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AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

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Memo

Attn:	All EDDs & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong Region)	From:	Carol Li Chief Life Officer
Copy:	All Department Heads	Dept:	Operations
Date:	05 June 2026	Total page:	4 + Appendix
Subject:	(Ref: A260638)	預約回電服務優化及「營運精英」嘉許活動 Outbound Call Enhancement and "Operation Elite" Appreciation Campaign	

為持續提升預約回電服務體驗，我們將優化現行預約安排，旨在提升預約便利性及整體支援體驗，並更切合前線實際運作需要。與此同時，提升聊天機械人的實用效能亦同樣重要，由於 2026 年 4 月至 5 月推出的「營運解碼」系列(詳情請參閱 A260477)反應熱烈，我們特此誠意推出「營運精英」嘉許活動，讓更多財務策劃顧問深入掌握「營運解碼」內容，提升專業能力，協助高效應對日常營運挑戰。

1. 預約回電服務優化安排

由 2026 年 6 月 8 日起，我們將「預約回電服務」的預約時間劃分為**上午**及**下午**兩個時段，詳情如下：

【預約回電】服務時段	接受預約時間
上午 9 時至下午 1 時	當日上午 8 時 30 分起
下午 1 時至下午 6 時	當日下午 12 時 30 分起

此外，請留意以下事項：

- 已成功預約服務後，須待該次服務完成，方可再次預約。
- 預約時請提供**保單號碼**及**相關查詢內容**，以節省回電時查找保單號碼的時間，敬希在查詢時,可精簡內容, 以便讓整個服務流程更快捷。

2. 「營運精英」嘉許活動

於 **2026 年 6 月 8 日至 6 月 19 日**期間分兩個階段舉辦**「營運精英」嘉許活動**，活動會分為個人挑戰賽和區域錦標賽。得獎者可獲禮券獎賞和嘉許狀。

活動詳情如下：

- 活動推廣期間，聊天機械人將以**「營運解碼」**的常見問答為基礎，以進行簡短測驗

個人挑戰賽

- 第 1 階段：2026 年 6 月 8 日至 6 月 12 日
- 第 2 階段：2026 年 6 月 15 日至 6 月 19 日

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- 每階段首 100 位完成測驗並獲最高分的財務策劃顧問可獲得港幣 100 元禮券
- 每位參加的財務策劃顧問可獲得營運部發出的『電子嘉許狀』

區域錦標賽

- 最多財務策劃顧問參與的 10 個區域會獲得首席人壽營運官親自簽發的**『嘉許狀』**
- 最多財務策劃顧問參與的 3 個區域會獲得港幣 1000 元禮券

除了上述優化措施外，營運部亦將持續致力為前線財務策劃顧問提供更全面及高效的支援。未來工作的重點將聚焦於三大範疇：加強自助服務及數碼支援、提升業務便利性並簡化營運流程，以及強化前線支援能力。

在數碼支援方面，將持續優化相關平台工具及用戶體驗，以提升自助處理能力，進一步減少對人工支援的依賴；在營運流程方面，會提升跟進事項及流程的清晰度與一致性，以減少重複查詢並提高處理效率；在前線支援方面，則將加強溝通及持續收集意見，有效識別常見痛點並推動針對性改善措施。

整體而言，目標是持續提升服務效率及使用體驗，並推動營運模式不斷優化。

有關詳情，請參閱以下附錄：
附錄 1, 2, 3, 4 – 預約回電服務優化安排, 如何進入聊天機械人,「營運解碼」查詢及「 營運精英」參與方法,「 營運精英」計劃詳情

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

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To continuously enhance the outbound call booking service experience, we will refine the current booking arrangement to improve booking convenience and the overall support experience, while better addressing frontline operational needs.

At the same time, enhancing the service effectiveness of the chatbot is equally important. Following the strong response to the "Operations Decoding" series launched from April to May 2026 (please refer to A260477 for details), we are launching the "Operations Elite" recognition campaign to encourage financial planners to deepen their understanding of the "Operations Decoding" content, enhance their professional capabilities, and effectively tackle daily operational challenges.

1. **Enhanced Arrangement for Agent Outbound Call Service**

   With effect from 8 June 2026, the booking schedule for the Agent Outbound Call Service will be available in two time slots, **morning** and **afternoon sessions**, as detailed below:

Outbound Call Service Hours	Booking Opens
9:00 a.m. to 1:00 p.m.	8:30 a.m. on the same day
1:00 p.m. to 6:00 p.m.	12:30 p.m. on the same day

   Important Notes:

   - Once a booking has been successfully made, another booking can only be arranged after the scheduled outbound call service has been completed.
   - When making a booking, please provide the **policy number** and **the details of your enquiry** in order to save time locating required information during the callback. We also encourage keeping enquiries concise to streamline the overall service flow.

2. **"Operation Elite" Appreciation Campaign Quiz**

   The campaign will be held in two phases from **June 8 to June 19, 2026**, aiming to encourage financial planners to make broader use of the chatbot as a faster and more efficient self-service inquiry tool to help resolve daily operational issues. The campaign will have individual and districts competition. Winners will have voucher and certificate.

