AIA Hong Kong
Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

Memo

Attn: All EDD & Honourable Advisors/
EDDs / PSDDs / SDDs / DDs /
MICs / Agency Leaders/
Financial Planners (Hong Kong & Macau)

From: Alfred Yip

Cc: Mr. Alger Fung / Ms. Amy Chan /
All Department Heads /
Heads of Agency Division /
Agency Business Partners

Dept: Agency Digital, Analytics,
& Business Acquisition

Date: 14 Sep 2026

Total page(s): 10

Subject: A260954 – iPA 2.0「產品類別分析」頁面升級 – 新增客戶群體篩選功能
iPA 2.0 "Product category analysis" page enhancement – New customer segment filter

iPA 2.0 業績報表現已推出全新優化功能。「產品類別分析」頁面新增客戶群體篩選，支援按**本地**、**新香港人**及**抵港內地人士**分析產品排名、以及相關首年佣金及保單數目表現。

此功能有助您聚焦核心客群的保障需求及市場趨勢，發掘業務機遇，提供更適切及全面的保障方案，精準回應客戶保障缺口。

敬請期待未來更多新功能的陸續推出！

如有任何疑問或需要支援，歡迎聯絡: hk.helpdesk@aia.com、致電財務策劃顧問 IT 熱線[香港：3108-1338 (系統技術支援)；澳門：8988-1900]或親身前往現場技術支援站查詢

Alfred Yip
Agency Digital, Analytics, & Business Acquisition

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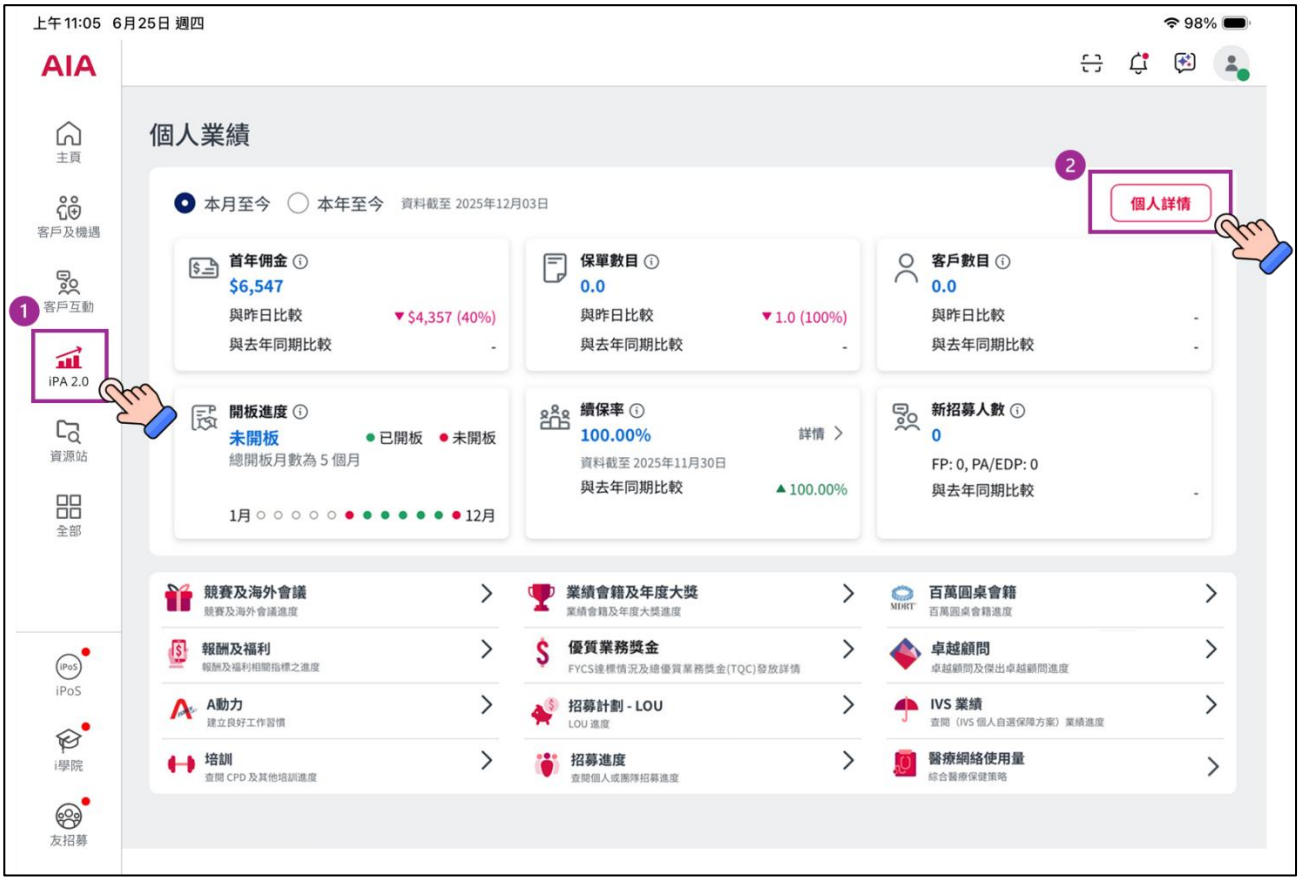
附件

