

Report Summary

(Silver Award)

報告摘要

(銀獎)

20th
Anniversary



Provided by Manulife (International) Limited
本報告摘要由宏利人壽保險（國際）有限公司提供

Manulife is very proud of our long history of 114 years in providing insurance, wealth and pension solutions to the people of Hong Kong. As well as providing a comprehensive range of individual insurance, group life and health insurance, pensions and investment funds to more than 1.6 million customers in Hong Kong and Macau, we have also been actively involved in supporting the community in Hong Kong through our Manulife Foundation.

Manulife (International) Limited is a subsidiary of Canadian-based Manulife Financial Corporation, which was the first global life-insurer to be listed on the Hong Kong Stock Exchange.

Leadership

Manulife has developed a unique leadership culture that is built around adherence to our PRIDE Values (Professionalism, Real Value to Our Customers, Integrity, Demonstrated Financial Strength, and Employer of Choice.). Our VISION statement reflects our dedication to addressing the evolving needs of our customers and key stakeholders, and the dynamic environment surrounding our business. It also highlights our mission to extend our business beyond life insurance, covering a broader range of products and services and targeting new customer segments.

Manulife Vision Statement

“To be the most professional financial services organization in the world, providing strong, reliable, trustworthy and forward-thinking solutions for our clients’ most significant financial decisions.”

The VISION and PRIDE Values (V&V) are the foundation upon which our senior management defines the company’s key success factors and core competencies, which in turn drive our strategic and business plans, as well as guide our day-to-day management decisions and actions.

Manulife’s senior management regularly communicates its vision, values and business objectives to staff, distribution partners and customers, and listens to key stakeholders’ feedback through different channels such as staff-engagement surveys.

過去一百一十四年，宏利一直為香港市民提供保險、財富管理、公積金等方面的專業服務，除了為港澳兩地一百六十多萬的客戶提供一系列涵蓋個人保險、團體人壽與醫療保險、公積金、投資基金等產品外，並透過宏利慈善基金積極回饋社會。

宏利人壽保險（國際）有限公司的母公司是加拿大保險業翹楚宏利金融有限公司，宏利金融是首家在香港聯合交易所上市的環球壽險企業。

領導才能

宏利具備獨特的領導文化，恪守PRIDE五大價值觀「發揮專業精神」、「向客戶提供物超所值的產品」、「以誠為本」、「展現雄厚的財政實力」、「成為上選僱主」。宏利的願景，反映公司著意於客戶及相關人士的變化需求以及營運環境的發展動向，並致力拓展壽險以外的業務，藉著推出不同類型的產品和服務開拓客源。

宏利願景

「成為全球最專業的壽險公司，就客戶的重大理財決策提供穩健可靠、深受信賴而且達遠前瞻的理財方案。」

基於上述願景及價值觀，宏利領導層為公司釐訂了多項關鍵成功因素和核心能力，藉以推動公司的策略發展和業務拓展計劃，並作為日常管理決策和措施的指導方向。

宏利領導層不時向員工、分銷夥伴及客戶闡述其願景、價值觀及業務宗旨，並透過

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Our V&V are supported by a clear brand positioning (“Manulife — For your future”), brand characteristics (Strong, Reliable, Trustworthy and Forward-thinking), and logo and identity.

Our agency force also holds true to the five “Ps” core agency values (Passion, Professionalism, Performance, Pride and Persistence.), which guides their day-to-day service commitment to customers.

To improve the health and well-being of society is the main focus of Manulife’s corporate social responsibility activity. This is achieved through donations, sponsorship and staff volunteer participation in charitable, community and environmental programmes.

Strategic Planning

Manulife adopts a highly disciplined approach to strategic planning to ensure that it balances long-term growth aspirations and short-term business-plan deliverables. Conducted annually, our strategic planning includes a Medium Term Outlook that sets out a five-year growth strategy and an Annual Business Plan.

Posited on our core competencies of product innovation, distribution excellence and our well-recognized service platform, our current growth strategy aims to increase sales through leveraging our diversified distribution channel, the pension regulatory change, increased mutual-funds sales and expanding our market into the High Net Worth sector.

Customer Focus

Manulife has a service motto, “Together We Deliver Service with Passion”, which is supported by a supplementary programme called C.A.R.E, standing for “Consistent, Accurate, Responsive and Empathy”. “The Star of Customer Services”, a company-wide staff-recognition programme, reinforces our customer-focused culture.

Among our competitive advantages is our single customer-service workbench that recognizes our customers’ total relationship with Manulife. Our Customer Service Management System allows support across all contact channels, affording a consolidated view of the

員工意見調查等不同渠道聆聽各方意見。

宏利的願景及價值觀，建基於清晰的品牌定位（宏利 — 與您共創未來）、品牌特徵（實力雄厚、穩健可靠、深受信賴、高瞻遠矚）、企業標誌和企業形象。

宏利經銷團隊恪守 5P 核心價值（熱誠、專業、表現、自豪及堅毅），以此作為對客戶服務承諾的基準。

宏利重視企業社會責任，透過捐獻、贊助、義工活動、社區及環保項目等渠道協助市民締造更美好、更健康的生活。

策略性規劃

宏利在業務拓展方面重視嚴謹的策略規劃，務求在長遠目標與短期部署之間取得平衡。宏利的一年一度的策略規劃，包括著眼於釐訂五年期業務發展策略的「中期展望」及「年度發展計劃」。

宏利現時的業務發展策略，旨在透過其產品創新能力、分銷實力及備受推崇的服務平台，積極發揮其多元化分銷渠道，以及掌握強積金制度未來變革所帶來的商機、進一步推動旗下互惠基金的銷售並大力拓展高增值客戶市場，務求達致銷售增長。

客戶焦點

宏利秉承「以誠待客」的服務理念，恪守 C.A.R.E.四大待客方針：「待客一致」、「認準客戶所需」、「迅速回應客戶要求」及「主動關顧/靈活應變」。為表揚



portfolio of each customer.

