

JOB DESCRIPTION (JD)

Date:	<u>May 2020</u>	Manager name:	<u></u>
		Manager title and GCF level:	<u>Head of POS - 6.2</u>
Job title:	<u>Manager, Policy Owner services</u>	Department:	<u>Client Services</u>
Job level:	<u>5.2</u>	BU/Division:	<u>Client Services</u>

Job purpose

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

The focus of this role is to support a positive customer experience via excellent administration of individual policy and group plan. This role demands strong technical skills, workflow management ability as well as a passion for high quality customer service.

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.

Manage team to process on policy services within established service standards

- Monitoring and evaluating service quality with key metrics (TAT, accuracy)
- Day-to-day supervision of POS staffs (including job performance, attendance and professional development)
- Ensure effective and consistent communication throughout the team, encourage feedback and customer insight in order to enhance the customer experience
- Developing a culture where training and development are part of the team, identifying actions and working with Line Manager and Supervisors to ensure the skills and knowledge are developed effectively.
- Tracking and measuring productivity and compare to benchmarks, find way to increase productivity
- Handling the escalated and sensitive customer/advisor issues within authorized limits
- Ensuring all relevant communications and data are updated and recorded
- Ensure all activities complied with approved Standard of Procedures (SOP) and relating policies
- Manage work priorities in a multifunctional environment

Manage the development plan of Processes and Guidelines, including working with other functions for common agreement on the processes.

- Reviewing and analyzing data/report on a regular basis, together with Client Experience Measurement (CEM) report to improve processes
- Identifying and recommending best practices, processes, systems/technology, and drive continuous improvement environment.
- Partnering with Sales Representatives, IT partners, Product and other business areas to clarify plan design and define the best operational procedures to meet the business needs

Responsible for hiring staffs, managing and evaluating staff's performance; Identify and address staff training and coaching needs

- Work with Talent Requisition for hiring staffs
- Conduct staffs' performance review, manage performance issues and making salary and API's recommendations

JOB DESCRIPTION (JD)

- Working with Line Manager for training plan to ensure all staffs receive appropriate training
- Compile monthly reports for management
- Other tasks/projects as assigned by Manager

Specialized knowledge

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

- Familiarity with eBao/Life Asia/ING system
- Deep knowledge of life insurance policy services processes and business practices
- Knowledge of Business law and insurance legal framework
- People management and influencing capability, ability to motivate staffs
- Good communication and interpersonal skills (collaborating, questioning, listening, writing, observing), with an ability to influence change through thoughtful recommendations
- Good Presentation skill, Coaching and Training 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.

- Service oriented mindset with good problem solving and complaint handling skill to handle escalated or sensitive client issues, identify root cause and propose relevant solution, and propose root cause fixed as well
- Good conflict resolution skills required

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 degree holder
- At least 5 years experience in Life insurance industry
- Good command of PC skill (Excel, Word, Powerpoint)
- Advanced English (both speaking and writing)

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: CRM, NBU & Claim, Operations excellence
- Cross function: IT, A&P, Legal & Compliance, PMO, BW, HR, CAs, DAS, FA, Marketing, Distributions
- External: Clients, Vendors

Management scope

Total number of direct reports: **2**

Total number of staff managed (direct and indirect): **10**

Metrics (if applicable)

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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:	
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Handled by:		Date:	
JAR #:			