

# CAMPAIGN GOLDMINE 2019

## FAQ

Campaign Date: 2<sup>nd</sup> May 2019 - 31<sup>st</sup> December 2019

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**CAMPAIGN GOLDMINE 2019**  
**FREQUENTLY ASKED QUESTIONS & ANSWERS**

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## **A. OVERVIEW**

### **1) What is the duration of this campaign?**

The campaign will run from 2<sup>nd</sup> May 2019 to 31<sup>st</sup> December 2019.

### **2) What is the objective of this campaign?**

The objective of this campaign is to provide you with new customer leads, so that you can fast track your customer acquisition and increase overall productivity. These leads are from our member base who have given their consent via MyAIA App or Web to receive marketing and promotional messages and calls.

### **3) How should we approach these customers?**

a) As these are new prospects, we suggest that your first initial contact should be via a phone call (and not via WhatsApp or SMS). You can position yourself as calling from AIA and inform your customer that:

“You have been selected for a special MyAIA Member Offer. For a limited time, we are offering MyAIA members with a Free Coverage Review. Plus, you are entitled to a RM50 Petronas Mesra card/ 1-year AIA Vitality membership when you have completed our free Coverage Review” .

b) You may also recommend suitable protection products to customers after understanding and reviewing the customer’s needs.

## **B. CAMPAIGN MERCHANISM**

### **4) How do you select the customers for this campaign?**

Customers are selected based on the following criteria:

- Age between 22 - 55 years old
- Does not hold any Conventional Life Product with AIA
- Has given consent to receive marketing and promotional messages and calls
- Located in Central, Northern (limited to Bayan Lepas, Ipoh & Penang) and Southern (JB, Masai, Melaka, Pasir Gudang and Seremban)
- Outpatient claims for past 3 years do not exceed RM10,000

### **5) Are there any specific products that I should recommend for this campaign?**

You can recommend any life products that are suited to the customer’s needs. However, we will provide our recommended products based on other customers with a similar profile for your reference.

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**6) How can I get my customer leads for this campaign?**

Your customer leads are available in the AIA Life Planner App (ALPA).

Platform	Steps
ALPA	<p>Step 1: Click New Leads</p> <p>Step 2: Use upfront filter &lt; RM50 Petrol-Goldmine Campaign&gt;/&lt; 1yr Vitality- Goldmine Campaign&gt; to find customer list</p> <p>Step 3: Update the actions: Call, message, email, set appointment, set reminder, Add notes, and more.</p>

For more info, please contact your DOA.

**7) What type of underwriting is applicable for this campaign?**

All applications are subject to full underwriting.

**C. CUSTOMER GIFT AND ENGAGEMENT**

**8) Are customers aware of this campaign?**

- a) Yes, customers will be notified through SMS on this campaign. Below are the SMS messages that will be sent to customers:

Appointment Gift	SMS Content
Petronas Mesra Card	RM0.00 MY AIA member offer: Find out if you're well protected with our coverage review & receive RM50 petrol card! Reply AIACRM GM19 if interested.
AIA Vitality Membership	RM0.00 MY AIA member offer: Find out if you're well protected with our coverage review & get 1 yr AIA Vitality m'ship! Reply AIACRM GM19 if interested.

- b) When you call the customer to make an appointment, you can refer to the SMS as a conversation starter:

"Good morning/afternoon/evening. May I speak to Mr/Ms/ Mrs <Customer Name>. I am <Life Planner name> calling from AIA. This is a follow up call with regards to our MyAIA Member Exclusive Offer which we have sent a SMS to you earlier.

May I meet you over a drink at your time and convenience to share further details?"

If customer enquires about the AIA Vitality programme:

AIA Vitality is a science-backed health programme that rewards your healthy choices. It empowers you with the knowledge, tools and motivation to achieve your health goals.

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**9) How is a customer entitled for the appointment gift?**

Customer who have made an appointment with our Life Planner and completed the free coverage review will receive a RM50 Petronas Mesra card/ 1-year AIA Vitality membership worth of RM120.

**10) Will the customer receive any sign-up gift under this campaign?**

Customers who sign up for any policy or certificate with an inforce status of a minimum annual premium of RM2,400 will receive a Lazada shopping voucher worth RM150.00.

**11) How will the gift be distributed to the customer?**

**a) Appointment Gift: RM50 Petronas Mesra Card**

- Petronas Mesra cards will be distributed to respective Life Planners during the campaign roll down session. Life planners will then present it to the customer upon the completion of coverage review.
- Prior to meeting the customer, Life planners are required to update the Appointment Status in ALPA.
- For leads that have no updated Appointment Status, please return their gift to your respective DOAs within the month after the campaign has ended.

**b) Appointment Gift: AIA Vitality 1-year membership**

- To sign-up, please visit <https://www.aia.com.my/en/crm/projectgoldmine/vitality-free-enrollment.html> and follow the steps below to be eligible for a 1 year AIA Vitality membership.

**Step 1:** Tick on the mandatory check box that confirms the registrant understands that only pre-selected customers are entitled to the 1- year AIA vitality membership.

**Checkbox message is as below:**

“Only pre-selected customers are eligible for the 1-year AIA Vitality membership and they will be notified via SMS. Registration will be rejected without further notice for ineligible customers”

**Step 2:** Enter customer’s Name, NRIC, DOB, Gender, Address, mobile number, and email address.

**Step 3:** Tick on the mandatory checkbox to confirm that the customer agrees to AIA vitality and marketing consent.

**Step 4:** Read and understand the campaign term and conditions as below: The campaign offer is only open to selected customers who receive the offer via short message service (SMS). Hereafter collectively known as “Eligible customers”.

