

# GV Managers' 1<sup>st</sup> Quarter Review Session

10<sup>th</sup> April 2023



# The Ultimate goal in doing Business is **Sustainable Profit**

- How to measure Profit?
- First must have “**Sales**” or “**Business Revenue**”
- Then from Revenue minus cost of goods = Gross Profit
- How to ensure good sales in the first place!
- **MAPA** is the measuring tape for Sales Monitoring



# How sales can be increased?

- Because of people – because of **Sales People (Manpower)** and the question is how many sales people? Make a difference
- Then, How many of them are **Active**? Active sales people with constant case submission in every single month
- The critical factor is how many of them are **Productive**? High Producer? With more cases in a month?
- What is the case size? How BIG? How much per case? What's the **Average Case Size**?

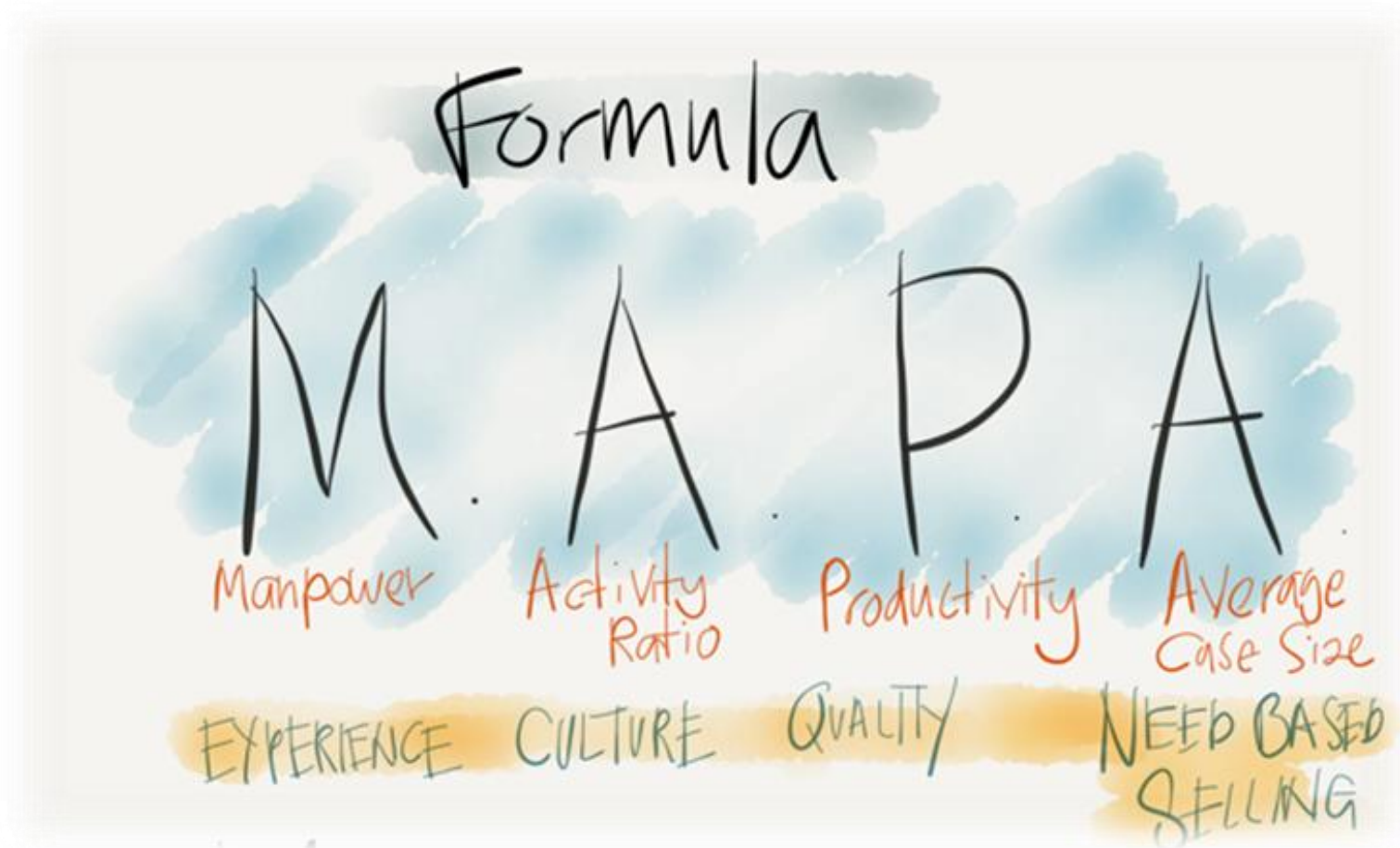
M

A

P

A

# MAPA Report



## Let's look at the differences....

MAPA	Dream Team	Short of manpower	Only half of them are active	Can only produce half of the activity	Market not good
Manpower	100	10	10	10	10
Active Ratio	80%		40%	40%	40%
Productivity	4 cases			2 cases	2 cases
Average case size	5,000				2,500
Total Monthly Sales	1.6 mil	160K	80K	40K	20K
Total Annual Sales Performance	19.2 mil	1.92 mil	960K	480K	240K

**Point to ponder: Which category are you in?**

If Loan, change to RM500,000 as average case size;

if Funds, then change to RM50,000 for average case size.

