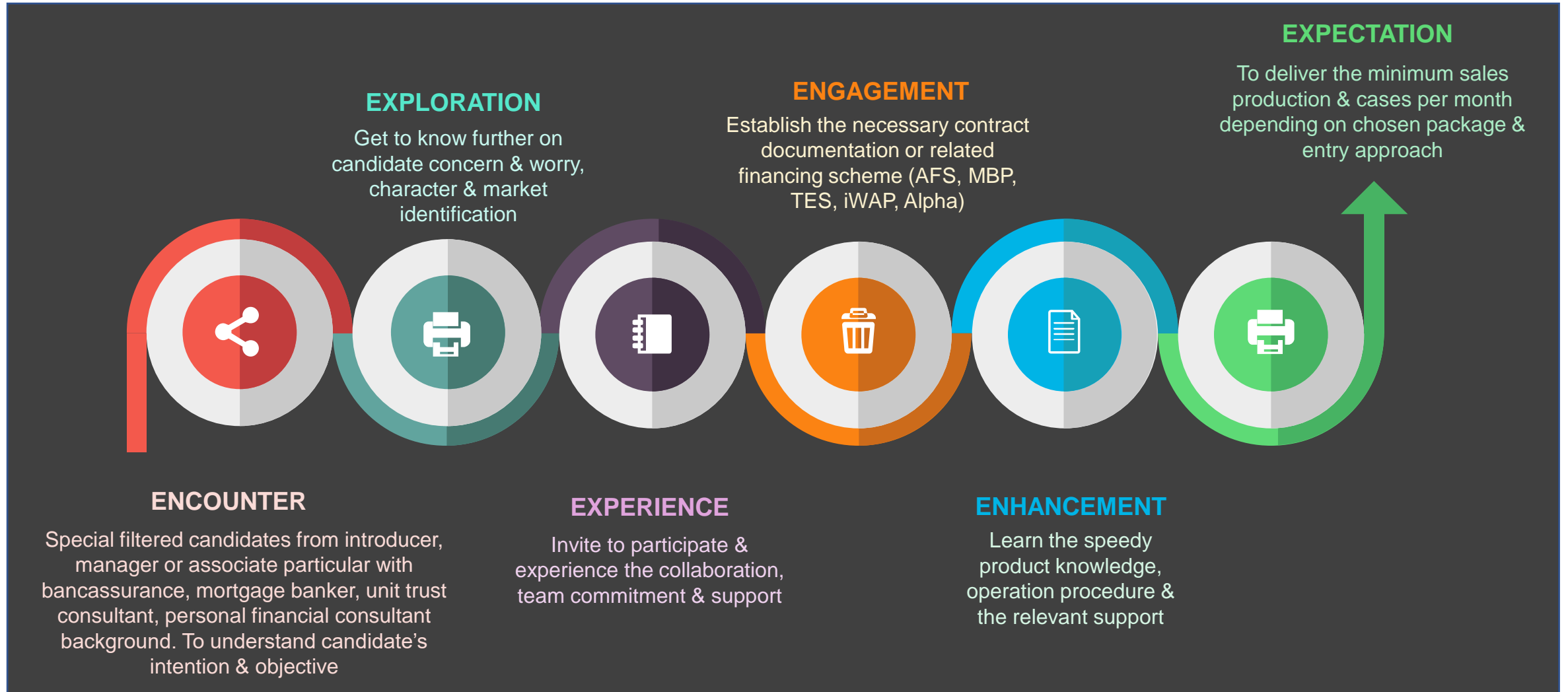


Understand the entire **Recruitment Flow**



GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
1	Establish your recruitment goal	<ul style="list-style-type: none">▪ Why do you want to recruit?▪ How many recruits needed?▪ By when do you want to complete?▪ How frequent is your recruitment activities?▪ How do you want to kick start?▪ What's your preparation?	Promotion? How many recruits per month?
2	Candidate Profile	To set your candidate criteria <ul style="list-style-type: none">▪ Age range▪ Education level▪ Working experience▪ Family background▪ Sex preference▪ Race▪ Character▪ Transportation etc...	

**What kind of people do you want?
Law of attraction!**

My Candidate Listing

Candidate Profile for Talent Search Program

01

Recruitment Candidate Profile

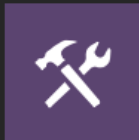


Background

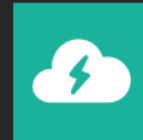
- Bancassurance > AFYC 300K
- PFC funds 1.5 to 3mil/yr
- Mortgage & SME Loan Banker (1mil/mth)
- Unit Trust Consultant (> 1mil/yr)
- Takaful Agent AFYC 100 to 200K



Locate within 30 KM from branches & with full time basis*



Age range from 25 to 38 with min 2 years working experience on the related field



Chinese speaking or Muslim Candidates (decide your own)



Ambitious, able to execute & Goal Driven with high believe in Financial Planning



With good sales performance & existing customer base

**Note: Only AFS with 3K package is available for candidate outside of Klang Valley*

Source of Leads

- Referrals
- From Nominators
- Personal observation
- Social media - iCARI
- Those call up to you on consistent & frequent marketing approach
- Target market recruit (set as project - specific industry)
- Bankers / Bancassurance / Mutual funds / PFC / sales & marketing
- Existing clients - 2nd generations (sons & daughters)
- Job seeker agency
- Universities & campus
- Advertisement - Job street / Facebook
- Company HR
- etc



GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
1	Establish your recruitment goal	<ul style="list-style-type: none"> ▪ Why do you want to recruit? ▪ How many recruits needed? ▪ By when do you want to complete? ▪ How frequent is your recruitment activities? ▪ How do you want to kick start? ▪ What's your preparation? 	Promotion? How many recruits per month?
2	Candidate Profile	To set your candidate criteria <ul style="list-style-type: none"> ▪ Age range ▪ Education level ▪ Working experience ▪ Family background ▪ Sex preference ▪ Race ▪ Character ▪ Transportation etc... 	
3	Recruiting prospect listing	Highlight all your potential list based on the candidate profile set above	Key into system
4	Plan your recruiting activity	Set the recruiting activity either by weekly or monthly basis or include the recruiting activity into your daily activity planning.	Make recruiting activity be your habit.

