AIA Hong Kong
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Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners (Hong Kong and Macau)	From	:	Amy Chan
Co/Dept	:	Mr. Alger Fung/ Mr. Louie Ho/ All Department Heads/ ABDD Executives	Dept	:	Management Team
Date	:	2 January 2026	Total page	:	7 + Appendix
Subject	:	**(A260129) 8 大任務極速起動挑戰賽 - Serve to Sales 2.0** **8 Missions Fast Start Challenge - Serve to Sales 2.0**			

2026年已揭開序幕，機會就在此刻！

今年，讓我們以**「全心為客，堅守使命」**為目標，充分運用**「CRM 客戶關係管理平台」**的強大功能，精準掌握每個關鍵時刻，**主動關懷客戶，將每一次互動轉化為信任與成果**。為鼓勵大家積極使用CRM平台，我們特別推出**「8大任務極速起動挑戰賽」**，只要快速起動，透過CRM與客戶互動，就有機會贏得豐富獎品！

由 1 月 1 日起，目標客戶名單將會於 AIA Smart 及 iPoS 發布。緊接其後，精準的目標客戶名單亦會由 1 月 12 日起，**逢指定星期一上載至「CRM 客戶關係管理平台」**，方便大家跟進。

首 2,300 名營業同事只要在競賽期內完成指定任務，即可獲「友邦嘉年華」門票 2 張 (每張連 10 個代幣)。如公司於競賽期完結前已達到限定名額，當天完成任務之營業同事皆可獲得獎賞。

讓我們馬上從服務出發，迎向更豐盛的成果，使 2026 成為收穫滿滿的一年！

Amy Chan
Chief Agency Officer
Agency Distribution
Hong Kong and Macau

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只限合資格之財務策劃顧問

8 大任務極速起動挑戰賽 – Serve to Sales 2.0

競賽資格：

特選財務策劃顧問可於 AIA Smart、iPoS 及「CRM 客戶關係管理平台」中存取以下客戶名單：

- [Recapture] 推廣活動 – 尊貴 (VIP) 特選客戶名單
- [Recapture] 2026年1-3月重點客戶名單
- [Recapture] 2025年重點客戶名單
- 2026年高端客戶名單 (1-3月)
- 2026年高購買潛力客戶名單 (1-3月)
- [優易/簡易核保] 2026年重點客戶名單 (1-3月)
- 特選危疾/醫療優易核保優惠 - 特選現有客戶名單
- 特選危疾/醫療簡易核保優惠 - 特選現有客戶名單

競賽日期：

2026年1月1日至1月23日

競賽規則：

競賽期間，目標客戶名單將會於AIA Smart、iPoS 及「CRM 客戶關係管理平台」發布，方便分流及跟進。

- 甲部分目標客戶名單：2026年1 月 1 日起，將上載至 AIA Smart 及 iPoS。
- 乙部分目標客戶名單：2026年1 月 12 日起，於指定星期一上載至「CRM 客戶關係管理平台」
- **詳情請參閱附錄 1【目標客戶名單】**

首2,300營業同事於競賽期間內，**與所獲派的目標客戶**[1]完成**任何 4 種不同的指定任務**，即可獲得：

- **「友邦嘉年華」門票2張 (每張連10個代幣)**
- **詳情請參閱附錄 2【競賽要求】- 8大任務**

名額有限，先到先得！

如 2,300 得獎名額於競賽期完結前已達到，**於同一日**完成任務之營業同事皆可獲得獎賞。

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註解：

1. ǂ目標客戶是指**目標客戶名單上的客戶**。（請參閱附錄 1：【目標客戶名單】）
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 4）
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 5）
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。於競賽期前發送的 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. **競賽要求項目 1 及 4 只適用於**乙部分的目標客戶名單**，即上載於「CRM 客戶關係管理平台」的指定客戶名單。（請參閱附錄 1：【目標客戶名單】）
9. 競賽要求以競賽期最後一天為限時，及由名單上載日起開始計算。
10. 如獲派多於一位目標客戶ǂ，營業同事可與同一位或不同目標客戶ǂ完成自選的 4 種**不同指定任務**。惟若與不同客戶重複完成同一項目，亦只會視作完成一種項目。此外，**競賽期以外**所完成的項目將不獲計算。
11. 目標客戶ǂ於競賽期間再投保的保單須於 2026 年 1 月 23 日或之前繕發，營業同事須獲成功繕發/生效最少 1 張再投保的保單。

一般規則

1. 所有再投保的保單包括 AIA「個人人壽」/「個人意外」保單基本計劃及附加契約。
2. 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/取消保單，並再次投保相同產品計劃，其保單將不獲計算。
3. 所有由現有保單轉換/退保後同一受保人之保單將不獲計算。
4. 若兩位或以上之營業單位主管/財務策劃顧問共同完成 1 張保單，將平均計算予各人。競賽期完結時，若保單數目總數為點數，數目將下調為整數計算。
5. 同一受保人於競賽期內投保同一基本計劃及同一保費繳付年期之所有新保單，將以一張保單計算。
6. 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。

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7. 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。
8. 競賽結果以保單冷靜期後作調整為準。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。
9. 若保單生效期 24 個月內出現之斷供或保費減額超過或等於競賽期內人壽及個人意外保險首年佣金（FYC）之百份之十五，公司有權根據調整後的 FYC 重新計算相關的花紅金額，以 AIA 最後決定為準。
   無論營業同事當時仍否與 AIA 持有效合約，若調整前後的花紅金額存在差異，公司將扣除相關花紅差額。
10. 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。
11. 無論是免費或從公司購買的公司內部門票，均不能以任何形式轉售他人，亦不得以活動門票作為招徠以營銷保單，包括但不限於：
    - 在保險產品的營銷、推廣或分銷過程中為客戶或潛在客戶送贈禮品，作為誘使/答謝客戶或潛在客戶投購保險產品（保險業監管局 - 指引 25《送贈禮品指引》）；及
    - 未經公司批准或同意，向任何人士轉售活動門票以獲取利益；及
    - 無論能否獲取任何得益或回報，未經公司批准或同意，以任何形式 (包括於社群媒體以抽獎、競賽、遊戲方式)向客戶或潛在客戶送出活動門票。

    詳情請參閱通告 A250463。
12. 所有獲獎者必須於獎賞發放時仍與 AIA 持有效合約。
13. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
14. 如有任何異議，以 AIA 最後決定為準。

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For Selected Financial Planners Only

8 Missions Fast Start Challenge - Serve to Sales 2.0

Eligibility:
Selected Financial Planners who have been assigned the following customer lists onto AIA Smart, iPoS and CRM:

- Recapture Promotion – VIP Selected Customer List
- (Recapture) 2026 Jan-Mar Selected Customers
- (Recapture) 2025 Selected Customers
- 2026 High-value Customers (Jan-Mar)
- 2026 High Propensity Customer (Jan-Mar)
- (Simplified/Preferential UW) 2026 Selected Customer (Jan-Mar)
- Preferential Underwriting Offer for Selected CI/ Medical - Selected Customer List
- Simplified Underwriting Offer for Selected CI/ Medical - Selected Customer List

Contest Period:
1 January – 23 January 2026

Contest Rules & Lucky Draw Prizes:
During the contest period, customer lists will be uploaded onto AIA Smart, iPoS, and CRM to facilitate follow-up.

- The Target Customer List - Part A: upload to AIA Smart and iPoS on 1st January 2026
- The Target Customer List - Part B: upload to CRM on 12th January 2026
- Please refer to **Appendix 1: Targeted Customer Lists** for details

The **first 2,300** financial planners to complete **any 4 different missions** with their target customers* will be rewarded:

- **2 "AIA Carnival" tickets (each ticket includes 10 tokens)**
- Please refer to **Appendix 2: Contest Requirement – 8 Missions** for details

The prizes are subject to availability and on a first-come, first-served basis.

If the quota of 2,300 winners is reached before the end of contest period, all financial planners who successfully achieved **on the same day** will also be eligible for the reward.

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Remarks:

1. ‡Target customers are referring to those on the **Targeted Customer Lists**. (Please refer to Appendix 1: Targeted Customer Lists)
2. *"Contact customer" light in CRM turned green is considered successful. (Please refer to appendix 4)
3. # "Submit iFHC" light in CRM turned green is considered successful. (Please refer to appendix 5)
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 the contest period 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 Lists 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. **Contest requirement - items 1 and 4 are applicable only to **Targeted Customer Lists – Part B**, i.e., the selected customer lists on CRM. (Please refer to Appendix 1: Targeted Customer Lists)
9. The Contest Requirement applies from the list upload date until the final day of the contest period.
10. If assigned multiple target customers‡, you may choose to complete the 4 different items with the same target customer‡ or across different target customers‡. However, completing the same type of item with different customers will only count as completion of one item. Only items completed **within the contest period** will be eligible.
11. Successful repurchase with target customers‡ within contest period, new policy must be issued on or before 23 January 2026 and financial planner must have at least 1 issued repurchase policy.

General Rules & Regulations:

1. Repurchase new policy on all Life, Life A&H Riders, Standalone Life A&H, PA, will be counted.
2. Producers who have submitted policies/policies issued before the contest period but withdraw the captioned policy applications/cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding case/FYC will not be counted.
3. Cases changed/lapsed from existing policies of the same insured will not be counted.
4. Joint policies will be shared evenly among the co-producers. Cases will be counted according to total no. of cases rounding down into an integer after contest completion.
5. Policies under the same insured for the same basic plans and with same premium pay period, which are issued within the contest period will be counted as one case.
6. 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.
7. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
8. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the award based on the result and any substantiated violations of required sales conduct.

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9. Subject to company's discretion, should any policies lapsed or premium reduced within 24-policy months, given the amount is greater than or equal to 15% of Life & PA FYC generated within the contest period, the corresponding Bonus will be re-assessed in accordance with the total net FYCB after adjustment. Any adjustment on Bonus amount in the results, will be clawed back regardless the producer is still inforce in AIA or not at the time being.
10. All privileges are not refundable, transferrable nor payable, program is subject to AIA's final decision.
11. Re-selling of AIA Event/Sponsored Event's internal ticket, no matter they are free or bought from the Company, is prohibited in any forms; nor using event tickets as a solicitation to market insurance policies, including but not limited to:
    - offering gifts to clients / potential clients, as inducements to / rewards for clients' subscription of insurance policies (Insurance Authority's GL 25 – "Guideline on Offering of Gifts"); AND
    -reselling event tickets to anyone for benefit without Company's approval; AND
    -giving out tickets to clients or potential clients in any way (including lucky draws, contests, or games on social media) without Company's approval, whether any benefit or reward can be obtained
    Please refer to memo A250463 for more details.
12. Qualifiers must be inforce with AIA at the time the awards are paid out/ redeemed.
13. 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.
14. In the event of dispute, AIA's decision is final and conclusive.

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附錄 1：【目標客戶名單】

Appendix 1: Targeted Customer Lists

目標客戶名單			
甲.	客戶名單會上載至 AIA Smart 及 iPoS：（請參閱附錄操作流程） - *AIA Smart > 推廣活動類別 >客戶名單* - *iPoS > 推廣活動及銷售機遇 > 客戶名單*		
上載日期	目標客戶名單名稱		
	[Recapture] 推廣活動 – 尊貴 (VIP) 特選客戶名單	特選危疾/醫療優易核保優惠 - 特選現有客戶名單	特選危疾/醫療簡易核保優惠 - 特選現有客戶名單
1 月 1 日	✔	✔	✔

乙.	客戶名單會上載至「CRM 客戶關係管理平台」： - *iEngage > CRM > 進階搜尋 > AIA 保單資料 > 推廣活動 > 客戶名單*				
上載日期（競賽期內逢星期一上載）	目標客戶名單名稱				
	[Recapture] 2026 年 1-3 月重點客戶名單	[Recapture] 2025 年重點客戶名單	2026 年高端客戶名單 (1-3 月)	[優易/簡易核保] 2026 年重點客戶名單 (1-3 月)	2026 年高購買潛力客戶名單 (1-3 月)
1 月 12 日	✔	✔	✔	✔	✔
1 月 19 日			✔	✔	✔