# THE MAGIC FORMULA - MAPA

VARIANCES	M	A	P	A	TOTAL ANNUAL PRODUCTION (x12)	Growth %
<i>Sample</i>	<i>16</i>	<i>50%</i>	<i>2</i>	<i>2,400</i>	<i>460,800.00</i>	<i>-</i>
Increase in Manpower	17	50%	2	2,400	489,600.00	6.3%
	18	50%	2	2,400	518,400.00	12.5%
Increase in Active Ratio	16	60%	2	2,400	552,960.00	20.0%
	16	80%	2	2,400	737,280.00	60.0%
Increase in Productivity	16	50%	3	2,400	691,200.00	50.0%
	16	50%	4	2,400	921,600.00	100.0%
Increase in Average Case Size	16	50%	2	3,600	691,200.00	50.0%
	16	50%	2	4,000	768,000.00	66.7%

- Recruit
- Activate Consultant
- Sales Breakthrough
- Client Segment Expansion



The needles can be moved by initiating training for the respective area! Take it a step of a time, or accelerate depends on how high we aim.

What's my **MAPA standing** for my Group?

Refer to report as at Feb or March 2023  
& also take reference from Dec 2022

# ACT system Familiarization

12:07 PM Thu 2 Jan 100%

Dashboard

China (FYP 100,000 by 31st Dec 2020) 25.00	Japan (FYP 200,000 by 31st Dec 2020) 12.5
75,000.00	175,000.00
PRODUCTIVITY	Undefined
12,500.00	0.00

China Early Bird FYP 60,000	0.00%
<b>Period:</b> 01-01-2020 - 02-01-2020	
<b>ANP:</b> 60,000.00	
<b>Balance:</b> 60,000.00	


  

Japan Early Bird FYP 120,000	0.00%
<b>Period:</b> 01-01-2020 - 02-01-2020	
<b>ANP:</b> 120,000.00	
<b>Balance:</b> 120,000.00	

**Congratulation**  
Let's congratulate **Andy Tang** on submitting a case **ANP25,000.00**. You are the star of the family. So proud of you!


**HIGHLIGHTS**



## GREAT VISION

**2020 APM Registration**  
Please register yourself for the 2020 APM which will be held on 8th & 9th January at Avenue Garden Bangi.

**HIGHLIGHTS**



# Congratulations!

**Congratulation**  
Let's congratulate **Andy Tang** on submitting a case **ANP15,000.00**. You are the star of the family. So proud of you!

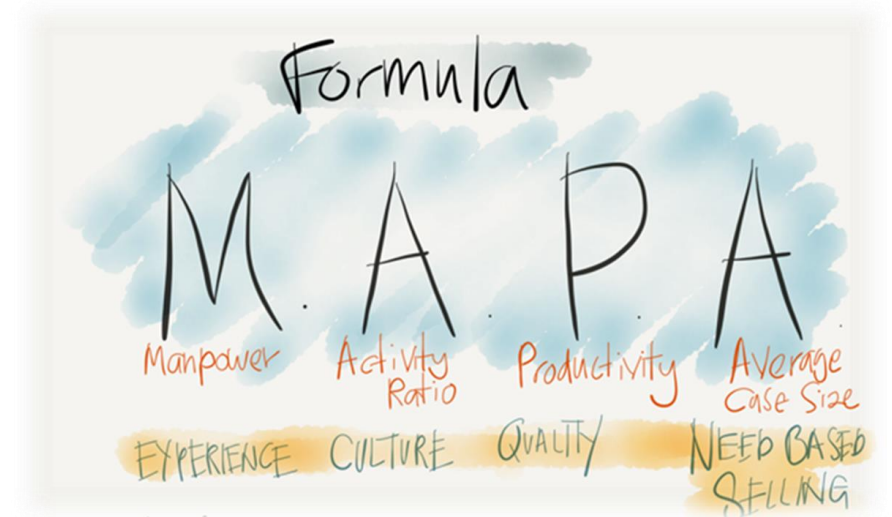
Dashboard       Sales Kit       Notification

# Search **MAPA** on.... ACT system

- Life & Takaful, refer to ACT system (sales kit)
- Loan, refer to ACT system (sales kit)
- Funds, refer to ACT system (sales kit)

Type “MAPA” at sales kit search engine

Then, select the appropriate file



# Sample Life Insurance MAPA report can be extracted from ACT

Agency	NOP
Rank	(All)

