AIA Hong Kong

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Memo

Attn:	All EDDs & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	From:	Amy Chan
Copy:	Mr. Alger Fung / Mr. Louie Ho / All Department Heads / ABDD - Executives	Dept:	Agency Digital, Analytics, & Bus. Acquisition – Bus. Acquisition
Date:	20 May 2026	Total page:	12

Subject: (A260537) 保單分配專員計劃 Lead Assignment Specialist Program (更新)

為進一步提升現有客戶的服務標準，並確保全面符合監管機構對新服務財務策劃顧問於保單分配及相關客戶服務上的最新要求，本公司將特別推出**「保單分配專員計劃」**。

計劃涵蓋四大核心綱領，包括：(i) 優質服務、(ii) 專業培訓、(iii) 卓越業績 及 (iv) 專屬獎賞。是次計劃旨在協助財務策劃顧問及團隊透過更制度化及更高效的服務模式，為保單分配及現有客戶提供更優質及一致的體驗，達到**全心為客，堅守使命**的精神。

為鼓勵財務策劃顧問及團隊的參與，只要符合所需目標，便可尊享特別福利，提升銷售機遇。有關計劃的詳情請參閱下文。如有任何查詢，請電郵至 (AIAHK.Agency-Bus-Acquisition@aia.com)。

To enhance our service for existing customers and meet the latest regulatory requirements for Financial Planners on policy reassignment and related services, the Company will launch the **"Lead Assignment Specialist Program"**).

The Program includes four principles: (i) Quality Service, (ii) Professional Training, (iii) Outstanding Performance, and (iv) Exclusive Recognition. These areas aim to improve overall service efficiency and strengthen professional support when engaging in new business.

Financial Planners and their teams who achieve the required targets will receive exclusive benefits that help increase sales opportunities. Please see the details below. For inquiries, please email to Agency Business Acquisition Team (AIAHK.Agency-Bus-Acquisition@aia.com).

Best Regards,

Amy Chan
Chief Agency Officer
Agency Distribution
Hong Kong and Macau

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保單分配專員計劃

A. 計劃摘要

計劃日期	2026年4月1日至12月31日		
合資格財務策劃顧問及營業單位主管	AIA官方渠道銷售機遇轉介計劃	保單分配 (2026年2月1日起獲分配保單)	現有客戶
目標	24小時內聯絡準客戶比率達80%	60日內達到80%跟進率	完成*8大任務其中一項並繕發保單

*** 8大任務**

項目	8大任務
1	於計劃期內成功[a]使用CRM聯絡現有客戶[b]
2	於計劃期內成功分享iSay 文章[c]予現有客戶[b]
3	於計劃期內成功發送iFHC 報告[d]
4	於計劃期內約見現有客戶[b]，並透過iChange助現有客戶[b]更新或確認聯絡資料
5	於計劃期內透過iChange助現有客戶[b]更新或確認以下**任何**一項資料： • 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	助現有客戶[b]於計劃期內成功下載及登記AIA+ 賬戶
7	助現有客戶[b]於計劃期轉讓電子保費現金券及成功推薦新客購買新單[e]
8	助現有客戶[b]於計劃期成功再投保

有關8大任務的教學及詳細請參閱通告: A260129。

註解：

a. CRM 中「聯絡客戶」之燈號變成綠色，方能視作成功。

b. 現有客戶再投保的保單須於 **2026 年 12 月 31 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。

c. 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。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。

d. CRM 中提交「全保理財分析」(iFHC) 之燈號變成綠色，方能視作成功。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。重複建立 iFHC 報告予同一客戶或準客戶，將以一份報告計算。於計劃期前發送的 iFHC 報告將不獲計算。

e. 以現有客戶所轉贈的電子保費現金券為記錄。

f. 8 大任務要求以計劃期最後一天為限，及由名單上載日起開始計算。

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為協助財務策劃顧問及團隊透過更高效的服務模式，並成功獲得每月傑出表現及年度嘉許，計劃涵蓋四大綱領 **(i)優質服務、(ii)專業培訓、(iii)卓越業績及(iv) 專屬獎賞**支持及提升現有客戶的購買和滿意度，增強財務策劃顧問的銷售技巧，從而加速業務成果。

