

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>Aug 2026</u>	Department:	<u>Policyowner Services</u>
Job title:	<u>Senior Specialist- Individual Policy Changes</u>	BU/Division:	<u>Sun Life Vietnam</u>
GCF level:	<u>GCF 4.2</u>	Career track:	<u>Professional</u>

Job purpose

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

This role to provide policy servicing and premium management operations to deliver client-centric, risk-controlled outcomes while driving service excellence, digital adoption, and operational efficiency.

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. Deliver policy servicing and premium management operations - Oversee and process policy change and premium management requests accurately and within agreed turnaround time, productivity, pending, and quality targets. - Coordinate with Operations, Information Technology, Distribution, Claims, Underwriting, Product, and other stakeholders to ensure smooth daily operations, especially during peak periods. - Resolve complex policy servicing cases, complaint-related transactions, and system or technical issues, while reviewing complex requests processed by team members to ensure accuracy and risk control.	70
2. Drive process, system, and digital transformation - Review end-to-end processes and recommend practical improvements to increase digital service adoption, straight-through processing, operational efficiency, and client experience. - Define business requirements, support user acceptance testing, and coordinate implementation for Policyowner Services transactions across platforms such as my Sun Life, Salesforce, and ING. - Participate in process reviews and control enhancements to strengthen risk management, regulatory compliance, and sustainable operational governance.	20
3. Support team leadership, coaching, and operational continuity - Act as back-up to the Team Leader or Manager when required, including task allocation, workload control, issue escalation, and coordination of daily team priorities. - Provide on-the-job coaching, guidance, and knowledge sharing to strengthen team capability, service quality, and readiness for transformation initiatives. - Perform complex ad-hoc assignments and other duties as assigned to support business priorities and operational resilience.	5
<i>Embed fair treatment of clients in all decisions, activities, and deliverables by proactively identifying, escalating, and mitigating risks that may lead to 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.

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- Strong knowledge of life insurance policy servicing, premium management operations, client service standards, and related business practices.
- Hands-on experience with core insurance systems and workflow platforms, with good understanding of digital adoption, automation, process improvement.
- Strong analytical thinking, problem-solving, communication, accountability, and client-centric mindset to deliver quality, risk-controlled, and result-oriented outcomes.

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.

- Resolve complex, escalated, or sensitive client and operational issues with sound judgment, balancing client experience, efficiency, compliance, and risk control.
- Analyze root causes, assess business impact, and recommend practical solutions or preventive actions to improve process effectiveness and avoid recurrence.
- Coordinate with relevant stakeholders and manage changing priorities during peak periods to maintain service quality, turnaround time, and operational continuity.

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 Administration, Finance, Insurance, or a related discipline.
- At least 2 years of experience in the life insurance industry, preferably in policy servicing or operations; or at least 3 years of relevant experience in finance or service operations.
- Proficient in Microsoft Office and able to communicate effectively in English, both written and spoken.

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 team: Client Services, Client Care, Call Center, NBU, Claims, Operations Excellence
- Cross function: IT, Pricing, Product, Legal, Compliance, Financial Controllershship, Client & Marketing, Distributions
- External: Clients, Vendors, Partners

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):

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