

Patricia Ong Liu Chee

+6012-2055736

liuchee@rocketmail.com

C-9-3, Endah Promenade, Taman Sri Endah

57000 Sri Petaling, Kuala Lumpur

I authorized your handling of my personal details as per "Malaysian Law Personal Data Protection Act 2010 (PDPA 2010)"

Working Experience

- 1) **Deputy Head of Sales**
Asia Assistance Network Sdn Bhd
July 2020 – Current
Reporting to: Head of Sales

Asia Assistance has different business units that provide different services to our clients. Customizable on unique services that are able to solve different needs of clients. AAN provides health assistance locally and globally, medical and security repatriation & evacuation, roadside assistance, travel assistance, cyber assistance, concierge assistance, and home assistance.

Responsibilities

Sales

- To be hunter role searching new opportunity in the market, consistently open conversation with potential clients and find solution to solve their problems.
- Upsell or cross sell different services across different business units to existing clients. Keep close relationship with HR or product team, explore new services for their employees or customers.

Account Managements

- I have 22 insurance accounts and 51 Corporate accounts under my portfolio.
- Attending to clients' daily requests and resolve clients complains.
- Consistently having meetings with clients to align operation process.
- Provide analysis to client and explore solutions for them.
- Retain account, and ensure renewal is successful.

Product Development for TPA and Cyber assistance

- Wellness program – create a health screening and monitoring journey for individual, promotes lifestyle changes and early sickness detection.
- Pharmacy facility – to help cost saving for patient who needs Long Term Medication
- Tele-consultation and Telemed – to create conveniency of getting GP consultation during pandemic season.
- Covid 19 Home monitoring program – Close monitoring by giving a call to those who are Covid-19 positive under category 1 & 2, which they need to be home quarantined.
- Cyber Security – to protect client's server, network, digital devices from being hacked.

Marketing

- Create sales and product presentation slide.
- Create flyers, brochure, guidebook, etc

Digital Enhancement

- Mobile App and E-member Portal
- Wellness Program App & portal
- Corporate Website

2) Head of Matured ALC and Industry Recruit, AVP

Manulife Wealth Advisors

Manulife Insurance Berhad

Jan 2017 – Jun 2020

Reporting to: Head Of Recruitment

Current position: Head of Matured and Industry Recruit ALC

Matured ALC is an agency that has at least 100 manpower and 10mil New business every year. In Manulife, we have 2 Matured ALC, which contribute the major share of business.

Responsibilities:

- To ensure ALC achieve their monthly target.
- To support in their operation issues.
- To strategies and plan the agency activities.
- To continue to do industry recruit.

Last position held: Business Development for MWA

Manulife Wealth Advisors (MWA) is an alternative channel that develops both Agency Leader Corporation (ALC) and Asset Management business. It is a newly start-up channel in 2015.

Responsibilities:

- Recruiting capable agencies to expand wealth advisory business.
- Help them to start-up the business: planning, training, and activation.
- Because we are a new channel, we run own campaigns, events, and trips on our own. Tactical campaign design, events that can drive momentum (New Year Kick Off, Annual Award Night, Planning Conference, festival celebrations, etc), and agency incentive trips.

Key Accomplishments:

- Recruited 5 ALC and helped them to start up.
- Build MWA channel from production RM3.6mil (2016) to RM11mil (2018), and RM22mil (2019)

3) Central Regional Manager

Agency Development Department

AmMetLife

Jan 2013 – Dec 2014

Reporting to: Chief Agency Officer

I have changed a few portfolios during my service with AmMetLife.

Last position held: Central Regional Agency Development Manager

Responsibilities:

- **Production:** To drive production for the Central Region, the biggest region in the company, that contributes 50% production of nationwide production.
- **Recruitment:** Aggressively drive for recruitment number. The central region achieved more than 100% recruitment target during my supervision.
- **Activity Ratio:** Activate inactive agents and increase the number of submission cases.

