

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date: _____	Manager name: _____ Manager title and GCF level: Supervisor – GCF 4.1/ Senior Supervisor – GCF 4.2
Job title: <u>Contact Center Senior Assistant</u>	Department: <u>Client Relationship Management</u>
Job level: <u>GCF 3.2</u>	BU/Division: <u>Sun Life Vietnam</u>

Job purpose

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

On behalf of Sun Life Viet Nam and business to receive incoming calls. A Contact Center Senior Assistant serves as an experienced professional who not only handles complex customer interactions but also provides leadership, mentorship, and operational support to enhance team performance and customer satisfaction. He/she gives a more specialized approach to Client or Advisors. He/She must answer questions, resolve problems in call, raise appropriate proposals to solve complicated issues, process transaction problems that our client/advisor might face with accuracy and efficiency, proactively identifies and addresses recurring issues.

Objective of this job: perform a client service standard through phone and handle daily work without error rate by in-deep special knowledge, technical, product, workflow, professional in service. Besides, Contact center Senior Assistant need to mentor and coach junior team members.

In overall, Call Center Senior Assistants are critical in bridging front-line service delivery with management, ensuring consistent quality, developing talent, and driving continuous operational improvement.

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 accountability. The percentages below should sum up to 100.

Handling incoming calls to achieve personal KPIs related to services such as service level, average speed answer, average talk time, call per day, first call resolution and contribute to team productivity goals	50%
On behalf of Sun Life Viet Nam, Contact Center Senior Assistant play an ambassador role to deliver standard/professional service via phone. Ensure satisfaction of Client needs to the best possible way	20%
Monitor all outstanding/ unresolved/ referred cases/requests; coordinate with the back-end support unit until call closed based on turnaround time.	10%
Resolves customer issues independently within established guidelines It has clear parameters for escalation and problem-solving	10%
Suggest workflow improvements Demonstrates patience and empathy with Clients and team members	10%

Specialized knowledge

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

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- **Customer focus:**

- Balances efficiency with quality service
- Demonstrates patience and empathy with Clients
- Handles complex, high-value, or escalated customer inquiries
- Resolves difficult issues using advanced product and system knowledge
- Provides solutions that require judgment and experience
- Manages high-priority customer relationships

- **Communication Skills**

- Clearly articulates solutions to customers
- Provides constructive feedback to peers
- Escalates effectively when necessary
- Have excellent interpersonal skills and the ability to work with all kinds of people

- **Decision-Making Authority**

- Prioritizes customer experience in decision-making
- Resolves customer issues independently within established guidelines
- Makes judgment calls without requiring constant supervisor approval
- Has clear parameters for escalation and problem-solving

- **Knowledge and Confidence**

- Possesses deep product and process knowledge
- Confidently handles complex customer interactions
- Mentors and coaches junior team members

- **Leadership Qualities**

- Demonstrates patience and empathy with team members
- Models best practices and positive behaviors
- Supports team morale and collaboration

- **Other skills:**

- Be good at PC skills (Excel, Word, Access Email)
- English (speaking and writing)

Problem solving and empathetic service

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.

- **Problem solving**

- Balance quick resolution with customer satisfaction
- Ask clarifying questions to gather necessary information
- Explain solutions clearly to customers
- Recognizes when seeking guidance versus proceed independently
- Follow-up to ensure problems stay resolved

- **Deliver empathetic Service**

- Active listening by fully focusing on understanding the customer's issue, avoiding interrupting or rushing to solutions, acknowledging what customers are experiencing
- Emotional Recognition: Identify frustration, urgency, or concern in customer communications, respond with appropriate tone and pace, validates customer emotions without dismissing them

Education and experience

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*Indicate the minimum education level and years of relevant experience required to perform the work.
Include specific professional designations, licenses, registrations, if applicable.*

- College/University graduate
- Female/Male
- At least 2 years of client service staff 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.*

- Communicate to Client / Advisor
- Work with inter-dept to facilitate completion of tasks
- Courtesy and effectiveness in dealing with other depts

Management scope

N/A

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):