(i)優質服務

提供現有客戶及保單跟進指南，以整合流程與指引，確保準確性與優質服務。

1.現有客戶跟進指南:

- 協助搜尋推廣活動及目標客戶群

2.保單跟進指南:

指南概要	指南下載(6 月中上架)
更新 • 保單分配培訓及相關資料概要 • 保單分配系統 (CRM) • iSay 文章 (保單分配客戶專用) • 分配保單 - PES 可查看的主要資料 • 客戶通訊 • MPF 保單分配機制、藍十字保單分配流程、步驟總覽 • 友邦手 AIA Genie • FAQ	

(ii)專業培訓

讓財務策劃顧問精進跟進技巧，搶佔2026每季度商機。隨時在i學院複習課程要點，強化專業實力。

培訓類型:

1 **各類型工作坊**

- AIA官方渠道銷售機遇轉介計劃課程
- 保單分配課程
- Serve to Sales 拓客產品工作坊

2 **i 學院網上學習 (全年開放)**

- AIA 官方渠道銷售機遇轉介計劃課程
- 內部牌照 (89)

3 **i 學院課程 (結合保單分配專員計劃內容)**

- 招募訓練中心營業單位主管培訓課程
- 未來領袖特訓班
- 新晉財務策劃顧問課程

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(iii)卓越業績

協助財務策劃顧問贏在起跑線、專業度及長遠價值，特定安排不同類型活動，成就卓越業績三部曲: 開拓、促成、再續。

成就卓越業績三部曲	概要	活動類型及配套
1. 客源開拓	從線上帶到線下，擴大流量溫度上揚	• 全方位營銷活動 • 高端專題講座 • AIA 官方渠道銷售機遇轉介計劃，線上線下無縫轉介
2. 高效促成	360 度全面支援，建立信任精準轉化	• 實戰演練 • 一App在手隨時追蹤進度，全方位掌控銷售流程 • 隨時隨地大量工具助攻
3. 深耕再續	提升保障維度，照顧客戶所需所想	• 數據導航，精準分析現有客戶缺口**iFHC** 數碼助攻加保更易 • 深耕子彈，專屬現有客戶優惠，製造投保情緒催化成交 • 每季精選重點客戶名單

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(iv)專屬獎賞

年度競賽資格

所有財務策劃顧問及營業單位主管(以個人業績計算)

競賽日期

2026年4月1日至12月31日

競賽要求及嘉許

年度嘉許	競賽要求		
	AIA官方渠道銷售機遇轉介計劃	**保單分配**	**現有客戶**
嘉許一[2] **卓越表現獎盃嘉許, 尊享體驗通行證及頂尖精英尊享體驗 (e.g. Celebrity Meet & Greet / 雜誌專訪表揚)**	1. **首名**最高FYC Score之財務策劃顧問[1] (名額一位) 2. **首名**繕發最多保單之財務策劃顧問[1] (名額一位)	1. **首名**最高分配客戶FYC Score之財務策劃顧問[1] (名額一位) 2. **首名**最高保單跟進率之財務策劃顧問[1](名額一位)	1. **首名**最高現有客戶FYC Score之財務策劃顧問[1] (名額一位) 2. **首名**繕發最多現有客戶保單之財務策劃顧問[1] (名額一位)
嘉許二[2] **卓越表現獎盃嘉許及尊享體驗通行證**	1. 第 **2 - 5**名最高FYC Score之財務策劃顧問[1] (名額四位) 2. 第 **2 - 5**名繕發最多保單之財務策劃顧問[1] (名額四位)	1. 第 **2 - 10**名最高分配客戶FYC Score之財務策劃顧問[1] (名額九位) 2. 第 **2 - 10**名最高跟進率之財務策劃顧問[1] (名額九位)	1. 第 **2 - 15**名最高現有客戶FYC Score之財務策劃顧問[1] (名額十四位) 2. 第 **2 - 15**名繕發最多現有客戶保單之財務策劃顧問[1] (名額十四位)
嘉許三[2] **獎狀表揚**	1. 每個月成功24小時內聯絡準客戶(Act-on)達到**75%** 或以上 (綠燈) 2. 成功繕發**兩張**或以上保單	1. 直至12月31日達到**80%**跟進率 2. 成功繕發**兩張**或以上保單	N/A

