

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>02/08/2026</u>	Department:	<u>Bancassurance Operations & Services (BOS)</u>
Job title:	<u>Manager, ACB Bancassurance Operation and Services</u>	BU/Division:	<u>Bancassurance</u>
GCF level:	<u>5.2</u>	Career track:	<u>Management</u>

Job purpose

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

The Manager leads the execution of ACB - Operation and Services by delivering efficient operational services, ensuring compliance with governance requirements, and driving continuous process improvement. The role is accountable for achieving service excellence, improving stakeholder experience, and enhancing operational productivity through standardization 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.

Operational Service Delivery - Execute day-to-day Bancassurance operations and service requests to ensure timely, accurate and efficient delivery. - Coordinate with ACB and internal stakeholders to support smooth business execution and issue resolution. - Monitor service performance and drive actions to improve stakeholder experience and operational effectiveness.	40%
Governance & Compliance Execution - Execute operational procedures, controls and governance requirements in accordance with company policies and regulatory standards. - Maintain operational tracking and supporting documentation to ensure compliance and audit readiness. - Identify operational risks, implement corrective actions and support continuous control improvements.	30%
Process Improvement & Automation - Identify process gaps and improvement opportunities to enhance efficiency and service quality. - Standardize workflows, templates and operating practices to improve consistency and scalability. - Leverage digital tools and automation solutions to reduce manual effort and increase productivity.	15%
Leadership - Lead, coach and develop team members to deliver operational excellence. - Identify capability gaps and implement development plans.	10%
<i>Ensure all activities, decisions and deliverables comply with fair treatment of Clients principles, proactively identifying and mitigating risks of unfair client outcomes in line with Company conduct expectations.</i>	5%

Specialized knowledge and skills

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

- Strong experience and knowledge in Insurance, Finance and Banking.
- Strong analytical, problem-solving and process improvement skills with a technology-driven mindset.
- Excellent communication, stakeholder management and influencing skills in English and Vietnamese.
- Proficient in Microsoft Office and business reporting tools.
- Demonstrate the Curiosity to effectively leverage AI tools to enhance productivity, decision-making, and quality of outcomes within the role

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.

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- Resolve operational, compliance and service-related issues within established policies and procedures.
- Apply analytical thinking and sound judgment to identify solutions and improve efficiency.
- Manage multiple priorities and stakeholders while balancing business and compliance requirements.
- Demonstrate strong accountability in problem solving by proactively identifying, owning, and resolving all issues within scope, regardless of formal task assignment

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's degree in business administration, Computer science, Business analysis, or a related field;
- 4+ years of experience in sales service, preferred Insurance/Banking industry, with a proven track record of success in managing and executing business initiatives and budget;
- Experience in administration and/or client service and/or system and project implementation.

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 ACB Banca HO to align proposal/processes.
- Interaction with internal functions / departments to stay abreast on the latest update of regulation.
- Confidently and independently deal to:
 - Support ACB Banca HO and internal operation functions for business decision making
 - Build trust, interact closely to get their engagement and sharing about their needs, feedbacks and suggestions
 - Influence to get their buy-in and commitment to drive productivity or solve problems/ issues

Management scope

Total number of direct reports: 1

Total number of staff managed (direct and indirect): **N/A**

Metrics (if applicable)

- Service Delivery: Achieve agreed SLA and turnaround time, manage activities within budget while maintaining high service quality.
- Stakeholder Experience: Deliver timely support and maintain strong stakeholder satisfaction.
- Governance & Compliance: Ensure audit readiness and full compliance with policies, procedures and regulatory requirements.
- Operational Productivity: Drive process improvements, standardization and automation to increase efficiency and reduce manual work.