如何到達 iPA 2.0 -「產品類別分析」頁面

1. 登入 AIA Smart+，點擊「iPA 2.0」進入主頁
2. 點擊「個人詳情」
3. 點擊「產品類別分析」
4. 篩選客戶群體（全部 / 本地 / 新香港人 / 抵港內地人士）
5. 查看不同產品的首年佣金表現
6. 查看不同產品的保單數目表現
7. 點擊「產品排名」
8. 查看十大產品的首年佣金排名
9. 查看十大產品的保單數目排名



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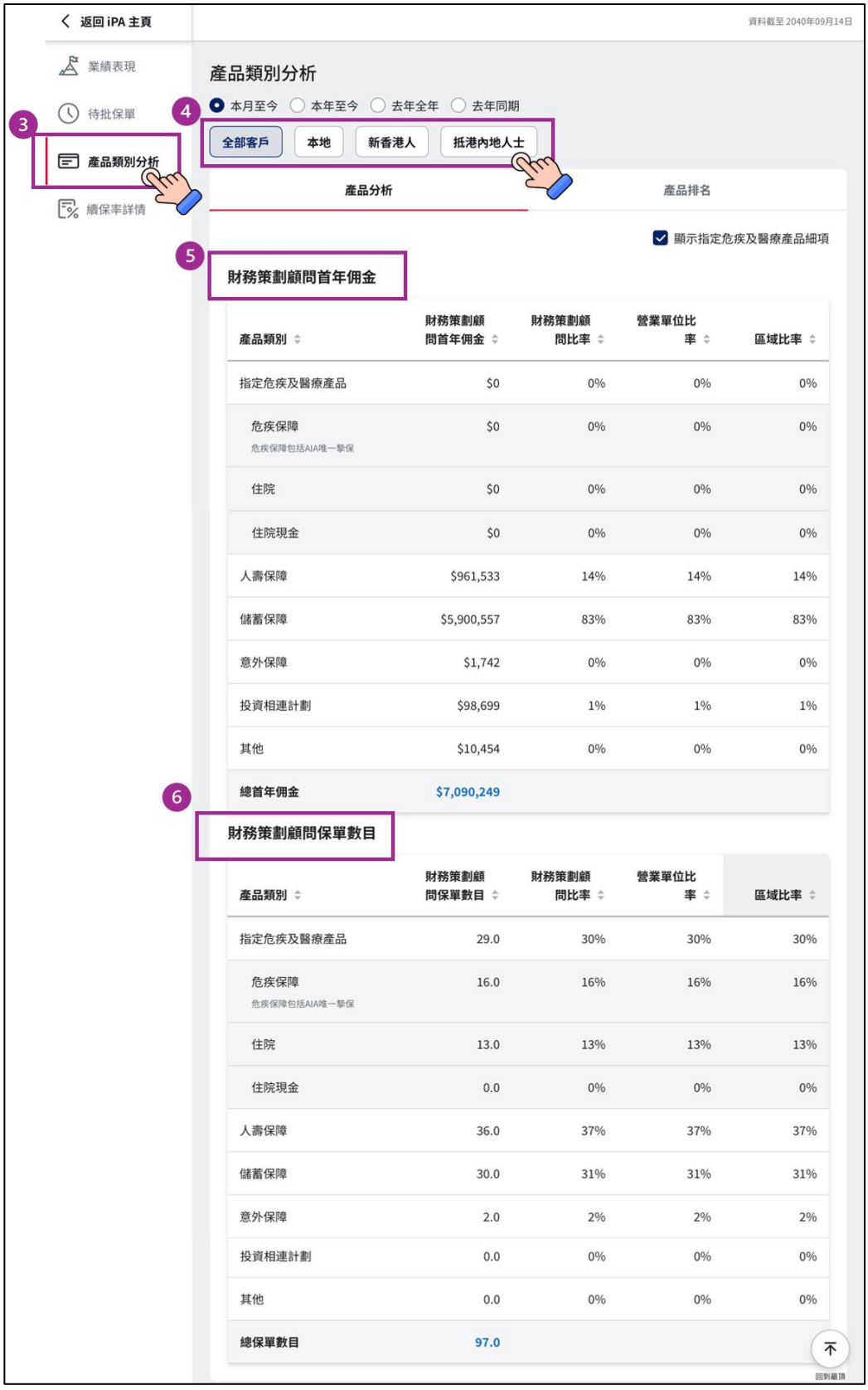

