AIA Hong Kong
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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: 30 Oct 2026

Total page(s): 6

Subject: A261053 – iPA 2.0「業績表現」報表升級：新增「機遇轉化分析」頁面
iPA 2.0 “Sales Dashboard” Enhancement: New “Lead Conversion Analysis” page

iPA 2.0「業績表現」報表現已新增「機遇轉化分析」頁面。

區域總監、營業單位主管及財務策劃顧問可快速掌握機遇流轉情況，了解機遇轉化成效及新生意表現。

透過深入分析機遇來源及轉化成果，協助您發掘高潛力商機，優化客戶跟進策略，提升銷售效能。頁面亦支援快速搜尋指定客戶及查閱機遇狀態，全面提升客戶管理及跟進效率。

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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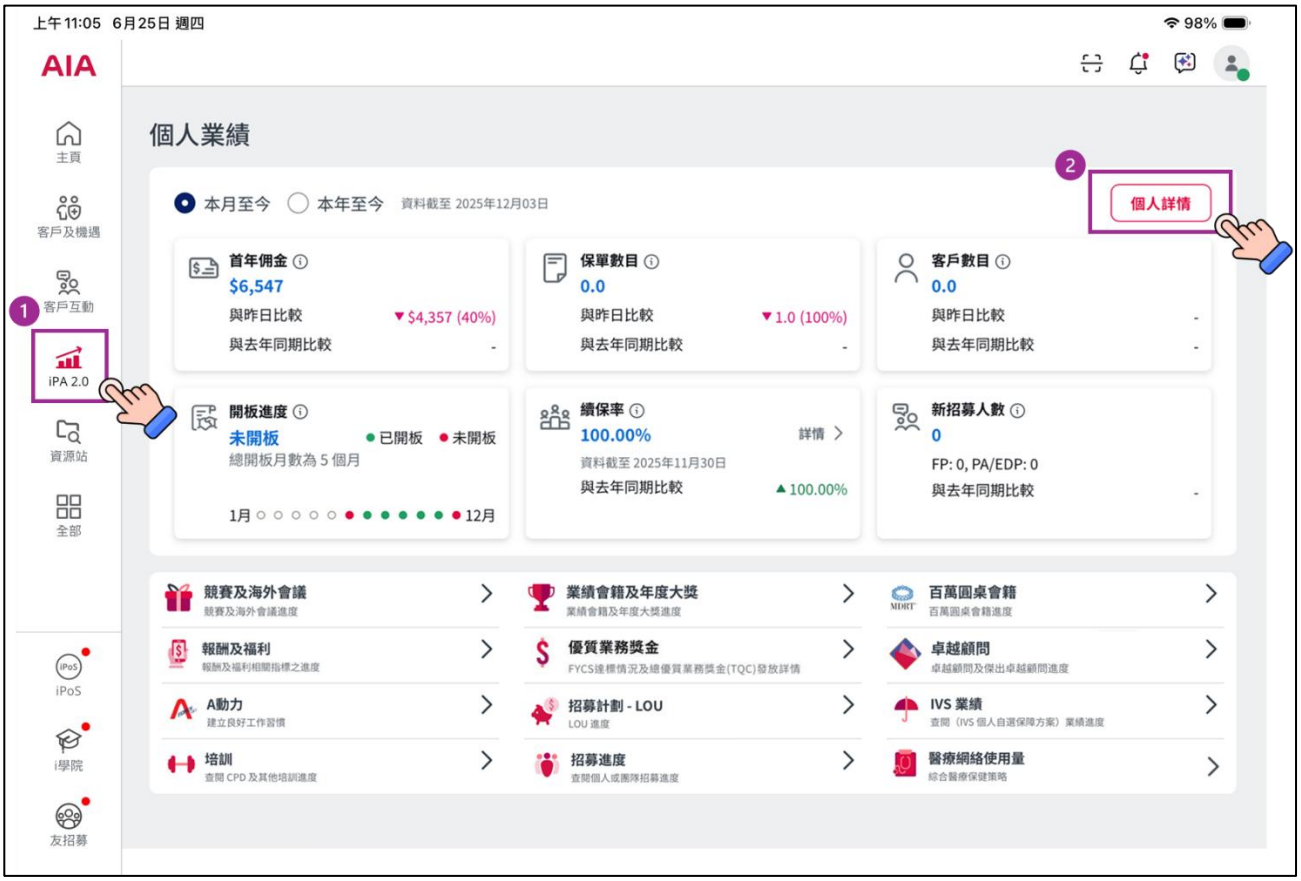
附件

如何到達 iPA 2.0 -「機遇轉化分析」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「機遇轉化分析」追蹤及查看機遇表現



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We are pleased to announce the new “Lead Conversion Analysis” page is now available on iPA 2.0 “Sales Dashboard”.

