

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>20 Jul 2026</u>	Department	<u>Bancassurance Compensation & Contest</u>
Job title:	<u>Associate Manager, Bancassurance Compensation & Contest</u>	BU/ Division:	<u>Bancassurance</u>
GCF level	<u>GCF5.1</u>	Career track:	<u>Professional</u>

Job purpose

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

The incumbent of this job is responsible for delivering the MIS to support the entire bancassurance channel in a concise and timely manner and includes all bancassurance metrics as may change from time to time.

Acquire data from primary or secondary data sources and maintain databases of Bancassurance and identify, analyze, and interpret trends or patterns in complex data sets.

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.

1. Reporting Operations & Performance Management - Manage the preparation and delivery of daily, monthly, quarterly and annual Bancassurance reports, ensuring accuracy, completeness and timely submission. - Develop, maintain and enhance reporting solutions, dashboards and analytical tools (e.g., Tableau, Python, MS Access, MS Excel) to support business monitoring and management reporting. - Perform data validation, reconciliation and quality control checks to ensure consistency and integrity across production, KPI, compensation, contest and target reporting. - Coordinate with relevant stakeholders to gather reporting requirements, clarify data needs and support reporting enhancements. - Prepare management reporting packs, business performance summaries and ad-hoc analyses to support decision-making. - Support reporting automation and process improvement initiatives to enhance reporting efficiency, scalability and user experience. - Identify and escalate reporting issues, data discrepancies and operational risks in a timely manner.	30%
2. Sales Target Management - Coordinate and execute annual, quarterly and monthly sales target allocation processes for Bancassurance sales teams and partner channels. - Maintain target allocation models, assumptions and tracking tools in accordance with approved business direction and target-setting principles. - Monitor target achievement, sales productivity and business performance against approved plans, highlighting key gaps, risks and improvement opportunities. - Prepare target tracking reports, performance forecasts and management analyses to support business planning and performance reviews. - Support reviews and adjustments of sales targets when required, ensuring accuracy and alignment with business priorities.	25%
3. Reporting Analytics & Business Insights - Analyze sales performance, production trends, productivity indicators and business outcomes to identify key trends, opportunities and risks. - Develop analytical reports and performance tracking tools to support management review and business planning. - Support assessment of sales force performance, contest effectiveness and business initiatives through data-driven analysis. - Partner with Compensation and Contest teams to provide reporting and analytical support for incentive programs, campaigns and strategic initiatives. - Provide actionable insights and recommendations based on data analysis to support performance management and operational effectiveness.	25%
4. KPI, Compensation & Contest Reporting Support - Work closely with DCOM team to support data for incentive and compensation calculation processes. - Support the development and maintenance of calculation methodologies, business rules and operational procedures related to KPI, contest and compensation reporting. - Perform reconciliation and validation activities to support accurate compensation, contest payment processes. - Respond to reporting-related inquiries from stakeholders regarding KPI, target achievement, contest and compensation results.	15%
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 and skills

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

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Knowledge:

- Good knowledge on Vietnam Life insurance market or Finance/Banking industry.
- Proficiency in MS Excel & Access & Python

Skills:

- Good communication and interpersonal skill in both English and Vietnamese
- Strong teamwork spirit
- Able to work under high pressure
- Passion with number. Logical thinking and analytical ability

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.

- Solutions to ensure the data quality.
- Solutions to meet the data and report requirements from different stake holders: sales, management team, partners ...

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.

- University degree with 4-7 years of experience or an equivalent combination of education and experience
- 2 years' experience working in insurance, especial in Management information system Dept (refer)
- Process improvement experience
- Project involvement experience

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.

- Partners reporting team
- Sales team
- IT team

Management scope

Total number of direct reports: 0

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

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):