- The campaign period is from 2 May - 31 December 2019.
- Eligible customers who have made an appointment with an AIA Life Planner and completed the free coverage review is entitled to receive a 1-year AIA Vitality membership worth RM120.
- The campaign’s terms and conditions are subject to change and AIA BHD.’s decisions on any matter concerning these terms and conditions are final.

**Step 5:** Click on “Complete” and the Thank You Note below will be displayed upon registration completion.

“Thank you for registering. You will be receiving a confirmation email in a week’s time upon the completion and approval of your registration.”

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c) Rewards on Purchase:

- To be eligible, all cases must be submitted through iPoS during the campaign period (i.e. last submission date on 31 December 2019) and must be approved at AIA's discretion (i.e. contributions are paid and set in force) by 15 Jan 2020.
- A RM150 Lazada shopping voucher code will be distributed to eligible customers a month after the campaign has ended through email or SMS.
- Each in-force policy or certificate qualifies for one gift at any point of time. The maximum gift a customer (as per NRIC) can receive for this campaign is five (5).
- The gift cannot be exchanged for cash.
- The campaign's terms and conditions are subject to change and AIA BHD. decisions on any matter concerning these terms and conditions are final.

**12) What are the benefits that customers will enjoy by becoming an AIA Vitality member?**

Customers can enjoy the following benefits depending on the type of products they purchase:

Product	Benefit
A-Life Signature Beyond 2 / A-Life Signature 2 / A-Life Signature-i	Additional 20% Signature Boost
A-LifeLink-i	Up to 45% Cover Boost (Depending on the riders attached - the minimum Basic Sum Assured (BSA) requirement to qualify for Cover Boost under A-LifeLink-i is RM50k)
A-Life Link 2/ A-Life Fleksi	Health Rewards
A-Life Cancer360 / A-Life Cancer360-i	20% Yearly Cash Bonus after AIA Vitality membership first year anniversary
A-Life Lady360 / A-Life Lady360-i	10% Yearly Cash Bonus after AIA Vitality membership first year anniversary

For more info on AIA Vitality membership benefits, please visit [www.myaiavitality.com.my](http://www.myaiavitality.com.my) or AIA Life Planner Portal (ALPP) > Marketing > AIA Vitality

**13. Who can I speak to if my customer encounters an issue with their AIA Vitality membership?**

If your customer has any issues, you may refer to the below contact for further assistance:

- Customer Care Hotline: 1300881899 (Option 5)/ 603-20561111 (for overseas customers)
- Member Portal: [www. Aiavitality.com.my](http://www.Aiavitality.com.my)
- Email: [customercare@aiavitality.com.my](mailto:customercare@aiavitality.com.my)

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**14. What is the best sales pitch that I can use to engage my customers?**

We recommend the following sales pitches when you approach your customers.

Appointment Gift	Sales Pitch
RM50 Petronas Mesra Card	<p>Mr/Ms Customer,</p> <p>At AIA, we want to ensure that our customers are always adequately protected.. Therefore, now AIA is offering you a free coverage review. This is a unique program to help customers to understand your existing insurance coverage.</p> <p>Can you spare sometimes so that I can assist you to perform a coverage review. As an appreciation token, we would like to reward you with the RM50 Petronas Mesra Card.</p>
AIA Vitality 1-year membership	<p>Mr/Ms Customer,</p> <p>You have been chosen to receive a complimentary 1-year AIA Vitality membership (worth RM 120/annum). AIA Vitality is a unique wellness program that rewards you for living healthy with vouchers, discounts on Air Asia, Fitness First, Jaya Grocer and what's more, and we even reward you for sleeping!</p> <p>To enjoy all these benefits, all you need to do is complete the coverage review with me. Through this coverage review, I would also be able to advise you whether you are adequately protected.</p>

**D. OBJECTION HANDLING (ON PERSONAL DATA PROTECTION ACT 2010)**

**15. How do I respond if a customer asks how did I obtain his/her contact details?**

You can explain to the customer with the following:

“Sir/Madam, I am a licensed Life Planner from AIA. You are receiving this call from us because you have consented to receive marketing campaign or offer when you registered on MyAIA. As a MyAIA member, you are entitled to many special offers from time to time. **Please be assured that we only have your name and contact number for communication purposes. Other personal information was not revealed to us.**”

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### 16. What if customer does not recall / ask what is MyAIA?

You can explain to customer with the following:

“Sir/Madam, you have either downloaded our MyAIA App or registered on MyAIA Web. MyAIA enables all employees who are insured with AIA Employee Benefit scheme to access their e-medical card, submit eClaims and view their medical bills and transaction history.”

**What is MyAIA ?**

*MyAIA enables all employees who are insured with AIA Employee Benefit scheme to access their e-medical card, submit eClaims and view their medical bills and transaction history.*

**WELCOME [CUSTOMER NAME]**  
My Claims | My Statements & Letters | My Profile | Log Out

**MY PLANS (3)**

**INDIVIDUAL PLANS (2)**

**AIA ASSURANCE ACCOUNT**

**TAKAFUL A-LIFELINK**

**EMPLOYEE BENEFITS (1)**

**PREFERRED CARE POLICY**

**YOUR MEDICAL ASSISTANCE, ANY TIME ANY WHERE.**

**HOW IT WORKS?**

Web App

AIA confidential and proprietary information. Not for distribution.

## E. OTHER ENQUIRIES

### 17. When can I retrieve my leads from ALPA?

Leads can be retrieved starting from 2<sup>nd</sup> May 2019.

### 18. Can the leads be transferred to other Life Planners?

Yes, that is allowed and doable through ALPA. The Lead Transfer function is only available to leaders (District Managers and Unit Managers only). Leads can only be transferred within the same agency.

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