Row Labels	Annual Goal	Accumulated Goal	Total Production	Sum of % on Annual Goals	Sum of % on Acc. Goals	Sum of ANP YTD	Sum of APYC YTD	Sum of ANP YTD Cases	Sum of APYC YTD Cases	Sum of Total Cases	WM	Man Power	Sum of Avg Cases	Sum of Case Size	MAPA	Current Month Man Power	Current Month Active Ratio
CHIA HUA HONG	160,000.00	40,000.00	3,751.80	2%	9%	3,751.80	-	1.00	-	1.00	3.00	1	0.53	3,751.80	3,751.80	1	100%
CHOONG JIUN HORNG	120,000.00	30,000.00	432.00	0%	1%	432.00	-	-	-	-	3.00	1	-	-	-	1	0%
CHOONG YUE WEN	30,000.00	-	-	0%	0%	-	-	-	-	-	-	1	-	-	-	1	0%
PONG MEI FUN	80,000.00	20,000.00	8,087.76	10%	40%	8,087.76	-	2.00	-	2.00	3.00	1	0.67	4,043.88	8,087.76	1	100%
HO YIE HONG	100,000.00	25,000.00	23,716.00	24%	95%	23,716.00	-	6.00	-	6.00	3.00	1	2.00	3,952.67	23,716.00	1	100%
LEONG LI KAI	120,000.00	30,000.00	30,328.04	25%	101%	30,328.04	-	7.00	-	7.00	3.00	1	2.33	4,332.58	30,328.04	1	100%
LOH JUN KANG	30,000.00	7,500.00	-	0%	0%	-	-	-	-	-	3.00	1	-	-	-	1	0%
NG CHIEW YEN	250,000.00	62,500.00	44,428.36	18%	71%	44,428.36	-	4.00	-	4.00	3.00	1	1.53	11,107.09	44,428.36	1	100%
NG CHUI PENG	160,000.00	40,000.00	27,600.00	17%	69%	27,600.00	-	7.00	-	7.00	3.00	1	2.33	3,942.86	27,600.00	1	100%
PANG TEEN CHEANG	250,000.00	62,500.00	118,433.04	47%	189%	118,433.04	-	4.00	-	4.00	3.00	1	1.53	29,608.26	118,433.04	1	0%
THONG MING CHONG	100,000.00	25,000.00	66,781.08	67%	267%	66,781.08	-	6.00	-	6.00	3.00	1	2.00	11,130.18	66,781.08	1	100%
TOK CHEE HONG	150,000.00	37,500.00	24,029.18	16%	64%	24,029.18	-	6.00	-	6.00	3.00	1	2.00	4,004.86	24,029.18	1	100%
WONG SIEW YOON	120,000.00	30,000.00	85,824.12	72%	286%	85,824.12	-	18.00	-	18.00	3.00	1	6.00	4,768.01	85,824.12	1	100%
YAP CHOO LING	30,000.00	7,500.00	-	0%	0%	-	-	-	-	-	3.00	1	-	-	-	1	0%
<b>Grand Total</b>	<b>1,700,000.00</b>	<b>417,500.00</b>	<b>433,411.38</b>	<b>25%</b>	<b>104%</b>	<b>433,411.38</b>	<b>-</b>	<b>61.00</b>	<b>-</b>	<b>61.00</b>	<b>39.00</b>	<b>14</b>	<b>1.56</b>	<b>7,105.10</b>	<b>433,411.38</b>	<b>14</b>	<b>64%</b>

## GVMA 1st Quarter MAPA on Loans Performance

Group	Manpower	March	March Total Cases	Accumulated Months	Total Cases	Active	Average	Average	MAPA	YTD MAPA
		Total Acceptance		Total Acceptance		Ratio	No of cases	Case Size	Per month	3 Months
SCS Team	24	5,351,566.00	14	10,337,777.00	25	23%	1.50	413,511.08	3,445,925.67	10,337,777.00
Central 1	14	3,617,435.00	5	6,233,729.00	9	19%	1.13	692,636.56	2,077,909.67	6,233,729.00
Central 2	18	4,356,700.00	8	10,568,200.00	18	24%	1.42	587,122.22	3,522,733.33	10,568,200.00
Ajax Team	7	4,065,580.00	6	8,733,480.00	13	33%	1.86	671,806.15	2,911,160.00	8,733,480.00
Jason Team	4	4,205,460.00	4	8,862,109.00	11	33%	2.75	805,646.27	2,954,036.33	8,862,109.00
Angeline Team	7	987,000.00	2	4,534,000.00	4	14%	1.33	1,133,500.00	1,511,333.33	4,534,000.00
Alex Wong Team	9	880,000.00	2	3,223,282.00	7	22%	1.17	460,468.86	1,074,427.33	3,223,282.00
Jean Chan Team	8	765,000.00	2	2,195,000.00	4	17%	1.00	548,750.00	731,666.67	2,195,000.00
Northern Team	9	4,357,000.00	4	4,636,387.00	5	11%	1.67	927,277.40	1,545,462.33	4,636,387.00
East Coast Team	4	2,082,500.00	1	2,297,500.00	2	22%	0.75	1,148,750.00	765,833.33	2,297,500.00
GVF Kuching	4	-	0	-	0	0%	-	-	-	-
GVF KK	4	-	0	-	0	0%	-	-	-	-
<b>Total</b>	<b>112</b>	<b>30,668,241.00</b>	<b>48</b>	<b>61,621,464.00</b>	<b>98</b>	<b>18%</b>	<b>1.21</b>	<b>615,789.05</b>	<b>1,711,707.33</b>	<b>61,621,464.00</b>

