

從一開始建立MDRT團隊文化

SPEAKER: MR. SOLOMON YUNG

15 - 16 JUNE 2017

容思瀚 Solomon Yung – Unit Manager

學歷

認證財務顧問師 RFC

法律系榮譽學士 LLB. (Hons)

演講

2016 第十一屆世界華人保險大會嘉賓演講

2016 第十三屆中國保險精英圓桌大會嘉賓演講

2015 香港人壽保險從業員協會舉辦的MDRT DAY嘉賓演講

2015 MDRT Experience 嘉賓演講 (澳門)

2014 公司第17屆小龍會嘉賓演講 (上海)



獎項

2017 中國保險新生代創業家

2017 中國青年保險家獎

2017 Premier Agency Leader - Diamond

2017, 2016 Top of the Table

2017, 2016國際龍獎 IDA (金龍獎)

2015 Court of the Table & Marathon Club

2014 HKMA 第46屆傑出青年推銷員獎 (OYSA)

2014, 2013 公司全年度傑出營業員

2014, 2013 MDRT百萬圓桌會員 & Millionaire

態度

- 常存積極的心態
- 相信保險，相信自己會成功

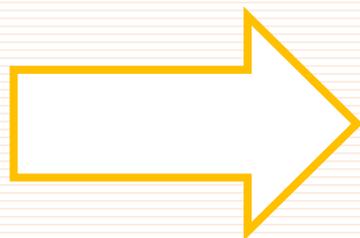


Productivity = Key to Success

Activity = Key to Productivity

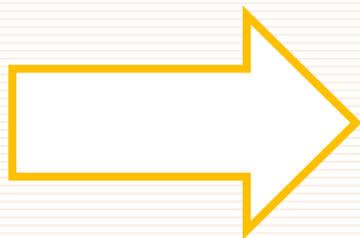
保險是一份愛...

有需要



雪中送炭

沒有需要



錦上添花

紀律



建立良好的工作習慣

需要有清晰的目標感

➔ 5 App & MDRT



Importance of 5 App & MDRT

Early Productivity Predicts Future Productivity

**Policies Written
in First Six Months**

0-9

10-19

20-29

30-39

40+

**Policies Per Agent of
Three Year Survivors**

23.9

51.1

66.7

75.7

103.0

Importance of 5 App & MDRT (cont'd)

Productivity Predicts Agent Retention

<u>Policies Written in First Six Months</u>	<u>Percent Surviving Three Years</u>
0-9	29.7
10-19	31.3
20-29	46.7
30-39	51.6
40+	67.7

堅持

有清晰的目標
成功者改善方法，不會改變目標
→ COT & Marathon Club
(100 Cases)



A Working Habit & An Unexpected Result

Your performance as of 09/30/2014(DATA for reference only)

Select Date: 09/30/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
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	Last Year YTD	YTD	Last Year MTD	MTD
Submitted	63.50	79.00	7.00	6.00
Delivered	52.50	65.50	5.00	5.00

2 months left

Your performance as of 10/31/2014(DATA for reference only)

Select Date: 10/31/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
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	Last Year YTD	YTD	Last Year MTD	MTD
Submitted	65.50	99.00	2.00	20.00
Delivered	56.50	80.00	4.00	14.50

1 month left

Your performance as of 11/10/2014(DATA for reference only)

Select Date: 11/10/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
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	Last Year YTD	YTD	Last Year MTD	MTD
Submitted	69.50	102.00	4.00	3.00
Delivered	60.50	84.00	4.00	4.00

3 weeks left

A Working Habit & An Unexpected Result (cont'd)

Your performance as of 11/24/2014(DATA for reference only)

Select Date: 11/24/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
		YTD	Last Year MTD	MTD	
Submitted	74.50	112.00	9.00	13.00	
Delivered	63.50	95.00	7.00	15.00	

5 days left

Your performance as of 11/25/2014(DATA for reference only)

