

## JOB POSTING TEMPLATE

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| <b>Date:</b> <u>2020</u>   | <b>Function:</b> <u>Bancassurance</u>                                   |
| <b>Job title:</b> <u>Specialist, Bancassurance Admin &amp; Support</u> | <b>Manager title:</b> <u>Manager, Bancassurance Admin &amp; Support</u> |

### Job purpose

Job holder is responsible to execute licensing and onboarding process, Bancassurance sales activities and administrations supports for Sales Force in order to ensure the effectiveness of Bancassurance Partnership

### Major accountabilities

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| <p>Execute support activities for training and licensing process:</p> <ul style="list-style-type: none"> <li>▪ Coordinate with the PIC of partner to register list of trainees for training courses, collect candidate's documents, review information and check documents to ensure qualification to attend the training courses.</li> <li>▪ Coordinate with other departments (AS; AT; IT; CI) in handling data of licensing details</li> </ul>   | 30% |
| <p>Execute IOIS information/structure management</p> <ul style="list-style-type: none"> <li>▪ Co-ordinate with other functions in sales force management: Record Sales Force Information in the system and file hard copy</li> <li>▪ Create new record for each IOIS/AD/TD entry and agency contract, agency structure in AgIS system Maintain system progress/ update for each IOIS and leader.</li> <li>▪ Manage and maintain all agency administrative works: update agency information; promotion; demotion; termination; change working branch/ office; change agency structure.</li> <li>▪ Execution of agency maintenance contract.</li> <li>▪ Provide real time agency information for usage of agency support; agency sales.</li> <li>▪ Maintain and storage agency personal information for further usage and verification</li> </ul> | 30% |
| <p>Execute supports for sales activities:</p> <ul style="list-style-type: none"> <li>▪ Collaborate with sales team to support sales activities, workshops, seminars.</li> <li>▪ Co-work with other functions to assure providing good service/support: Provide equipment, sales support materials, gift and others to sales force</li> </ul>  | 30% |
| <p>Execute other admin activities of Bancassurance team</p>   | 10% |

### Specialized knowledge

- Insurance/Finance/Banking knowledge/experience
- Computer skill
- English is preferable
- Effective communication
- Servicing mindset and strong collaboration

### Education and experience

- University graduate, prioritize economics/finance/banking
- 3-year Insurance/Banking Experience of working independently in high pressure and team working spirit
- Experience in administration and/or client service and/or system and project implementation

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### Communication scope

- Motivated and ambitious
- Flexible and adaptable to change
- Innovative and willing to challenge status
- Self-starter
- Excellent communication skills with internal and external stakeholders
- Personable and able to manage stakeholders to achieve desired outcomes