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更新 年度嘉許	競賽要求		
	AIA官方渠道銷售機遇轉介計劃	**保單分配**	**現有客戶**
嘉許四[2] **傑出壽險從業員慶祝會(AAC)** **- 財務策劃顧問級別**	1. 首3名最高FYC Score之財務策劃顧問[1]	1. 首10名最高分配客戶FYC Score之財務策劃顧問[1] 2. 首10名最高保單跟進 率之財務策劃顧問[1]	1. 首10名最高現有客戶FYC Score之財務策劃顧問[1]
嘉許五[2] **傑出壽險從業員慶祝會(AAC)** **- 區域級別**		1. 首3個最高分配客戶FYC Score之區域[1] 2. 首3個最高保單跟進率之區域[1]	1. 首3個最高現有客戶FYC Score之區域[1]

備註1: 如遇相同業績，將以較多客戶者排序。

備註2: 嘉許一、二、三、四及五可同時兼得。

為鼓勵每月維持傑出表現，若當月達到以下要求，有機會獲得特別獎賞(包括慶祝派對邀請/電子宣傳嘉許)。

每月傑出表現嘉許要求:

1. **個人級別** (獎賞包括專屬襟章)

- **AIA官方渠道銷售機遇轉介計劃**
  - 過往3個月成功達到24小時內聯絡準客戶(Act-on) 75% 或以(綠燈) **及** 當月成功繕發一張或以上AIA官方渠道銷售機遇轉介計劃保單
- **保單分配**
  - 當月成功達到跟進率80% **及** 當月成功繕發一張或以上分配客戶保單
- **現有客戶**
  - 當月現有客戶新保單FYC Score達HK$108,000 或以上

2. **營業單位級別**

- **保單分配**
  - 當月成功達到跟進率80% **及** 當月成功繕發一張或以上分配客戶保單
- **現有客戶**
  - 當月首10名現有客戶新保單FYC Score之營業單位

3. **區域級別**

- **保單分配**
  - 當月成功達到跟進率80% **及** 當月成功繕發分配客戶兩張保單或以上

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一般規則：

1. 包括所有2026年2月1日多於 5 位分配客戶之財務策劃顧問。
2. 於競賽期間最多只能獲得專屬襟章一個，只適用於個人級別。
3. 每月傑出級別之獎賞不可同時兼得，以較高級別之獎賞為準。
4. 若兩位或以上之財務策劃顧問共同完成張保單，將平均計算予各人。
5. 所有獲獎者必須於獎賞發放時仍持有效合約。
6. 公司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，以公司最後決定為準。

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Lead Assignment Specialist Program

A. Program Summary

Program Period	1 April 2026 to 31 December 2026		
Eligible Financial Planners and Agency Leaders	**AIA Official Channel Leads Assignment Program**	**Reassigned Customer (Customer assigned starting from 1 February 2026)**	**Existing Customers**
Objectives	Achieved 80% 24-hours act-on rate	Achieved 80% follow-up rate within 60 days	Achieved at least one mission from the *8 missions and issued new policies

Item	8 Missions
1	Successfully contact[a] existing customers[b] via CRM
2	Successfully shared iSay article[c] to existing customers[b]
3	Successfully send iFHC report[d]
4	Meetup the target customer[b] on list and help the target customer[b] update or confirm contact information on iChange
5	Successfully help existing customer[b] update or confirm **any** below item(s) on iChange within Program period: • 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	Existing customers[b] successfully download and register AIA+
7	Existing customers[b] successfully refer a new customer to purchase a new policy by transferring the ePremium coupon[e]
8	Existing customers[b] successfully repurchase

Please refer to memo A260129 for the 8 missions step guides and details.

