

# 2019 CONFERENCES

## International Agency Transformation Forum

*From Quantity to Quality in China*



**May 22 – 23, 2019**  
Grand Kempinski Hotel Shanghai  
Shanghai, China



# 2019 International Agency Transformation Forum

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## Schedule at a Glance

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### Wednesday, 22 May

7:30 – 17:00	REGISTRATION
8:45 – 9:30	CONFERENCE WELCOME & OPENING REMARKS
9:30 – 10:15	AGENCY SYSTEM INNOVATIONS
10:15 – 10:45	NETWORKING BREAK
10:45 – 11:15	SUCCESSFUL, PROFITABLE AGENCY DISTRIBUTION MODELS – PART 1
11:15 – 11:45	SUCCESSFUL, PROFITABLE AGENCY DISTRIBUTION MODELS – PART 2
11:45 – 12:30	PUBLIC VALUE IS THE CORE OF THE INDUSTRY
12:30 – 13:30	LUNCH
13:30 – 14:15	FROM QUANTITY TO QUALITY: FUNDAMENTALS OF A HIGH QUALITY RECRUITING STRATEGY
14:15 – 14:45	RECRUITING & SELECTING TODAY'S TOP TALENT
14:45 – 15:15	SUSTAINING AN INNOVATIVE CULTURE
15:15 – 15:45	NETWORKING BREAK
15:45 – 16:30	INNOVATIONS IN FIELD TEAM MANAGEMENT
16:30 – 17:00	AI MEETS RISK INTELLIGENCE: A CASE STUDY OF AI-POWERED HEALTHCARE
17:00 – 17:20	SUMMARY OF THE DAY

### Thursday, 23 May

8:00 – 8:45	REGISTRATION
8:45 – 9:00	WELCOME BACK
9:00 – 9:30	LIMRA RESEARCH UPDATE: AGENCY MODEL BEST PRACTICES
9:30 – 10:15	21 <sup>ST</sup> CENTURY GOAL SETTING TO EXPONENTIALLY INCREASE RETENTION AND PRODUCTIVITY
10:15 – 10:45	NETWORKING BREAK
10:45 – 11:15	DIGITAL FIRST MARKETING – HELPING AGENTS SELL MORE, AND SERVICE THEIR CUSTOMERS BETTER
11:15 – 12:30	INSURTECH EXECUTIVE PANEL: USING TECHNOLOGY TO EMPOWER AGENTS
12:30 – 13:30	LUNCH
13:30 – 14:00	INTERMEDIARY TRANSFORMATION: THE ROAD TO HIGH QUALITY DEVELOPMENT
14:00 – 15:15	CAO PANEL: CREATING A QUALITY-DRIVEN AND CUSTOMER-CENTRIC AGENCY OPERATION
15:15 – 15:45	NETWORKING BREAK
15:45 – 16:45	TRANSFORM WITH A TOUCH OF MAGIC
16:45	CLOSING



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# 2019 International Agency Transformation Forum

## WEDNESDAY, 22 MAY

7:30 – 17:00 — REGISTRATION OPEN

Grand Ballroom Foyer, Floor 3

8:45 – 9:30 — CONFERENCE WELCOME & OPENING REMARKS

Suncuba Grand Ballroom, Floor 3



**DAVID LEVENSON**

President and Chief Executive Officer  
LIMRA, LOMA, and LL Global, Inc.

9:30 – 10:15 — AGENCY SYSTEM INNOVATIONS



**JOHN CAI**

Regional Chief Executive  
AIA Group Limited

10:15 – 10:45 — NETWORKING BREAK

10:45 – 11:15 — SUCCESSFUL, PROFITABLE AGENCY DISTRIBUTION MODELS — PART 1



**HUA YU**

Vice President  
China Pacific Life Insurance Co., Ltd.

11:15 – 11:45 — SUCCESSFUL, PROFITABLE AGENCY DISTRIBUTION MODELS — PART 2



**SAM NAKACHI**

Assistant General Manager  
of Marketing Planning Department  
Sumitomo Life Insurance Company

11:45 – 12:30 — PUBLIC VALUE IS THE CORE OF THE INDUSTRY



**JUTIAN WEN**

Member of the 18th National Congress of the  
Communist Party of China, Marketing Director  
China Taiping Life Insurance

12:30 – 13:30 — LUNCH

Elements Restaurant, Lobby Floor

13:30 – 14:15 — FROM QUANTITY TO QUALITY: FUNDAMENTALS OF A HIGH QUALITY RECRUITING STRATEGY



**CHRIS AU**

Regional CAO  
Manulife Financial Asia, Ltd.

14:15 – 14:45 — RECRUITING & SELECTING TODAY'S TOP TALENT



**RICK FUNKE**

Assistant Vice President,  
Assessment and Development Solutions  
LIMRA and LOMA

14:45 – 15:15 — SUSTAINING AN INNOVATIVE CULTURE



**SIDNEY YUEN**

Chairman  
HBC

15:15 – 15:45 — NETWORKING BREAK

15:45 – 16:30 — INNOVATIONS IN FIELD TEAM MANAGEMENT



**HONGYOU CHEN**

Sales Head, First Regional Area  
Ping An Insurance Company of China, Ltd.,  
Shanghai Branch

16:30 – 17:00 — **AI MEETS RISK INTELLIGENCE: A CASE STUDY OF AI-POWERED HEALTHCARE**



**JASON LIU**  
CEO  
*Leapstack, Inc.*

17:00 – 17:20 — **SUMMARY OF THE DAY**



**YADONG LAN**  
Chairman  
*Hengqin Life Insurance Co., Ltd.*

## THURSDAY, 23 MAY

8:00 – 8:45 — **REGISTRATION**

*Grand Ballroom Foyer, Floor 3*

8:45 – 9:00 — **WELCOME BACK**

*Suncuba Grand Ballroom, Floor 3*

9:00 – 9:30 — **LIMRA RESEARCH UPDATE: AGENCY MODEL BEST PRACTICES**



**PING ZHAO**  
Chief Strategy Officer, Greater China  
*LIMRA and LOMA*

9:30 – 10:15 — **21<sup>st</sup> CENTURY GOAL SETTING TO EXPONENTIALLY INCREASE RETENTION AND PRODUCTIVITY**



**JOHN T. BAIER**  
Chairman and Co-Founder  
*25 Point Systems Inc.*

10:15 – 10:45 — **NETWORKING BREAK**

10:45 – 11:15 — **DIGITAL FIRST MARKETING — HELPING AGENTS SELL MORE, AND SERVICE THEIR CUSTOMERS BETTER**



**HUGH TERRY**  
Founder  
*The Digital Insurer*

11:15 – 12:30 — **INSURTECH EXECUTIVE PANEL: USING TECHNOLOGY TO EMPOWER AGENTS**



**HAOJIAN LI**  
Founder & CEO  
*TopMDRT*



**HONGZHEN TIAN**  
Deputy General Manager, Chief Actuary  
*Funde Sino Life Insurance Company, Ltd.*



**CHUNYUAN YANG**  
Assistant President  
*Mingya Insurance Brokers*



**JACKY ZUO**  
President and CEO  
*Allianture Info Tech Co., Ltd.*



**JUN WU, Moderator**  
Founder and CEO  
*Shenzhen Kaopubao (KPB) Technology Development Co., Ltd.*

12:30 – 13:30 — **LUNCH**

*Elements Restaurant, Lobby Floor*

# 2019 International Agency Transformation Forum

## 13:30 – 14:00 — INTERMEDIARY TRANSFORMATION: THE ROAD TO HIGH QUALITY DEVELOPMENT



**CHONGWEN LIN**  
Chairman and President  
GM Financial Service

## 14:00 – 15:15 — CAO PANEL: CREATING A QUALITY-DRIVEN AND CUSTOMER-CENTRIC AGENCY OPERATION



**JAMES CHANG**  
Senior Vice President  
AVIVA-COFCO Life Insurance Co., Ltd.



**XIAOHONG SUN**  
Vice President  
Aeon Life Insurance Company Ltd.



**ALBIN WANG**  
General Manager Assistant  
CITIC-Prudential Life Ins. Co. Ltd.



**DAVID YU**  
Chief Agency Officer  
Sino-US United Metlife Insurance  
Company Limited



**EDWIN SI, Moderator**  
Managing Director, China  
LIMRA and LOMA

## 15:15 – 15:45 — NETWORKING BREAK

## 15:45 – 16:45 — TRANSFORM WITH A TOUCH OF MAGIC



**JOHNNY WU**  
International Celebrity Magician & Speaker

A rational person knows magic is not real, yet the best magicians still leave people in awe by making the seemingly impossible appear as possible. The technique for doing this involves a good closing strategy: The

ability to change a person's perception and believe in something they did not previously believe in. The ability to understand a prospect's pain and provide a solution accordingly. And the ability to provide an experience that is not offered by competitors. Johnny Wu, international magician and illusionist, will deliver a high energy, entertaining performance that combines the allure of magic with a powerful message on how any transformation is possible when looked at from the right perspective – and how embracing the mindset of a closer can help lead these transformations.

