

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	Jun 04, 2026	Manager name:	
Job title:	Manager, Bancassurance Capability Development	Manager title and GCF level:	Senior Manager, Bancassurance Capability Development
Job level:		Department:	Sales Capability Development
Career track:	Individual contributor	BU/Division:	Bancassurance Academy

Job purpose

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

This role is designed to take charge of design & development of training programs to develop the salesforce skillset as business requirements, managing and ensuring effective implementation and delivery of the programs for allocated training areas/partners.

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.

1. Drive impactful capability development programs aligned with business goals Design and lead the development of comprehensive training roadmaps and learning solutions for IOIS, AD and Banker, based on identified capability gaps and business priorities, in order to enhance sales effectiveness and support achievement of distribution targets.	30%
2. Deliver and elevate capability of sales leaders and key stakeholders Facilitate advanced training programs and capability-building initiatives for management-level sales forces (AD+) and key stakeholders, aiming to strengthen leadership capability, improve sales performance and ensure effective cascade of knowledge across distribution channels.	20%
3. Ensure regulatory-compliant and quality-driven training governance Establish and maintain high-quality training standards and governance practices by embedding regulatory requirements, company policies and audit expectations into all training materials, safeguarding compliance while ensuring consistency and credibility of training outcomes	20%
4. Provide expert guidance and enable effective training ecosystem Act as a subject matter expert in training methodology and capability development by guiding trainers, conducting Train-the-Trainer programs and certification, and providing advisory support to stakeholders to ensure consistent and scalable training delivery.	10%
5. Strengthen stakeholder engagement and communication effectiveness Collaborate with internal stakeholders and external partners to clearly communicate training strategies, align expectations and gather feedback, ensuring training initiatives are relevant, well-adopted and effectively implemented across partners	10%
6. Manage and optimize training execution and related initiatives Plan, coordinate and execute training programs and related projects efficiently, optimizing resources, timelines and logistics while continuously identifying opportunities for process improvements and enhancement of training impact.	10%

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Specialized knowledge

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

- Capability of instructional design and coaching sales training programs at various levels.
- Good knowledge on sales, marketing, Insurance, training methodology
- Excellent presentation, communication, and interpersonal skills
- Good organization and planning skills
- Fluent in English and Vietnamese
- Familiar with Excel, Word, and Power Point
- Familiar with and capable of applying AI tools to enhance work efficiency, training effectiveness
- Positive working attitude and able to influence others
- Ability to work under pressure and meet deadlines while working with ambiguity
- High resilience

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.

- Build roadmap for IOIS/ADs effectively.
- Build lessons for training delivery in urgent time based on bank partner's request.
- Handle internal & external stakeholder to develop and effective implementation of training programs.

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 6+ years of relevant experience.
- Experience in Bancassurance channel is plus
- Preferred operated successfully in cultures with financial discipline priority.

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.

- Internal stakeholders: training delivery, product, compliance, legal, banca operation, sales team.
- External stakeholder: bank partner, vendor for training & programs.

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):