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2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

# Memo

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

From: Alex Li

Copy: Mr. Alger Fung, Ms. Amy Chan, Mr. Louie Ho / All Department Heads /ABDD Executives

Dept: Agency Digital & Innovation

Date: 1st March, 2025

Total page: 7 pages

Subject: **(A250305) 數碼平台競賽 – 三月 Top 100 大獎賞**
**Digital Active – March Top 100 Award**




為鼓勵所有財務策劃顧問(1)及營業單位主管能善用數碼平台包括 **iSAY「友分享」**(2)及 **i 學院 人工智能推薦**拓展新生意、充實自己、發展團隊，公司特意推出「數碼平台競賽 – 三月 Top 100 大獎賞」以推動大家早一步成為卓越顧問。使用量首 100 位營業同事可獲得 iPhone 16 Pro 512GB 或 Klook 旅遊現金禮券 HK$1,000 或 百佳超級市場 HK$50 現金券 。

善用科技，讓大家不費心力獲得更多客源及銷售機遇！

Alex Li
Head of Agency Digital and Innovation

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## 數碼平台競賽 – 三月 Top 100 大獎賞

**競賽資格：**

所有財務策劃顧問[1]及營業單位主管

**競賽日期：**

2025 年 3 月 1 日至 3 月 31 日

**競賽規則及獎賞：**

於競賽期內使用以下數碼平台最少一次:

**iSay「友分享」**[2]: 透過 “分享「一對一」專屬鏈結” 或 “其他分享” 分享 iSay 文章。

**i 學院 人工智能推薦:** 登入 i 學院 完成任何一個**人工智能推薦課程**(新)

使用量[3]最高的首 100 位營業同事可獲得以下獎品。

| 排名 | 獎品 |
|---|---|
| 第 1 名<br>(必須完成最少 20 個 iSay 文章分享) | **iPhone 16 Pro 512GB (1 部)** |
| 第 2 - 3 名 | **Klook 旅遊現金禮券 HK$1,000** |
| 第 4 - 100 名 | **百佳超級市場 HK$50 現金券** |

**備註:**

1. 不包括 SEP
2. 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。
3. 使用量 = 3 月期間iSay 「友分享」文章分享次數+ i學院 人工智能推薦課程完成次數。
4. 已於 2025 年 2 月 28 日或以前於iSay「友分享」之文章分享及完成 i學院 人工智能推薦課程將不獲計算。
5. 於競賽期內重複分享iSay 「友分享」文章予同一客戶或準客戶，均計算為一次。
6. 如有出現賽果相同之情況，排名將以營業同事之iSay「友分享」文章分享**總次數較多**為先。
7. 有關獎品安排將會在最終競賽結果公布中確定，相關獎品將於 2025 年 4 月內發放。
8. **一經發現不誠實使用 iSay 友分享，將取消競賽資格。**

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## *附錄 1：iSay分享流程*

### 分享「一對一」專屬鏈結




**一般規則：**

1. 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**。
2. 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。
3. 所有獲獎者必須於獎賞發放時仍與AIA持有效合約。
4. AIA保留隨時修改競賽規則或獎賞之權利(例如獎品有機會以現金發放)，恕不另行通知。
5. 如有任何異議，以AIA最後決定為準。

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## *附錄2：i 學院 人工智能推薦教學*




**完成人工智能推薦課程方法：**

1. 登入i學院，點擊"人工智能推薦"。
2. 選擇網上人工智能推薦學習課程。
3. 開始網上學習課程，完成網上學習課程。
4. **當課程右上角會顯示為 "已經完成"，方計算為完成一個人工智能推薦課程。**
5. 如有任何異議，以AIA最後決定為準。

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## Digital Active – March Top 100 Award

**Eligibility:**
All Financial Planners(1) and Agency Leaders

**Contest Period:**
1st Mar 2025 – 31st Mar 2025

**Contest Rules & Prizes:**
Financial Planner using below platforms at least once during contest period.

**iSay(2):** Share iSay contents via "Share 1-on-1 unique link" or "Other" button via iSay platform
**iAcademy AI Personal Recommendation:** Completed any AI Personal Recommendation Training (New)

The Top 100 Financial Planners with highest usage(3) will be awarded below prize.

| Rank | Prize |
|---|---|
| 1st (Shared at least 20 iSay contents) | **iPhone 16 Pro 512GB x 1** |
| 2nd – 3rd | **Klook Travel Cash Coupon HK$1,000** |
| 4th - 100th | **PARKnSHOP Gift Voucher HK$50** |

