



# INTER-OFFICE MEMO

Dec. 20, 2024 | 1:54 PM

**To:** All AIBI Employees

**Subject:** Quarterly Reporting and Collection Updating Guidelines for 2025

**Dear Team,**

We would like to provide key updates regarding quarterly reporting and collection guidelines for the upcoming year. Please review the details carefully and ensure compliance.

**Quarterly Meeting Topics:**

- **Renewal Analysis (MAM):** Classify accounts as renewed, unrenewed, non-renewable, or new/additional business. Please ensure premiums and commissions are clearly indicated.
- **Collection Report (MAM/HES):** Categorize collections by the following timelines: within 30 days, 31-60 days, 61-90 days, and overdue.
- **Production Report (AFA/JVM):** Assess whether the quarter's production are achieved or not based on projection.
- **Expense Report (NLA):** Identify if projected expenditures remained within budget or if any savings were generated.
- **Claims Report (FBS):** Provide a detailed breakdown by insurer & status whether paid, outstanding &/r pending due to technicalities.
- **Other Concerns:** Address any other office &/or business issues.

**Quarterly Meeting Schedules:**

- April 25, 2025 – Friday at 2:00 PM
- July 25, 2025 – Friday at 2:00 PM
- October 24, 2025 – Friday at 2:00 PM
- January 23, 2026 – Friday at 2:00 PM

**Report Submission Guidelines:**

- All required reports must be submitted three (3) days prior to each meeting.
- If reports are not submitted on time, the individual will be responsible for preparing and presenting their own report during the meeting.

- It is important that you continue submitting monthly reports to help us stay aligned and regularly updated.

**Attendance Policy:**

- Attendance for these meetings is mandatory. Leave requests on meeting days will not be approved, except in cases of emergency.
- If you file for sick leave on a meeting day, please provide a medical certificate for validation.

**Bi-Monthly Collection Summary for MAM and HES:**

Starting January 2025, we will also introduce a bi-monthly collection summary for collected accounts. For the signed-off collection report, MAM must state the reason for overdue accounts. Please note:

- Even if the total outstanding accounts over 90 days are within 10%, incentives can be forfeited due to lack of reason on why these accounts have been left out for collection.
- This measure ensures that all unpaid accounts are properly coordinated and communicated to clients.

Thank you for your cooperation and commitment. Let's work together to make 2025 a productive and successful year for AIBI!

  
**APRIL ANE ASTROLOGO**