

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: _____	Manager name: _____
	Manager title and GCF level: _____
Job title: <u>Associate Manager, Client Service</u>	Department: <u>Client Services and Premium Collections</u>
Job level: <u>5.1</u>	BU/Division: <u>Sun Life Vietnam</u>

Job purpose

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

Responsible for leading and overseeing Client Service operations across the Southern and Northern regions of SLV, ensuring alignment in service standards, operational excellence, and a consistent, high-quality client experience.

Objective of this job: This role is accountable for defining, driving, and continuously enhancing Client Service strategies, standards, and performance across all locations. The Manager, Client Service will take full ownership of service delivery, productivity, and development of capability to ensure a consistent and high-quality client experience nationwide.

This role serves as the central point of accountability for Client Service operations, ensuring alignment across all teams, driving continuous improvement initiatives, and supporting business growth through service excellence.

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.

Lead nationwide Client Service operations <ul style="list-style-type: none"> • Lead and oversee end-to-end Client Service operations across all locations to ensure consistent, high-quality service delivery • Ensure alignment of service practices, operational processes, and client experience standards nationwide 	20%
Drive and govern Client Service standards and performance <ul style="list-style-type: none"> • Define, implement, and continuously enhance Client Service standards, policies, and procedures • Govern service performance against defined KPIs, SLAs, and quality standards • Ensure consistent client experience across all channels and locations 	20%
Performance management and continuous improvement <ul style="list-style-type: none"> • Establish and drive performance management framework for Client Service teams • Analyze service metrics and operational data to identify trends, issues, and improvement opportunities • Lead initiatives to enhance productivity, service quality, and operational efficiency 	20%
Data-driven decision making and service enhancement <ul style="list-style-type: none"> • Leverage data and insights to support strategic decision-making and service optimization • Identify key drivers of client satisfaction and implement improvement actions • Enhance reporting, automation, and analytics capabilities within Client Service 	20%
Lead people management and capability development <ul style="list-style-type: none"> • Lead, develop, and manage Client Service teams nationwide • Drive capability building, coaching, and succession planning within the function • Ensure high performance culture, employee engagement, and strong leadership pipeline 	20%

Specialized knowledge

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

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Service oriented mindset
Strong people management and influencing capability
Strong Communication and presentation skill
Strong problem solving and complaint handling skill
Decision making skills
Coaching and training capability
Good command of PC skill (Excel, Word, Access), team working, English (speaking and writing)

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.

- Realize root cause of problem
- Able to understand or accomplish or deal with task/issue/situation/person
- Able to find the best solution

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 graduate
- Female/Male
- At least 2 years' experience in supervisor role or above. 6-8 years' experience in financial services, life insurance experience is 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.

- Inter OP department for daily transaction
- AD force for communication/ corporate and support sale
- Manage office service for location offices
- Marketing for company branding
- IT for all related to system

Management scope

Total number of direct reports: 2 - 5
Total number of staff managed (direct and indirect): 20 - 40
Total location managed: 20 – 30

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):