# GV - Monthly MAPA for Funds - Jan to Dec 2022

TEAM	MAPA	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	Simple Average
CELINA	Total Sales	6,718,132	2,597,501	2,307,336	13,030,790	3,519,468	19,512,638	3,716,140	3,626,271	3,170,588	196,105	1,829,513	1,747,766	5,164,354
	Manpower	15	15	15	15	15	15	15	15	15	15	15	15	15
	Active Ratio	60%	53%	40%	60%	53%	33%	33%	27%	40%	33%	40%	53%	44%
	Productivity	7.33	5.50	5.17	4.78	1.88	3.80	5.80	2.25	2.17	2.00	2.33	6.25	4.10
	Average Case Size	101,790	59,034	74,430	303,042	234,631	1,026,981	128,143	402,919	243,891	19,611	130,680	34,955	230,009
EDWIN	Total Sales	62,700	1,000	34,350	793,540	26,550	217,050	15,000	608,307	36,250	12,910	54,003	119,900	165,130
	Manpower	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8
	Active Ratio	38%	19%	25%	34%	38%	33%	32%	33%	33%	34%	33%	34%	32%
	Productivity	3.00	3.00	3.17	3.00	2.67	2.69	2.56	2.38	2.33	2.19	2.14	2.88	2.67
	Average Case Size	6,967	7,078	5,161	27,018	22,954	26,400	25,004	35,170	32,049	30,638	30,027	20,859	22,444
ERIC ENG	Total Sales	893,682	3,869,660	1,095,604	2,854,079	331,005	452,849	297,914	269,319	400,399	202,707	698,021	500,069	988,776
	Manpower	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00
	Active Ratio	67%	66%	63%	57%	54%	50%	47%	44%	41%	39%	37%	37%	50%
	Productivity	4.22	3.08	2.97	2.78	2.60	2.55	2.47	2.42	2.36	2.32	2.25	2.37	2.70
	Average Case Size	6,620	24,553	21,944	28,756	26,917	25,877	25,051	24,728	25,035	24,750	25,597	23,542	23,614
ERIC YAP	Total Sales	77,586	83,386	79,651	133,463	84,886	428,998	33,789	43,950	64,293	130,650	43,154	123,266	110,589
	Manpower	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13
	Active Ratio	69%	50%	44%	42%	42%	38%	38%	38%	34%	32%	31%	32%	41%
	Productivity	4.22	4.08	3.65	3.23	2.93	2.90	2.63	2.46	2.43	2.39	2.29	2.58	2.98
	Average Case Size	2,042	3,037	3,881	5,269	5,810	10,207	10,019	10,059	10,619	11,843	11,687	10,287	7,897
HUI	Total Sales	5,347,381	374,260	1,223,341	481,311	913,425	410,169	301,001	285,946	247,638	100,340	192,704	467,179	862,058
	Manpower	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00	19.00
	Active Ratio	84%	89%	86%	86%	80%	71%	66%	63%	58%	55%	54%	56%	71%
	Productivity	6.06	4.47	4.45	4.03	3.72	3.75	3.60	3.48	3.38	3.29	3.19	3.42	3.90
	Average Case Size	55,128	37,642	31,858	28,345	29,469	28,783	28,552	28,208	28,356	28,072	27,362	23,618	31,283

# GV - Monthly MAPA for Funds - Jan to Dec 2022

JACK	Total Sales	417,702	553,755	1,004,916	584,444	340,145	153,047	256,503	6,293,440	204,783	253,566	122,339	518,130	891,897
	Manpower	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11.00	11
	Active Ratio	91%	86%	85%	80%	73%	67%	64%	60%	57%	54%	52%	52%	68%
	Productivity	5.30	4.95	4.32	4.06	3.95	3.84	3.88	3.79	3.68	3.66	3.54	4.56	4.13
	Average Case Size	7,881	10,335	16,334	18,034	18,361	18,071	17,424	47,781	47,615	46,585	45,671	34,525	27,385
JEAN	Total Sales	624,240	617,729	1,290,012	889,304	1,184,996	605,756	435,839	237,295	147,524	124,340	220,900	370,270	562,350
	Manpower	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00	21.00
	Active Ratio	67%	57%	67%	63%	58%	52%	48%	45%	42%	40%	38%	37%	51%
	Productivity	3.29	2.63	2.50	2.42	2.28	2.24	2.19	2.15	2.08	2.08	2.08	2.32	2.35
	Average Case Size	13,570	19,714	24,114	26,729	33,139	35,216	36,914	36,554	36,342	35,590	35,237	31,242	30,363
JOCELYN	Total Sales	135,200	7,100	32,500	317,750	128,900	305,300	92,502	37,300	3,300	54,300	400	29,900	95,371
	Manpower	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3
	Active Ratio	33%	33%	33%	42%	33%	28%	29%	29%	30%	33%	30%	31%	32%
	Productivity	7.00	5.00	3.67	3.60	3.60	3.60	3.50	3.14	2.88	2.80	2.80	2.82	3.70
	Average Case Size	19,314	14,230	15,891	27,364	34,525	51,486	48,536	48,025	46,081	39,791	39,805	36,918	35,164
KELVIN	Total Sales	326,530	290,874	303,052	10,465,831	257,360	542,932	293,530	194,640	430,543	148,663	171,583	462,983	1,157,377
	Manpower	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00
	Active Ratio	85%	69%	67%	65%	60%	56%	54%	52%	50%	45%	45%	46%	58%
	Productivity	5.45	4.61	4.19	3.88	3.69	3.52	3.73	3.63	3.50	3.47	3.33	4.03	3.92
	Average Case Size	5,442	7,439	8,445	86,260	80,859	78,623	68,197	64,667	64,558	64,653	63,031	47,891	53,339
NCP	Total Sales	182,846	117,116	249,708	175,047	160,070	263,370	144,730	89,521	215,144	75,520	137,784	229,157	170,001
	Manpower	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20
	Active Ratio	50%	45%	45%	44%	42%	39%	36%	34%	34%	33%	33%	35%	39%
	Productivity	2.00	2.28	2.48	2.37	2.24	2.13	2.06	1.96	1.95	1.91	1.86	1.98	2.10
	Average Case Size	9,142	7,316	8,204	8,732	9,413	11,482	12,552	12,800	13,425	13,493	13,315	12,439	11,026

