

JOB POSTING TEMPLATE

Date: 2020

Function: Client Services

Job title: Representative, Client Services

Manager title: Head of Client Relationship Management

Job purpose

- On behalf of Sun Life Viet Nam and business, responsible for communicating to walk-in Client and Advisor at counter or via phone. They have to answer questions, resolve problems, process transaction, collect cash and resolve any emerging problems that our client/advisor might face with accuracy and efficiency.
- Objective of this job: perform a client service standard and handle daily works without error rate at location by in-deep special knowledge, technical, product, workflow, professional in service.
- In overall, Client Service Representative is expected to perform an excellent service and skilled at process all requests.

Major accountabilities

Process daily transactions smoothly including: new application kit, policy change requests, cash collection, complaint... without error rate or pending.	30%
Underwriting claim requests (minor claim and major claim), ensure all claim request are in Term & Condition and sufficient docs.	10%
Ensure all receipts will be well-managed without error including: issue, take back, audit.	15%
Monitors all outstanding/ unresolved/ referred cases/requests; coordinates with the back-end support unit until cases closed based on turnaround time.	15%
On behalf of Sun Life Viet Nam, CS officer play an ambassador role to deliver standard/professional service to all walk-in client/advisor or via phone.	20%
Ensure cash deposit in bank daily and complete all daily necessary reports for business/sale force	10%

Specialized knowledge

- Service oriented mindset
- Ability to analysis and handle issues at counter
- Ability to multi-task, prioritize, and manage time effectively
- Strong communication
- Coaching and training regularly capability
- Good command of PC skill (Excel, Word, Access), team working, English (basic in speaking and writing)

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Problem solving

- Able to understand or accomplish or deal with task/issue/situation/person

Education and experience

- College/University graduate.
- At least 1 years of client service staff in financial services, life insurance experience is preferred.

Communication scope

- Inter OP department for daily transaction
- AD force for support sale
- Office service for manage location office
- Marketing for company branding
- IT for all related to system

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):

Travel required (express as % of working time):