Remarks:

a. "Contact customer" light in CRM turned green is considered successful.
b. Successful repurchase with existing customers, new policy must be issued **on or before 31 December 2026** and financial planner must have at least 1 issued repurchase policy.
c. 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. Shared iSay content on or before Targeted Customer Lists upload date will NOT be counted. Financial Planners should check if customer/prospect have opt-out from company information before sharing post(s) via iSay platform.
d. "Submit iFHC" light in CRM turned green is considered successful. 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 will be counted as one report and iFHC reports conducted before will not be counted.
e. Tracked by ePremium Coupon transferred by Customer on list.
f. The Contest Requirement applies from the list upload date until the final day of the program period.

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To support financial planners and agency teams in adopting a more efficient service model, and to help them achieve monthly outstanding performance and annual recognition, the plan will enhance existing customers' purchasing levels and satisfaction through four principles: **(i) Quality service, (ii) Professional training, (iii) Outstanding performance and (iv) Exclusive Recognition**. This aims to strengthen the sales capabilities of financial planners and generate business.

(i) Quality Service

Guidelines for existing customer follow-up and policy follow-up will be provided to consolidate processes and instructions, ensuring accuracy and high-quality service.

1. **Existing Customer Follow-up Guide:**
   - Assist in identifying promotional campaigns and target customer segments

2. **Policy Follow-up Playbook:**

Playbook Overview	Download Playbook (Launch by mid of Jun)
• Lead Assignment Training and Related Materials Overview • Lead Assignment System (CRM) • iSay Articles (Exclusive for Lead Assignment Customers) • Lead Assignment – Key Information enquiry in PES • Customer Communications • MPF Lead Assignment Mechanism, Blue Cross Policy Assignment Process and Procedure Overview • AIA Genie • FAQ	

Update

(ii) Professional Training

Enable financial planners to enhance their follow-up skills and capture quarterly business opportunities in 2026. They can revisit key course highlights anytime on iAcademy to strengthen their professional capabilities.

Training Types:

1. **Various Workshops**
   - AIA Official Channel Leads Assignment Program training
   - Policy Assignment Courses
   - Serve to Sales – ECM & Prospecting Workshops

2. **iAcademy Online Learning (Open Year-round)**
   - AIA Official Channel Leads Assignment Program online training
   - Internal Licensing (89)

3. **iAcademy Courses (Integrated with the Lead Assignment Specialist Program)**
   - Recruitment Learning Hub
   - Hi-Po Leaders Accelerated Program
   - New Agents Training

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(iii) Outstanding Performance

Support financial planners in gaining an early advantage, enhancing professionalism, and building long-term value by arranging various types of activities. It helps achieve the three pillars of outstanding performance: Prospecting, Closing, and Repurchase.

Three Pillars of Achieving Outstanding Performance	Overview	Activity Types and Support
1. Prospecting	Driving traffic from online to offline to expand reach and warm up potential leads	• Comprehensive marketing campaigns • Premium themed seminars • AIA Official Channel Leads Assignment Program for seamless online-to-offline referral
2. Closing	360-degree support to build trust and achieve precise closing	• Practical simulation and exercises • One App to track progress anytime for full control of the sales process • A wide range of tools available anytime, anywhere to enhance efficiency
3. Repurchase	Enhancing protection levels to meet customers' needs and expectations	• Data-driven insights to analyse existing client gaps; make top-up sales easier by iFHC digital tools • Targeted offers for existing customers to create purchase intent and accelerate closing • Priority customer lists for every quarter

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(iv) Exclusive Recognition

Eligibility

All Financial Planners and Agency Leaders (based on individual performance)

