

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	Apr.2026	Manager name:	_____
Job title:	Sr. Manager, CBM	Manager title and GCF level:	_____
Job level:	6.1	Department:	Client benefit management (CBM)
Career track:	Management Career Track	BU/Division:	Sun Life Vietnam/ Operations

Job purpose

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

This role is responsible to:

- Propose, initiate and manage operations of Claim admin and investigation team to ensure team's activities smoothly executed in accordance with the corporation philosophy, Company principle and guidelines; Monitor quality and productivity of admin staff to ensure fast, accurate and comply with Sun Life standards assessment as Claims guidelines and cost efficiency;
- Give user requirement to enhance systems to increase automation, minimize errors, and reduce manual works; implement some special service like as calling to medical advisory, set up desk investigation ... to make SLVN's Claims service reliable and earn the trust of customers.
- Be responsible for controlling Claim admin's budget and training/ developing/ effectively utilizing Claim admin's human resources.

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"> • Responsible for leading the Claim admin & investigation team to successfully complete tasks by assigning tasks to members fairly, transparently, and reasonably; creating a dynamic work environment with strong teamwork; facilitating problem-solving and collaboration; empowering team members; and proposing ways to improve service quality and processes. The Claim admin & investigation tasks are required to have at least 98% accuracy and be completed within TAT of 99% 	30%
<ul style="list-style-type: none"> • Participate in system set up/ enhancement/ UAT for Claim field to improve the automation transaction/process and new product launching; develops functional requirements of applications and projects of medium size and/or complexity; reviews, analyzes, and evaluates user needs; participate in software design and prototyping new or enhanced applications; develop new and innovative solutions to customer 	30%
<ul style="list-style-type: none"> • Responsible for effectively managing the Claim admin & investigate team's resources: goals setting and service standards; conduct performance reviews and hold regular 1:1 meeting with employees to provide effective feedback; proposing HR actions related to subordinates (recruitment and dismissal, promotion, disciplinary action, etc.); attracting, engaging, developing and retaining talent 	20%
<ul style="list-style-type: none"> • Participate in establishing/updating Claim procedures and guidelines in line with the Company's vision and mission and provide training on them to Claim employees and relevant departments. 	10%
<ul style="list-style-type: none"> • Responsible for proposing the Claim annual budget plan and managing the approved budget, and perform other Claim tasks as assigned (handle complaints related to Claim fields, answer mailbox/ hotline inquiries...) 	10%

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Specialized knowledge

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

- Deep expertise in claim, products, and regulatory environment
- Having good experience in system setup, process building, recruiting and training human resources for Claim field
- Have good experience in system set-up, UAT
- Good management, communication and presentation skills
- Organized and able to work under pressure and tight deadlines
- Highly committed and self-motivated, highly capable of self-learning
- Ability to exert influence and to provide training and knowledge to employees
- Good initiative and ability to multitask

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 appease customers and resolve issues via email/phone and in person.
- Detect errors, loopholes, and inconsistencies in processes, regulations, and systems to report to management and find solutions/propose improvements.
- Ability to handle complex cases

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.

- **Education:** Bachelor's degree. A degree in medical, insurance, economics, finance, technical or accounting is an advantage.
- **Experience:**
 - At least 5 years of experience in NBU and/or Claim, experience in complaint handling related to UW and/or Claim is an advantage.
 - And at least 2 years of experience NBU and/or Claim management position
- English in proficient
- LOMA and equivalent life insurance certificates

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.

- Internal communication: Regularly working with colleagues in Operations and IT, Compliance, Risk Management, Legal, and Finance to handle claim cases.
- External communication: Working with the sales force, receiving and processing customer requests related to the Claim, working with vendor for system development, work with INS for executing TPA contract

Management scope

Total number of direct reports: 2-3

Total number of staff managed (direct and indirect): 5 -10

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Metrics (if applicable)

Finance metrics (revenue, budget managed, etc.): Sales metrics (type and amount): Other metrics (specify): Travel required (express as % of working time):

Prepared by	Le Thi Hong Hanh	Date	22/04/2026
Approved by	Tran Thi Ly	Date	
For HR Use Only			
Handled by		Date	
Job profile		Job category	
JAR #			

This job description is attached as a part of the Labour Contract be executed in two sets. One set will be kept by the employer. One set will be kept by the employee and both sets have the same legal effect.

ACCEPTANCE AND CONFIRMATION

I also confirm that I have fully read, understood and agreed to the job description.

Name: _____

Date signed: _____