   Details are as follows:

   - During the campaign period, the chatbot will roll out short quizzes based on the FAQs from **"Operation Decoding."**

   Individual challenge

   - First Phase: June 8 to June 12, 2026
   - Second Phase: June 15 to June 19, 2026

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- The first 100 financial planners who complete the quiz with highest score in each phase will receive a HKD 100 voucher
- Each participant will receive an “e-Certificate of Appreciation” issued by Operations

Districts Championship

- The top 10 districts with the highest participation of financial planners will receive a **Certificate of Appreciation** personally issued by our Chief Life Officer
- The top 3 districts with the highest participation will each receive HKD 1,000 in vouchers

Beyond the enhancements initiatives outlined above, the Operations Team remains committed to providing financial planners with more comprehensive and efficient support. Going forward, our priorities will centre on three key areas: strengthening self-service and digital enablement, improving business convenience through streamlined operational processes, and enhancing frontline support capabilities.

With regard to digital enablement, we will continue to refine platform tools and improve the user experience to strengthen self-service capabilities and further reduce reliance on manual intervention. From an operational process perspective, we will enhance the clarity and consistency of follow-up items and workflows to reduce repeated enquiries and improve overall efficiency. In terms of frontline support, we will reinforce communication and continue gathering feedback to effectively identify common pain points and implement targeted improvement measures.

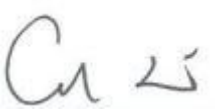
Overall, our aim is to continuously improve service efficiency and user experience, while driving the ongoing optimisation of our operating model.

For additional information, please refer to the below appendices:

- Appendices 1, 2, 3, 4 – Outbound call enhancement arrangement, Ways to access Chatbot, Ways to enquire about “Operations Decoding” and participate in the “Operations Elite” Campaign and Details of “Operation Elite” campaign

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

Best regards,



Carol Li
Chief Life Officer

AIA Hong Kong

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附件 1-「預約回電服務」優化為上午及下午兩個預約時段

Appendix 1- "Outbound Call Service" optimized into both morning and afternoon booking time slots



預約回電預約名額狀態

途徑	狀態
Outbound Call Service – Premier	尚有餘額
Outbound Call Service – MDRT	尚有餘額
Outbound Call Service – Non-MDRT	尚有餘額

備註: 狀態更新至Chatbot登入時間 2026-06-03 18:17:00

由2026 年 6 月 8 日起 ，「預約回電服務」將劃分為上午/下午2個時段

上午時段

預約回電服務為上午 9 時至下午 1 時:
接受預約時間為當日上午 8 時 30 分起

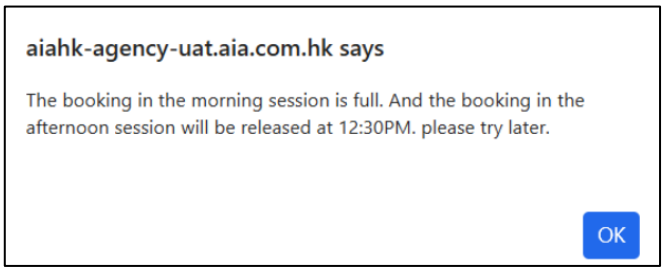
下午時段

預約回電服務為下午 1 時至下午 6 時:
接受預約時間為當日下午 12 時 30 分起

*如上午時段已滿額，系統將顯示通知。財務策劃顧問可於 12:30 下一時段開放後，預約下午回電服務。

*If the morning session is full, a system notification will appear. Agents may proceed to book the afternoon outbound service once the next session opens at 12:30. *





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附件 2- 如何於不同平台進入聊天機械人
Appendix 2- How to Access the Chatbot Across Different Platforms

聊天機械人常用入口 Chatbot entrance		
營業員專頁 (eAgency Corner)	保單查詢系統 (PES)	iEngage - iChat
		

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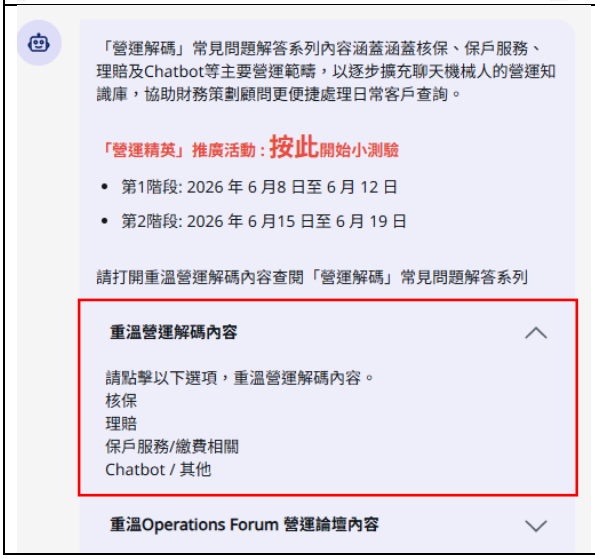
附件 3- 如何透過聊天機械人查閱「營運解碼」及完成「營運精英」推廣活動小測驗
Appendix 3- How to enquire "Operations Decoding" and participate in "Operation Elite" Quiz via Chatbot

「營運解碼」查閱方法及「營運精英」推廣活動小測驗 Access to "Operations Decoding" and "Operation Elite" appreciation campaign quiz	
	1. 進入聊天機械人 >「營運解碼」查看常見問題內容
	2. 選擇「營運解碼」選項以重溫內容

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3. 財務策劃顧問可「按此」完成小測驗

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附件 4-「營運精英」推廣活動詳情
Appendix 4- Details of "Operation Elite" Appreciation Campaign