The slide features a white central area with the text "ACT system" in a bold, black, sans-serif font. The background is composed of four geometric sections: a dark grey triangle in the top-left, a light grey trapezoid in the top-right, a light grey trapezoid in the bottom-left, and a blue trapezoid in the bottom-right. All sections are separated by thin white lines.

ACT system



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	1	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
65,000	65,000	32,500	2
Guilin, China	40.63%	Rome & Venice, Italy	21.67%

95,000

235,000

PRODUCTIVITY	MDRT
7,222	263,000

HIGHLIGHTS

2021-08-03 09:20:36

Congratulation

Let's congratulate **Jason Chew** on submitting a case **(Loan) RM100,000.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

2021-08-03 02:11:27

Congratulation

Let's congratulate **Charmaine LX** on submitting a case **(Fund) RM300.00**. You are the star of the family. So proud of you!

HIGHLIGHTS

2021-08-02 22:39:17

Menu

 My Account

 R50

 P100

 Financial Report

 Report

 Search

 Agent Hierarchy

 Search Activities

 Search Policy

 Policy Analysis

 Log out

v2.0.8



ACTIVITY MONITOR

	A	P	C	R	N
WEEKLY	1	0	0	0	0
TODAY	0	0	0	0	0

ANP	FYP	POLICY SIZE	CASES
65,000	65,000	32,500	2

Guilin, China	40.63%	Rome & Venice, Italy	21.67%
95,000		235,000	

PRODUCTIVITY	MDRT
7,222	263,000

HIGHLIGHTS

Congratulation

Let's congratulate **Jason Chew**
You are the star of the family. So

HIGHLIGHTS

Congratulation

Let's congratulate **Charmaine L**
are the star of the family. So pro

HIGHLIGHTS

Q Type Here...

1

Source of Names		Source Letter	A	A	A	A	B	B
A.Relatives B.School Friend C.Neighbors D.Colleagues/Former Colleagues E.Known Through Spouse F.Known Through Children G.Known Through Hobbies/Games H.Known Through Church/Temple I.Known Through Social Groups J.Known Through Public Services K.Newly Married Couple L.New Job Or Promotion M.New Homeowners N.People with whom you do business	RM50,000 or Below							
	RM 50,001 - RM 100,000							
	RM 100,001 - RM 300,000	X		X				
	RM 300,001 - RM 500,000		X		X	X		
	Above RM 500,000							
Annual Income	Below 25				X			
	25 - 40	X		X				

Recruit – Felicia

Add New Customer (R50)

Client Name

Phone

Cancel
Save



PHONE: (017) 567 4

4. NAME: Tita

PHONE: (019) 878 7765

5. NAME: Recruit

PHONE: (016) 330 1218

6. NAME: HOO

PHONE: (014) 345 4567

7. NAME: Recruit



1

Source of Names		Source Letter	A	A	A	A	B	B	L	
A.Relatives B.School Friend C.Neighbors D.Colleagues/Former Colleagues E.Known Through Spouse F.Known Through Children G.Known Through Hobbies/Games H.Known Through Church/Temple I.Known Through Social Groups J.Known Through Public Services K.Newly Married Couple L.New Job Or Promotion M.New Homeowners N.People with whom you do business	Source Name		1. NAME: Den Ki PHONE: (019) 887 6789	2. NAME: Adam PHONE: (016) 330 2324	3. NAME: Felicia PHONE: (017) 567 4432	4. NAME: Tita PHONE: (019) 878 7765	5. NAME: Recruit PHONE: (016) 330 1218	6. NAME: HOO PHONE: (014) 345 4567	7. NAME: Recruit	
	Annual Income	RM50,000 or Below								
		RM 50,001 - RM 100,000								
		RM 100,001 - RM 300,000		X		X				
		RM 300,001 - RM 500,000			X		X	X		
		Above RM 500,000								
	Below 25					X				
	25 - 40		X		X					

My weekly activities

MARCH 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

APRIL 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19 Nuzul Al-Quran	20	21	22	23
24	25	26	27	28	29	30

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
1	Establish your recruitment goal	<ul style="list-style-type: none"> ▪ Why do you want to recruit? ▪ How many recruits needed? ▪ By when do you want to complete? ▪ How frequent is your recruitment activities? ▪ How do you want to kick start? ▪ What's your preparation? 	Promotion? How many recruits per month?
2	Candidate Profile	To set your candidate criteria <ul style="list-style-type: none"> ▪ Age range ▪ Education level ▪ Working experience ▪ Family background ▪ Sex preference ▪ Race ▪ Character ▪ Transportation etc... 	
3	Recruiting prospect listing	Highlight all your potential list based on the candidate profile set above	Key into system
4	Plan your recruiting activity	Set the recruiting activity either by weekly or monthly basis or include the recruiting activity into your daily activity planning.	Make recruiting activity be your habit.
5	Telephone Script	Get ready your telephone script for making appointment. No selling over the phone. Self-introduction Purpose of calling Set the date time venue to meet	Just secure the appointment.

Recruiting Script



- Sample script (examples)
 - Hi Mr. Candidate, glad to meet with you. Talking about your career yeah, May I know, if there is a better career offer, would you consider? Why? Are you willing to give yourself a chance to explore into better opportunity? I would like to invite you to participate in our zoom event / Hi Tea / meet with my leader on _____ to find out more.
 - Hi Mr. Candidate, would you be working at this company for long term or until your retirement age? Why? I see. May I know, if there is a better career offer, would you consider? Why? Are you willing to give yourself a chance to explore into better opportunity? I would like to invite you to participate in our zoom event / Hi Tea / meet with my leader on _____ to find out more.

Calling script

Hi, good morning.
May I speak to
Mr. A?