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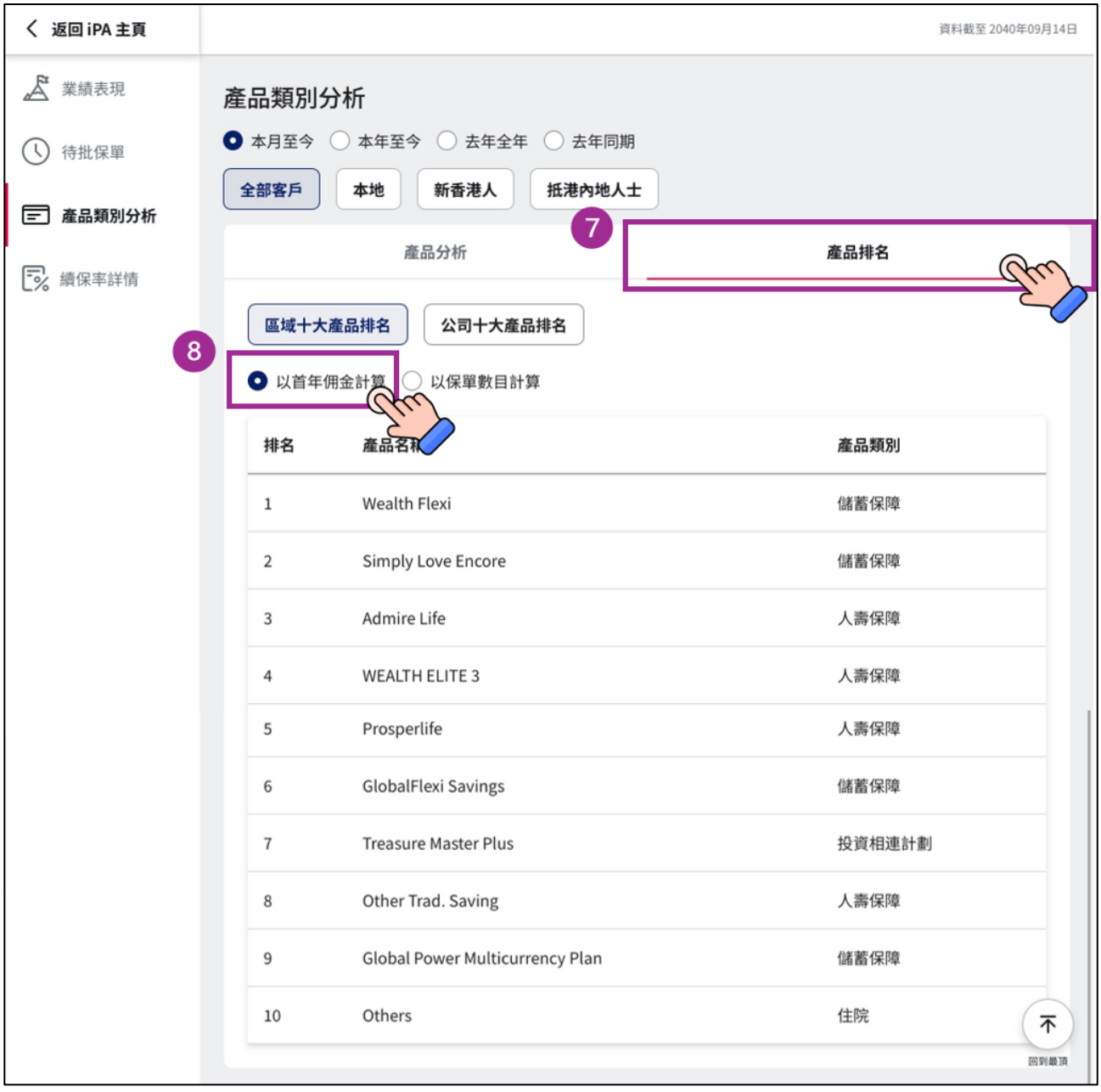