This enhancement enables District Directors, Leaders, and Financial Planners to gain a clear overview of sales lead progression, conversion effectiveness, and new business performance.

By analyzing lead sources and conversion outcomes, it helps identify high-potential opportunities, optimize customer follow-up strategies, and improve sales effectiveness. The page also supports quick customer search and lead status tracking, enhancing customer management and follow-up efficiency.

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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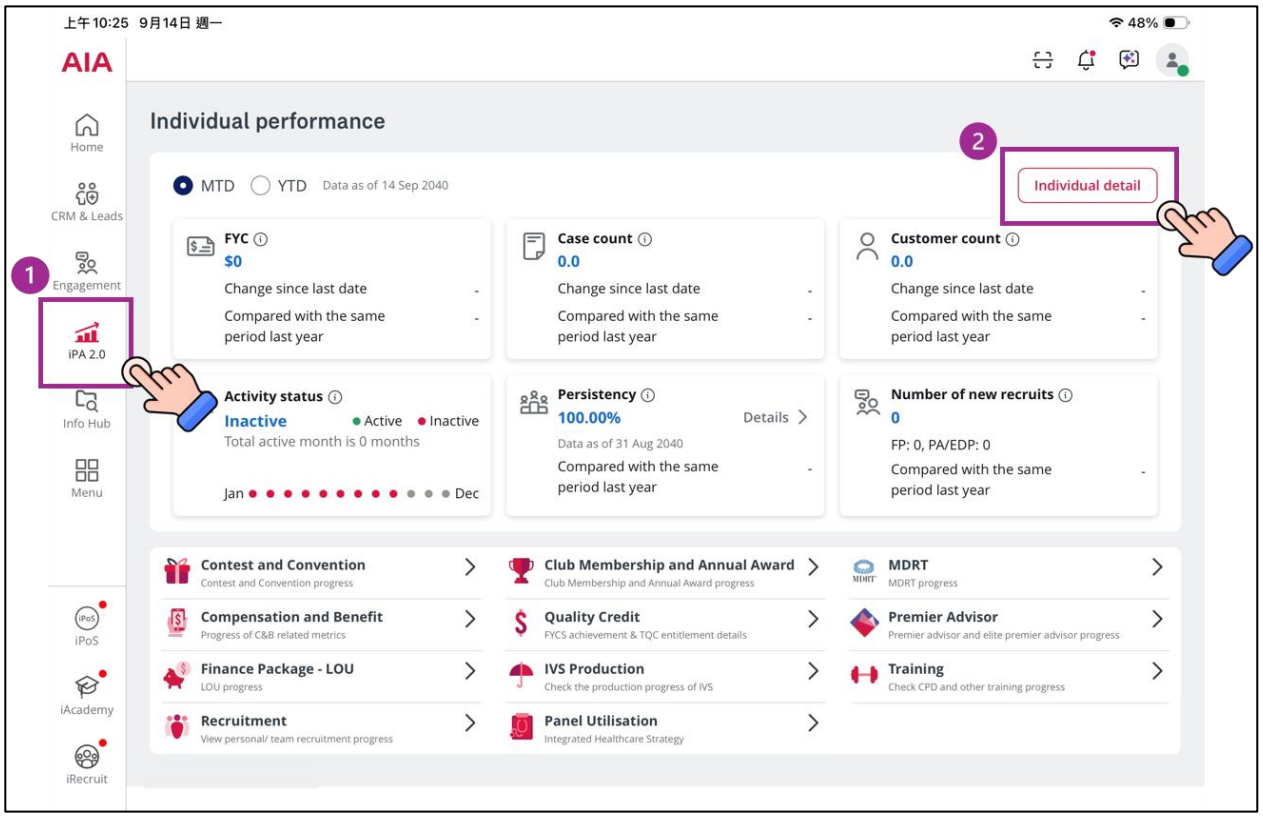
Appendix

