JOB DESCRIPTION (JD)
Sun Life Asia Job Evaluation Process

Date: 10/01/2023   **Function:** Agency Distribution

Job title: Manager, Agency Operations   **Manager title:** Senior Manager, Agency Operations

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

Job holder is responsible for:
- Appointment of Agency Manager (AM)/ Demotion/promotion/termination/ Team moving/structure adjustment
- Office hierarchy set up
- Changing the financial advisor for insurance policy (OPM & Request from Policy Owner)
- Process improvement & System enhancement
- Project Monitoring
- Expense monitoring & Budget management

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. Provide process & training to team members & sales leaders on daily transactions of agency life cycle (promotion, demotion, termination, movement, new agency manager appointment, office set up in system)
2. Set criteria on each transaction for exception acceptance
3. Give advice/ solution to solve problems/ complaint from sales
4. Review documents related to movement team before getting approval of AOS Head/CAO/CDO
5. Review & improve daily process to increase efficiency and distribution services
6. Work with IT for technical solutions related to systems enhancement, new system/application development (user requirement, user stories, test scenarios, test cases, system issue, …)
7. Manage projects of AOS (work with other departments for business case, cost & benefits analyis, privacy information assessment, risk assessment, information security risk assessment,…..)
8. Semi-annual budget planning & management
9. Support other departments, sessions on issue/task on agent hierarchy, agent data, reports.
10. Prepare Agency Operation Manual Document yearly

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

- Communication, negotiation and problem solving
- Logical & analytic, service oriented
- Able to work under high pressure and willing to work overtime.
- Multitask
- Insurance knowledge/experience (LOMA is preferable)
- Computer skills (Microsoft Office) Fluency in using Word, PowerPoint, Excel
- Proficient command of spoken and written English
- Logical thinking and analysis ability
- Strong collaboration
- Strong understanding on distribution working model (GA, Agency, Partnership distribution….)

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.

- Clear understanding of recruitment and department's objectives to provide specific recommendations and solutions to achieve Agency's recruitment strategic plans

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

1. Education:
- University graduate, prioritize economics/finance/banking

2. Experience:
- Insurance Experience (5 years)
- Distribution administration experience (at least 3 years)
- System development & management
- Project management

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.

- Regular interaction with sales leaders, trainer, general agency director to execute agency appointment, induction.
- Co-work with related departments – F&A, Ops, IT, Planning, Quality Assurance, Audit, Legal, Compliance to assure sale quality and provide best service/support to Sale force

Management scope

Total number of direct reports: 0

Total number of staff managed (direct and indirect): 0

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):
Key KPI:
- Complete initiatives & project as assigned
- Manage error rate in daily transaction <5%
- Manage Turn-around-time (TAT) in processing operation requests as standard in Operating Manual