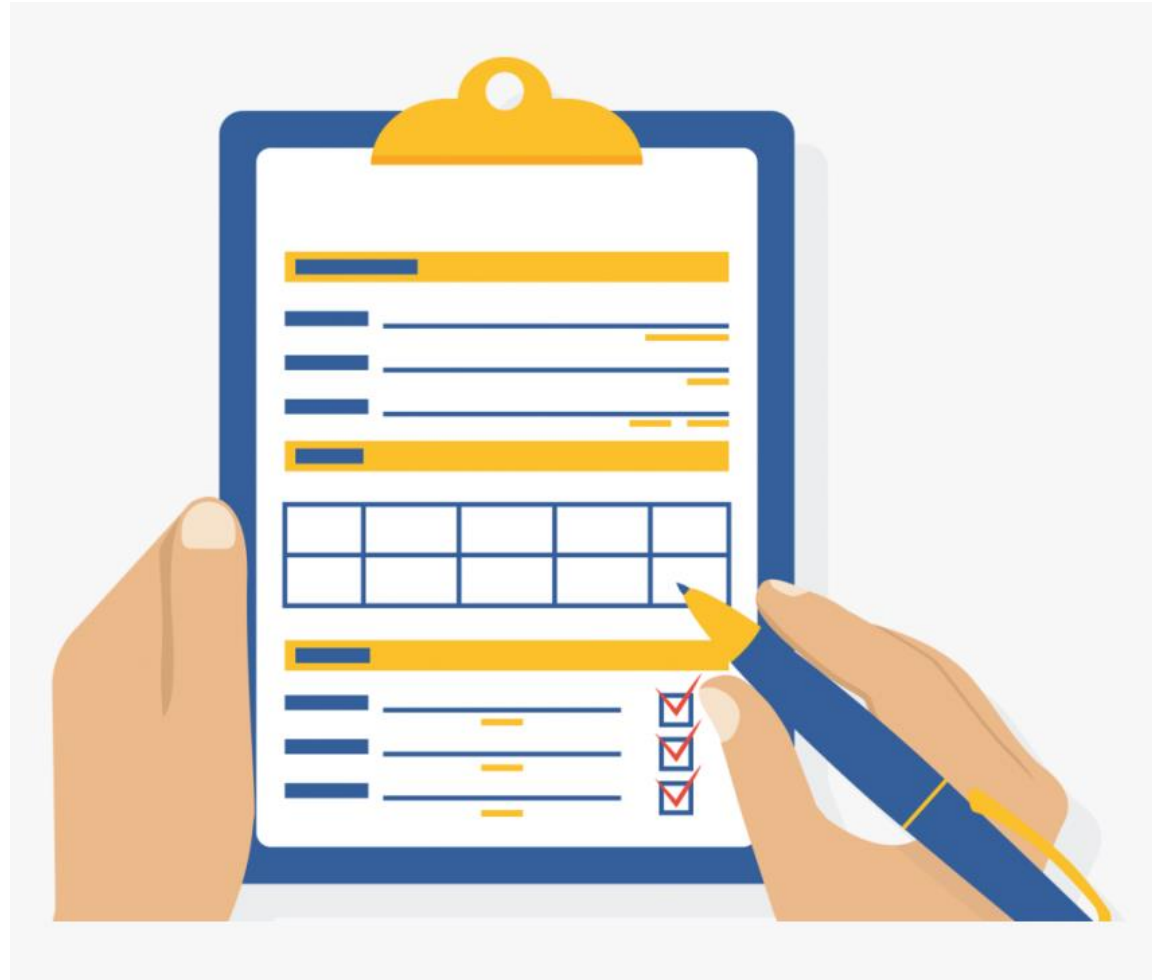


## GV - Monthly MAPA for Funds - Jan to Dec 2022

NEO	Total Sales	154,030	102,829	96,118	167,294	55,102	91,440	34,206	221,250	72,568	12,900	26,750	183,037	101,460
	Manpower	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00
	Active Ratio	75%	63%	56%	54%	48%	47%	46%	45%	43%	40%	38%	41%	50%
	Productivity	4.44	4.47	4.00	3.62	3.69	3.41	3.23	3.07	3.02	2.94	2.90	3.12	3.49
	Average Case Size	3,851	3,834	4,412	5,535	5,377	5,748	5,564	6,987	7,157	7,147	7,134	6,617	5,780
SEM	Total Sales	6,074,797	440,991	3,801,172	991,468	546,500	814,362	609,346	492,550	314,661	230,483	290,918	529,950	1,261,433
	Manpower	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00
	Active Ratio	100%	100%	96%	94%	90%	83%	80%	77%	75%	74%	73%	74%	85%
	Productivity	6.63	5.63	5.70	5.33	4.94	4.90	4.96	4.92	4.61	4.34	4.16	5.01	5.09
	Average Case Size	114,619	72,398	78,755	70,678	66,601	64,639	59,545	57,142	56,570	55,923	54,914	42,520	66,192
SY	Total Sales	968,663	1,042,435	576,900	663,114	132,418	1,404,218	401,800	616,834	712,404	839,518	352,563	933,227	720,341
	Manpower	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10
	Active Ratio	60%	55%	53%	53%	50%	52%	53%	51%	51%	52%	52%	53%	53%
	Productivity	19.67	13.73	11.56	10.00	9.08	8.42	8.03	7.49	6.83	6.46	6.30	7.73	9.61
	Average Case Size	8,209	13,319	13,989	15,481	14,905	18,344	17,473	18,913	20,760	21,900	21,479	17,750	16,877
TW	Total Sales	171,350	279,541	704,832	334,260	181,350	1,025,482	300,879	173,850	324,518	151,112	156,185	687,629	374,249
	Manpower	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00
	Active Ratio	43%	43%	43%	43%	41%	38%	35%	34%	36%	34%	34%	40%	39%
