

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	June 09, 2026	Manager name:	
Job title:	Manager, Bancassurance Training Delivery	Manager title and GCF level:	Associate Director, Bancassurance Academy Training Delivery
Job level:		Department:	Bancassurance Academy
Career track:	Professional	BU/Division:	Sun Life Vietnam/ Bancassurance

Job purpose

This role is designed to take charge of managing and ensuring effective implementation including delivery of the training programs to develop the salesforce & partner' skillset as business requirements. The role works closely with Sales Teams and stakeholders to ensure training solutions are relevant, effectively executed, and aligned with evolving business needs.

Major accountabilities

<p><u>As the Trainer:</u></p> <ol style="list-style-type: none"> 1. Develop & effective deliver training programs to meet training needs of Bancassurance distribution channels, including training to insurance salesforce & partner's staff. 2. Ensure sufficient and effective delivery of training programs to uplift skill set and knowledge to targeted audience. 3. Provide coaching for salesforce & partner's staff when required to support them achieving goals. 4. Support Leaders in assessing learning needs, training service performance, and program effectiveness for necessary adjustment: <ul style="list-style-type: none"> • Identify changes in learning needs & propose update training program. • Record & analyze training records and statistics for training program improvements. 5. Ensure constant self-improvement, keep abreast of training development and competence practices, including legislation and market best practices. 6. Ensure training activities in respective zone to comply with the MOF's regulations and the company's internal compliance regulations. 7. Manage the training programs and activities in a cost-effective manner. Monitor and control expenses closely within budget. 	70%
<p><u>As the Training Partner:</u></p> <ol style="list-style-type: none"> 1. Coordinate with stakeholders (Leaders of Sales team, Partners, Design & Development team...) to: <ul style="list-style-type: none"> • Support Manager to build & manage training plan of assigned partner/ Sales team delivering training activities. • Identify changes in learning needs & propose revised programs to address these changes. • Analyze training records and statistics for adjustment required. 2. Manage the training resources, operations, training programs and activities of assigned partner in a cost-effective manner. Monitor and control expenses closely within budget. 	30%

Specialized knowledge

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- Solid knowledge of training delivery methodologies, facilitation techniques, and adult learning principles
- Understanding of bancassurance, insurance products, and sales processes
- Ability to assess capability gaps and recommend appropriate learning interventions
- Training abilities in soft skills, sales related knowledge, product and technical knowledge.
- Preferable coaching skills.
- Good presentation, excellent communication, and interpersonal skills
- Good organization and planning skills
- Proficiency in Microsoft Office tools (PowerPoint, Excel, Word)
- Positive working attitude and able to influence others
- Ability to work under pressure and meet deadlines while working with ambiguity. High resilience
- This role will be required travel time at least 7 days/month

Problem solving

- Resolves moderately complex and varied training-related issues within established frameworks and processes
- Applies professional judgment to adapt training approaches based on audience needs and business context
- Identifies opportunities for improvement in training effectiveness and recommends practical solutions

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, Education, or a related field
- Minimum 5–7 years of experience in training delivery, sales capability development, or related areas
- Experience in life insurance or bancassurance is preferred
- Experience delivering sales training and coaching frontline teams is an advantage

Communication scope

Internal: Sales teams, Training & Development team, cross-functional stakeholders

External: Bank partners

Interactions typically involve coordinating training activities, facilitating sessions, and aligning on training plans and priorities.

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.): Training activities budget

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):