

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>7 Jul 2026</u>	Department	<u>Bancassurance</u>
Job title:	<u>Senior Specialist, Bancassurance Compensation & Contest</u>	BU/ Division:	<u>Bancassurance Compensation & Contest</u>
GCF level	<u>GCF4.2</u>	Career track:	<u></u>

Job purpose

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

The incumbent is responsible for supporting the Banca Compensation, Contest & Reporting team in preparing contest and business memos, executing regular and ad-hoc reporting, and coordinating contest execution activities for the bancassurance channel.

A key responsibility of this role is to support the line manager in designing compensation schemes and short-term incentive schemes for the sales force, including budget tracking, production projection, pricing data preparation, proposal drafting and stakeholder alignment.

Major accountabilities

Identify 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.

Compensation, contest & short-term incentive scheme design support: - Support the design and implementation of compensation schemes, contest programs and short-term incentive initiatives under the guidance of line manager - Monitor and track compensation budget to ensure spending remains within approved limits, identify potential overspending risks and recommend timely mitigation actions. - Monitor sales force income, compensation payout and incentive performance, highlighting unusual movements, potential risks and key observations. - Prepare production projections and compensation analyses to support business planning and management review. - Draft memos, implementation documents and communication materials for review; coordinate with relevant stakeholders to support program launch and execution.		50%
Reporting & Analysis: - Prepare and maintain regular business, production reports, ensuring data accuracy, completeness and timely delivery. - Perform data validation and reconciliation to ensure report accuracy and consistency - Analyze sales performance, compensation results and incentive outcomes to identify trends, anomalies and potential risks requiring management attention. - Provide data-driven insights and observations to support business planning, performance management and decision-making. - Support the development of new reports, dashboards and analytical tools based on business requirements. - Participate in reporting automation and process improvement initiatives to enhance operational efficiency.		45%
<i>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.</i>		5%

Specialized knowledge and skills

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

- Database knowledge and skills (SQL, Power BI, SAS, Oracle, ...): basic level
- Critical thinking / Analytical skills: basic level for simple analysis
- Agility: a fast learner, willing to learn and do new things, ready to change
- Computer skills (Excel, Access,...)
- Flexible and adaptable to change
- Innovative and willing to challenge status

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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.

- Collaboration Problem Solving: basic level to solve within-scope problems

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, prioritize economics/finance/banking is preferred
- 0-4 years Insurance/Banking Experience of working independently in high pressure and team working spirit
- Knowledge of Life Insurance and Business / Data Analytics
- Motivated and ambitious

English is preferable

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.

- Communication skills: clear verbal and written communication to explain things and communicate with relevant stakeholders for execution (sales team, line manager and LT)

Management scope

Total number of direct reports: 0

Total number of staff managed (direct and indirect):

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):

Prepared by:		Date:	
Approved by:		Date:	
For HR Use Only			
Handled by:		Date:	
Job profile		Job category	
JAR #:			

This job description is attached as a part of the Labour Contract to 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