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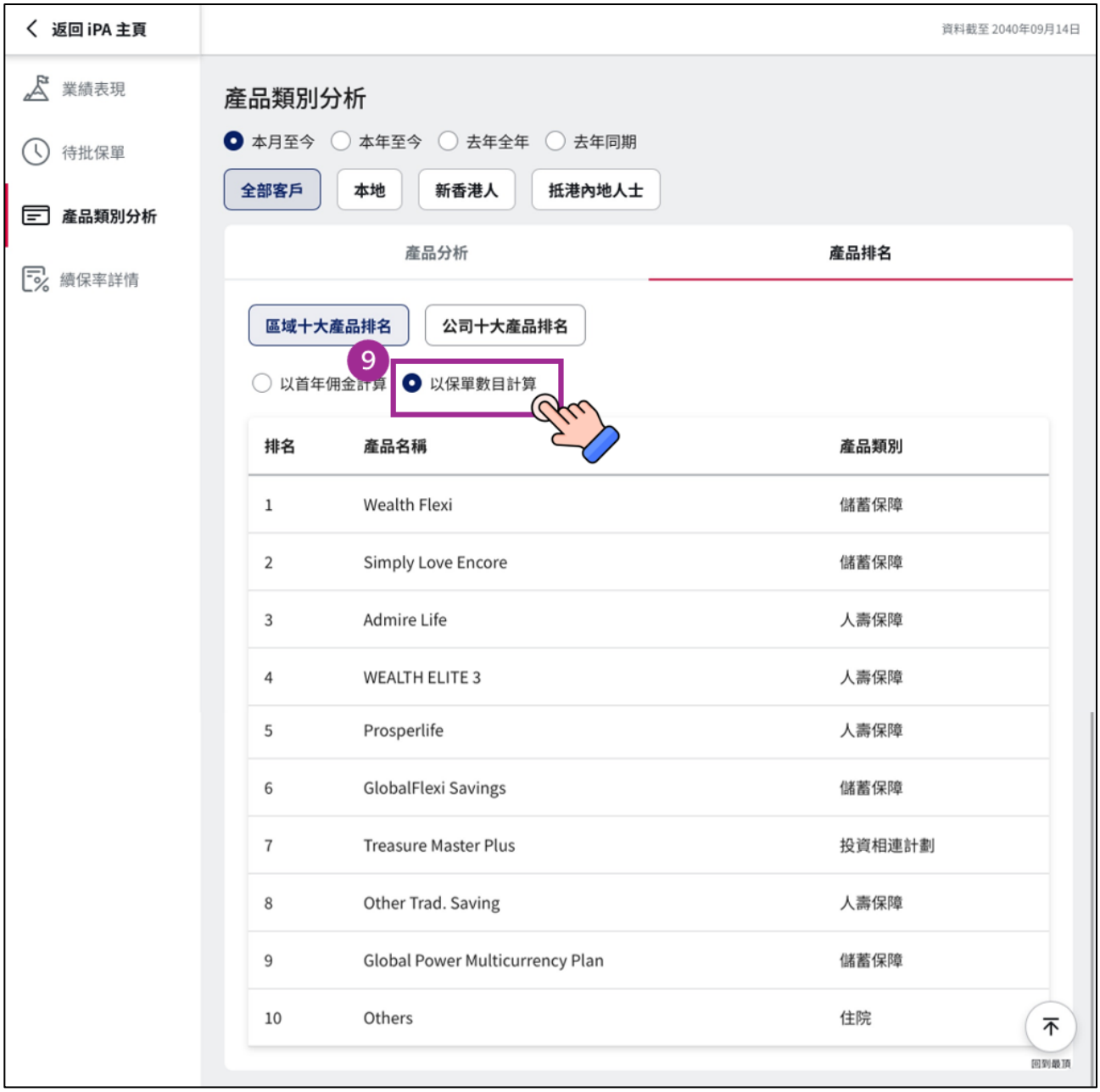

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We are pleased to announce a new enhancement to iPA 2.0 Sales Dashboard.