Yes, speaking.
Who is that?

I'm Alice, calling from Great
Vision. A company that is looking
for Talent in Financial services.
Do you have a moment?

What's that
regarding?

FYI, we are expanding our services
and we need more talent like you to
work & collaborate together. We are
specialized in Loan, Funds & Risk
Management.

What can I
do for you?

We would like to explore
this opportunity to you and
we really want to know if
you are interested to know
more about it.....

I haven't really know
what is that about & I
have no idea

Are you calling from
outsource agency?
Who's Great Vision?

Our company, Great Vision was established
since 1993 and we are the only outsource team
for Maybank Loan.....(ask if heard before),
exclusive team for Affin Hwang Asset
Management in funds Investment(ask if
heard before) & Corporate Agency for both AIA
& SunLife Takaful Malaysia.

We are looking for Talent to work as
independent Financial Specialist and
eventually to be a Financial
Entrepreneur. Btw, are you willing to
explore yourself for a better career
opportunity?

Well...Okay...
.but I am not
ready

No problem, you may
explore for a better
opportunity. May I
proceed to arrange a
meeting for you?

Alright! Sure.


Frequently Asked Question

Candidate's respond or feedback	Caller's respond
I am not interested	No problem. You may explore to it now preparing for future action. We are not sure what will be happening next future. This is only an opportunity given. If you change your mind, you may contact us. Btw, do you come across any candidates you know, may need this offer?
Are you an insurance agency?	<p>Not really. We are a ONE stop financial services platform for all clients, which consists of Mortgage Loan, SME Loan, Funds investment, Risk Management. We are the only outsource team for Maybank Loan, exclusive team for Affin Hwang Asset Management and Corporate Agency for both AIA & SunLife Takaful Malaysia.</p> <p>We are expanding our business and we really want Talent like you to explore the market. If you are okay, then may I arrange a meeting for you?</p>
I am happy with what I have now	<p>That's a good one. Congrats.</p> <p>You may explore to more opportunity preparing for near future. We are not sure what will be happening next day. This is only an opportunity given. If you change your mind, you may contact us. Btw, do you come across any candidates you know, may need this offer?</p>
Do you provide fix salary?	We do provide basic allowance subject to the decision from the interview. Btw, you will enjoy the full commission from your sales effort on top of the basic allowance given. Shall I arrange a meeting for you?
What is your sales target or KPI?	The sales target or KPI will be determined during the interview. Shall I proceed to arrange the meeting for you?
I can't handle so much services	I agree with you and we will guide you to kick start (entry approach) the business, no worry.
Any successful candidate so far?	Oh yes! There are many successful young people that manage to deliver a spectacular result in short duration. Of course, we need to have interview selection to go through. Shall I arrange the meeting for you?
I am not confidence to move out from here	We totally understand your concern. There is no obligation and if you really want to explore and get to know, you are always welcomed. Perhaps, this is an opportunity given for near future. You may explore for future preparation. Shall I count you for a meeting?
I will let you know	Sure. I will reserve it for the next 7 days. If you do confirm, please call back?

GV SOP for Recruitment Flow – Execution Guideline for Leader


Step	Subject	Description	Remark
6	One to One approach	Fact & Feeling finding 1. Get to know him or her 2. Check if there is any discontent on existing career or lifestyle 3. Invite for BOP seminar or to meet your leader for further interview	Do not over sell your career. Be integrity & do not be too eager on recruiting him/her
7	Initial Interview	Get your leader to execute 1. Prior to initial interview, get your candidate to fill up the candidate profile form 2. Discuss with your leader before setting this appointment 3. Get a mutual understanding with your leader on handling your candidate	Get ready below: <ul style="list-style-type: none">▪ interview form▪ meeting room setting▪ welcome team▪ GV profile

How to conduct the **initial interview?**

 New Candidate Profile				
Personal Biodata				
Full Name: (English)	Chinese Name:	Recruited by:		
Age:	Date Of Birth:	New NRIC No:		
Race:	Sex :	Place of birth :		
Residence Address :		Home Tel:		
Email Address:		Mobile Phone:		
Current Occupation:		Company Name:		
Marital Status : Single / Married / Divorced / Widow				
Spouse's Name:		Age:		
Spouse's Occupation:		No of dependents:		
Parents or Children's Name	Date of Birth	Sex	Age	Occupation
Education & Qualification				
Highest Education Level Attained: Primary / Secondary / Tertiary (Diploma or University)				
School / College / University / etc	Year	Field / Major / Qualification		

Past & Current Working Experience			
Company	Position	Duration	Reason of Leaving
Personal Financial Commitment			
Current monthly income range:		Desired monthly Income range:	
Monthly Living Expenses:		Existing Life Insurance Coverage (Sum Assured):	
Remark:			
Social Activities			
Any involvement in social activities (please indicate):			
Position:			
Social Media IDs (eg. Facebook/Twitter/Linked-in/Instagram/etc):			
Others			
Own a transport: (Yes/No)			
Spoken & Written Languages:			
Two Referees' Names & Contacts:			
<u>No</u>	<u>Name</u>	<u>Contact</u>	<u>Relationship</u>
1.			
2.			
Estimated date of commencement:			
I hereby declare that all the above information given above are correct and I wish to pursue for further enquiries on this career as Financial Planner.			
Candidate's Signature _____			

How to conduct the **initial interview**?

MANAGER'S COPY		
 <p style="text-align: center;">Initial Interview</p> <p>Date: _____</p>		
Candidate Background		
Name:	Age:	
Recruited by:	Preferred language:	
Brief background:		
<p>Kindly tick (√) whichever appropriate:</p> <input type="checkbox"/> Financial based <input type="checkbox"/> Non-Financial based <input type="checkbox"/> Bank Relationship Manager <input type="checkbox"/> Insurance Agent <input type="checkbox"/> Unit Trust Consultant <input type="checkbox"/> Others _____		
No	Questionnaires	Manager's Remark
1	What are you doing now? What's your main responsibility?	
2	Why do you choose your current job?	
3	How do you feel about your current job? What do you like/dislike most about your current job?	
4	What's your previous job? Why you quit the job?	

