

JOB POSTING TEMPLATE

Date: <u>July 2021</u>	Function: <u>Marketing</u>
Job title: <u>Director, Client Experience</u>	Manager title: <u>Chief Marketing Officer</u>

Job purpose

- This role will be central to driving the delivery of the ideal Client journey that will make Clients, join us, stay longer, buy more and refer us to others, thereby increasing our Clients' lifetime value to the business.
- He/She will generate and leverage Client insights in order to develop the ideal end-to-end Client journey.
- He/She will partner with the various functions: Distribution, Product, Operations, Technology, Legal, Compliance among others, to embed and deliver Client-centered value propositions and best CX practices in the business.
- He/She would be the voice of the Client and the resident authority and thought leader for Client journey/experience for Sun Life Viet Nam.

Major accountabilities

<p>1. Client insight Activation</p> <ul style="list-style-type: none"> ▪ Drive the discovery of insights about our Clients to give shape to our Client segmentation strategy to enable the delivery of Client For Life. This involves driving research and also translating insights into personas, and uncovering pain points and opportunities to inform the design of our Client strategy, which includes Client experience, product solutions and services. ▪ Execute the journey mapping/ any research and insights needs to find out Client/ Advisor satisfaction gaps between client expectation and our services in terms of operation and perception ▪ Manage the Client Index, strategize .and drive the company activities to enable Sun Life Viet Nam to continuously measure and evaluate our impact on Clients, to ensure progression towards CX practice maturity. 	30%
<p>2. CX Strategy and Implementation</p> <p>- Develop roadmap and plans that address the pain points and opportunities to enhance Sun Life Viet Nam's Client experience and deepen Client relationship in an omni-channel context. This would involve working closely with and influencing different business lines, distribution, product, operations and technology for ensuring alignment and synchronization across the different parts, such as but not limited to the following:</p> <ul style="list-style-type: none"> ▪ Product/ Legal/ Compliance team to ensure we have the right product to address different Client segments and the product packaging and positioning is compelling and relevant. ▪ Service Design Teams and Operations to ensure the service design (touchpoints. processes and policies) meet the requirements of the ideal Client journey. ▪ Distribution to ensure we have the right channels to serve the different segments and that the advisor journey or advisor experience is aligned to delivering the ideal Client journey. ▪ Communication to ensure product/solution awareness and consideration of segments we wish to target. ▪ The above are expected to result in increased Client loyalty and increased product holding per Client. <p>- Conceive and design meaningful and desirable solutions and services that enable our Client For Life strategy. The role will ensure the creation as well as the adoption / usage of CX solutions and services based on insights derived from qualitative and quantitative data. Drive the design and creation of a connected ecosystem of solutions and services centered around the Clients as part of Sun Life Viet Nam's end-to-end Client acquisition, engagement, and servicing proposition.</p> <p>- Support DE efforts from CX perspectives for Advisor and Client enablement</p> <p>- Custodian of CX and Traffic Enforcer – Ensure that all Client communication and servicing solutions coming from the head office is aligned, consistent and relevant to the ideal Client journeys..</p> <p>- Build up culture of Client/ user centricity within the business</p>	50%

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<p>3. People Development</p> <ul style="list-style-type: none"> ▪ Lead and manage the CX team to deliver the marketing and business goals ▪ Coach and develop the CX team with required qualifications and skills ▪ Coach, contribute to the training plan of Marketing team 	20%
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Specialized knowledge

<p>Technical Knowledge</p> <ul style="list-style-type: none"> ▪ Expert knowledge of market research and end-to-end CX processes, tactics and deliverables and proven human-centered design methodologies for medium to large size organizations. ▪ Experience in harnessing insights from various data sources and translating them into actionable Client experience strategies with clear business outcomes. ▪ Training and experience in applied behavioral psychology or behavioral experience. ▪ Hands on creation of personas, customer journey maps, and service design. ▪ Experience in information architectures, wireframes, workflows, UX specifications and prototypes to explain and negotiate design solutions with key stakeholders and advantage. ▪ Experience In product marketing to plan marketing campaigns, events. ▪ Strong project execution skills with experience taking project from concept to launch in a cross-functional manner. ▪ High knowledge of the business model, operations and sales support processes. ▪ Senior Management experience in translating Client journey work to business outcomes. ▪ At least 5 years in the Client experience design field. <p>Competencies and Skills Required</p> <ul style="list-style-type: none"> ▪ Experience with executing a CX mandate and UX strategy in a large size corporation. ▪ Expert knowledge of design thinking, UX processes, tactics and deliverables and proven human-centered design methodologies. ▪ Strong conceptual and creative problems solving skills to drive strategic design thinking and information modelling at a broad digital ecosystem level in an organization. ▪ Ability to successfully manage and deliver on multiple projects with tight timelines in a fast-paced environment. ▪ Experience in Client Services ▪ Strong stakeholder management skills. ▪ Excellent collaborator with exceptional communication and interpersonal skills ▪ Excellent communication skills - written and verbal ▪ University or advance degree in user experience, with possible training or applied experience in behavioral economics or behavioral psychology.. ▪ Business minded and oriented ▪ Strong interpersonal skills and ability to develop relationships to influence change ▪ Passionate about the co-creation and collaboration process. ▪ Adaptability and flexibility <p>Track Record of:</p> <ul style="list-style-type: none"> ▪ Planning, managing, involving in qualitative and quantitative researches ▪ Client segmenting, planning, implementing client programs ▪ Planning, deploying new product launch, product marketing campaigns. ▪ Fluent English in advantage (Writing & Speaking). ▪ Familiar with PC literate, Excel, Word and Power Point.
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Problem solving

<ul style="list-style-type: none"> ▪ Analyzing the job requirements to research and collect enough information ▪ Consulting the best solution/options to match target audience and meet business's requirements ▪ Execute plan in high quality and meet deadline ▪ Raise concerned/ obstacles to C-level (if any)

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Education and experience

Education:

- Bachelor or higher Degree preferably in Marketing, Economics, Business Administration
- Specific certificate in the business sector: LOMA, etc is an advantage

Experience:

- Minimum 10 years relevant working experience in marketing in the Insurance, financial services sector supporting with both online and offline business partners
- Experience in CX management a must

Communication scope

- Good interpersonal and organizational skills, ability to manage C-Level expectations.
- Discipline, strong follow up, attentive to detail
- Quick learner and have the ability to multi – task
- Good written and verbal English communications skills
- Proactive and accountable

Management scope

Total number of direct reports: 3

Total number of staff managed (direct and indirect): **3**

Metrics (if applicable)

Finance metrics:

- Business target
- Marketing budget: manage marketing spending within the approved budget of Client Experience
- Number of campaigns achieving the set KPI, done by Client Experience Team

Client metrics:

- Client index
- Brand awareness
- Number of campaigns deployed timely and properly
- Number of research done timely and properly
- Number of projects implemented timely