The “Product category analysis” page now includes a customer segment filter, enabling you to analyze product rankings, FYC and case count performance across the following customer segments: **Local**, **New Hker**, and **CMV**.

This enhancement provides deeper insights into the protection needs and market trends of key customer segments, helping you identify business opportunities, develop more targeted sales strategies, and deliver more comprehensive protection solutions to address customers' protection gaps effectively.

Please stay tuned for more features to be released in the future.

For enquiries or support, please email to hk.helpdesk@aia.com, call IT Helpdesk Hotline [Hong Kong – 3108-1338 (technical enquiries on applications); Macau – 8988-1900] or visit Operations Counter in person.

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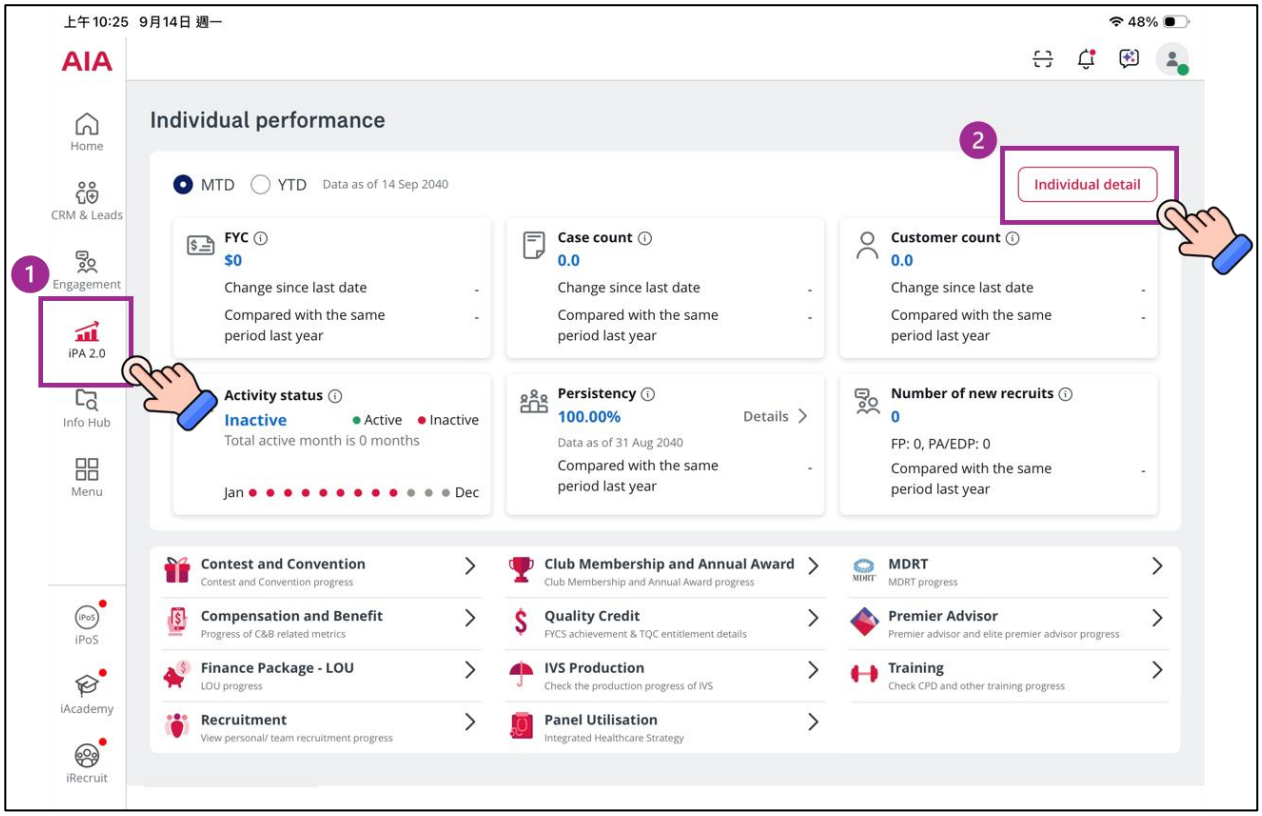
Appendix

