

JOB POSTING TEMPLATE

Date: 2022

Function: Bancassurance

Job title: Manager, ACB Client Relationship Management

Manager title: Account Head - ACB

Job purpose

The incumbent of this job is responsible for developing and implementing quality ratio K2 ACB's portfolio of second-year clients. Goals include generating K2 performance targets of ACB & SLV >75%, developing and improving after sales services for ACB & SLV clients.

Major accountabilities

Relationship Management duties:

- Recruit, train and manage the IOIS team to take care clients.
- Monitor, analyze performance data and motivate the team to achieve the target.
- Engage and support IOIS team to help the team achieve their goals.
- Maintain direct contact with clients to handle complex situations that IOIS have not been able to resolve.
- Make sure the IOIS Care meets the following requirements:
 - Take care of clients who have bought insurance policies for the 2nd year and convincing clients that have lapsed to restore the policy via phone, email, text message, zalo, etc.
 - Notify the fee payment deadline and convince and follow up with clients to pay fees to maintain the validity of the contract during T-30 -> T + 60
 - Coordinate with existing/servicing IOIS to collect fees from clients on time / Convince clients to pay fees and save cases of refusal to pay fees.
 - Answer clients' questions related to insurance products and benefits in the clients 's contract.
 - Support and guide clients to pay insurance premiums (Including the collection of insurance premiums from clients via POS machine if customers have demand)
 - Record and transfer to IOIS Servicing to coordinate to answer questions of the Clients related to the Insurance Policy.

Relationship management:

- Coordinate and participate in regular meetings with the leadership to set orientation and unify the implementation of the plan and operational targets.
- Build up good cooperation with internal departments and management
- Coordinate closely with the sales team ACB & SLV for all business-related issues of the assigned business units

Training activities:

- Be responsible of delivering sales and management skill in order to improve the quality and professionalism of IOIS team
- Proactive in self-learning and improvement to meet up with job requirements, helping to improve personal productivity and effectiveness

Planning and Strategy:

- Be responsible for working with sales team ACB & SLV to ensure smooth execution.
- Provide clear guidance and directions to IOIS team to improve the ratio K2 >75% like as: call quality, how to coordinate effectively, after-sales client care programs...

Team Development:

- Deliver regular guiding and development conversations with IOIS team.

Specialized knowledge

- Strong tele-sales and client care skills

JOB POSTING TEMPLATE

Problem solving

- Systematic and structured to understand systems and processes
- Ability to work hard and can work under minimum supervision

Education and experience

- Bachelor Degree, majoring in Banking, Business Administration, Marketing, with at least 5 years of working experience in sales/ client relationship management or supports.
- Preferably obtain some basic life insurance qualifications.

Communication scope

- Dynamic personality with good ability to interact with different people and levels
- Regular interaction with team members and internal stakeholders to express opinions, recommendations related to operations or issues, and to deliver all activities effectively