	Productivity	5.33	5.83	6.33	5.63	5.00	4.69	4.74	4.55	4.09	4.09	3.96	4.78	4.92
	Average Case Size	5,355	6,441	10,138	11,037	11,526	17,979	18,619	18,333	19,000	18,996	18,111	14,034	14,131
WILLIAM	Total Sales	52,014	33,660	95,082	59,401	25,999	30,761	16,670	39,232	8,374	31,442	52,817	82,281	43,978
	Manpower	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14.00	14
	Active Ratio	71%	43%	38%	36%	31%	30%	27%	25%	23%	22%	23%	23%	33%
	Productivity	1.80	1.75	1.81	1.80	1.73	1.72	1.73	1.68	1.66	1.71	1.63	1.72	1.73
	Average Case Size	2,890	4,080	6,233	6,671	7,004	6,905	6,969	7,507	7,525	7,408	7,815	7,877	6,574

# Fill up form to feel it....

- Analyse, understand the issue, diagnose & react to it.



Name \_\_\_\_\_

Date: \_\_\_\_\_

<b>SALES Performance Review</b>	<input type="checkbox"/> Annual	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Monthly
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Category	Goal Set	Actual Achieved	%	Remark
Total Production				
Total Cases				
Man Power				
Active Ratio %				
Productivity (Average case)				
Case Size				

RECRUITING	Goal Set	Actual Achieved	Remark
New Recruits (pax)		pax	
Total Man Power		pax	

**Sales/ Recruiting/ Marketing/ Training/ Admin Remark (Issue faced, Action Plan & Strategies)**

**OVERALL Comment by Top Management**

Prepared by  _____	Reviewed by  _____
Name: _____	Name: _____

## Manager to fill up this form every month

- This is a **Monthly Review** Form
- Get the form from **ACT system**
- Use **adobe fill & sign** to key in
- Refer & **extract** from monthly performance report for some data
- **Key in** the remark and comment accordingly while doing the review
- Your leader will key the overall comment & advise accordingly.

