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Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**From:**	Angela Yeung
		Dept:	Customer and Marketing
Copy:	Mr. Alger Fung Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	5
Date:	15 May 2025		
Subject	**A250527**		

自動化「型」銷
i-Intelligent Event Trigger

深化
現有客戶



自動化「型」銷



為進一步支援財務策劃顧問把握機會接觸客戶拓展銷售商機，**自動化「型」銷於 2025 年再接再厲推出**！
有助鼓勵現有客戶因應保障需要「再次投保」。

為配合業務發展，自動化「型」銷推廣會適時作出調整及更改，敬請留意。

1. **自動化「型」銷 詳情：**

推廣期	由即日起至 2025 年 12 月 31 日 (包括首尾兩日) 我們將於每月發送推廣活動資訊給以下條件的「特選客戶」(保單持有人) • 持有有效電郵地址(eDM) (附錄 1) • 沒有要求拒收宣傳信息 • 香港或澳門的客戶，並持有最少 1 張仍生效之 AIA 保單 • 客戶的身份證明文件資料必須存錄於 AIA • **符合指定銷售機遇的準則** (詳情請參考自動化「型」銷列表)
特選客戶名單	客戶名單將於2025年5月內上載至以下專頁 • iEngage CRM > 進階搜尋 > AIA 保單資料 > 推廣活動 • iPoS > 推廣活動及銷售機遇 > 銷售機遇 • AIA Smart > 推廣活動及銷售機遇 > 銷售機遇

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2. **自動化「型」銷列表**

	自動化「型」銷	詳細/ 客戶行為分析
1.	更改地址	客戶於上一個月更改地址紀錄
2.	歡迎 AIA 新客戶	在上一個月第一次購買 AIA 保單之客戶
3.	給承讓人之電子保費現金券提示	提醒在 10 日前已接收電子保費現金券之客戶在到期日前儘快使用

3. **財務策劃顧問提示訊息**

途徑: iEngage CRM / iPoS/ AIA Smart

財務策劃顧問可於 iEngage CRM, iPoS 及 AIA Smart瀏覽銷售機遇之特選客戶名單，及客戶對推廣的興趣。

- **iEngage CRM > 進階搜尋 > AIA 保單資料 >推廣活動**
- **iPoS >推廣活動及銷售機遇 >銷售機遇**
- **AIA Smart >推廣活動類別 > 銷售機遇**

其他注意事項：

1. 香港及澳門財務策劃顧問只能於所屬營業牌照境內推行進行受規管活動。所有銷售活動及投保申請必須在香港或澳門境內進行。
2. 財務策劃顧問必須遵守「為抵港抵澳內地人士銷售保險業務的營運指引」及「抵港抵澳內地人士認證手續之工作流程」。
3. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。如是，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動的優惠)。
4. 財務策劃顧問必須根據客戶實際需要而建議合適產品。如該產品屬於須要完成財務需要分析之產品，財務策劃顧問必須於進行產品推介或銷售前與客戶完成相關之財務需要分析 。
5. 財務策劃顧問需提示客戶，討論保險產品或提供保險產品建議是受管制的活動，除非獲得保險業監管局/監管機構的許可，否則不能就保險產品進行討論或建議。 客戶應向財務策劃顧問查詢。

請把握銷售良機，盡快與客戶聯絡及跟進！

如有任何疑問， 請電郵至 AIAHK.CustomerExperience-ECM@aia.com。

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i-Intelligent Event Trigger



To support Financial Planners in grasping the chance to reach out to customers and explore sales opportunities and encourage customer to purchase based on their needs, we are proud announce that the **i-Intelligent Event Trigger** will be continuously launched in 2025.

Aligning with overall business development, please note that i-Intelligent Event Trigger may subject to changes and revision.

1. Details of i-Intelligent Event Trigger

Promotion Period	From now to 31 December 2025 (both dates inclusive) Monthly promotion message will be blasted to selected customers that fulfils the following requirements (policyholder) via email • email address (applicable for eDM) (Appendix 1) • without opt-out for promotion message • Hong Kong or Macau customers with at least one in-force AIA policy • Customers must have a valid identity document information recorded in AIA • Has met the criteria of Event Trigger sales opportunity (For details, please refer to "The i-Intelligent Event Trigger details")
Selected customer list	Customer list will be uploaded to the below pages in May 2025: • iEngage CRM > Advanced Search > AIA Policy Information > Campaigns • iPoS > Leads & Campaigns > Sales Opportunities • AIA Smart > Campaigns Type > Sales Opportunities

2. The i-Intelligent Event Trigger details

	Event Triggers	Details/ Customer Behaviour
1.	Address Update (New Home)	Customer who has updated the address record in previous month
2.	Policy onboarding (First month)	Greet new customers who have purchased first AIA policy in previous month
3.	e-Premium Coupon Reminder for Transferee	Remind customers who have received e-Premium Coupons 10 days ago to use them in time

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3. Notification to Financial Planners

Location: iEngage CRM / iPoS/ AIA Smart
Financial Planners can browse the selected customer list in iEngage CRM, iPoS and AIA Smart and respective customer responses to the promotion message to follow up with the target customers.

- **iEngage CRM > Advanced Search > AIA Policy Information > Campaigns**
- **iPoS > Leads & Campaigns > Sales Opportunities**
- **AIA Smart > Campaigns Type > Sales Opportunities**

Points to Note:
1. The Financial Planners in Hong Kong and Macau can only conduct regulated activities within the territory of their business license. All solicitation activities and insurance application must be conducted in Hong Kong or Macau territory.
2. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants / Policyowner From PRC" and "Guidelines for Sales and Marketing to PRC prospects".
3. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If yes, please do not conduct direct marketing before obtaining explicit consent from customers (including the promotional activities)
4. Financial Planners must recommend suitable products based on the actual needs of customers. If the product requires the customer to complete the Financial Needs Analysis (FNA), the Financial Planners must complete the relevant FNA before recommendation of products or sales.
5. Financial planners please remind customers that discussions or advice on insurance products is a regulated activity and is prohibited unless the appropriate license is obtained from the Insurance Authority / Regulator. Customers should contact Financial Planner if they have any queries.

Please grasp the opportunity and follow up with your customers now!

Should you have any queries, please email to AIAHK.CustomerExperience-ECM@aia.com .

Best regards,

Angela Yeung
Head of Digital & Design Experience

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附錄 1 - 發出予客戶之自動化「型」銷電郵範本
Appendix 1: i-Intelligent Event Trigger - Sample email to customers

Sample



Sample



Sample



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