



Subsector: Insurance

Job Family: Sales and Distribution

Impact Level

Today, this role is responsible for setting sales targets and developing agency strategies to deliver growth targets, focusing on improving the business profitability through product mix and maintaining business quality.

Medium Impact

Consolidated Activities

	Today	Future
Goal Setting and Business Planning	Execution requires strong business and financial acumen to set strategic goals and plans for the agency. This task requires close collaboration with various stakeholders to collect input and decide the direction of the agency.	Advanced Analytics can be used to generate deeper insights (e.g., past performance, sales trends and data around customer behavior) to facilitate evidence-based decision making.
Training Program Design and Facilitation	Execution requires strong communication skills as well as a passion for developing others.	E-learning portals and digital applications can be put in place to support personalised training and experience sharing, regardless of time or location.
New Agents' Recruitment and Onboarding	Execution is time intensive and document heavy, with strong communication skills being critical as recruiters are the initial point of contact between new agents and the insurer.	AI can be used to conduct quicker background screenings. Digital applications with self-service capabilities will allow agents to have easier access to information without having to liaise extensively with the job holder in this role. RPA can also help to speed up documentation processes during onboarding of new staff.
Regulatory Changes and New Products Communication	Execution requires strong communication skills to effectively communicate updates across the entire agency.	Digital applications will be able to inform agents about new product launches and communicates updates of regulatory policy changes in a quick and efficient manner.

In the next

3-5 years ...

Self service channels will help to improve communication and transfer of information between parties. Digital tools and Advanced Analytics will help to support this role in serving agents, which in turn will better support customers.

Skills Differentiators:

- ▶ **Advanced Digital Acumen/Literacy:** Staying updated with evolutions and being well versed in the latest digital trends will allow for the job holder to effectively use digital tools and advise the organisation on how best to communicate with agents.
- ▶ **Leading Virtual Teams:** Working with agents via digital channels will need the job holder to adapt to new communication and management technique to achieve the same results as face-to-face interactions.
- ▶ **Data Interpretation and Analysis:** The job holder will possess the ability to draw further insights from the information provided to create actionable plans.
- ▶ **Stakeholder Engagement:** The job holder will need to be able to develop a strong network of internal and external contacts, as well as balance the interests of complex stakeholders.
- ▶ **Technology Troubleshooting:** The job holder will display ability to handle agent inquiries about digital channels and provide basic technical support to ensure a positive user experience.



RPA



Advanced Analytics



AI