Select Date: 11/25/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
		YTD	Last Year MTD	MTD	
Submitted	74.50	113.00	9.00	14.00	
Delivered	63.50	94.00	7.00	14.00	

4 days left

Your performance as of 11/26/2014(DATA for reference only)

Select Date: 11/26/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
		YTD	Last Year MTD	MTD	
Submitted	74.50	116.00	9.00	17.00	
Delivered	64.50	98.00	8.00	18.00	

3 days left

Your performance as of 11/27/2014(DATA for reference only)

Select Date: 11/27/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
		YTD	Last Year MTD	MTD	
Submitted	76.00	118.00	10.50	19.00	
Delivered	65.50	99.00	9.00	19.00	

2 days left

Your performance as of 11/28/2014(DATA for reference only)

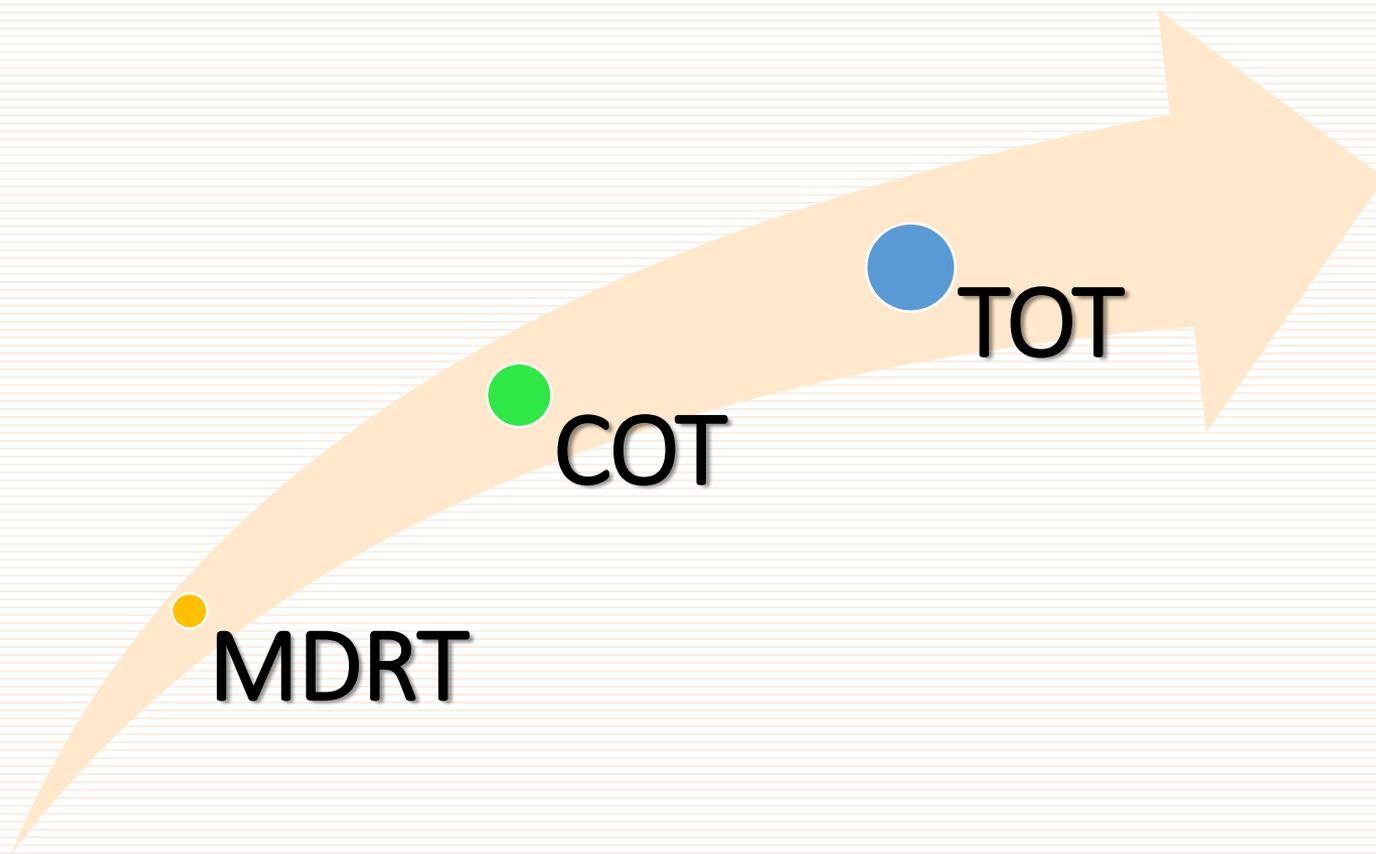
Select Date: 11/28/2014 (MM/DD/YYYY) > Go

