

JOB POSTING TEMPLATE

Date: 10/2020

Function: Bancassurance

Job title: Account Head

Manager title: Chief Bancassurance Officer

Job purpose

Bancassurance channel is an emerging distribution channel in Vietnam with a great potential for growth. Sun Life Vietnam is keen on developing this channel to become a substantial part of our business. This position plays a key role in planning, developing and managing the performance of one of the Bancassurance Partner.

Major accountabilities

Planning and Implementation

- Be responsible for effective strategic growth of partnership with one of the Bancassurance Partner.
- Be represented in working committees to agree the sales strategy and guidelines to be used for different areas of Bancassurance partnership and ensure the effective implementation of any such strategy and guidelines;
- Work out the Yearly Business Plan with Partner, which is built on core strengths of our distribution capacities and opportunities in the market
- Monitor economic and market trends, including competitor information and evaluate best practices within the company to ensure a continued optimization of the Strategy, tactics and models used for the channel and institutionalize best practices from outside and inside the company.

Relationship management

- Build up close relationship at Bancassurance management levels to ensure successful implementation of the partnership.

Monitoring, management and organization of work

- Design and Drive the year-round Campaign Calendar through Bancassurance partnership and carry out promotional activities for customers and sales force to increase the sales
- Steer and Manage the rigorous monitoring and tracking of the sales/lead performances, KPI's and quality indicators agreed for the channel and manage improvement in the areas where sales are lacking, KPI's are not being met or quality is missing
- Discuss and align the Design, Implementation and further development of sales- and leads processes and structures
- Ensure effective SLA's and SOP's are in place with the important stakeholders (Operations, Call Centre, Sales, etc.) and drive resolution within the parameters of the SLA.
- Lead and Manage the Digital Strategy for the partnership with the Partner.

Management and team development

- Drive the recruitment strategy (together with HR) and "sense of urgency" in recruiting the right number and quality of sales staff
- Work with Training Department to ensure sales readiness by continuously training both Bank staff and IOIS according to an effective training methodology and keep them updated with the latest market trends and knowledge about SLV products.
- Lead and provide coaching to develop staff assigned for the Partner.
- Develop subordinates for succession plan.

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Specialized knowledge

- Good analytic skills
- Strong leadership and motivation skills
- Sales management skill – Relationship building
- Sales management and marketing principles
- Excellent knowledge on Financial Service sector
- Life insurance knowledge
- Excellent English/Vietnamese written and speaking skills

Education and experience

- Bachelor Degree, majoring in Banking, Business Administration, Marketing....
- Dynamic personality with good ability to interact with different people and levels
- Systematic and structured to understand systems and processes
- Strong leadership
- Strong business acumen
- Over 10 years of working experience with at least 7 years of senior management position in bancassurance, life insurance or banking businesses.

Management scope

Total number of direct reports: **2**

Total number of staff managed (direct and indirect): **180**

Metrics (if applicable)

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

Sales metrics (type and amount):

- Be responsible for the strategy, business plan and sale target of assigned for Partner.
- Direct sales activities and productivity.
- Plan, develop and manage the performance of Partner.

Other metrics (specify):

Travel required (express as % of working time):