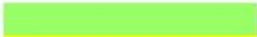


# 2023 GV Sales Report (ANP & AFY)



as at 6.4.2023

No	Region	Group	Month-To-Date (Apr)							Month-To-Date					
			AIA ANP		SLM AFYC		Total Picked Up	Balance	%	AIA ANP		SLM AFYC		Total Picked Up	%
			BP	Picked Up	BP	Picked Up				BP	Picked Up	BP	Picked Up		
1	Central Region	Setia	96,600.00	20,004.00	27,000.00	-	20,004.00	103,596.00	16.18	1,100,400.00	370,128.51	400,500.00	12,000.00	382,128.51	25.46
		Neo	49,000.00	10,668.00	15,000.00	10,000.00	20,668.00	43,332.00	32.29	626,500.00	148,448.48	249,000.00	121,776.00	270,224.48	30.87
		NCP	68,400.00	102.44	16,500.00	-	102.44	85,002.44	0.12	800,000.00	433,308.94	200,000.00	-	433,308.94	43.33
		Oneiric	24,500.00	6,519.96	-	-	6,519.96	17,980.04	26.61	399,000.00	117,184.12	-	-	117,184.12	29.37
		Aiden Lim	24,200.00	-	8,000.00	-	-	32,200.00	-	299,200.00	71,693.02	100,800.00	6,000.00	77,693.02	19.42
		Thomas Yeoh	51,000.00	1,942.56	-	-	1,942.56	49,057.44	3.81	703,800.00	94,713.07	-	-	94,713.07	13.46
		K.E Yeoh	69,000.00	6,751.52	18,000.00	2,400.00	9,151.52	77,848.48	10.52	800,000.00	196,876.36	200,000.00	10,320.00	207,196.36	20.72
		GVF Central	-	-	171,000.00	-	-	171,000.00	-	-	2,500.00	2,124,000.00	261,067.20	-	263,567.20
Total			382,700.00	45,783.60	255,500.00	12,400.00	58,183.60	580,016.40	9.12	4,728,900.00	1,434,852.50	3,274,300.00	411,163.20	1,846,015.70	23.07
2	East Coast Region	GVF Direct KB	-	-	25,200.00	-	-	25,200.00	-	-	-	471,600.00	68,808.00	68,808.00	14.59
Total			-	-	25,200.00	-	-	25,200.00	-	-	-	471,600.00	68,808.00	68,808.00	14.59
3	East Malaysia Region	GVV	63,000.00	-	21,000.00	-	-	84,000.00	-	715,500.00	150,218.34	252,000.00	15,600.00	165,818.34	17.14
		GVF KK	-	-	38,400.00	13,000.00	13,000.00	25,400.00	33.85	-	-	470,400.00	127,000.00	127,000.00	27.00
		GVF Direct Kuching	-	-	22,500.00	-	-	22,500.00	-	-	-	486,000.00	600.00	600.00	0.12
Total			63,000.00	-	81,900.00	13,000.00	13,000.00	131,900.00	8.97	715,500.00	150,218.34	1,208,400.00	143,200.00	293,418.34	15.25
4	North Region	Northern Jack Lai	60,000.00	4,200.00	-	-	4,200.00	55,800.00	7.00	726,000.00	86,785.80	18,000.00	-	86,785.80	11.95
		Northern Celina	40,000.00	-	-	-	-	40,000.00	-	550,000.00	20,297.00	-	-	20,297.00	3.69
Total			100,000.00	4,200.00	-	-	4,200.00	95,800.00	4.20	1,276,000.00	107,082.80	18,000.00	-	107,082.80	8.39
5	South Region	Vera	67,200.00	24,565.36	44,800.00	18,000.00	42,565.36	69,434.64	38.00	902,400.00	167,172.90	624,400.00	82,660.00	249,832.90	16.36
		Jimn Ng	45,000.00	-	45,000.00	5,520.00	5,520.00	84,480.00	6.13	525,000.00	33,289.12	520,000.00	157,531.20	190,820.32	18.26
		Wei Kang	44,800.00	3,000.00	28,000.00	-	3,000.00	75,800.00	4.12	576,800.00	87,958.46	425,600.00	68,880.00	156,838.46	15.65
		Eric Eng	21,600.00	7,200.00	4,800.00	-	7,200.00	33,600.00	27.27	302,400.00	13,474.24	57,600.00	-	13,474.24	3.74
Total			178,600.00	14,365.36	122,600.00	23,520.00	37,885.36	263,314.64	12.58	2,306,600.00	301,894.72	1,627,600.00	309,071.20	610,965.92	15.53
Grand Total			724,300.00	65,248.96	485,200.00	48,920.00	114,168.96	1,096,231.04	9.44	9,027,000.00	1,995,713.36	6,599,900.00	932,242.40	2,927,955.76	18.74

We still have **24 day** to go. Please gear up our collection towards 95% to 115% achievements by end of the months. Cheers.

YTD:  ≥ 90%  
 ≥ 70%  
 ≤ 70%



# Split into Group for discussion

- MAPA, if to increase? Which one? M? A? P? A?
- Why?
- How?
- What to do next?
- Who to act?
- What to act?
- When to act?
- Action Plan



# Lunch Grouping

Group	Members	Total
1	Ang Cheng Koon, Chin Keun Thiam, Chung Soon Hong, Joseph Goh, Lim Heng Yi, Aiden, Moh Yee Ping, Yeoh Kok Ee, Thomas Yeoh, Seng Yew, Neo, Kelvin Ng	11
2	Joanne, Pei Siah, Suet Ting, Wai Man, Pauline, Yong Hui, Yen, Chui Peng, Duncan, Sem, Sammie, Teck Wai, Andy Tang	14
3	Angeline Teoh, Jason Chia, Foo, Lee Oi Chin, Pang TC, Ajax Soo, Alex Wong, Jean Chan, Ivon Lee	9
4	Celina, Soo Ing, Nicky Chu, Eric Eng, Eric Yap, Jessie Ting, Jack Lai, Chris Wong, Edwin Ooi, Andy Yap	10
5	Darren Lim, Jackie Ng, Jimn Ng, Derrick Tee, Adrian Tan, Nick Tang, Marcus Tong, William Chauh	8
		52



