

CO/Mktg/ZD/FPDO/39/2023

Date: 30.11.2023

TO ALL ZONAL MANAGERS, REGIONAL MANAGERS (Marketing)
OFFICERS IN-CHARGE OF DIVISIONS.
MDC, ZTCs, STCs, AUDIT AND INSPECTION CENTRES

Re: Second Unit Meeting of Agents under the organisation of Development Officers
for the Financial Year 2023-24

It has been decided by the Competent Authority to support the Development Officers to accelerate the marketing activities for the current Financial Year 2023-24 by allowing them to conduct the second Unit meeting of their agents during period from 01.12.2023 to 15.01.2024, which will lead to their better performance during the year .

Accordingly, the Zonal Offices are requested to ensure that the Divisional / Branch Offices undertake the following activities:

- 1) Unit Meetings are to be held from 01.12.2023 to 15.01.2024.
- 2) Unit Meetings will be allowed without imposing any condition on Development Officers.
- 3) All the Confirmed Development Officers and PDOs shall initiate Unit Meetings immediately so as to complete it by 15.01.2024. However, those Development Officers, who are facing disciplinary action under Regulation (39) of Staff Regulations 1960, should be excluded from conducting the Unit Meeting. As provided in the CO Circular Ref: CO/Mktg/ZD/FPDO/06/2022 Dt. 25.2.2022, the Development officers against whom there are no pending disciplinary proceedings/ actions may be allowed to conduct the unit meeting of their agents.
- 4) All Agents whose agency is in force as on the date of unit meeting will be eligible to participate in the unit meeting commencing from 01.12.2023.
- 5) Development Officer will initiate and plan the Unit Meeting of his/her organization under the guidance and support of the Branch I/C.
- 6) Branch-in-charge shall extend all support in the form of providing training material and guidance to the Development Officers for conducting the Unit Meetings.
- 7) Development Officer and Branch Marketing Officials should endeavor to ensure maximum attendance of the agents.
- 8) The Unit Meetings shall be conducted in the presence of the Branch Marketing Officials. The Product Manager may also be invited, wherever possible. In case of unavailability of Marketing

officials, the Class-I officer of the Branch /Satellite office attached to the BO may also be allowed to lead the meeting.

9) Also it is to be noted that no meeting should be conducted after the specified period of the Unit Meetings.

10) The Agenda for the Unit Meeting is as below:-

- i. Presentations of Jeevan Utsav and its marketing.
- ii. ANANDA Module for Agents and effective use of technology.
- iii. Information on competitions floated by Central Office / Zonal Office.
- iv. Sharing information about Agent's App and App available for policyholders
- v. Increasing the agent activation on Monthly Basis
- vi. Latest Underwriting changes.
- vii. ULIP and Pension Products and their marketing.
- viii. Benefits to Agents in their agency tenure.
- ix. Any other relevant topic with the approval of the Branch in-charge

11) Branch has to maintain control Register of agents attending the Unit Meeting. Branch shall also maintain the record of all the expenses incurred for the unit meeting along with relevant bills and vouchers, which are subject to Audit/Inspection.

12) Branch offices shall enter the number of agents, who attended the meeting immediately in the option provided in CO MIS page.

13) For the above purpose, the Classes of Cities are divided into 3 categories and the maximum amount of expenses that can be incurred by the Office is as under:

Class of Cities	Population details	Amount (₹.) per participant (excluding taxes)
A	Cities with population exceeding 12 lakhs.	₹. 600/-
B	Cities with population exceeding 5 to 12 lakhs	₹.500/-
C	Other cities not included in (A) and (B) above	₹.400/-

14) The expenses incurred for conducting the Unit Meeting shall be settled by the Branch Office directly to the vendor debiting the Account Code 11365400 (Unit Meetings of D.Os.). Zone-wise budget was allocated vide letter Dt. 18.08.2023 (Ref: Mktg/DO/ 72(6)).

15) Zones should ensure that:

- i. The Unit Meetings data is updated by the branches in the system regularly.
- ii. The budget review of A/c Code 11365400 (Unit Meetings of D.Os.) duly tallied with the PL

Balance as on 31.01.2024 is sent by 10.02.2024.

- iii. The consolidated data in the enclosed Performa (Annexure A) is submitted by the Divisions to the Zonal office as at 31.12.2023 and 15.01.2024. A scanned copy of the consolidated division wise data duly signed by the Regional Manager (Mktg) shall be sent to FP section, Marketing Department, Central office on e mail id co_fp@licindia.com.

If the Branch-in-charge desires to honour the toppers unit wise with some mementos, the same can be done within the limits of per agent expense allowed as above.

You are requested to bring these instructions to the notice of all the offices under your jurisdiction and ensure timely compliance of the same.



Executive Director (Marketing/PD) & CMO

Encl: Annexure A