How to access the iPA 2.0 – "Lead Conversion Analysis" page

1. Log in to AIA Smart+ and click "iPA 2.0" to access the homepage
2. Click “Individual detail”
3. Click “Lead conversion analysis” for tracking lead conversion performance



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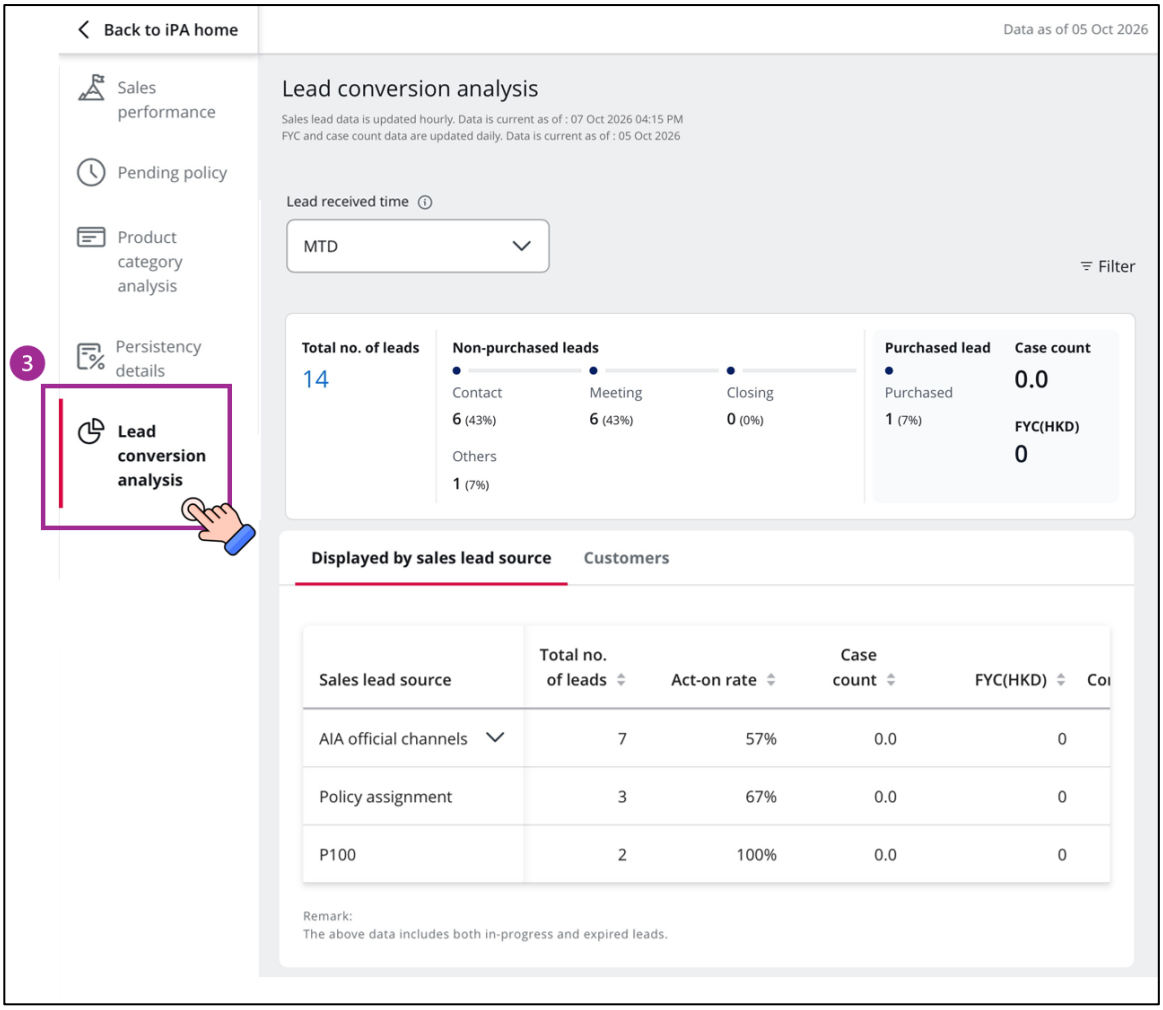

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