How to access the iPA 2.0 – "Product category analysis" page

1. Log in to AIA Smart+ and click "iPA 2.0" to access the homepage
2. Click “Individual detail”
3. Click “Product category analysis”
4. Select customer segment filter (All / Local / New Hker / CMV)
5. View FYC performance by product category
6. View case count performance by product category
7. Click “Product ranking”
8. View top 10 products ranked by FYC
9. View top 10 products ranked by case count



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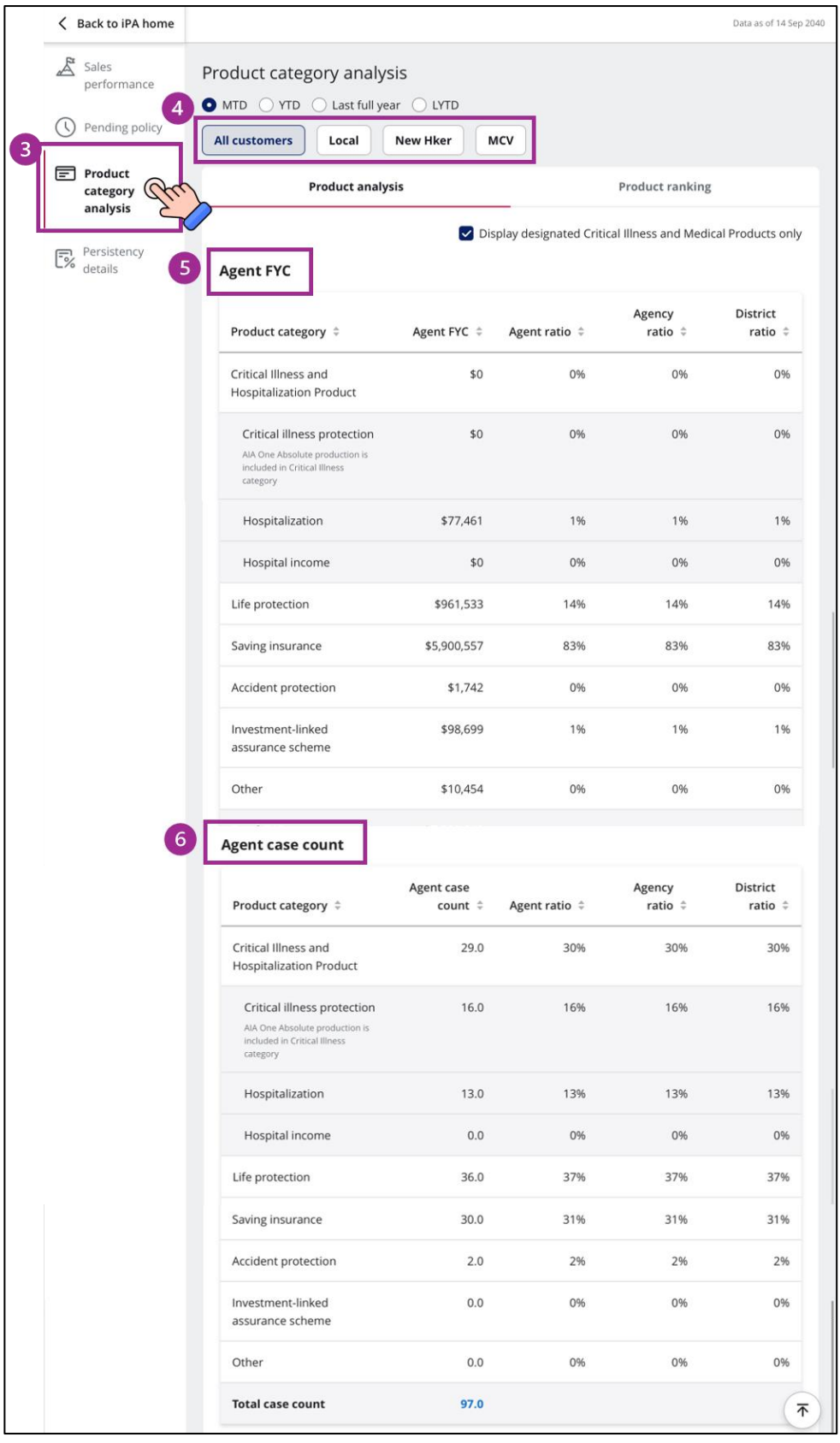

