

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	31/7/2026	Manager name:	
		Manager title and GCF level:	ACB, Sale Head
Job title:	Senior Specialist, Sales Administration & Business Support (ACB Bancassurance)	Department:	Bancassurance Admin & Support
Job level:	4.1-2	BU/Division:	Bancassurance

Job purpose

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

The job holder is responsible for providing end-to-end sales administration, business coordination, reporting, sales governance and partner operation support for the ACB Bancassurance channel. The role acts as a key business enabler for the ACB Sales Head, Regional Directors, Area Directors and frontline sales force to ensure effective execution of business priorities, timely management reporting, compliant sales operations and continuous sales productivity improvement.

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.

Sales Planning, Reporting & Business Analytics: - Consolidate and analyze daily, weekly and monthly sales performance, including FYP, case count, K1/K2, Hero Product, AFF and activation metrics. - Prepare management dashboards and business review materials for Sales Head, CBO and leadership meetings. - Identify performance gaps by region, AD, branch, bank staff and IOIS population to support timely action planning. - Coordinate with Planning & Compensation team on target allocation, incentive tracking and contest performance reporting.	35%
Sales Operation & Partner Coordination: - Coordinate operational activities between ACB Sales team, Head Office functions and ACB stakeholders. - Track execution of business action plans from RD and AD teams, including pipeline follow-up, branch activation and field visit priorities. - Facilitate communication of business updates, operational guidelines, campaign mechanics and management announcements. - Support preparation and logistics for business reviews, partner meetings,	30%
Contest, Campaign & Sales Force Administration: - Administer sales contests, recognition programs, reward tracking and communication to sales force. - Monitor implementation progress of Hero Product, AFF expansion, K2 recovery and other business campaigns. - Coordinate merchandise, event materials, inventory monitoring and vendor/payment documentation where required. - Maintain sales force administration data, including structure updates, workforce tracking and related documentation.	20%
Governance, Compliance & Project Support: - Support tracking of action items from audits, compliance reviews, meeting minutes and management governance forums. - Coordinate required documentation and approval flows for business activities and partner engagement programs.	10%

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- Participate in process improvement and digitalization initiatives to improve sales operation efficiency. - Maintain proper records and audit trail for business activities, campaign execution and stakeholder approvals.	
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.	5%

Specialized knowledge

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

- Insurance/Finance/Banking knowledge/experience - Computer proficiency skill - English is preferable - Effective communication - Servicing mindset and strong collaboration - Demonstrate the Curiosity to effectively leverage AI tools to enhance productivity, decision-making, and quality of outcomes within the role
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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, Business Administration or related disciplines. - Minimum 3 years of experience in Sales Administration, Sales Operations, Business Support, Banking, Insurance or Financial Services industry. - Experience in Bancassurance distribution, sales performance management or partner management is highly preferred. - Proven experience in preparing business reports, management presentations and performance analysis. - Experience in coordinating projects, campaigns, sales contests and cross-functional initiatives. - Ability to work independently in a fast-paced environment with multiple priorities and tight deadlines. - Demonstrate strong accountability in problem solving by proactively identifying, owning, and resolving all issues within scope, regardless of formal task assignment
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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.

- Coordinate daily with ACB Sales Head, RDs, ADs and related support functions regarding business performance, sales initiatives and operational matters. - Liaise with Head Office departments (Planning & Compensation, Training, BQA, Operations, Compliance, HR and Marketing) to support reporting, campaign execution and governance requirements. - Communicate regularly with ACB Head Office and Branch stakeholders to facilitate business activities and resolve operational issues. - Coordinate with external vendors for events, campaigns, reward fulfillment and administrative activities. - Prepare and deliver business reports, dashboards and presentation materials for management meetings. - Build effective relationships with internal and external stakeholders to ensure successful implementation of business objectives.

Management scope

Total number of direct reports: 0
Total number of staff managed (direct and indirect): 0