

JOB POSTING TEMPLATE

Date: 2021 **Function:** Business Development
Job title: Life Portfolio Manager **Manager title:** Center Director

Job purpose

Life Portfolio Manager is the first line of service in a unique, hi-end and financially credible center providing one-stop service to Sun Life's existing and potential VIP customers. The daily activities of Life Portfolio Manager includes insurance advisory, lead generation, sales commitment, branding and coordinating with frontline operation staffs to ensure smooth transaction and pleasure experience to customer. The role requires good financial experience, excellent customer service, can-do attitude and willing to learn & change behavior.

Major accountabilities

<p>Customer service:</p> <ul style="list-style-type: none"> ▪ Provide a one-stop service by offering customers the convenience of having multiple needs met at the branch through high-tech and distinguished frontline customer service ▪ Build up and maintain solid relationship and rapport with customers and internal operation staffs to provide good customer service and holistic financial solutions when needed ▪ Receive and carefully verify customer's form and attached personal documents (customer's ID, health declaration...) to make sure that all forms & customer's personal papers are completed, exactly submitted in line with Company rules and local regulations ▪ Handle customer's enquiry within the job holder's accountability and ensure the promised turn-around time 	40%
<p>Financial advisory and sales:</p> <ul style="list-style-type: none"> ▪ Provide professional financial assistance and/or consultancy to advisory-seeker customers ▪ Explore & open up-sales/cross-sales opportunity from existing customers based on their unfilled needs and comfort walk-in customers, generate leads to build up the customer database ▪ Directly generate sales and contribute to overall branch's productivity to meet predefined sales target ▪ Manage and meet consistent sale performance and persistency ratio 	40%
<p>Branding:</p> <ul style="list-style-type: none"> ▪ Be the corporate representative, including the personal branding on all social media channels in the professional way ▪ Be the life partners of the customers in tailoring the advisors with word-of-mouth approach 	10%
<p>Others:</p> <ul style="list-style-type: none"> ▪ Other job enquiry & assign tasks from Managers 	10%

Specialized knowledge

- Have very potential the people management skills
- Have the dynamic personality with good ability to interact with different people and levels
- Be systematic and structured to understand systems and processes
- Diversify the working experience in non-financial fields such as security, hospitality, education, beauty...

Education and experience

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- Education - Bachelor's Degree, majoring in Banking, Business Administration, Marketing...
- Education - Preferably obtain some basic life insurance qualifications
- Experience - At least one-year experience in sales, especially finance fields
- Special skills:
 - Financial creditability e.g. financial and general knowledge
 - English proficiency (intermediate and above)
 - Good communication and inter-personal skills, customer-oriented service
 - Proficient in basis office software application (Microsoft Office)
- Self-motivated and able to work under pressure

Communication scope

This position will communicate with both internal and external stakeholders on the daily basic.

- External: existing and potential customers, supplier, landlord, public relation, and marketing partners ...
- Internal: all stakeholders in the internal departments at Sun Life Vietnam