5	What were your greatest achievements in your previous employment? Why?	
6	What were your greatest challenges in your previous employment? How did you overcome?	
7	How do you describe yourself?	
8	Given you a chance to choose your career, what are your 3 main priorities & concerns? Why?	
9	How do you describe your family?	
10	What's your perception towards a Financial Planner? Why?	
<p>We are going to organize a Special Career Talk, would you able to attend? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>		
<p>Interviewed by _____</p>		
<p>Manager's Name _____</p>		

How to conduct the **initial interview**?

MANAGER'S COPY



Initial Interview

Date: _____

Candidate Background

Name:	Age:
Recruited by:	Preferred language:
Brief background:	

Kindly tick (√) whichever appropriate:

- Financial based
- Non-Financial based
- Bank Relationship Manager
- Insurance Agent
- Unit Trust Consultant
- Others _____

How to conduct the **initial interview**?

No	Questionnaires	Manager's Remark
1	What are you doing now? What's your main responsibility?	
2	Why do you choose your current job?	
3	How do you feel about your current job? What do you like/dislike most about your current job?	
4	What's your previous job? Why you quit the job?	

How to conduct the **initial interview**?

5	What were your greatest achievements in your previous employment? Why?	
6	What were your greatest challenges in your previous employment? How did you overcome?	
7	How do you describe yourself?	

How to conduct the **initial interview?**

8	Given you a chance to choose your career, what are your 3 main priorities & concerns? Why?	
9	How do you describe your family?	
10	What's your perception towards a Financial Planner? Why?	
<p>We are going to organize a Special Career Talk, would you able to attend? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Interviewed by</p> <hr/> <p>Manager's Name</p>		

Manager's Assessment

Candidate Name: _____ Recruited by: _____

Manager's Rating (1 = Low or Poor, 5 = High or Good)	1	2	3	4	5
General outlook & appearance					
Communication & Interpersonal skill					
Level of discontent					
Perception & Attitude towards Financial Planner					
Willing to make a change					

Your overall impression about the Candidate

Will you recommend him/her to be GV Associate? Yes No

Assessed by

Manager's Name

Date: _____

Know Myself

In order to be **better**.....

Get to Know yourself

1st Thing First

1. Character Assessment



English



Bilingual

2. Career Suitability Assessment



English



Bilingual

Leverage on Existing Facilities

2022 BOP – Business Opportunity Program

Every month basis for both
GVMA & GV

Month	Platform	Team
March	GVMA	1
April	GV	B
May	GVMA	2
June	GV	C
July	GVMA	3
August	GV	D
September	GVMA	1
October	GV	A
November	GVMA	2
December	GV	B

BOP Committees

GV Platform

Team	Main Speaker	Testimony	Emcee	Language
A	Andy Tang	Ng Chiew Yen	Koh Suet Ting	Mandarin
B	Andy Tang	Pauline Liew	Ricky Ho	English / Mandarin
C	Jean Chan	Angeline Teoh	Charmaine Lee	English
D	Duncan Ong	Lai Wai Man	Khoo Pei Siah	Mandarin

GVMA Platform

Team	Main Speaker	Testimony	Emcee	Language
1	Ashley Ang & Derrick Tee	Chloe Yue/ CIMB	Dy kai	Mandarin
2	Ajax Soo & Adrian Tan	Jason Chew/ Maybank	Tok Chee Hong	Mandarin
3	Angeline Teoh & Pang TC	Angela Ng/ SCB	Charmaine Lee	English / Mandarin



拼吧!

拼吧!

CAREER
EXPLORATION
WITH GV

8TH APRIL
8PM TO 930PM

宏愿理财 Great Vision Advisory Group

GV Recruitment Hi-Tea

GV

RECRUITING HIGH TEA

DATE : EVERY SATURDAY

TIMES : 2PM-5PM

ENTRY CHARGED : FOC

RSVP: William, Sammie & Jean



GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
6	One to One approach	<p>Fact & Feeling finding</p> <ol style="list-style-type: none"> 1. Get to know him or her 2. Check if there is any discontent on existing career or lifestyle 3. Invite for BOP seminar or to meet your leader for further interview 	<p>Do not over sell your career. Be integrity & do not be too eager on recruiting him/her</p>
7	Initial Interview	<p>Get your leader to execute</p> <ol style="list-style-type: none"> 1. Prior to initial interview, get your candidate to fill up the candidate profile form 2. Discuss with your leader before setting this appointment 3. Get a mutual understanding with your leader on handling your candidate 	<p>Get ready below:</p> <ul style="list-style-type: none"> ▪ interview form ▪ meeting room setting ▪ welcome team ▪ GV profile
8	Examination	<p>Arrange the candidate for necessary exams: PCE/CEILLI/TBE</p>	<p>Arrange for personal tuition if needed</p>
9	BOP arrangement	<p>Small scale of BOP (Business Opportunity Program) is preferable which will cover:</p> <p>Why change? Why financial planning career? Why with Great Vision? What's the market potential & income potential? (what is in it for me?) How to get started?</p>	<p>Get a prominent speaker to handle. Work as a team for better outcome.</p>
10	Attend Principal Mandatory program	<ul style="list-style-type: none"> ▪ Enroll the candidate for the mandatory program in order to be contracted. ▪ Check the coming training schedule for FIST via BU head & lookup into the training Google Form. ▪ Refer BU head for the training content. 	<p>Must attend in order to be contracted.</p>

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
11	Contracted Interview	<ul style="list-style-type: none">▪ Reaffirm him on his career▪ Get his commitment for success▪ Reveal to him on the mutual expectation▪ Tell him the dos & don't▪ Full support given by BU & yourself▪ Get ready with AIA & GV contracts	Get the rules from BU heads & tell him your mutual expectation. Check with admin on the necessary forms.



