

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:		Manager name:	
	Senior Supervisor/Supervisor, Bancassurance Compensation and Reporting	Manager title and GCF level:	
Job title:		Department:	Bancassurance
Job level:	GCF4.2/4.1	BU/Division:	Bancassurance Compensation and Reporting

Job purpose

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

Job holder is responsible to execute the contest designing process and reporting, which propose and communicate the bancassurance initiatives, monitoring initiative budget and making reporting for Sales Force in order to ensure the effectiveness of Bancassurance Partnership

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.

Design the contest proposals under instruction of line manager: <ul style="list-style-type: none"> - Post analysis the impact of contest to improve the effectiveness for the following designs. - Track and manage contest budget to ensure within the expected spending and notify the potential spending to advise the prompt actions to achieve bancassurance strategy. - Do the production projection following the standard template to prepare the overall picture and provide the key driver need to focus. - Have regular meetings with sales team to align the contest supporting to achieve periodic target and finalize the contest proposal, seek approval from sales team, line manager and LT. - Prepare the suitable date to pricing the proposals - Draft or prepare the memo for review, coordinate with design team to prepare the launch-out package and communicate with right recipients. 	50%
Execute the updating and final result for contests: <ul style="list-style-type: none"> - Coordinate with relevant stakeholders to understand data capturing in systems to ensure the accuracy data query for updating and giving final result - Assist in creating auto-update tools for certain types of contests and perform the updating as the schedule which requires the accuracy. - Prepare the final result of contest and compare this one with finance team to ensure the accuracy of data. The final result has to be released as the committed schedule. 	35%
Work with compensation team for payment process Execute regular reports to support reporting person: <ul style="list-style-type: none"> - Be the backup person for reporting team and can handle to perform some standard reports which having auto-tools. - Contribute in building the new report to reflect the business requirement 	15%

Specialized knowledge

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):