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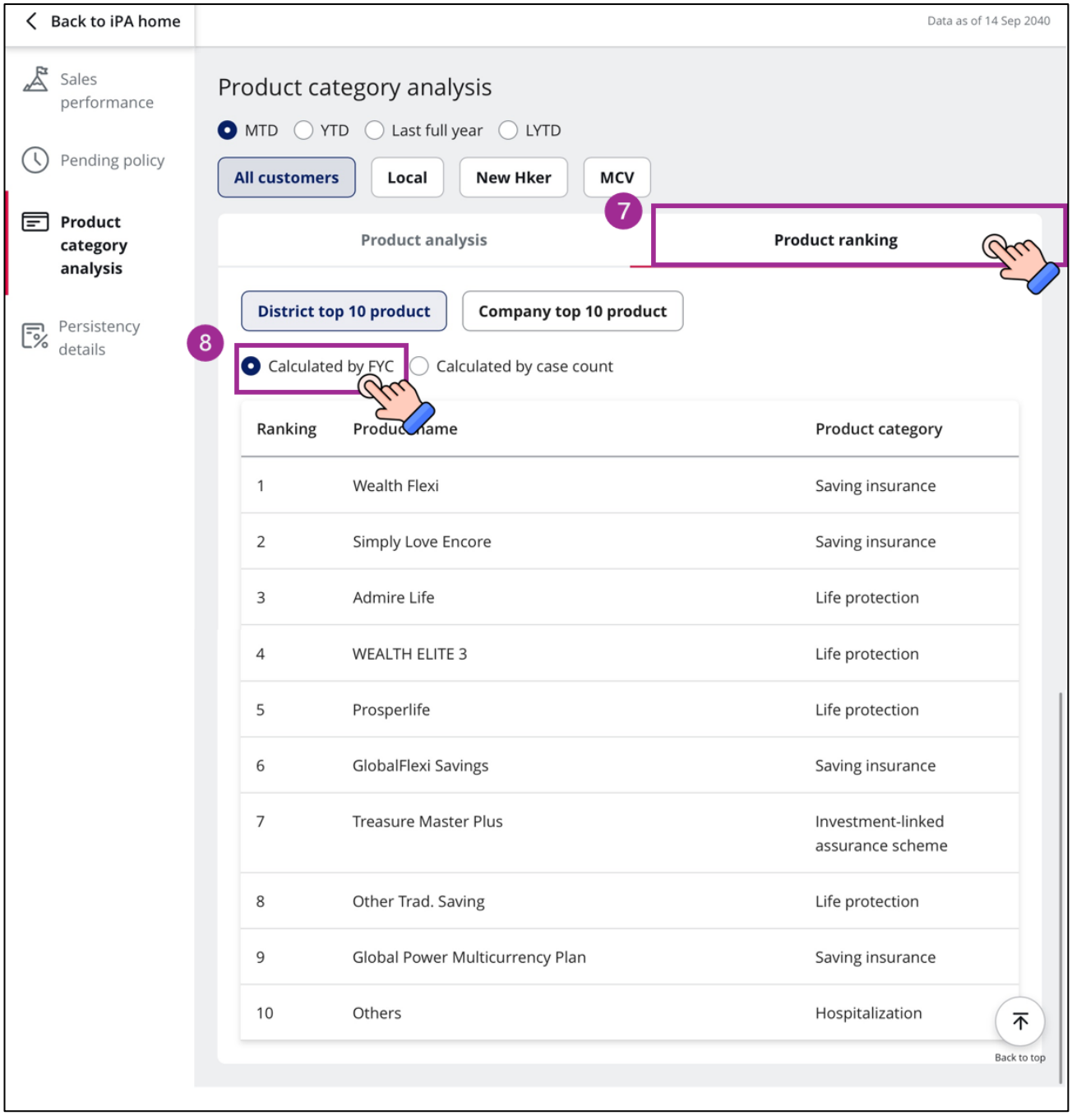