**Remarks:**

1. SEP is excluded in this contest.
2. Financial Planners should check if customer/prospect have opt-out from company information before sharing post(s) via iSay platform.
3. Usage = number of iSay content shared + number of iAcademy AI Personal Recommendation training completed in March
4. Shared iSay content and completed iAcademy AI Personal Recommendation training on or before 28th Feburary 2025, will NOT be counted.
5. During contest period, repeating share to one existing customers/ prospects only count as once.
6. In case of tied results, ranking will be based on the **higher of total number of iSay contents shared**.
7. Prize arrangement will be confirmed when final results is released. Prize will be released within April 2025.
8. **Participants will be disqualified for using iSay with dishonest intent.**

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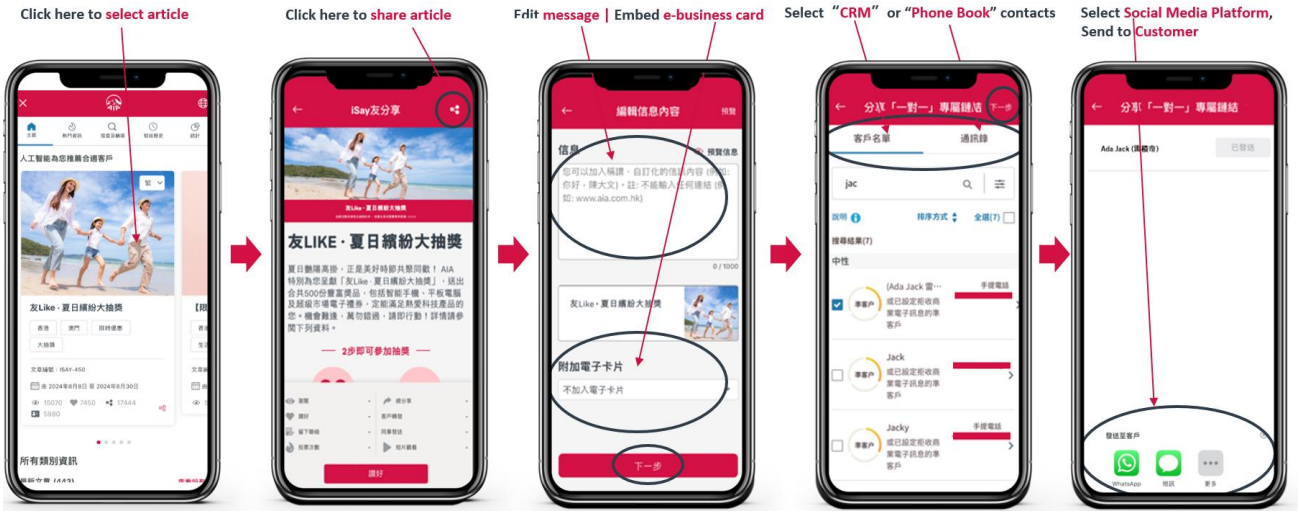
*APPENDIX 1: Instruction on iSay Sharing:*

## Share 1-on-1 unique link




General Rules & Regulations:

1. Sales representative should check if customer/prospect have opt-out from company information before sharing post(s) via iSay platform.
2. Cooling-off policies are excluded. AIA will reserve the right to not offer / claw back the awarded gifts or same value of the awarded gifts after cooling-off period.
3. Qualifiers must be inforce in AIA at the time the awards are paid out / redeemed.
4. 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.
5. In the event of dispute, AIA's decision is final and conclusive.

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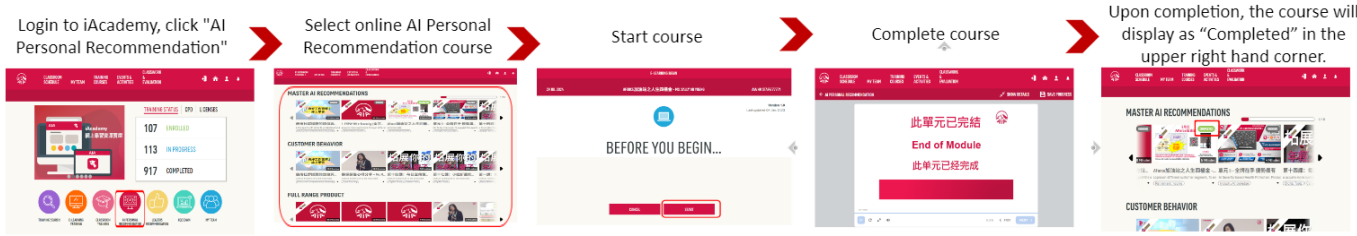
*APPENDIX 2：: Instruction on iAcademy AI Personal Recommendation Training*




**How to complete online course in AI Personal Recommendation Training:**

1. Login to iAcademy, click "AI Personal Recommendation."
2. Select online AI Personal Recommendation course.
3. Start and complete the course.
4. **The course will display as "Completed" in the upper right corner and count as one completed course.**
5. In the event of dispute, AIA's decision is final and conclusive.

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