FYC	All Lines FYC	FYP	ANP	Case Count	PA Persiste
		YTD	Last Year MTD	MTD	
Submitted	76.00	121.00	10.50	22.00	
Delivered	66.00	102.00	9.50	22.00	

The last day

提升

Number of Cases → Size of Cases



AUM Difficulties

- 開始建立團隊
- 專注更多在個人業績
- 只有一個Agent → Failure

業績

請Agent



2015 Sept

改變Mindset



2015年成功聘請6位Agents

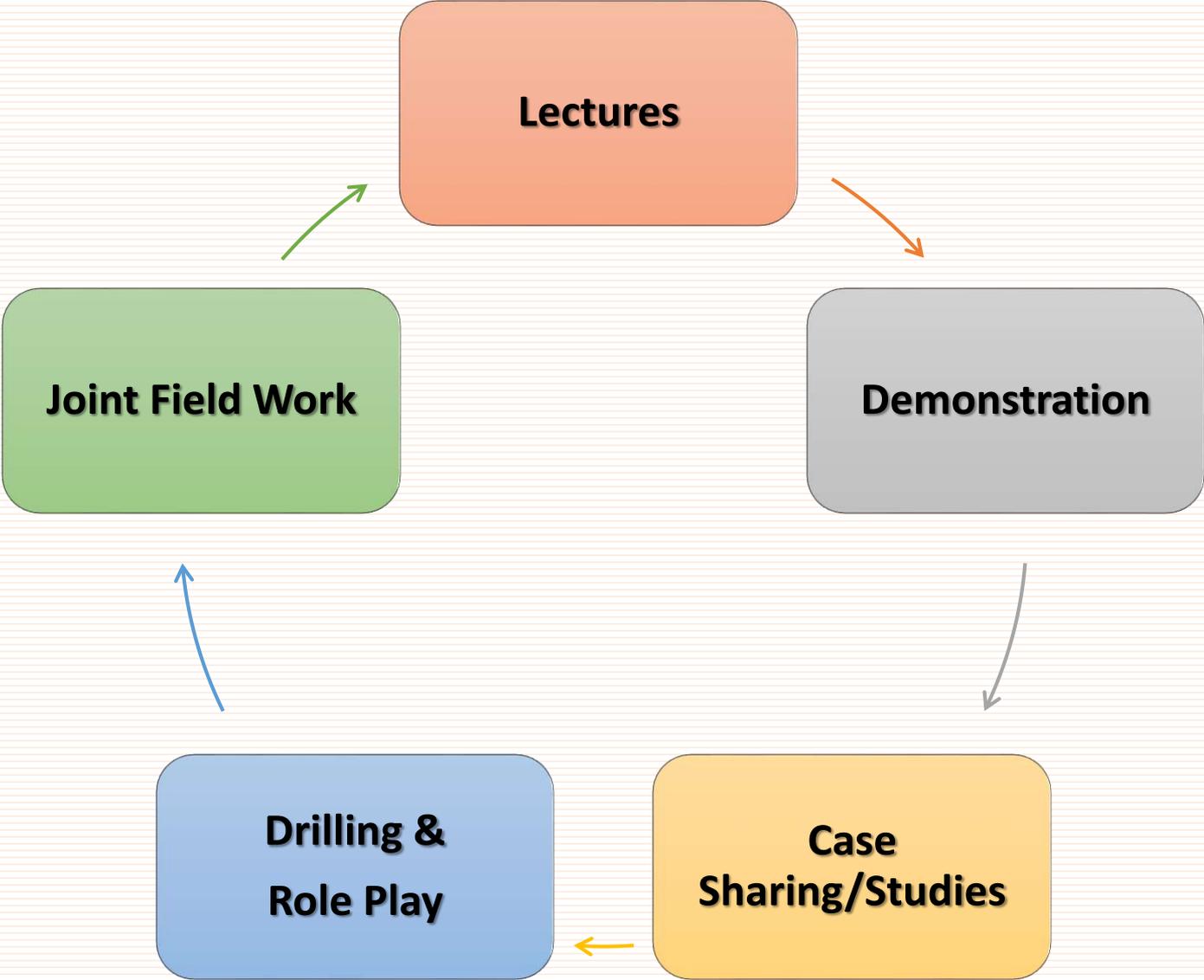


2位MDRT



全組FYC 3,500,000

Successful Training



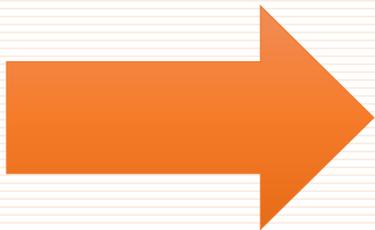
How to coach to be MDRT

美國回來的應屆畢業生 (22歲)

建立自信心

成為本區最年輕的MDRT，破自己紀錄

Dream to Be History



22歲MDRT

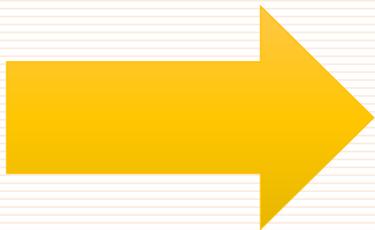
How to coach to be MDRT

督察(26歲)

建立目標感

破自己紀錄，比自己快成為MDRT

要有不放棄精神



3個月成為MDRT

How to coach to be MDRT

