


JOB DESCRIPTION

 <p>SIPOC BPO Sdn. Bhd. (1143905-K)</p>	<p>SIPOC BPO Sdn. Bhd. No 1-2 , Jalan 2/76C , Desa Pandan 55100 Kuala Lumpur Tel : 603-9202 5666</p>		
Employee Name:			
Job Title:	Planning & Solutions Executive	Date Join :	
Job Role:			
<p>Reports to HOD, Planning & Solutions and coordinate with Relationship Managers/Advisors and Operations Department to maintain clients' files; work with Advisor on the open cases, do planning and proposed solutions for clients' cases.</p>			
Job Description:			
Responsibilities: Job Responsibilities			
No	Key Areas	Tasks	
1	Products knowledge	a) Refer to relevant product manuals and materials (eg Product Disclose Sheet (PDS), Rate Book, Asset Allocation, Products Manual) b) Attend product training when necessary and available	
2	Client folder	a) Create client folder when necessary and attach to servicing Advisor(s) b) Ensure all necessary files are in the folder c) Transfer client data from worksheet to client folder	
3	Planning & Solutions (for all products)	a) Prepare solution & generate report b) Gather information c) Liaise with client in gathering information via phone call, email, SMS. d) Familiar with all the planning & solution tools in used e) Familiar with working process with respective product providers	
4	Open cases	a) To receive documents from CS b) To work on recommended solutions for clients c) Incomplete documents to liaise with Advisor(s) d) Go through client solutions with respective Advisor(s) before appointment	
5	Close cases	a) Update weekly open cases report so that operations can submit application b) Insurance cases ensure policy received then prepare summary and put in client folder & inform AS to make appointment for Adviosr(s) to deliver policy (if advisor using AS service)	
6	Generate departmental report	Prepare weekly productivity report for weekly department meeting	
7	SOP	a) Prepare workflow for new products/services to complement existing as advised by Marketing department b) Ongoing update & enhance existing workflow in SOP when necessary	
8	Products & Services Practical Guide	a) Prepare practical guide for new products/services as advised Marketing department liaise with marketing department for details to prepare guide b) Ongoing Update & enhance existing practical guide for each product/services provided to complement SOP	
9	Departmental Supervision	Assist the HOD in day-to-day supervision of departmental staff (if any)	

Industry Opportunities & Recruitment

Job Location:	Central	Employment Status & Type:	Full-time employee
Manage/ Supervise Others:		Initial Monthly Salary:	
Qualifications:			
Professional Qualifications:			
1. under going financial planning certification (/CFP/IFP/RFP/Syariah RFP)			
Academic Qualifications:			
SPM/MCE/GCE 'O' Level and above			
Career Level: (mark appropriate level)		Student/Internship	Management
	X	Entry Level	Executive/Director
		Mid Career	Senior Executive (President/CEO)
Residence Location:	Klang Valley	Years of Experience:	Minimum 1 year/ fresh graduate with internship experience
Skills:			
1	Ability to work with people at all levels		
2	Telephone skills		
3	Presentation skills		
4	Strong analytical skills		
5	Interest in leadership role		

Signature: