Sun Life Financial®

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	8/2026	**Manager name:**	Regional Director, Bancassurance
		Manager title and GCF level:	GCF 5.2
Job title:	Area Director, Bancassurance	**Department:**	Bancassurance Development
Job level:	GCF 5.1	**BU/Division:**	Sun Life Vietnam / Bancassurance

Job purpose

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

Own business outcomes and the end-to-end operating cycle for the assigned ACB area and branch portfolio. Diagnose performance, prioritize opportunities, activate branches and sellers, execute plans, review outcomes and continuously improve. The role is accountable for AFYP growth, seller productivity, branch activation, sales quality, partner capability development and local implementation of strategic initiatives, while ensuring fair treatment of Clients, compliant sales conduct and effective use of data, AI and automation.

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.

Own area business outcomes, including AFYP growth, seller productivity, branch activation, sales quality, persistency and sustainable performance. Translate regional priorities into branch-level plans and ensure timely corrective action for performance gaps.	**30%**
Lead the full area operating cycle: diagnose branch and seller performance; prioritize opportunities; activate bank leaders, sellers and field resources; execute agreed actions; review outcomes; and continuously improve branch routines and business impact.	**15%**
Lead branch partner engagement and capability development. Build trusted relationships with ACB area and branch leaders, influence joint priorities, equip bank leaders and sellers, and strengthen ownership of customer, productivity and quality outcomes.	**15%**
Manage performance governance using standardized dashboards, analytics, AI and automation tools. Maintain pipeline visibility, convert insight into branch actions, track owners and deadlines, and escalate material risks or blockers with clear recommendations.	**15%**
Implement strategic initiatives and transformation programmes across the assigned area, including HERO, Affluent expansion, customer value propositions, AI adoption and digital initiatives. Drive adoption, monitor impact and share lessons for continuous improvement.	**10%**
Lead, coach and develop the assigned Insurance Officers/Insurance Specialists (IOIS) and field sales resources to achieve sustainable business outcomes. Conduct regular field coaching, joint customer engagements, pipeline reviews and performance discussions; strengthen sales capability, customer conversation quality, productivity, stakeholder management and digital adoption; identify development needs and succession opportunities; and build a high-performance culture focused on accountability, continuous learning and business excellence.	**15%**

Specialized knowledge

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

- Bancassurance sales and business management, branch activation, field leadership and bank partner engagement.
- Strong understanding of life insurance products, customer segments, seller productivity, pipeline conversion, sales quality, persistency and compliant conduct.
- Ability to interpret branch and seller performance, diagnose root causes and translate insights into focused actions and measurable outcomes.
- Demonstrated ability to leverage dashboards, AI and automation tools to improve decision quality, operating efficiency, coaching and execution effectiveness.
- Strong communication, presentation, coaching, stakeholder influence, change adoption and cross-functional collaboration skills.
- Ability to implement strategic initiatives, embed standard operating routines and continuously improve performance across multiple branches.

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.

- Resolve varied and interdependent business, partner, customer, operational and people issues across assigned branches under short turnaround times.
- Use dashboards, pipeline data and field observations to distinguish root causes from symptoms and prioritize high-impact actions.
- Balance growth, productivity, sales quality, fair treatment of Clients, partner expectations and internal governance in daily decisions.
- Escalate cross-functional blockers with clear facts, impact, recommendation, accountable owner and expected closure date.
- Adapt branch plans and coaching interventions when customer demand, partner priorities or performance signals change.

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.

- Bachelor degree in Banking, Finance, Business Administration, Marketing, Economics or a related discipline. Relevant professional insurance qualification is preferred.
- Minimum 5-7 years of relevant experience in bancassurance, banking, insurance distribution or financial services sales.
- At least 3 years in a people leadership, branch sales management or multi-branch field management role is preferred.
- Proven track record of delivering sales outcomes, activating branches, improving seller productivity and building effective relationships with bank partners.
- Demonstrated capability in coaching, performance governance, change adoption and execution of strategic initiatives.
- Demonstrated ability to use digital tools, dashboards, AI and automation to improve decisions, reporting and operating effectiveness.

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, daily/weekly: Regional Director, peer Area Directors and Banca functional teams for performance governance, issue resolution, capability building and initiative delivery.
- Bank partner, daily/weekly: ACB area and branch leaders and relevant sellers for branch plans, activation, pipeline, customer and quality outcomes, and performance follow-up.
- Management, weekly/monthly/ad hoc: Present area results, root causes, actions, risks and support required in regional business reviews.
- Team, daily: Coach field sales resources, align priorities, reinforce conduct and productivity expectations, and drive digital and AI adoption.

Management scope

Total number of direct reports: Based on assigned area structure and approved field organization.
Total number of staff managed (direct and indirect): Based on branch portfolio, field sales coverage and indirect bank seller scope.

Metrics (if applicable)

Finance metrics: AFYP growth and delivery against approved area business plan. Sales and partner metrics: Seller productivity, branch activation, pipeline and conversion, product and customer segment penetration, persistency, sales quality and partner capability development. Transformation metrics: Local adoption and business impact of HERO, Affluent expansion, customer value propositions, AI and digital initiatives; action closure and improvement benefits. People metrics: Coaching effectiveness, capability development, engagement and talent readiness. Travel required: Regular travel within the assigned area and to other locations based on business and partner needs.