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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)

From: Grace Yan
Head of Service

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 24 February 2025

Total page: 1

Subject: (Ref: A250255) 優化預約回電服務
Enhancement of Outbound Call Service

為了持續提升預約回電服務的體驗，自 2025 年 2 月 24 日起，我們將對成功預約回電的財務策劃顧問進行三次致電。如果財務策劃顧問未能接聽第一次電話，我們將在 10 分鐘後再次致電。如果第二次仍未接聽，我們將在 10 分鐘後進行第三次致電。如果三次致電均未接聽，該次服務將被取消。

如有任何查詢， 請經 iEngage/PES 使用 Chatbot 進行查詢。

To continuously enhance our pre-booking service, effective February 24, 2025, we will make three attempts to contact Financial Planners who have successfully scheduled a booking. If the Financial Planner is unable to answer the first call, we will attempt to call again after 10 minutes. If there is no answer on the second call, we will make a third attempt after another 10 minutes. If all three calls are unanswered, the service will be cancelled.

Should you have any queries, please enquire by using Chatbot in iEngage/PES.

Regards,

Grace Yan
Head of Service

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