Prior to that: Agency Management Talent Program Head

Responsibilities:

- Set up a new project for New Agent recruitment.
- Recruit New Agent and run through a 3-month program with them.
- Monitor, guide, train, coach the new agents to start doing insurance business.
- Increase New Agent activity ratio.

Prior to that: Recruitment and Incentive Head

Responsibilities:

- Drive Direct Appointment and Agency Leader Corporation (ALC) recruitment. Successfully set up 2 ALC in 6 months.
- Created full range of new recruitment tools and new agent sales tools.
- Organize agency events like Grand BOP, Annual Award Presentation, New Year Kick Off, MDRT Day, ect...
- Organize agency over sea convention trips.
- Launch agency incentive and contest.

**4) Manager
Agency Development Department
AIA Berhad Malaysia
Dec 2010 – Dec 2012**

Reporting to: Assistant Vice President, Head of Agency Development Department

Responsibilities:

Responsible for company recruitment number and new agents' activity ratio, and responsible of new Unit Manager appointment.

Recruitment Number:

New recruitment process set-up (to achieve Premier Agency)

- Set up a new recruitment process and requirement for the company.
- Re-design full range of recruitment tools (Premier Interview Guidebook, LIMRA Career Choice test, BOP presenter, Recruitment Booklet, Recruitment CD, Recruitment Bunting and posters)

Set-up Agency Development Executive (ADE) Program

- Project owner for ADE program. ADE program is to help agency leaders to hire a recruitment executive to grow and build the agency.
- Close monitoring of ADE activities and results.
- Conduct monthly interviews with ADE and Agency leaders.

New Agent Activity Ratio:

Re-vamp and run New Agent training.

- Enhanced new agent training program and activity.
- Run nationwide new agent training every month.
- Close monitoring of new agents activity after nationwide training for 6 months.

Set-up Premier Agent Financing Scheme (PAFS)

- Project owner for Premier Agent Financing Scheme. PAFS is to recruit Premier Agent, and groom them to be MDRT qualifiers.
- Premier agent candidates interview and selection.
- Run Sales Excellent Training program for PAFS agents.
- Close monitoring on PAFS daily activities and sales results.

New Unit Manager Appointment

- Project owner for Project L. Project L is to appoint new unit manager with financing scheme.

**5) Manager, Bancassurance
Partnerships Distribution
Prudential Assurance Malaysia
Mar 2010 – Nov 2010**

Reporting to: Senior Manager, Head of Bancassurance (New Acquisitions), Partnership Distribution

Responsibilities:

New business set-up

- Set up business and operational processes for new bank partners, Citibank and Alliance Bank
- Work on strategy paper for a new insurance specialist team, with the ultimate direction of leading the team to deliver on key business metrics: referrals, conversion, and sales.

Drive training and sales activity

- Work closely with internal training team, PRUbusiness academy, on product training materials, and develop customized learning programmes and skill set modules
- Work closely with Bank partners to coordinate product launch and training, as well as regular sales activities.

**6) Assistant Vice President, Sales (Central Region)
CIMB Wealth Advisors
May 2007 – Mar 2010**

Reporting to: Senior Vice President of Regional Sales and Marketing

Responsibilities:

Agency Sales & Relationship Management for the Central Region

- Oversee a 200 plus strong agency sales force (7 agency leaders).
- Drive sales and recruitment activity across Unit Trusts, Insurance and Trust Nomination.
- Responsible for sales quality and compliance-related issues, i.e. monitor redemption and ethical selling/conduct.
- Responsible for events and agent roadshows on sales motivation, Business Opportunity Presentation, and product launch.

Training

- Conduct FMUTM Tutorial, Product Training, and Basic Selling Skills Training for new agents, and to help them to get started in selling unit trust and insurance.
- Arrange a discussion platform for agents and fund managers on market outlook, fund products and investment strategy.

Notable Experiences:

- Key project member for enhancement of company-wide sales activity & client management system.
- Have run company annual dinner, Grand Presentation Opportunity Presentation and company New Year Kick Off event successfully.

