

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>Associate Director, Bancassurance Operations and Services</u>	BU/Division:	<u>Bancassurance</u>
GCF level:	<u>6.2</u>	Career track:	<u>Management</u>

Job purpose

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

The Associate Director, Bancassurance Operations and Services leads the design, governance and continuous enhancement of the Banca Operations and Service capability, enabling sustainable business outcomes by transforming from activity-based execution to outcome-based management. The role is accountable for driving service excellence, operational efficiency, stakeholder satisfaction and effective risk control through a scalable and disciplined operating model.

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 Excellence & Service Delivery - Ensure day-to-day business operations are delivered compliantly and consistently across Sales, Bank, and internal operations stakeholders. - Monitor service quality, turnaround time and issue address, and lead corrective actions to improve productivity, stakeholder experience, and business continuity. - Continuously strengthen service delivery standards for Bancassurance operations.	20%
Process Automation, Improvement - Strengthen the digital transformation aspect by incorporating AI, automation and digital tools to improve operational efficiency, scalability and service quality across the Bancassurance operating model. - Deliver measurable outcomes through reduced turnaround time, higher productivity and increased automation adoption.	20%
Business Operations Governance - Establish governance frameworks, controls, and procedures to ensure compliant and sustainable Bancassurance operations. - Lead operational risk management, issue resolution, remediation tracking, and business continuity planning. - Partner with Compliance, Legal, Finance, Risk, Operations, and bank stakeholders to ensure regulatory and business requirements are met.	20%
Vendor, Contract & Budget management - Lead in working vendor, contract and procurement to ensure effective service delivery, compliance. - Manage Marketing Allowance and Internal Banca budgets to optimize spending efficiency and maximize business value. - Evaluate vendor performance and business investments to improve results, cost effectiveness and financial governance.	15%
Cross-functional Project Delivery - Lead cross-functional and strategic initiatives, ensuring business value delivery. - Partner with stakeholders to simplify operating models and remove barriers to growth - Translate business priorities into scalable operating models, governance, and execution plans	15%
People Leadership Improved team capability, engagement, productivity, and succession readiness.	5%
<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.

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- Advanced knowledge of Bancassurance operating models, insurance and banking distribution, sales service operations, partner governance and regulatory expectations.
- Proven capability in operational excellence, service delivery management, process redesign, automation, continuous improvement.
- Strong financial governance and vendor/contract management knowledge, including budget control, procurement coordination and service performance oversight.
- Advanced stakeholder management, influencing and business partnering skills with Sales, Bank partners, Product, Marketing, Operations, Compliance, Legal, Finance and Risk.
- Strong analytical, problem-solving and project delivery skills; ability to convert business needs into operating models, dashboards, measures and executable plans.
- Excellent communication skills in English and Vietnamese; advanced Microsoft Office.
- 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.

- The role addresses complex, interdependent operational issues that require balancing business priorities, partner expectations, regulatory requirements, cost control, service quality and continuity of operations.
- The role is expected to diagnose root causes, define measurable outcomes, align stakeholders, design practical solutions, and lead implementation through governance routines and project discipline.
- The role must identify best practices, anticipate future operating model needs, and drive continuous improvement rather than only resolving individual incidents.
- 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 Economics, Finance, Banking, Insurance or a related field; relevant professional certifications in project management, operational excellence, process improvement or risk/control management are preferred.
- Typically 8+ years of relevant experience in insurance, banking, relevant fields.
- 3+ years of experience leading and developing teams.
- Experience managing contracts, vendors, budgets, events/business campaigns and stakeholder governance, process improvement, service governance, cross-functional project delivery.

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 partners with Bancassurance Head Office, Sales, Product, Marketing, Operations, Compliance, Legal, Finance, Risk, Procurement and IT teams to align priorities, governance, controls and delivery plans.
- Engages bank stakeholders and vendors to understand business needs, manage service delivery expectations, resolve issues and support execution of joint initiatives.
- Builds trusted relationships across internal and external stakeholders to drive accountability, adoption and measurable business outcomes.

Management scope

Total number of direct reports: 4-5

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

Metrics (if applicable)

- Service delivery: achievement of service-level agreements, turnaround time reduction, issue resolution timeliness, service quality and stakeholder satisfaction.
- Operational efficiency: process cycle-time improvement, reduction of manual/rework activities, automation adoption, productivity gains and dashboard/reporting effectiveness.
- Governance and control: timely completion of controls, documentation, remediation actions, audit/risk issue closure and business continuity readiness.

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- Finance matters: Marketing Allowance and Internal Banca budget utilization within approval, timely tracking/reconciliation and cost optimization outcomes.
- Project delivery: cross-functional initiatives delivered against agreed scope, milestones, adoption measures and post-implementation outcomes.
- People and capability: team engagement, capability development, succession readiness and sustained service mindset.