

JOB POSTING TEMPLATE

Date: 2020

Function: Client Services

Job title: Manager, Policyowner Services

Manager title: Associate Director, Policyowner Services

Job purpose

- Support the technical pricing of new and revamped products to facilitate the execution of the company's product strategy
- Work with different internal stakeholders including but not limited to Valuation team, Product Management team, and distribution channels in the design and development of products
- Perform product-related systems UAT and for the new proposal system.
- Complete regulatory filings and reports as required in a timely manner.
- Assist in ad-hoc requests from other departments.

Major accountabilities

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

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Specialized knowledge

- 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

- 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

- 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

- 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