Contract Interview

MANAGER'S COPY

Date: _____

Candidate Background

Name:	Age:
Recruited by:	Preferred language:
Brief background:	

Kindly tick (✓) whichever appropriate:

- Financial based Non-Financial based
 Bank Relationship Manager Insurance Agent Unit Trust Consultant
 Others _____

- Attended Mandatory course?** Yes No (to be attended later)
Completed Project 100? Yes No (in the progress)
Completed Career Choice & Preference Test? Yes No (to be done later)

No	Questionnaires	Manager's Rating 123			
		A	C	T	M
1	Why are you joining this career?				
2	How do you feel about Great Vision & its services?				
3	Do you have any financial commitment? How does that burden you?				
4	What do you want to achieve in this career? How do you want to make a difference?				

5	What are the concerns, obstacles & challenges you foresee in pursuing this career? What kind of support do you require at this moment?				
6	Do you think there is a need for a person to plan for a proper financial planning? Why?				
7	What do you think are the public resistances towards Financial Planning particularly Life Insurance? How do you handle them?				
8	Why do you want to do Sales & Marketing?				
9	How is your Business Sales Planning? Tell me about your plan				
10	In conclusion, why should we consider you?				

Is the candidate qualified to be contracted? Would you recommend? Yes No

Interviewed by

Manager's Name

Note: Profile for Recruitment : A=Attitude ; C=Capability ; T=Team work ; M=Motivation





Contract Interview

Date: _____

Candidate Background

Name:

Age:

Recruited by:

Preferred language:

Brief background:

Kindly tick (✓) whichever appropriate:

Financial based

Non-Financial based

Bank Relationship Manager

Insurance Agent

Unit Trust Consultant

Others _____

Attended Mandatory course? Yes

No (to be attended later)

Completed Project 100? Yes

No (in the progress)

Completed Career Choice & Preference Test?

Yes

No (to be done later)

No	Questionnaires	Manager's Rating 123			
		A	C	T	M
1	Why are you joining this career?				
2	How do you feel about Great Vision & its services?				
3	Do you have any financial commitment? How does that burden you?				
4	What do you want to achieve in this career? How do you want to make a difference?				

No	Questionnaires	Manager's Rating 123			
		A	C	T	M
5	What are the concerns, obstacles & challenges you foresee in pursuing this career? What kind of support do you require at this moment?				
6	Do you think there is a need for a person to plan for a proper financial planning? Why?				
7	What do you think are the public resistances towards Financial Planning particularly Life Insurance? How do you handle them?				
8	Why do you want to do Sales & Marketing?				

Is the candidate qualified to be contracted? Would you recommend? **Yes** **No**

Interviewed by

Manager's Name

Note: Profile for Recruitment : A=Attitude ; C=Capability ; T=Team work ; M=Motivation

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
11	Contracted Interview	<ul style="list-style-type: none">▪ Reaffirm him on his career▪ Get his commitment for success▪ Reveal to him on the mutual expectation▪ Tell him the dos & don't▪ Full support given by BU & yourself▪ Get ready with AIA & GV contracts	Get the rules from BU heads & tell him your mutual expectation. Check with admin on the necessary forms.
12	Applying for Financing Scheme if needed	Check if he needs financial support (TES/AFS/MBP/Leader/IWAP/ALPHA financing scheme) Inform him on the KPI requirements.	Needs BU head's approval prior to application

***Financing Scheme for New
Business Associates
2022***

Financing Scheme in Summary

Principal	GV	SLM			AHAM	
Category	AIA Life	SLM Takaful (AFYC)			Funds	
Package	TES	AFS	MBP	Leader	IWAP	ALPHA
Duration	6 months	6 months	12 months	12 months	12 months	6 months
Amount (RM)	3K, 5K, 7K, 10K	3K only	3K, 5K, 7K, 10K	7K, 10K, 15K, 20K	3K to 4K	5K and above
Type	Fixed	Fixed	Scale up	Scale up	Scale up	Fixed
Monthly Sales Target (ANP/AFYC)	10.5K, 17.5K, 24.5K, 35K	8K	10.5K, 17.5K, 24.5K, 35K	28K, 40K, 60K, 80K on group sales	RM 400K	As assigned
Min cases per mth	3 cases	3 cases	3 cases	Not applicable	5 cases	Not applicable
Extend to 2 nd Yr	No	No	Yes if achieve 420K	No	No	No
Monthly Payment	Pay if achieve monthly KPI and will pay on top of sales commission. MBP package on 2 nd year is on Top-up basis, 50K bonus if achieve AFYC420 in 2 nd yr)				(note: SLM	Pay upfront
PR0, PR1 %	85%	85%	85%	85%	Not applicable	
Catch up program	Quarterly	Quarterly	Yearly with min 420K	Yearly with min 480K	Quarterly	No
Catch up manpower	Not applicable	Not applicable		N/A, 5, 8, 8	Not applicable unless specified	
Claw back if PR below 85%	Yes	Yes	Yes	Yes	Not applicable	
Performance Review	Monthly	Monthly	Monthly	Min group sales 250K within 6 months	Monthly	
Production Count	Picked up	Picked up	Picked up	Include max 2 earliest MBP candidates sales	Upon fully invested or acceptance	

Note: All candidate must fill up Candidate Profile form, Character & Career Suitability test, Interviewed by respective GAM then to attend specific Principal Interview

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

1. To ask candidate to fill up the **Candidate Profile Form**

Candidate Profile
Application Form
(can be obtained via ACT)

GREAT VISION					New Candidate Profile				
Personal Biodata									
Full Name: (English)			Chinese Name:		Recruited by:				
Age:			Date Of Birth:		New NRIC No:				
Race:			Sex :		Place of birth :				
Residence Address :					Home Tel:				
Email Address:					Mobile Phone:				
Current Occupation:					Company Name:				
Marital Status : Single / Married / Divorced / Widow									
Spouse's Name:					Age:				
Spouse's Occupation:					No of dependents:				
Parents or Children's Name		Date of Birth	Sex	Age	Occupation				
Education & Qualification									
Highest Education Level Attained: Primary / Secondary / Tertiary (Diploma or University)									
School / College / University / etc			Year		Field / Major / Qualification				
Initial Interview @2017									
Page 1									

