

## JOB DESCRIPTION (JD)

### Sun Life Asia Job Evaluation Process

<b>Date:</b>	<b>Manager name:</b>
<b>Job title:</b> Representative, Client Services	<b>Manager title and GCF level:</b> Manager, Client Relationship Management - Counter
<b>Job level:</b>	<b>Department:</b> Client Relationship Management
<b>Career track:</b>	<b>BU/Division:</b> Operations

#### Job purpose

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

- On behalf of Sun Life Viet Nam and business, responsible for communicating to walk-in Client and Advisor at counter or via phone. They have to answer questions, resolve problems, process transaction, collect cash and resolve any emerging problems that our client/advisor might face with accuracy and efficiency.
- Objective of this job: perform a client service standard and handle daily works without error rate at location by in-deep special knowledge, technical, product, workflow, professional in service.
- In overall, Client Service Representative is expected to perform an excellent service and skilled at process all requests.

#### 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.*

- Process daily transactions smoothly including: new application kit, policy change requests, cash collection, complaint... without error rate or pending.
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- Underwriting claim requests (minor claim and major claim), ensure all claim request are in Term & Condition and sufficient docs.
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- Ensure all receipts will be well-managed without error including: issue, take back, audit.
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- Monitors all outstanding/ unresolved/ referred cases/requests; coordinates with the back-end support unit until cases closed based on turnaround time.
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- On behalf of Sun Life Viet Nam, CS officer play an ambassador role to deliver standard/professional service to all walk-in client/advisor or via phone.
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- Ensure cash deposit in bank daily and complete all daily necessary reports for business/sale force

#### Specialized knowledge

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

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- Service oriented mindset
- Ability to analysis and handle issues at counter
- Ability to multi-task, prioritize, and manage time effectively
- Strong communication
- Coaching and training regularly capability
- Good command of PC skill (Excel, Word, Access), team working, English (basic in speaking and writing)

#### **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.*

- Able to understand or accomplish or deal with task/issue/situation/person

#### **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.*

- College/University graduate.
- At least 1 years of client service staff in financial services, life insurance experience is preferred.

#### **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.*

- Inter OP department for daily transaction
- AD force for support sale
- Office service for manage location office
- Marketing for company branding
- IT for all related to system

#### **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):