# Group Presentation



# SIT Plan



# SIT Plan Procedure

**Seek :** Seeking for the last week activities, get to know what he or she faced.

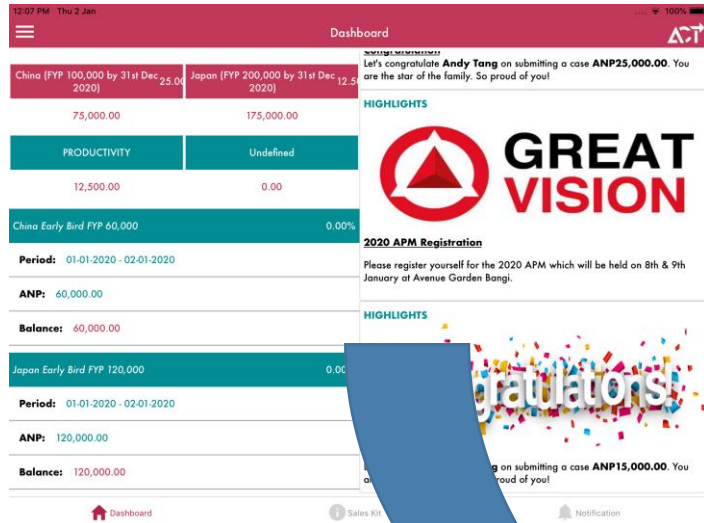
**Identify :** Identify the problem faced, identify the potential & opportunity, identify resources

**Track :** Track on the progress on what action plan given to him or her with mutual agreement.

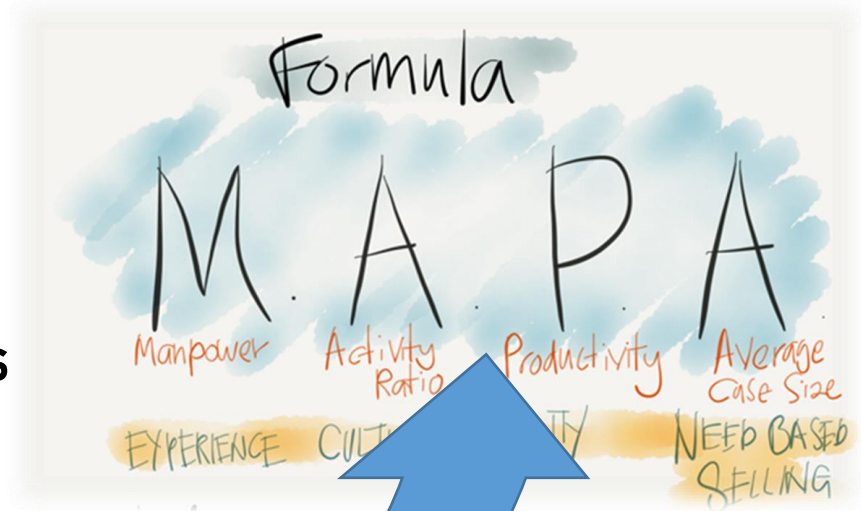
## Note:

1. **NO case study** to be conducted during SIT plan session.
2. **Proper advice** is needed
3. **Assist** him or her to plan the activities for next week.





## MAPA Report on monthly basis at Sales Kit of ACT system



1. Daily Activities
2. Approaching history
3. SIT Plan
  - Seeking issue
  - Identify opportunities
  - Track for result

1. Leads to Active Ratio bcos **actively monitored**
2. Productivity (number of cases by month), **the more activities, the more chances of closing**
3. Case Size due to concept & target market **upon actively case study & advice by leader**

# Extract & download from ACT

## SIT Plan : Activities Report

Activity Report						
Associate Name						
Activities Duration :	19-Oct-2021	to	26-Oct-2021			
Summary of Activities						
Business	Approach	Presentation	Closing	Referral	New Recruits	Potential Sales
Life		1	0	1	0	0
Fund		0	0	0	0	0
Loan		3	0	0	0	0
Overall		4	0	1	0	0
Activities in details						
Day/Date	Client Name	Stages	Product Category	Potential Sales	Closed	Remark after meet
19-Oct-2021	Robert	Close	life		17,800	
21-Oct-2021	Firdaus puremeditech	Approach	Loan		0	After initial discussion, directors to submit income docs for CIMB trrf. Remaining docs submitted only on 6 Sept. Client submitted offer letters Fr MBB to justify its non TRRF on 27/9. Pending Mgt Acc 2020, directors tax submission b4 approval. Remaining
23-Oct-2021	Sani En	Approach	Loan		0	Agreeable to commercial Subsale purchase under SB via CIMB Sme. Initial ctos screening by CIMB passed. Client income docs all in.
23-Oct-2021	Joey neo	Approach	Life		0	Existing Prudential medical card holder. Need to dig out policies for reviewing purposes..following up
25-Oct-2021	Ms Yeong B-Crobes	Approach	Loan		0	Case submitted to CIMB. Awaiting application response Fr Cimb trrf