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

1. To ask candidate to fill up the **Candidate Profile Form**
2. To ask candidate to do both **Character Assessment & Career Suitability Test**

1. Character Assessment



English



Bilingual

2. Career Suitability Assessment



English



Bilingual

Character Test

Name : _____

Date : 6th July 2021

Division : _____

以下每一组有四题，每一题均有关于个性的说明，请依符合您的程度，分别以1, 3, 5, 7评分，1代表最不像你的个性，3代表不像你的个性，5代表接近你的个性，7代表最接近你的个性。There are 4 questions in each group, every question describes about character, please choose the appropriate answer according to your character. 1 refers to not exactly like you, 3 refers to not like you, 5 refers to nearly like you and 7 refers to the most like you.

请注意：每一组四题当中，不得重复评分。换言之，A, B, C, D 四类个性描述选项中，只能配1, 3, 5, 7的评分，不得重复评分。Please take note: you can't repeat your assessment point within a group; whereby there are 4 questions separately answered with 4 different points.

Group		Descriptions : Kindly rate your Self Assessment by the point	Point
1	A	意志坚定, 择善固执 Firm decision, Stick to own way	3
	B	具说服力, 喜好表现 Persuasive, Expressionism	1
	C	性格温和, 温文儒雅 Gentle, Good manner	5
	D	态度谦虚, 宽容容忍 Humble, Forgiveness	7
2	A	敢于冒险, 胆大而为 Adventurous, Daring	7
	B	团队活力, 群体焦点 Team spirit, Center of Focus	5
	C	举止节制, 行事稳健 Discipline, Steadiness	3
	D	要求严格, 严谨考究 Strict, Analytical	1
3	A	具有决心, 有决断力 Decisive, Determine	3
	B	使人信服, 擅于攻心 Trustworthy, Convincing, Persuasive	7
	C	心地善良, 崇尚和谐 Kind, Advocate harmony	5
	D	小心谨慎, 谨言慎行 Cautious, Prudent	1
4	A	有竞争力, 有进取心 Competitive, Ambitious, Initiative	5
	B	淘气调皮, 性格开朗 Mischievous, Cheerful	7
	C	性情温顺, 和蔼可亲 Compliant, Modest, Amiable	3
	D	重视思考, 服从真理 Analytical, Abide to truth	1
5	A	坚持己见, 行事果断 Stick to own view, Resolute, Decisive	1
	B	积极乐观, 善于交际 Positive, Optimistic, Socialable	7
	C	心胸宽广, 心怀慈悲 Forgiveness, Kind, Gentle	5
	D	追求精准, 正确无误 Perfectionist, Accuracy	3

类型 Types	A	B	C	D	E
Total pts	19	27	21	13	14

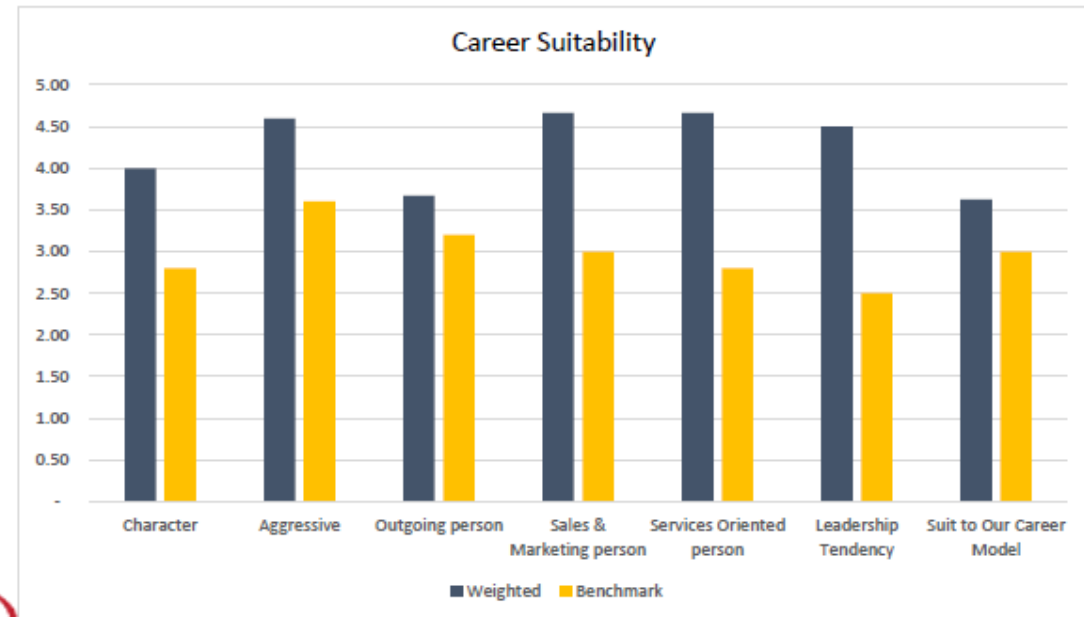
You're Type	B
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Character Assessment & Career Suitability Test

Name: _____

Category	Weighted	Benchmark
Character	4.00	2.80
Aggressive	4.60	3.60
Outgoing person	3.67	3.20
Sales & Marketing person	4.67	3.00
Services Oriented person	4.67	2.80
Leadership Tendency	4.50	2.50
Suit to Our Career Model	3.63	3.00
Total	29.73	20.90

1. Want to be recognized
2. Able to execute & deliver work
3. Not really precise in work
4. Have own thinking & may use own way to do
5. Like to have team
6. Like to perform and talk
7. Not really like detail work



Disclaimer: The above analysis is based on the candidate's input and it is only meant for training use purpose.

This report is strictly for internal circulation and we are not liable to any loss if the candidate were to use this for future action.