Targeted Customer Lists			
A.	Target customer lists will be uploaded on AIA Smart and iPoS: (Please refer to appendix) - *AIA Smart > Campaign Type > Customer List* - *iPoS > Leads & Campaigns > Customer List*		
Upload Date	Targeted Customer List Name		
	Recapture Promotion – VIP Selected Customer List	Simplified Underwriting Offer for Selected CI/Medical – Selected Customer List	Preferential Underwriting Offer for Selected CI/Medical – Selected Customer List
1st Jan	✔	✔	✔

B.	Target customer lists will be uploaded on CRM: - *iEngage > CRM > Advanced Search> AIA Policy Information > Campaigns > Customer List*				
Upload Date (Mondays within Contest Period)	Targeted Customer List Name				
	(Recapture) 2026 Jan-Mar Selected Customers	(Recapture) 2025 Selected Customers	2026 High-value Customers (Jan-Mar)	(Simplified/Preferential UW) 2026 Selected Customer (Jan-Mar)	2026 High Propensity Customer (Jan-Mar)
12th Jan	✔	✔	✔	✔	✔
19th Jan			✔	✔	✔

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附錄2：【競賽要求】- 8大任務
Appendix 2: Contest Requirement – 8 Missions

項目	競賽要求 - 8大任務
1**	於競賽期間內成功*使用CRM聯絡目標客戶‡（請參閱附錄操作流程）
2	於競賽期內成功分享iSay 文章+予目標客戶‡
3	於競賽期內成功發送iFHC 報告#（請參閱附錄操作流程）
4**	於競賽期內約見目標客戶‡，並透過iChange助目標客戶‡更新或確認聯絡資料（請參閱附錄操作流程） (請注意見面禮遇只適用於CRM上目標客戶名單的特選客戶)
5	於競賽期內透過iChange助目標客戶‡更新或確認以下**任何**一項資料：（請參閱附錄操作流程） • 更改基本計劃/附加契約 • 更改受益人/第二持有人/信託人 • 更改「個人資料用作直銷及推廣用途」 • 更換簽名簽署式樣
6	助目標客戶‡於競賽期內成功下載及登記AIA+ 賬戶
7	助目標客戶‡於競賽期間轉讓電子保費現金券及成功推薦新客購買新單^
8	助目標客戶‡於競賽期間成功再投保

競賽要求項目1及4 只適用於乙部分的目標客戶名單**，即上載於「CRM客戶關係管理平台」的指定客戶名單。（請參閱附錄1：【目標客戶名單】）

Item	Contest Requirement – 8 Missions
1**	Successfully contact* target customers‡ via CRM within contest period (Please refer to appendix)
2	Successfully shared iSay article+ to target customers‡ within contest period
3	Successfully send iFHC report# to target customers‡ within contest period (Please refer to appendix)
4**	Meetup the target customer‡ on list and help the target customer‡ update or confirm contact information on iChange within the contest period (Please refer to appendix) (Please note the Meet & Greet offer is only applicable to the selected customers under the targeted customer lists on CRM)
5	Successfully help target customer‡ update or confirm **any** below item(s) on iChange within contest period: (Please refer to appendix) • Change of Basic Plan / Supplementary Contract • Change of Beneficiary / Contingent Owner / Contingent Trustee • Change of the use of personal data for direct marketing purposes • Change of Signature
6	Target customers‡ successfully download and register AIA+ within the Contest Period
7	Target customers‡ successfully refer a new customer to purchase a new policy by transferring the ePremium coupon within Contest Period^
8	Target customers‡ successfully repurchase within Contest Period

**Contest requirement - items 1 and 4 are applicable only to Targeted Customer Lists – Part B, i.e. the selected customer lists in CRM. Please refer to appendix 1: Targeted Customer Lists for details.