Key Accomplishments:

- Promoted to Assistant Vice President in 2008.
- Achieved 120% of Unit Trust sales target in 2008, totaling RM180 mil.
- In 2009, increased insurance sales by 300% over the previous year.

7) **Branch Manager (Shah Alam)**

SBB Mutual Bhd

January 2006 – May 2007

Reporting to: Senior Vice President of Regional Sales and Marketing

Responsibilities:

- Oversee transaction, operations, and service levels at the branch.
- Responsible for agency sales and recruitment for 150-strong agency force.
- Service walk-in clients, mainly on portfolio review and investment recommendation, based on client's objective, needs and risk profile.

Key Accomplishments:

- Recruited 150 new agents in 3 months campaign (50 new agents per month, compared to typical average of 20 per month)
- Designed and kick start New Agents Program, which increased 30% of active new agents (submit at least 1 case in a year), and increased productivity per agent from RM20k to RM50k.

8) Unit Trust Consultant
SBB Mutual

March 2003 – December 2005

Reporting to: Agency Manager, and Matrix line to Group Agency Manager

Responsibilities:

- Provide advice on financial and investment planning according to risk profile and objectives.
- Monitor clients' investment portfolio through regular portfolio reviews, and help them to maximize their profits and minimize their losses.
- Recruit and coach down-line Unit Trust consultants to achieve their career goals – through organized training, sales events, joint research and fund analysis, and joint field work.
- Monitor team sales results and ensure monthly sales target is met.

Notable Experiences:

- Recruit, lead and coach own team of 12 consultants.

Key Accomplishments:

- Achieved company Premier Club target in year 2003 to Vienna & Venice and Premier Club target in year 2004 to Turkey. Premier Club target is RM1.8mil UT sales
- Recruited 12 consultants, and over 2 years owned over 100 clients in my personal portfolio.
- Promoted to Agency Supervisor in 3 months with RM500k UT sales.

9) Web Designer
i-Republics.com

August 2002 – March 2003

Reporting Line: Direct to Head of Marketing, and Matrix line to CEO

Responsibilities:

- Design web page for company's clients and work closely with programmer to plan and execute interactive part of web page.
- Design and produce marketing collaterals – brochures, banners, presentation and other multimedia.
- Responsible for designing dummy web page for marketing department for job pitching presentation.

Notable Experiences:

- Designed and delivered online presence for the following organizations: www.irepublics.com, www.vis.com.my, www.asli.com.my, www.cgrm.com, www.nationwide.com.my, www.malaysianbar.org.my.
- Well-versed in Macromedia Dreamweaver, Macromedia Flash and Adobe Photoshop.

10) Assistant Art Director
Carrot Films

July 2001 – July 2002

Reporting Line: Direct to Head of Art Director

Responsibilities:

- Worked closely with Art Director in organizing workflow, manpower and working budget.
- Initiate research of the design materials from the production requirement and manipulate in computer by using Adobe Photoshop software.

Notable Experiences:

- Art directed TV commercials for: Priceline (Hong Kong TVC), Coca-Cola World Cup Promo, Appeton Lose Weight, UOB loan, FAB Total, and etc.

Key Accomplishment:

- Started as a team leader in the research department. Promoted to Assistant Art Director in half a year.

Personal Skills

- Training & Presentation skills – Experienced in developing and presenting training and motivation programs for frontline sales teams and agents.
- Research & Analysis skills – Experienced in conducting competitor research and mystery shopping of the wealth management space – both investments & insurance – in order to develop competitor, product, and industry analysis.
- Team-focused & People-oriented - Collaborates well within a team and able to communicate effectively with sensitivity to various team dynamics.
- Highly Adaptable – Able to handle new challenges, feedback, or criticism, and willing to adapt and learn new things.

Education

Bachelor of Science – Digital Media Arts & Sciences (Media Innovation)

University of Multimedia, Cyberjaya

1997 – 2001

SPM - 7 As (Aggregate 10)

SMJK Chan Wa, Seremban

1996

PMR - 7 As

SMJK Chan Wa, Seremban

1994

UPSR – 5 As

SRJK (C) Chung Hua, Seremban