

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: <u>8/2026</u>	Manager name: <u>Sale head, Bancassurance</u>
	Manager title and GCF level: <u>GCF 6.2</u>
Job title: <u>Regional Director, Bancassurance</u>	Department: <u>Bancassurance Development</u>
Job level: <u>GCF 5.2</u>	BU/Division: <u>Sun Life Vietnam / Bancassurance</u>

Job purpose

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

Own the end-to-end business outcomes and operating cycle for the assigned ACB bancassurance region. Diagnose performance, prioritize opportunities, activate partners and resources, execute plans, review outcomes and continuously improve results. The role is accountable for AFYP growth, seller productivity, branch activation, sales quality, partner capability development and regional delivery of strategic and transformation 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 regional business outcomes, including AFYP growth, seller productivity, branch activation, sales quality, persistency and sustainable performance. Translate business strategy into clear regional priorities, resource choices and measurable plans, and take timely corrective action where outcomes are off track.	30%
Lead the full regional operating cycle: diagnose business performance and root causes; prioritize opportunities; activate Area Directors, bank partners and support resources; execute agreed actions; review outcomes; and continuously improve operating routines and business impact.	25%
Run regional business reviews and data-driven performance management routines. Use standardized dashboards, sales reports and approved AI-assisted productivity tools to identify trends, performance gaps and business opportunities; prepare clear insights for weekly or monthly reviews; track action owners, deadlines and closure status; and follow through until issues are resolved.	15%
Build strong internal and partner relationships to support regional business delivery. Work closely with ACB regional, area and branch stakeholders, and coordinate with Academy, Enablement, Service, Quality Assurance, Product, Operations, Compensation and Reporting teams to secure resources, remove execution blockers, improve training adoption and ensure smooth campaign or initiative deployment.	15%
Coach, develop and strengthen regional leadership capability. Provide coaching and mentoring to Area Directors on partner management, field governance, problem solving, performance management, digital and AI tool adoption; identify successor or backup candidates for critical Area Director and regional roles; and ensure all activities comply with fair treatment of Clients and Company conduct expectations.	15%

Specialized knowledge

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

- Bancassurance business management, regional planning, partner leadership and multi-area operating governance.
- Strong understanding of life insurance products, customer segments, branch activation, seller productivity, sales quality, persistency and compliant conduct.
- Ability to diagnose business performance, identify root causes, set priorities, and convert insight into measurable business outcomes.
- Demonstrated ability to leverage dashboards, AI and automation tools to improve decision quality, operating efficiency, coaching and execution effectiveness.
- Strong stakeholder influence, partner leadership, change management, coaching and cross-functional collaboration capabilities.
- Ability to lead strategic initiatives, transformation programmers, standardized operating routines and continuous improvement across a geographically dispersed region.

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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 complex and interdependent business, partner, operational, customer and people issues across multiple areas and branches under significant business pressure.
- Use quantitative and qualitative evidence to diagnose root causes, assess trade-offs and prioritize actions with the greatest business and customer impact.
- Balance growth, productivity, sales quality, fair treatment of Clients, partner expectations and internal governance when making decisions.
- Lead structured resolution of cross-functional blockers with clear facts, impact, recommendation, accountable owner and closure date.
- Adapt regional plans and change interventions when market conditions, partner priorities or performance signals shift.

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 8-10 years of relevant experience in bancassurance, banking, insurance distribution or financial services, including substantial sales leadership experience.
- At least 5 years in a people management or field leadership role, preferably covering multiple areas, branches or geographically dispersed teams.
- Proven track record of delivering business growth, improving seller productivity and branch activation, strengthening sales quality and influencing bank partners.
- Demonstrated experience in leading change, strategic initiatives, performance governance and continuous improvement.
- Demonstrated ability to use analytics, dashboards, AI and automation to improve management decisions 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: Sales Head, Area Directors and Banca functional teams to align priorities, review outcomes, resolve blockers and govern strategic initiatives.
- Bank partner, daily/weekly: ACB regional, area and branch leaders to jointly plan business, activate branches, build partner capability and manage performance and quality outcomes.
- Management, monthly/ad hoc: Present regional outcomes, risks, transformation progress, decisions required and support requests in management reviews.
- Team, daily/weekly: Coach Area Directors, reinforce accountability and BOS routines, and lead change, capability and succession discussions.

Management scope

Total number of direct reports: based on assigned RD structure; typical direct reports include Area Directors.
Total number of staff managed (direct and indirect): based on assigned region, Area Director coverage, branch portfolio and indirect sales force scope.

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):