

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>09 July 2026</u>	Department	<u>Bancassurance Enablement</u>
Job title:	<u>Associate Director, Bancassurance Business Performance</u>	BU/ Division:	<u>Bancassurance</u>
GCF level	<u>6.2</u>	Career track:	<u>Professional</u>

Job purpose

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

To lead the Banca business performance management agenda by providing timely and actionable performance insights, identifying performance gaps and underlying business drivers, and driving cross-functional intervention and recovery actions to ensure delivery of Bancassurance business commitments. The role serves as the central performance management point for Banca, connecting business results, sales drivers, execution effectiveness, and management actions to support the Chief Banca Officer and Banca Leadership Team in making timely business decisions.

Major accountabilities

Identify 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.

Lead Banca business performance management Lead the end-to-end Banca performance management process by monitoring business results against agreed targets, commitments, and key business drivers across bank partnerships and sales channels.	25%
Diagnose performance gaps and business drivers Analyse business performance to identify material gaps, trends, root causes, and emerging risks across sales productivity, activation, product mix, customer segments, quality, and partnership execution.	20%
Drive performance interventions and recovery actions Translate performance insights into clear management actions and coordinate with Sales, Enablement, Academy, Operations, and relevant functions to develop and track intervention and recovery plans.	20%
Provide actionable insights for executive decision-making Provide timely and actionable performance insights and recommendations to the Chief Banca Officer and Banca Leadership Team to support business decisions, prioritisation, and resource deployment.	20%
Lead performance governance and management reviews Lead the Banca performance governance rhythm, including regular business performance reviews, management dashboards, action tracking, and escalation of material performance risks requiring management intervention. 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.	15%

Specialized knowledge and skills

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

- Strong knowledge of Bancassurance sales management, business performance management, and insurance distribution economics.
- Strong analytical and commercial capability with the ability to connect data, business drivers, and frontline execution to identify root causes and actionable interventions.
- Strong capability in performance management, management information, dashboard interpretation, root-cause analysis, and action tracking.
- Ability to challenge constructively, influence cross-functional stakeholders, and drive accountability for business outcomes.

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- Demonstrate the Curiosity to effectively leverage AI tools to enhance productivity, performance analysis, 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.

- Solve complex and time-sensitive business performance issues where performance outcomes are influenced by multiple interdependent drivers including sales productivity, bank policies, customer behaviour, product mix, operational execution, and market competition.
- Diagnose underlying performance drivers beyond reported results and determine the most appropriate intervention, escalation, or recovery action.
- Exercise judgement in prioritising material performance issues and escalating risks requiring Chief Banca Officer or senior management intervention.
- 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, Finance, Economics, Banking, Insurance, Data Analytics, or a related discipline.
- Minimum 10 years of relevant experience in business performance management, sales management, Bancassurance, banking, insurance, or financial services.
- Demonstrated experience in business performance analysis, root-cause diagnosis, management reporting, and driving cross-functional business actions.

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.

- Regularly interact with the Chief Banca Officer, Banca Leadership Team, Sales Heads, Enablement teams, and relevant Company functions to review performance, identify business gaps, and drive corrective actions.
- Engage with bank partner working teams and relevant senior stakeholders to understand performance drivers and coordinate joint business interventions.
- Provide performance insights and escalation to Company Leadership Team and Regional Office when material business risks or management decisions are required.