

## JOB DESCRIPTION (JD)

### Sun Life Asia Job Evaluation Process

<b>Date:</b> _____	<b>Manager name:</b> _____
<b>Job title:</b> Associate Manager, Bancassurance Services	<b>Manager title and GCF level:</b> _____
<b>Job level:</b> GCF 5.1	<b>Department:</b> Bancassurance Enablement
<b>Career track:</b> Professional	<b>BU/Division:</b> Sun Life Vietnam/ Bancassurance

#### Job purpose

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

- a) Provide all levels of partnership management and build up solid relationships with partners' business/operation functions/Distribution Agreements/Operation procedures in place and are adhering to the regulatory and company requirements.
- b) Implement key initiatives/projects/product propositions with close monitoring of sales activities and trend by partners.

#### 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.*

Engaging with related departments and partners to provide all levels of partnership management: <ul style="list-style-type: none"> <li>- Develop, maintain, and update policies, procedures, and documentation related to Bancassurance business activities, ensuring compliance with regulations issued by the SBV and MOF.</li> <li>- Implement Bancassurance products and distribution models, including selecting, evaluating, negotiating, signing cooperation with banks, and monitoring the implementation situation under Terms and Conditions of Distribution Agreement (DA).</li> <li>- Collaborate with the Marketing Department of banks and in participating, promoting advertising and communication activities related to Bancassurance products through banks' nationwide distribution channel and media tools.</li> </ul>	50%
Implement key projects : <ul style="list-style-type: none"> <li>- Understand insight and best practice to deliver the assigned projects effectively.</li> <li>- Work with Training Department to ensure readiness of Bank staff and sales team by continuously training.</li> </ul>	50%

#### Specialized knowledge

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

- Proficient in Microsoft Office
- Digital experiences (preferable)
- Partnership business experiences (mandatory)
- Insurance operation knowledge.
- Knowledge of digital learning ecosystem, e-learning integration, and capability development methodologies
- Strong project management and stakeholder management capability

#### 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.*

- Strong communication and interpersonal skills.
- Analytical thinker - strong problem solver
- Curious - eager to learn
- Strong organizational skills - meticulous, thorough, and detail-oriented.

#### 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.*

- Bachelor's degree
- Minimum 4 years in partnership/sales related

#### **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.*

- Cross-function internal team.
- Partners.
- Vendors.

#### **Management scope**

Total number of direct reports:  
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):