

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: <u>June 09, 2026</u> Job title: <u>Associate Director, Bancassurance Academy Training Effectiveness</u>	Manager name: _____ Manager title and GCF level: <u>Director, Bancassurance Academy</u>
Job level: _____ Career track: <u>Management</u>	Department: <u>Bancassurance Academy</u> BU/Division: <u>Sun Life Vietnam/ Bancassurance</u>

Job purpose

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

Lead the Bancassurance Training Operations and Effectiveness (TOE) function to ensure scalable, data-driven, compliant, and high-impact training operations across Bancassurance channels. The role is responsible for governance of the Bancassurance Learning Management System (LMS), training quality assurance, reporting and analytics, operational excellence, and continuous capability improvement to strengthen sales productivity, regulatory compliance, and business performance.

The position acts as the strategic bridge between Bancassurance Academy, Sales, Operations, Compliance, Technology, and Bank Partners to drive execution excellence and future-ready learning capability.

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.

<p>1. Training Systems and Learning Operations Management</p> <ul style="list-style-type: none"> a. Lead and optimize Bancassurance Learning Management Systems (LMS), including partner e-learning platforms, to ensure effective training administration and learning accessibility. b. Oversee system governance, user management, learning assignment, certification tracking, and reporting processes across all bancassurance channels. c. Drive LMS enhancement initiatives, including digital integration, automation, AGIS connectivity, and new learning technology implementation. d. Ensure operational excellence in training administration, examination processes, learning records, and audit readiness. 	30%
<p>2. Training Quality Assurance and Effectiveness</p> <ul style="list-style-type: none"> a. Establish and lead Training Quality Assurance (TQA) framework to measure effectiveness and consistency of training delivery. b. Define and monitor training KPIs, learning completion, certification quality, sales impact, and capability improvement metrics. c. Develop end-to-end evaluation methodology covering pre-training, in-training, and post-training effectiveness measurement. d. Partner with Distribution and Academy teams to continuously improve learning outcomes and field capability. 	30%

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

<p>3. Reporting, Analytics and Governance</p> <p>a. Lead all training-related reporting and analytics for internal stakeholders, Compliance, Internal Audit, regulators, and bank partners.</p> <p>b. Consolidate training data and generate strategic insights to support management decision-making and business planning.</p> <p>c. Develop standardized dashboards and governance reports to monitor training effectiveness, productivity, compliance, and operational performance.</p> <p>d. Develop and standardize Bancassurance Academy SOPs, governance framework, and operating procedures.</p>	20%
<p>4. Continuous Improvement and Capability Building</p> <p>a. Identify process improvement opportunities to enhance training operational efficiency, learner experience, and execution speed.</p> <p>b. Drive digitalization and automation initiatives to improve scalability and reduce operational risk.</p> <p>c. Benchmark best practices in bancassurance capability development and learning operations to strengthen organizational capability.</p>	10%
<p>5. Stakeholder Management and Cross-functional Collaboration</p> <p>a. Collaborate closely with Bank Partners, Sales, Compliance, Operations, Product, Technology, and HR teams to align training initiatives with business priorities.</p> <p>b. Act as key liaison for training governance, operational issue resolution, and strategic learning initiatives.</p> <p>c. Manage external vendors and training partners to ensure quality delivery and operational effectiveness.</p>	10%

Specialized knowledge

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

<ul style="list-style-type: none"> • Strong knowledge of Learning Management Systems (LMS), particularly CSOD and enterprise learning administration • Expertise in training operations, governance, reporting, and quality assurance frameworks Strong analytical capability with experience in dashboarding, KPI management, and training effectiveness measurement • Understanding of bancassurance operations, sales processes, and regulatory requirements • Knowledge of digital learning ecosystem, e-learning integration, and capability development methodologies • Strong project management and stakeholder management capability

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.

<ul style="list-style-type: none"> • Analyze large and complex training data to identify capability gaps and operational improvement opportunities • Resolve cross-functional operational issues impacting training delivery and learning compliance • Balance regulatory requirements with business execution speed and operational efficiency • Lead transformation initiatives related to LMS implementation, process automation, AI adoption and governance enhancement

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

- Manage changing priorities from business, regulators, and bank partners while maintaining operational stability

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, Finance, Education, Human Resources, or related disciplines
- Minimum 10 years of relevant experience, preferably in bancassurance, insurance, banking, training operations, or learning governance
- Strong experience in LMS administration, reporting, and operational management
Experience in training effectiveness measurement and governance framework implementation preferred
- Experience managing cross-functional stakeholders and transformation initiatives preferred

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 Stakeholders (Frequent communication):

- Bancassurance Sales and Distribution Teams
- Bancassurance Academy and Training Delivery Teams
- Compliance, Legal, Risk, and Internal Audit Teams
- Operations, Technology, Product, and HR Teams
- Senior Leadership Team and Regional Office

External Stakeholders (Periodic communication):

- Bank Partners and Partner Training Team
- External LMS / Training Vendors
- Regulatory and audit-related stakeholders where required

Management scope

Total number of direct reports: 2

Total number of staff managed (direct and indirect): 2

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Metrics (if applicable)

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

Sales metrics (type and amount): Other metrics (specify):

Travel required (express as % of working time): Approximately 10–20% of working time depending on business and partner requirements