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附錄 3: 使用 AIA Smart 及 iPoS 搜尋特選客戶名單
Appendix 3: Find Selected Customer List in AIA Smart and iPoS

客戶名單上載日期: 2026 年 1 月 1 日

AIA Smart → 推廣活動類別 → Recapture → Recapture 推廣活動 – 尊貴(VIP) 特選客戶名單	
AIA Smart → 推廣活動類別 → 簡易核保/優易核保 → 1. 特選危疾/醫療優易核保優惠 - 特選現有客戶名單 2. 特選危疾/醫療簡易核保優惠 - 特選現有客戶名單	

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iPoS → 推廣活動及銷售機遇 → Recapture → Recapture 推廣活動 – 尊貴(VIP) 特選客戶名單	
iPoS → 推廣活動及銷售機遇 → 簡易核保/優易核保 1. 特選危疾/醫療優易核保優惠 - 特選現有客戶名單 2. 特選危疾/醫療簡易核保優惠 - 特選現有客戶名單	

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附錄 4: 使用 CRM 聯絡名單上的客戶
Appendix 4: Contact Customers in CRM



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附錄5: 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 5: Before conducting iFHC from iPoS, it is a must to download customer profile from CRM





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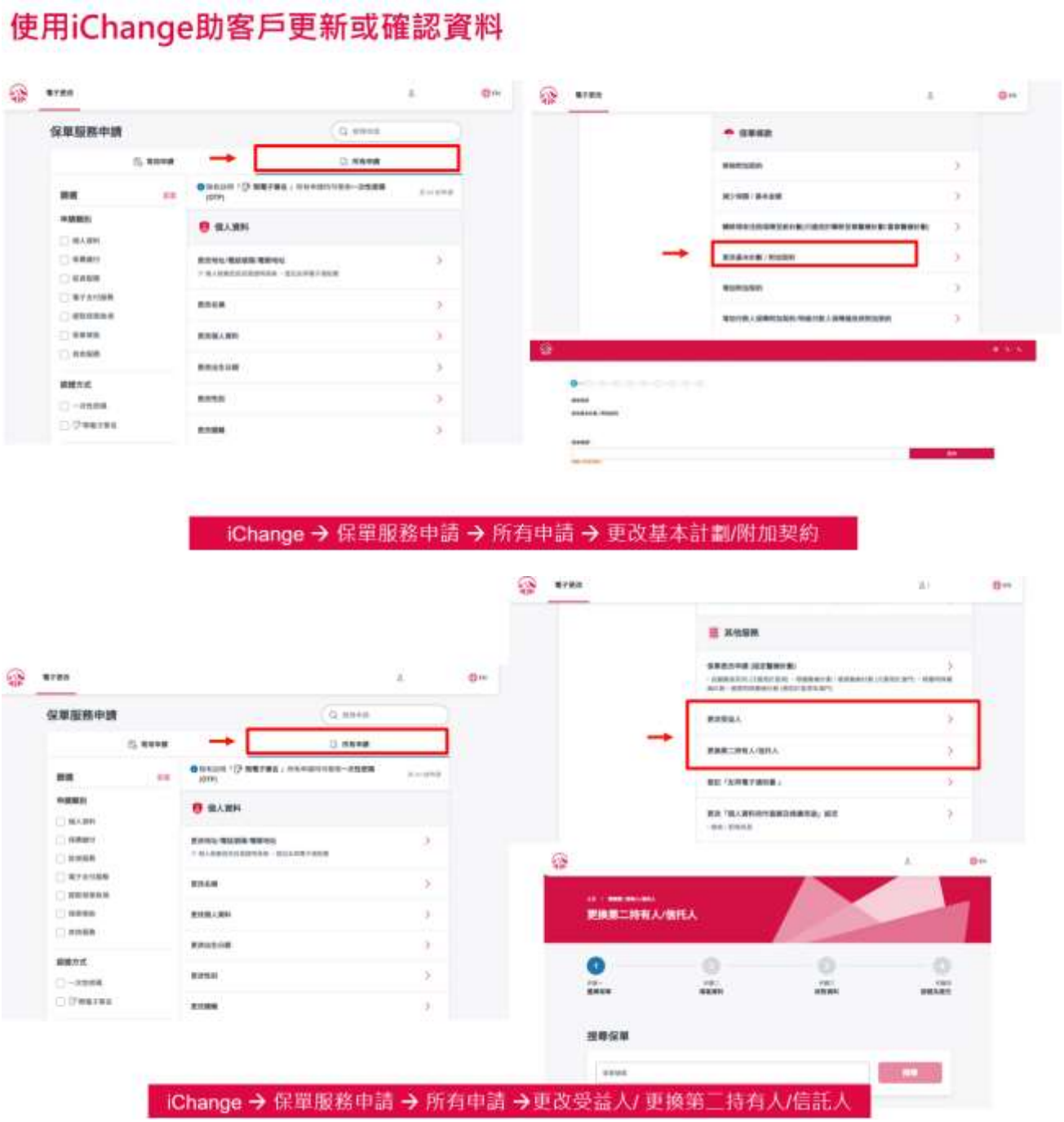
附錄6: 使用iChange助客戶更新或確認資料
Appendix 6: Use iChange to assist customer in updating or confirming information



