

Job title: Specialist, New Business**Job description**

At Sun Life, we work together, share common values and encourage growth and achievement. We offer many career paths that attract a wide variety of talent and skills. Follow a path that lets your talents shine.

Role Summary

This role is a member of the New Business team, and will provide a wide range of administrative services in support of agency sales.

This role will also facilitate the day to day activities within the new business environment and ensure the work load distribution is well organized and continuously contribute to building to Sun Life Vietnam's growth.

Main Accountabilities

- Handle the administration of new business applications using Ingenium and other system applications.
- Review and ensure applications/ member-related information are complete with 100% accuracy and the premium is matching with the illustration/Quotation, seek clarification when needed.
- Arrange for required premiums to be paid, ensure accurate billing and allocation of premium/contribution on the system.
- Correspond with Sales on required policy or member information.
- Prepare application files for hand-over to Underwriters. Correspond with Sales on required underwriting information, as delegated.
- Monitor daily pending applications and ensure follow-up is in order.
- Ensure scanned documents are complete before moving to online storage.
- Report production issues promptly following the Incident Reporting Process.
- Perform other new business functions as assigned, i.e. payment to clinics for medical requirements ensuring the billed amount matches the requirements, policy kit assembly ensuring policy summary details match the system information, processing refunds for reject and cancelled policies, follow-up overdue acknowledgment receipts and update the system for end of free look period upon receipt of valid acknowledgment receipts and file document accordingly, track substandard policies ensuring system details match the policy summary premium amount and Acceptance of Offer, track policies settled over SLV retention limit for reporting to A&P and ensure underwriting cession form is in order.
- Work closely with the Head, New Business and/or Underwriting to identify key new business issues and provide resolutions.
- Investigate and resolve escalated issues or complaints
- Provide training/direction to team members as required
- Maintain quality and standards of organization individual and corporate parts in all areas of concern, i.e., new business, policy issue and delivery, refund, pending cases.
- Manage UAT processes to ensure projects complete timely and good result.

Competencies

- Proven ability to work in fast-paced environment with fluctuating work volumes
- Client mindset
- Good communication skills
- Analytical thinker and detail-oriented
- Team player with a positive attitude
- Multi-tasking, well organizing and time management
- Knowledge of insurance products and systems (Ingenium), CPMS and SMS

Education and Experience

- 2 years working experience at similar positions.
- University graduate

Please send CV to: careers@sunlife.com.vn