

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: _____	Manager name: _____
Job title: <u>Senior Manager, Business Strategy</u>	Manager title and GCF level: <u>Chief Bancassurance Officer</u>
Job level: _____	Department: <u>Strategic Initiatives</u>
Career track: <u>Professional</u>	BU/Division: <u>SLVN/ Strategic Initiatives</u>

Job purpose

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

Overall responsibility for maintaining high standards of quality & excellence is paramount for Sun Life Vietnam's reputation & success. This role implements robust execution assurance measures, monitoring project deliverables, & assessing loopholes, to ensure that outcomes meet expectations & deliver value to stakeholders.

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 accountability. The percentages below should sum up to 100.

<ul style="list-style-type: none"> • Process optimization & standardization: Identify opportunities to streamline operational processes and standardize procedures to enhance efficiency and quality. Collaborate with departmental leaders and stakeholders to redesign workflows and eliminate redundancies. Implement process improvement initiatives to drive financial effectiveness & improve productivity. 	25%
<ul style="list-style-type: none"> • Cross-functional collaboration and communication: Foster collaboration and communication between departments to ensure alignment and coordination on quality assurance initiatives. Serve as a liaison between different functional areas to facilitate information sharing and problem solving 	20%
<ul style="list-style-type: none"> • Performance monitoring and analysis: Establish performance metrics and KPIs to measure the effectiveness of quality assurance efforts. Monitor and analyze performance data to identify trends, patterns, and areas for improvement. Provide regular reports and insights to high management to support strategic decision-making and continuous improvement efforts. 	15%
<ul style="list-style-type: none"> • Risk management and mitigation: Identify potential risks and vulnerabilities within operational processes and project activities. Develop risk mitigation strategies and action plans to minimize exposure and protect organizational assets. Monitor risk mitigation efforts and provide recommendations for corrective action to mitigate impact. 	20%
<ul style="list-style-type: none"> • Continuous improvement initiatives leadership: Lead cross-functional teams in identifying, prioritizing, and implementing continuous improvement initiatives to enhance operational effectiveness and efficiency. Champion a culture of continuous improvement by promoting innovation, creativity, and accountability throughout the organization. Evaluate the effectiveness of improvement initiatives through performance metrics and stakeholder feedback, making adjustments as necessary to drive sustainable results. 	20%

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Specialized knowledge

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

- Advanced knowledge of Life insurance fundamentals – sales process, sales & management training, recruitment & selection, performance management, compensation & incentive.
- Advanced knowledge of insurance company's operations, products and services is highly preferred
- Advanced knowledge and skills in product positioning and sales communication; design & delivery of training programs
- Experienced in project management JOB DESCRIPTION (JD) Sun Life Asia Job Evaluation Process JD Template v2 April 2014
- Professional knowledge: LOMA courses, Financial Planning designation or courses (e.g. in-house programs, RFC, RFP, ChFC, etc.)
- Professional in using SQL, Tableau, Power BI
- Solid data analysis skills, precision, and attention to detail;
- Advanced computer skills required for Windows Office programs including Word, Excel, PowerPoint and Project, in addition to Outlook and web-based applications

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.

- Ability to define root cause of problem and propose relevant solutions
- Ability to understand and accomplish and/or deal with complicated task/issue/situation/person (relating to persistency, way of working to achieve targets, work well with Sales and other departments)
- Ability to manage up and manage cross functions

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.

University degree with > 3 years working experience or an equivalent combination of education and experience, preferred in management trainee/associate or cross-functional roles - Have at least 2 years' experience in Business Analytic or Business strategy

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.

- Chief Bancassurance Officer – daily/weekly to coordinate on BAU work streams, as well as special initiatives.
- Heads/LTs of functional teams outside Agency (e.g. Marketing, IT, Actuarial, New Business, Compliance, Legal, Investments, Finance) – weekly/monthly to coordinate on BAU work streams, as well as special initiatives.
- Vendors or suppliers of outsourced services (e.g. audio-visual production, art/graphic services, etc.) to coordinate on BAU work streams, as well as special initiatives.