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

1. To ask candidate to fill up the **Candidate Profile Form**
2. To ask candidate to do both **Character Assessment & Career Suitability Test**
3. To set **Initial Interview** with the Candidate

GREAT VISION Initial Interview MANAGER'S COPY Date: _____

Candidate Background

Name:	Age:
Recruited by:	Preferred language:
Brief background:	

Kindly tick (✓) whichever appropriate:
 Financial based Non-Financial based
 Bank Relationship Manager Insurance Agent Unit Trust Consultant
 Others _____

No	Questionnaires	Manager's Remark
1	What are you doing now? What's your main responsibility?	
2	Why do you choose your current job?	
3	How do you feel about your current job? What do you like/dislike most about your current job?	
4	What's your previous job? Why you quit the job?	

Initial Interview ©2017 Page 3

Initial Interview Form MANAGER'S COPY

Manager's Assessment

Candidate Name: _____ Recruited by: _____

Manager's Rating (1 = Low or Poor, 5 = High or Good)

	1	2	3	4	5
General outlook & appearance					
Communication & Interpersonal skill					
Level of discontent					
Perception & Attitude towards Financial Planner					
Willing to make a change					

Your overall impression about the Candidate

Will you recommend him/her to be GV Associate? Yes No

Assessed by _____

Manager's Name _____ Date: _____

Initial Interview ©2017 Page 4

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

1. To ask candidate to fill up the **Candidate Profile Form**
2. To ask candidate to do both **Character Assessment & Career Suitability Test**
3. To set **Initial Interview** with the Candidate
4. To propose by **submitting all information** (candidate profile, character assessment, career suitability test and interview form) to the relevant person

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

1. To ask candidate to fill up the **Candidate Profile Form**
2. To ask candidate to do both **Character Assessment & Career Suitability Test**
3. To set **Initial Interview** with the Candidate
4. To propose by **submitting all information** (candidate profile, character assessment, career suitability test and interview form) to Andy Tang
5. Get the **zoom link** for the candidate once the Financing Interview is set.
6. Get the **result after the interview** (within 24 hours)

Manager's Role on Financing candidates

Applicable to the relevant Leader or Manager

7. Once is successful, the leader or manager have to **set up the following**
 - Ensure the candidate has taken the TBE exam
 - Arrange for the Agent Code Contract together with GVF BA contract
 - Business Sales Planning via ACT system
 - Weekly Activities Planning
 - Morning meeting arrangement
 - Weekly SIT Plan
 - Monthly Review
8. **Weekly Feedback** to William & Andy



Weekly SIT Plan

Associate Name: _____ Duration: _____ to _____

A) Activity Review *Refer to ACT System for details report*

Activity Performance							
Tel	App	Pst	Cls	Training	Service	Join call	Referral
Activity Analysis		App / Tel		Pst / App		Cls / Pst	

Seek & Comment on activity review (refer to the previous Activity Goal Setting)

B) Sales Review *Refer to ACT System or Sales Report for details*

Sale Performance							
Life Sales		UT		PRS / EPF		Loan / SME	
Cases	ANP	Cases	RM	Cases	RM	Cases	RM

Seek & Comment on achievement review (refer to the previous Sales Target & Goal Setting)

C) Identify the Potential & Resources if any and give proper advice

D) Action Plan - Assign task if any & assist to plan for the next week activity

Leader Name : _____ Date : _____

PERSONAL Performance Review

Name: _____ Date: _____



- CASE SIZE**
- Market of Prospect
 - Concept used

- Market of Prospect**
- a. Mostly approach on which market of prospects?
 - b. Why?
 - c. How to make a difference or make a change?
 - d. What do I need?
 - e. My Action Plan...

- AVERAGE CASES**
- Personal Emotion
 - Time Management

- Personal Emotion**
- a. Are you satisfied with your average cases?
 - b. What's the cause?
 - c. How do I avoid it?
 - d. What do I need?
 - e. My Action Plan...

- Concept Used**
- a. What kind of Concept is used most frequently?
 - b. Why?
 - c. How to move to another concept?
 - d. What do I need?
 - e. My Action Plan...

REMARK (Sales concern, Health concern, Family concern, Personal concern, others....)

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
11	Contracted Interview	<ul style="list-style-type: none"> ▪ Reaffirm him on his career ▪ Get his commitment for success ▪ Reveal to him on the mutual expectation ▪ Tell him the dos & don't ▪ Full support given by BU & yourself ▪ Get ready with AIA & GV contracts 	<p>Get the rules from BU heads & tell him your mutual expectation.</p> <p>Check with admin on the necessary forms.</p>
12	Applying for Financing Scheme if needed	Check if he needs financial support (TES/AFS/MBP/Leader/IWAP/ALPHA financing scheme) Inform him on the KPI requirements.	Needs BU head's approval prior to application
13	Business Sales Planning	<ul style="list-style-type: none"> ▪ Leader concern to lead the candidate on how to plan for his/her business. ▪ Get the SOP guide for Business Sales Planning via ACT system ▪ Planning includes; financial goal setting, sales goal setting, prospect listing, shortlisted prospect, telephone approach for appointment making. 	Refer to the step given in the SOP
14	Approaching Skill	<p>BU head or Leader to teach him/her on</p> <ul style="list-style-type: none"> ▪ Basic sales cycle ▪ Telephone skill ▪ Face to face manner ▪ Handling of anticipated challenges ▪ FAQ 	To equip the candidates on basic knowledge and skill
15	90 days Job Sampling	<p>Candidates are required to be on field for at least 90 days. Leader to check & perform the following:</p> <ol style="list-style-type: none"> 1. Joint field work with the candidates 2. Case study & role play with him 3. Activity checking & monitoring 4. Supervision & coaching 5. SIT plan is needed by weekly basis <p>Ensure the candidate with 10 cases in 90 days.</p>	SIT plan to check on his activity status, identify his resources, referral, solve his problem.

