

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>June 2026</u>	Department:	<u>Client Services and Premium Collections</u>
Job title:	<u>Manager, Client Care</u>	BU/Division:	<u>Operations</u>
GCF level:	<u>5.2</u>	Career track:	<u>Management</u>

Job purpose

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

Responsible for managing assigned Client Care support functions, including reporting framework, compensation scheme and budget governance, quality control and quality management framework, manpower planning, recruitment coordination, training roadmap, and system administration.

This role leads the operating model, control discipline, stakeholder coordination, and continuous improvement agenda for the assigned scope to ensure activities are executed consistently, accurately, and in accordance with company policies, Standard Operating Procedures, compliance requirements, and internal control expectations.

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.

Reporting framework and management insights Manage the reporting framework for assigned Client Care support activities by defining key indicators, report structure, review cadence, data quality expectations, and escalation requirements. Oversee report preparation and consolidation, review accuracy and completeness, interpret trends and performance gaps, and provide management insights and recommendations to support decision-making, follow-up actions, and continuous improvement.	15%
Compensation scheme, budget, and governance Lead the design, proposal, review, and ongoing governance of Client Care compensation or incentive schemes, including scheme mechanics, eligibility conditions, payout logic, performance linkage, cost assumptions, and approval materials. Manage team budget related to Client Care compensation or incentive programs by monitoring budget utilization, payout cost, variance, and exception cases. Oversee compensation data validation, reconciliation, payment readiness, and stakeholder alignment to ensure approved schemes are executed accurately, consistently, and in line with company policy, budget governance, and internal control requirements.	10%
Quality framework and performance assurance Establish and oversee the quality control and quality management framework for assigned Client Care interactions and related processes, including QC criteria, sampling approach, review cycle, task allocation, quality calibration, and reporting discipline. Review QC findings and violation trends, identify root causes, drive corrective and preventive actions, and provide direction for training, coaching, SOP updates, and risk mitigation to ensure quality standards are consistently maintained.	25%
Manpower planning, recruitment, and system administration Manage manpower planning and recruitment pipeline for Account Managers or assigned Client Care resources by identifying capacity needs, monitoring headcount status, reviewing recruitment progress, and escalating gaps or delays when required. Oversee onboarding readiness, resource movement, termination tracking, system updates, records, and access requirements in coordination with Human Resources, business stakeholders, and system support teams to ensure operational readiness and control discipline.	20%
Training roadmap and capability development Own the capability development framework and end-to-end training roadmap for new and existing Account Managers or assigned Client Care resources. Define required capabilities, training priorities, onboarding requirements, refresher needs, and coaching focus based on business priorities, quality findings, process changes, system updates, and performance gaps. Oversee training execution, monitor completion and effectiveness, and drive follow-up actions to ensure resources are equipped with the required knowledge, system understanding, and practical skills.	25%
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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- Strong understanding of life insurance post-sales service, Client support operations and client service quality expectations.
- Experience in designing or managing reporting frameworks, performance dashboards, management insights, and operating review cadence.
- Knowledge of compensation or incentive scheme design, budget planning, payout control, reconciliation, exception handling, and internal control requirements.
- Solid knowledge of quality control, quality management, call monitoring, QC criteria, sampling methodology, violation tracking, corrective action management, and SOP improvement.
- Ability to manage manpower planning, recruitment pipeline, onboarding readiness, training roadmap, system access, and stakeholder follow-up.
- Strong people management, stakeholder management, problem solving, decision making, coaching, communication, and execution management capability.
- Good command of Microsoft Office tools, especially advanced Excel, Word, and PowerPoint; working knowledge of SQL, data extraction, data validation, and dashboard/reporting tools is preferred. Demonstrate the Curiosity to effectively leverage AI tools to improve productivity, decision-making, and quality of outcomes within the role.

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.

- Solve varied and interdependent issues across reporting, compensation scheme execution, budget control, quality findings, recruitment pipeline, training roadmap, system access, and stakeholder alignment.
- Analyze data, validate facts, identify root causes, assess business or control impact, and determine appropriate corrective or preventive actions.
- Make sound recommendations or decisions within delegated authority and escalate material risks, exceptions, budget variances, quality concerns, or resource constraints to Department Head when required.
- Balance operational practicality, stakeholder requirements, control expectations, and resource capacity to deliver sustainable solutions.
- Demonstrate strong accountability in problem solving by proactively identifying, owning, and resolving all issues within scope, regardless of formal task assignment

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 graduation in Business Administration, Economics, Finance, Insurance, Data Analytics, or other relevant fields.
- Minimum 5 years of relevant experience in life insurance operations, customer service, call center operations, quality management, compensation administration, or post-sales service.
- Minimum 2 years of experience in a supervisory, senior team leader, quality management, operations management, or equivalent people/process management role.
- Practical experience in reporting framework management, compensation or incentive scheme administration, budget monitoring, quality control, recruitment coordination, training roadmap management, and stakeholder management is preferred.
- Experience in managing cross-functional initiatives, process improvement, or control enhancement in a regulated environment is an advantage.

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.

- Department Head of Client Services & Premium Collections: provide regular updates, escalate key risks, seek direction or approval on compensation schemes, budget, quality issues, manpower planning, and major operational decisions.
- Internal Operations functions: align operating model, reporting requirements, process execution, escalation handling, system updates, and improvement actions.
- Finance / Compensation / Human Resources: coordinate compensation scheme design, budget monitoring, payout control, recruitment, onboarding, movement, termination, and people-related processes.
- Legal, Compliance, Risk, and Internal Control teams: align SOP requirements, quality findings, violation handling, risk mitigation, exception cases, and internal control requirements.
- Distribution, Bancassurance, and business stakeholders: align manpower needs, client feedback, service quality improvement, compensation inputs, and cross-functional implementation.
- Information Technology and system support teams: coordinate reporting tools, system data, access administration, issue resolution, and enhancement follow-up.

Management scope

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Total number of direct reports: 2 – 10
 Total number of staff managed (direct and indirect): 2 – 10, including assigned Client Care support resources, quality management members, or project-based contributors where applicable.
 Total location managed: 0

Metrics (if applicable)

Finance metrics (revenue, budget managed, etc.): Client Care compensation or incentive scheme budget, payout cost, cost assumptions, budget utilization, variance tracking, exception cases, and payment readiness, where applicable.
 Sales metrics (type and amount): Not applicable.
 Other metrics (specify): Report accuracy and timeliness, management insight quality, compensation data accuracy, payout reconciliation completion, QC score, violation frequency, quality finding closure, recruitment fulfillment, onboarding readiness, training roadmap completion, training effectiveness follow-up, system update accuracy, access readiness, manpower movement accuracy, and stakeholder satisfaction.
 Travel required (express as % of working time): Not applicable.

Prepared by:	Nguyen Thi Thu Hien	Date:	29 June 2026
Approved by:	Tran Thi Ly	Date:	06 July 2026
For HR Use Only			
Handled by:		Date:	
Job profile	05CSPSSMS - GCF 5 Post Sale	Job category	Management
JAR #:			

This job description is attached as a part of the Labour Contract be executed in two sets. One set will be kept by the employer. One set will be kept by the employee and both sets have the same legal effect.

ACCEPTANCE AND CONFIRMATION

I also confirm that I have fully read, understood and agreed to the job description.

 [full name]

 Date signed