IANG(26歲)

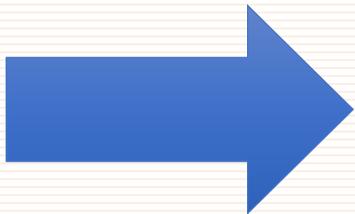
- 入職3個月沒有生意，想放棄

堅持鼓勵同事

關心她所面對的困難

給她全方位支援

讓同事感到有歸屬感



團隊內第一位女同事成為MDRT

How to coach to be MDRT

會計 – CPA(26歲)

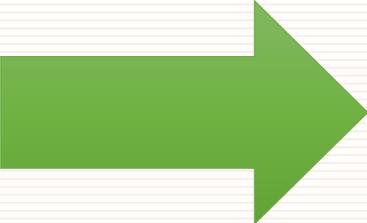
- 經驗不足，欠缺自信

專業培訓

每星期開會練習銷售技巧

持續陪同事見客

讓她感到放心，增強信心



半年內成為COT

Supervision and Coaching

Review agents' activities **every week**

Review agents' production **every month**

Set **production standard** for agents

Lead by Example!

要比Agent做得更好!

Legend



Zinedine Zidane • Skills and Tricks • The Ultimate Magician HD Viva Football

Zinedine Zidane vs Bayer Leverkusen 2002





“你今天看到別人的成功，但看不到別人背後流的血和汗水。”

“努力爭取回來的成就更顯得寶貴和有價值。”

要成功，為自己找個原因

昨天的成績已經過去，展望將來，
今天我們要有清晰的目標、信念、
堅持，繼續向前！