GV SOP for Recruitment Flow – Execution Guideline for Leader

Step	Subject	Description	Remark
16	BASIC course	Send the candidates to BASIC course conducted by GV talent academy centre to enhance their basic knowledge & skill.	This is a refresh program to enrich the quality of the candidates.
17	Kick Start Program	There are 5 modules in Kick Start Program 1. Fundamental of financial planning 2. Healthcare planning 3. Family income protection planning 4. Debt cancellation 5. Savings for serious money Refer to BU head or GV talent academy centre for the respective slides.	Each Module can be conducted by weekly basis based on BU's choice
18	Next 180 days	Approaching & Closing Skills (Sales Cycle, handling challenges, Referral) Generic & Technique Course (submission, underwriting, claim, servicing)	To send the candidate to GV talent academy
19	Performance review	SIT Plan (identify resources, rectify issue, activity monitoring)	BU level
20	CPD hours monitoring	Leader to ensure the candidate acquire sufficient CPD by the 1 st six months (20 CPD) and the 12 months requirement (30 CPD).	Always can check via principal system for the up to date CPD

Talent Development Program – GV Academy

Course	Category	Subject	Module 1	Module 2	Module 3
CDP – Career Development Program	新人培训 (销售培训) BASIC	On boarding Program	PCE/ TBE tutorial	Online submission	ACT system
		Kick Start Program	Product Training	Concept & Need based	Basic Sales Cycle
		Generic & Technique Program	NB submission & Underwriting	Claim Knowledge & Procedure	Policy servicing

Mechanism: Online zoom delivery

Pre set schedule

GV **BASIC** Monday 4pm – 5:30pm (weekly basis) – New Associates/BA

Note:

1. Pre-registration is needed
2. Full attendance & commitment
3. Assignment & Achievement



FEBRUARY 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31 Chinese New Year Eve	1 Chinese New Year	2 Chinese New Year	3	4	5
6	7	8 GV Office Resume	9	10	11	12
13	14 Valentine's Day GV BASIC (4pm to 5:30pm)	15 90 Days (2pm - 3.30pm)	16	17 AVA Leadership Prog (2pm - 4pm)	18	19 Hi Tea 3pm – 5pm Onboarding (2pm - 3.30pm) BOP - Mand (8pm - 9.30pm)
20	21 GV BASIC (4pm to 5:30pm)	22 90 Days (2pm - 3.30pm)	23 Pangkor Laut Trip	24 Premier & Elite (2pm - 4pm) Trip Focus (4pm - 6pm)	25 BDM Grooming (3pm – 5pm)	26 Hi Tea 3pm – 5pm Onboarding (2pm - 3.30pm)
27 GV BASIC (4pm to 5:30pm)	28	1	2	3	4	5

MARCH 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	1 90 Days (2pm - 3.30pm)	2	3	4 GVMA BOP 8pm – 930pm	5 Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
6	7 GV BASIC (4pm to 5:30pm)	8 90 Days (2pm - 3.30pm)	9	10 AVA Leadership Prog (2pm - 4pm)	11 GV ADVANCED (4pm to 5:30pm)	12 Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
13	14 GV BASIC (4pm to 5:30pm)	15 90 Days (2pm - 3.30pm)	16 GV INTERMEDIATE (4pm to 5:30pm)	17	18	19 Hi Tea 3pm – 5pm Onboarding (2pm - 3.30pm) WEP Eng (8pm - 9.30pm)
20	21 GV BASIC (4pm to 5:30pm)	22 90 Days (2pm - 3.30pm)	23	24 Premier & Elite (2pm - 4pm) Trip Focus (4pm - 6pm)	25 BDM Grooming (3pm – 5pm)	26 Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
27	28 GV BASIC (4pm to 5:30pm)	29 90 Days (2pm - 3.30pm)	30	31	1	2

APRIL 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2
					GVA BOP 8pm – 930pm	Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
3	4	5	6	7	8	9
	GV BASIC (4pm to 5:30pm)	90 Days (2pm - 3.30pm)			GV ADVANCED (4pm to 5:30pm)	Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
10	11	12	13	14	15	16
	GV BASIC (4pm to 5:30pm)	90 Days (2pm - 3.30pm)	GV INTERMEDIATE (4pm to 5:30pm)	AVA Leadership Prog (2pm - 4pm)		Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
17	18	19	20	21	22	23
	GV BASIC (4pm to 5:30pm)	Nuzul Al-Quran			BDM Grooming (3pm – 5pm)	Hi Tea 3pm – 5pm Onboarding (2pm - 3.30pm) BOP - Mand (8pm - 9.30pm)
24	25	26	27	28	29	30
	GV BASIC (4pm to 5:30pm)	90 Days (2pm - 3.30pm)		Premier & Elite (2pm - 4pm) Trip Focus (4pm - 6pm)		Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm

MAY 2022

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Labour Day	2 Labour Day Holiday	3 Hari Raya Puasa	4 Hari Raya Puasa	5	6 GVMA BOP 8pm – 930pm	7 Onboarding (2pm - 3.30pm) Hi Tea 3pm – 5pm
8 Mother's Day	9 GV BASIC (4pm to 5:30pm)	10 90 Days (2pm - 3.30pm)	11	12 AVA Leadership Prog (2pm - 4pm)	13 GV ADVANCED (4pm to 5:30pm)	14 Hi Tea 3pm – 5pm
15 Wesak Day	16 Wesak Day Holiday	17 90 Days (2pm - 3.30pm)	18 GV INTERMEDIATE (4pm to 5:30pm)	19	20	21 BOP - Mand (8pm - 9.30pm) Hi Tea 3pm – 5pm
22	23 GV BASIC (4pm to 5:30pm)	24	25	26 Premier & Elite (2pm - 4pm) Trip Focus (4pm - 6pm)	27 BDM Grooming (3pm – 5pm)	28 Hi Tea 3pm – 5pm
29	30 GV BASIC (4pm to 5:30pm)	31	1	2	3	4



**Thank
You.**