Customer satisfaction is determined through direct e-mail surveys, periodic market research, industry benchmarking studies, feedback from customers and distributors, and monitoring of customer complaints. Our CEO chairs a complaints review meeting every quarter to discuss customer issues and agree on improvement initiatives.

Measurement, Analysis, and Knowledge Management

A balanced-scorecard system with measures that cover a broad range of metrics, which include financial, customer, operational, compliance, distribution and employee-related areas, is used to keep track of our operational and financial performance against strategic targets and is reviewed monthly by the senior management.

Manulife's comprehensive knowledge-management process enables us to transfer organization knowledge to our partners, customers, employees and suppliers.

Workforce Focus

Manulife's employer-proposition statement is: "Financially strong, consistently successful, values-based Manulife is a place where talented people achieve great things TOGETHER".

We conduct regular surveys on staff engagement and adopt a "Say-Stay-Strive" framework for measuring this.

The company emphasizes staff learning and career development. We provide a comprehensive learning curriculum with themes aligned to strategic direction and have a wide range of recognition and appreciation programmes for individuals and teams.

Process Management

Manulife processes are based on the life-cycle of the policy and we adopt recognized methodologies, such as the Lean Six Sigma and ISO 9001, to review them, as well as employing a well-established control mechanism to monitor service performance, productivity and accuracy.

以誠待客的員工，宏利定期舉辦「客戶服務之星」計劃以加強公司內部以客為本的文化。

宏利的競爭優勢之一，在於透過其一站式客戶服務平台為客戶提供全面關係管理。其客戶服務管理系統涵蓋所有銷售渠道，有助公司全面掌握每一客戶的產品組合。

宏利透過電郵問卷調查、定期市場調查、行內基準研究、客戶及分銷商意見分析、客戶投訴監察等渠道釐訂客戶滿意度。宏利首席行政總監每季均會主持客戶投訴個案檢討會議，商討客戶關注事項並議定改善措施。

評估、分析和知識管理

宏利採用平衡計分卡按預設策略目標衡量公司的營運及財務績效，而績效指標主要涉及公司的財務、客戶、營運、規管、經銷、員工事務等不同範疇。宏利領導層每月均對平衡計分卡進行檢討。

宏利設有全面的知識管理程序，有助公司向業務夥伴、客戶、員工及供應商傳授相關知識。

工作團隊焦點

作為上選僱主，宏利恪守以下價值主張：「宏利實力雄厚、成就不斷而且恪守其核心價值，既為人才薈萃之地，亦是成就理想之所。」

宏利定期舉行員工意見調查，並以三「樂」

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As a world-class financial-services organization, we are well-known for our innovation in both products and services. Comprehensive analysis of current and future customer needs, financial climates and trends, risks and opportunities, are conducted on an ongoing basis.

Results

Manulife has an enviable record as a perennial collector of accolades for its financial strength, leadership, customer-service standards and contributions to the community. We have enjoyed more than a century of notable business success, becoming a leading insurance company, the second largest MPF provider, and a key financial-services institution providing a range of investment solutions for our customers.

With our trusted and reliable brand, financial strength, professional employees and distribution partners, and forward-thinking management, we are committed to the continuous pursuit of quality, the expansion of our businesses and the delivery of long-term value to our key stakeholders.

(樂於分享口碑、樂意留下、樂於付出) 為衡量基準以審視員工的投入程度。

宏利著意員工的培訓和事業發展，為其提供全面的培訓課程以配合公司的策略發展方向，並透過各類表揚和嘉許計劃以獎勵勇創佳績的員工和團隊。

程序管理

宏利因應保單周期推行多項作業程序，並採用精益六西格瑪、ISO 9001 等管理方法檢討有關程序，並透過行之有效的監控機制對公司的服務表現、生產力和精確度作出監察。

宏利作為國際金融服務機構，向以產品及服務的推陳出新備受業界推崇。公司對當前及未來客戶所需、金融氣候及發展趨勢、風險及機遇致力進行持續而全面的分析。

業績

宏利向以實力雄厚、領導卓越、客戶服務與社會貢獻見稱，百多年來不但傲享殊榮，而且屢創佳績。作為本港保險業翹楚，宏利是本港第二大強積金服務供應商、並為客戶提供各類投資方案的主要金融服務機構之一。

宏利擁有穩健可靠而且深受信賴的品牌、雄厚的財政實力、以專業見稱的員工隊伍和經銷夥伴以及高瞻遠矚的管理層，著意追求優質管理和業務拓展，並致力為持份者創造長遠價值。