## 16:45 — CLOSING

## Antitrust Policy and Caution

Each person attending this function must be mindful of the constraints imposed by applicable antitrust laws.

Some personnel here today represent companies that are in direct business competition with one another.

This meeting's purpose is to provide a forum for the free exchange of ideas on the designated topics. It is not the purpose of this meeting to reach any agreement that could have anticompetitive effects.

You can avoid antitrust compliance problems by following simple guidelines:

- Stick to the published agenda.
- Pricing, premiums, and benefits to be offered or terminated are competitively sensitive information which competitors should not exchange or discuss with each other. Never take a poll of views or make a collective agreement on these issues.
- Always retain your right to make an independent judgment on behalf of your company.

LIMRA and LOMA are dedicated to the purpose of assisting all of their members to achieve their competitive potential.

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# 用思想 影响保险

今日保險  
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两天听百年, 品质见未来

# 对话寿险业“造钟者”



俯仰中国保险业,  
顶层视角20年

周延礼  
国务院参事  
全国政协委员  
原保监会副主席



“我们观察了全球保险103年,  
唯品质恒久不变”

Nick Wilson  
LIMRA LOMA Global  
国际人才发展中心总监



LIMRA课程听过,  
但30多年老行尊的  
原装讲师见过几个?

郭晋维  
LIMRA首席讲师



从销售一线到最高决策者,  
28年逆袭之路不辍,  
畅想寿险营销未来

兰亚东  
横琴人寿董事长



我是梦之队队长,  
团队300人, MDRT100%。  
我行, 你也行!

周荣佳 Wave Chow  
友邦香港资深区域总监  
国际峰会主讲讲师



20多年保险从业的发现:  
互联网上,  
消费者竟如此不同

钟诚  
轻松筹健康保险事业群CEO



我曾是保险业务员,  
通过互联网,  
帮助500万同行, 打造个人品牌

李浩坚  
超级圆桌创始人

- 1 在中国举办的、首次面向营销一线的国际行业盛典
- 2 全球顶级行业大脑, 揭示百年轨迹、规律和趋势
- 3 分享案例、揭示原理、袒露心迹: 道法术后还有魂
- 4 寿险培训体系缔造者, 首发原汁原味最新深度培训

- 5 国家大政财税政策, 万物关联, 从保障到财富管理
- 6 全球独步私享工作坊, 赢得信任、赢得一切(限额)
- 7 互联网、人工智能时代, 不被替代, 掌握驾驭科技
- 8 个人到团队持续奋斗, 100%继续率, IQA典范分享



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直接报名

# 质

# 2019 见未来

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QUALITY IS THE FUTURE

LIMRA LOMA 首届IQA国际保险峰会 IQA INSURANCE SUMMIT 2019 6月28日-29日 珠海·横琴

主办: LIMRA LOMA GLOBAL INC.

承办: 深圳市靠谱科技发展有限公司 (IQA中国独家授权运营商)

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IQA (International Quality Award), 国际品质奖, 是享誉百年的国际寿险组织LIMRA, 于1960年创设的、唯一以品质和客户视角作为衡量标准的全球性认证奖项, 用以表彰为客户提供专业、优质保险服务的寿险从业者。

IQA的中国标准为同时满足: 2个自然年度内, 保单件数不少于30件, 13个月继续率不低于90%, 相当于从“时间、客户数、客户满意度”三个维度同时考察, 极富挑战性, 是衡量保险企业和从业者含金量的试金石。

2018年, 全球仅4万多人获此殊荣, 其中包括业界广为传颂的日本寿险女神柴田和子, 已连续44年获IQA认证。加入LIMRA会员、申请IQA认证奖项, 正在成为中国寿险行业提质增效、赢得消费者青睐的更高标准。

2018年, 平安、太平洋、太平、泰康、阳光等近20家寿险公司, 及明亚、盛唐、大童等知名寿险中介, 发起成立了“中国保险IQA联盟”, 授权深圳市靠谱科技发展有限公司代运营。

2019年6月28-29日, LIMRA将在港珠澳大桥起点——珠海横琴, 召开“质·见未来”为主题的首届IQA国际保险峰会, 围绕寿险升级转型, 面向寿险领域的顶级精英和团队, 以“品质”为核心, 以“开拓国际视野、提升职业高度、拓展专业深度、掌握前沿科技”为宗旨, 整合LIMRA全球最佳资源, 分享高层观点、最新资讯、海外案例、原创课程、体系化销售技能和保险科技趋势等, 是极为值得期待的高品质行业盛事。