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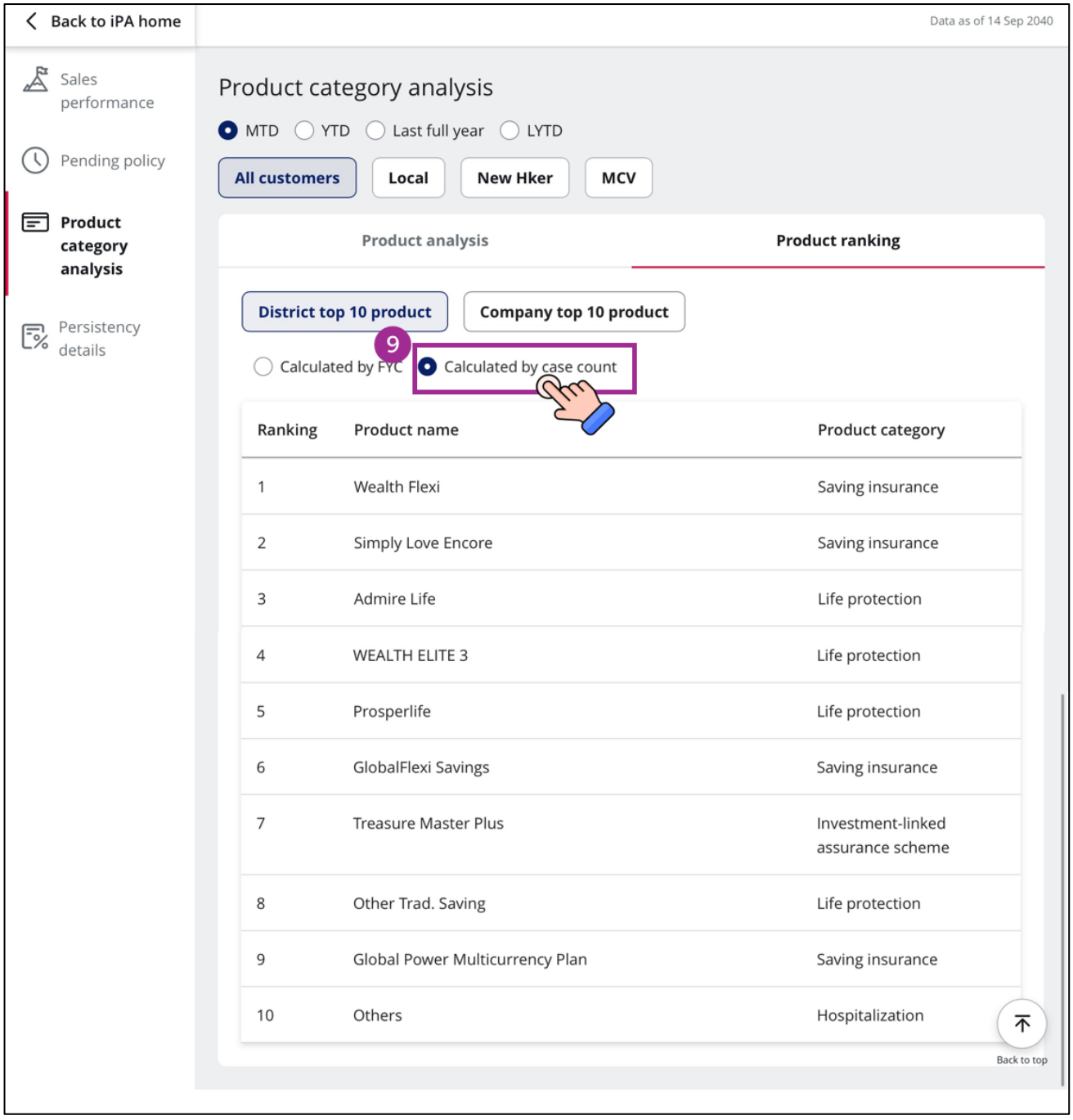

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