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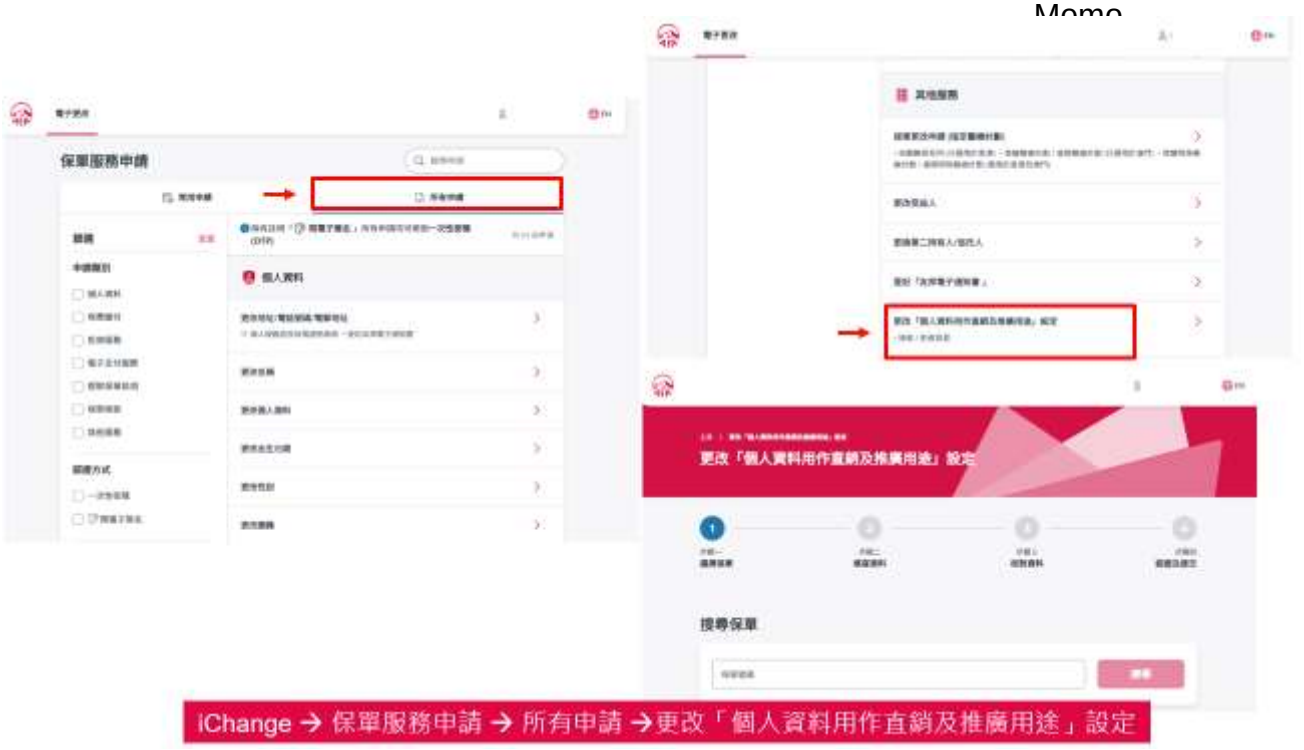



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