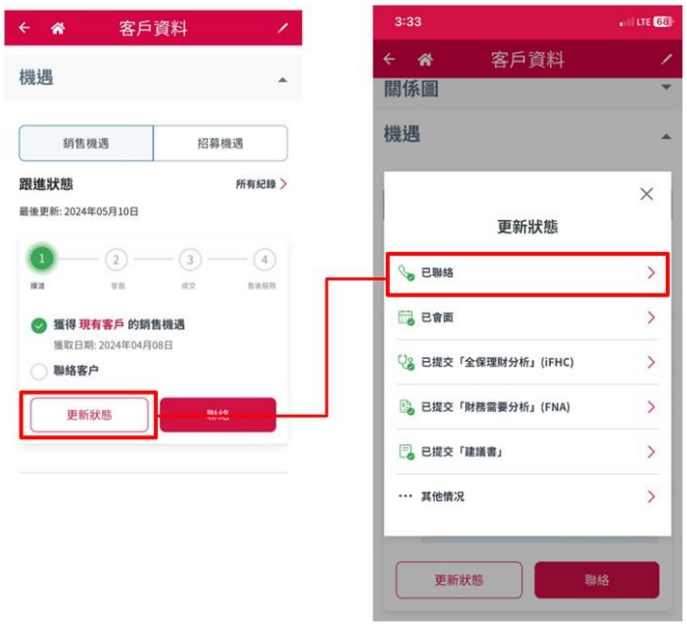
方法 (2) – 直接於CRM「更新狀態」，記錄聯絡日期



成功聯絡客戶之燈號

用方法一或方法二聯絡後，
在1號接洽燈號下的聯絡客戶燈號
將亮起, 代表成功聯絡客戶



常見問題

1 搜索結果中的重點客戶沒有銷售機遇



由於客戶是受保人，
「受保人」並不會有
銷售機遇

2 按聯絡後，出現拒收訊息提示



該客戶拒收訊息，不可進行電話促銷。
請留意**A241076** - 電話促銷指引「該做與不該做」，請查閱CRM中該客戶的"拒絕接收商業電子訊息"狀態。

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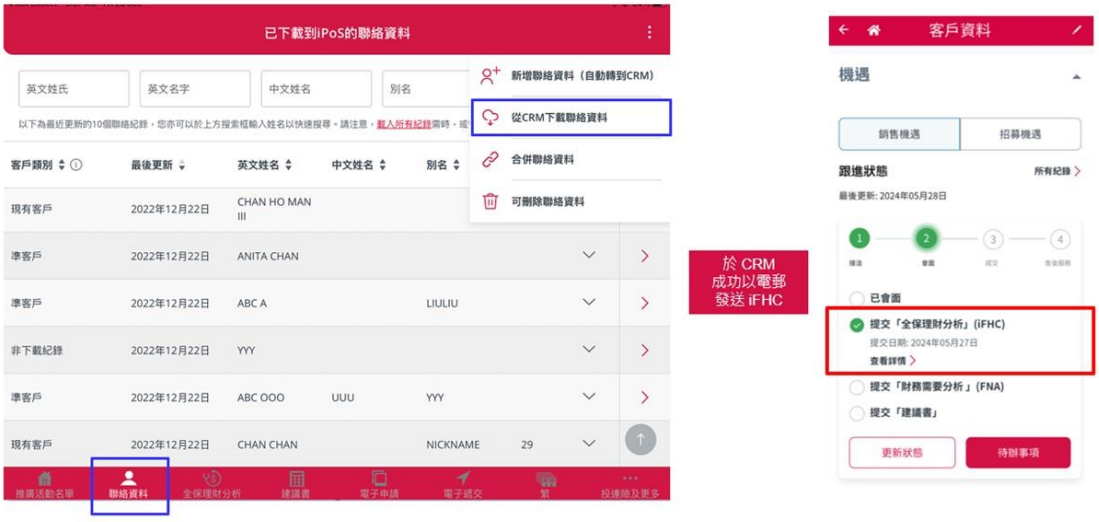
附錄2: 使用 iPoS 做「全保理財分析」(iFHC) 前，須從CRM下載聯絡資料CRM聯絡

Appendix 2 : Before conducting iFHC from iPoS, it is a must to download customer profile from CRM

重要提示: 做「全保理財分析」(iFHC) 前，須從CRM下載聯絡資料



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重要提示:「更新狀態」中的「已提交全保理財分析 iFHC 」按鍵



此按鍵代表閣下已經提交iFHC
請在完成提交iFHC後，方使用此按鍵以作更新

敬請留意
如CRM中燈號亮起，但iFHC系統没有發送紀錄，將有機會被取消競賽資格

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