

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: _____	Manager name: _____ Manager title and GCF level: <u>Regional Director, ACB Account</u>
Job title: <u>Area Director, ACB Account</u>	Department: <u>ABC Sales</u>
Job level: _____	BU/Division: <u>Bancassurance</u>

Job purpose

Please provide a summary of the purpose and objective of the job.

Major accountabilities

Identify 5-6 major accountabilities of the job (not the employee). Describe these accountabilities by what is to be accomplished, how and why. Use action verbs to begin each sentence. Avoid the use of acronyms. Include the approximate percentage of time spent on each accountability. The percentages below should sum up to 100.

1. **Sales management duties**
 - Act as an escalation contact point to the assigned accounts/business units
 - Work directly with Bancas sales team leader to ensure the assigned business targets achieved
 - Be responsible to handle customer complaints if possible or be the key contact point for any customer feedback/complaints towards the company or the business partners
 - Proactively look at the neglected areas of the team and provide improvements accordingly
 - Visit business units and meet the bancas sales team leader, BU Head and sales team on regular basis
 - Work with IOIS, bank & internal team to clear all pending requirements for issuance of policies

2. **Relationship management**
 - Build up close relationship at the bank BU levels to ensure the business results are developed
 - Build up good cooperation with internal departments
 - Coordinate closely with the bank sales staff for all business related issues of the assigned business units

3. **Training activities**
 - Be responsible of delivering soft skill and techniques of sales cycle in order to improve the quality and professionalism of sales staff or banking sales team
 - Proactive in self-learning and improvement to meet up with job requirements, helping to improve personal productivity and effectiveness.

4. **Sales Activity management**
 - Jointly plan business activity calendar with bancas sales team leader and ensure smooth execution
 - Help drive business development or other activities launched by company to recognize superior performance and drive sales
 - Support 'Pilot' initiatives undertaken by the Bancassurance Department to explore new opportunities of business and help drive these initiatives to write business.
 - Be able to conduct/organize sales seminars, group presentation, customer events

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5. **Team Development**

- Continue referring source of qualified IOIS candidate to meet up with business requirement.
- Coaching and development of Insurance IOIS in the assigned areas.
- Join with bancas team leader in developing and maintaining a professional IOIS team.

Specialized knowledge

List specific types of technical or professional skills and knowledge required for the job.

- Preferably obtain some basic life insurance qualifications
- Dynamic personality with good ability to interact with different people and levels
- Systematic and structured to understand systems and processes
- Strong leadership
- Strong business acumen
- Ability to work hard and can work under minimum supervision

Problem solving

Outline problem solving requirements in terms of how standardized, varied, complex and interdependent problems and issues are typically faced by this job. Provide examples if necessary.

Education and experience

Indicate the minimum education level and years of relevant experience required to perform the work. Include specific professional designations, licenses, and registrations, if applicable.

- Bachelor Degree, majoring in Banking, Business Administration, Marketing....
- At least 3 years of sales management experience in bancassurance and/or banking businesses

Communication scope

Identify the level and nature of internal and external contacts with whom this job must interact regularly. Describe the reason and frequency of their communication.

Management scope

Total number of direct reports:

Total number of staff managed (direct and indirect):

Metrics (if applicable)

Finance metrics (revenue, budget managed, etc.):

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):

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Prepared by:			
Approved by:		Date:	
<i>For HR Use Only</i>			
<i>Handled by:</i>		<i>Date:</i>	
<i>JAR #:</i>			