Contest Period

1 April 2026 to 31 December 2026

Contest Rules & Awards

Annual Recognition	Requirements		
	AIA Official Channel Leads Assignment Program	**Reassigned Customer**	**Existing Customers**
Award 1[2] **Top producer exclusive experience (Celebrity Meet & Greet / Magazine recognition)**	1. Ranked Top **1** by AIA Official Channel Leads Assignment Program FYC Score by personal production[1] (1 winner) 2. **Top** Financial Planner with the Most Issued Cases[1] (1 winner)	1. Ranked Top **1** by Reassigned Customer FYC Score by personal production[1] (1 winner) 2. **Top** Financial Planner with the Highest Policy Follow-up Rate[1] (1 winner)	1. Ranked Top **1** by Existing Customers FYC Score by personal production[1] (1 winner) 2. **Top** Financial Planner with the Most Issued Cases[1] (1 winner)
Award 2[2] **Trophy recognition & Annual Pass**	1. Financial Planners ranked **2nd to 5th** in Highest AIA Official Channel Leads Assignment Program FYC Score[1] (4 winners) 2. Financial Planners ranked **2nd to 5th** with the Most Issued Cases[1] (4 winners)	1. Financial Planners ranked **2nd to 10th** in Highest Reassigned Customer FYC Score[1] (9 winners) 2. Financial Planners ranked **2nd to 10th** in Highest Follow-up Rate[1] (9 winners)	1. Financial Planners ranked **2nd to 15th** in Highest Existing Customers FYC Score[1] (14 winners) 2. Financial Planners ranked **2nd to 15th** with the Most Issued Cases[1] (14 winners)
Award 3[2] **Certification recognition**	1. Achieve **75%** or above monthly 24-hours act-on rate respectively, i.e., obtain all "Green Light" in every monthly performance during the program period 2. Convert **two or more cases** from the prospect leads	1. Achieve **80%** follow-up rate as of 31 Dec 2026 2. Issued **two or more cases**	N/A

NEW

Annual Recognition	Requirements		
	AIA Official Channel Leads Assignment Program	**Reassigned Customer**	**Existing Customers**
Award 4[2] Annual Awards Celebration (AAC) - Financial Planner Level	1. Ranked Top **3** by AIA Official Channel Leads Assignment Program FYC Score by personal production[1]	1. Ranked Top **10** by Reassigned Customer FYC Score by personal production[1] 2. Ranked Top **10** Financial Planner with the Highest Policy Follow-up Rate[1]	1. Ranked Top **10** by Existing Customers FYC Score by personal production[1]

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Award 5[2] Annual Awards Celebration (AAC) - District Level		1. Ranked Top **3** by Reassigned Customer FYC Score by district production[1] 2. Ranked Top **3** District with the Highest Policy Follow-up Rate[1]	1. Ranked Top **3** by Existing Customers FYC Score by personal production[1]

Note 1: Priority will be given to the qualifier with the higher customer count when performance results are identical.
Note 2: Awards of 1,2, 3, 4 and 5 can be entitled simultaneously.

To encourage outstanding performance each month, financial planners and agency leaders who meet the following requirements within the month may receive special rewards (including celebration party invitations/digital recognition)

Monthly Outstanding Performance Recognition Requirements:

1. **Individual Level (Award: Exclusive Pin)**
   - **AIA Official Channel Leads Assignment Program**
     - Successfully achieved Act-on Green Light contacting prospects within 24 hours for the past 3 months, **AND** Issued at least one policy
   - **Reassigned Customer**
     - Achieved 80% follow-up rate for the month, **AND** Issued at least 1 Reassigned Customer case
   - **Existing Customers**
     - Existing Customers New Business FYC Score HK$108,000 or above

2. **Agency Level**
   - **Reassigned Customer**
     - Achieved an average follow-up rate of 80% for the month, **AND** Issued at least 1 Reassigned Customer case
   - **Existing Customers**
     - Ranked Top 10 in Existing Customers New Business FYC Score

3. **District Level**
   - **Reassigned Customer**
     - Achieved an average follow-up rate of 80% for the month, **AND** Issued at least 2 Reassigned Customer cases

General Rules:
1. All Financial Planners who meet the above requirements are eligible for the contests, except those assigned fewer than five customers, from 1 February 2026.
2. Qualifiers can receive the exclusive pin only once during the contest period. Only applicable at the individual level.
3. Three levels of monthly awards are mutually exclusive, according to whichever is higher.
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. Qualifiers must be inforce with AIA at the time the awards are paid out/ redeemed.
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.