

## **Steven Chan Sai Kim**

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Birth Date: 12<sup>th</sup> October 1976  
Birth Place: Melaka  
Nationality: Malaysia  
Languages: Cantonese, English &  
Bahasa Malaysia

### **Employment History**

**January 2021 to December 2021**  
**Sr. Manager**

**Sun Life**  
**Kuala Lumpur (Head Office)**

**Head of Distribution Admin**  
**(Agency, Bancassurance and Principle Asset Management; PAM)**

- Administer and oversee on all three channels; Agency, Banca & PAM on Registration, Licensing and Movement.
- Administer, set-up on Agency Compensation; Commission and Balance Score Card (BSC) in system (automation)
- Administer setup on Agency Administration (Agency Movement) For Agency Channel (automation)
- Liaise closely with Project Management Office (PMO) on agency setup and compensation (automation)
- Draft and Complete Agency Handbook (Licensing, Movement, Compensation & Balance Score Card) for Agency Channel (Takaful) - rollup in 2021
- Discuss with Top Management and provide proposals including strategies to deliver agency behavior change and also enhance Company's risk and compliance policy framework.
- Compile and liaise with respective pillar heads on their agency initiative and discuss overall with Chief Distribution Officer (CDO) and Regional Office (RO) on Agency Initiative. (monthly-basis)
- Monthly Meeting with Steering Committees on Agency Channel progress and Banca Officer on the progress for Banca Channel.
- Discuss and provide strategic campaign/contest to Marketing Solutions;
- Provide and discuss with Compliance on monthly Market Conduct Tracking (MCT) Report on Agency Channel
- Complete and finalize new agency agreement; Agent, Leader & Agency Leader Corporation (ALC) - with Legal Dept.

Projects :-

- Set-up E-recruit application (online platform - (Agency Channel) with Regional Office, Vendor and Local IT) - phase 1
- Draft and Complete Remuneration Policies for both Agency and Banca Channel
- Draft and complete (MRA) and metrics (Tracking Report) with Regional Office (RO)
- Assist and provide inputs on finalizing (Top Performers handbook) with Marketing Solutions

**August 2018 till December 2020**  
**Manager**

**Ammetlife**  
**Kuala Lumpur (Head Office)**

Head of Performance Management (August 2018 till now)

- Oversee and administer in Contest Reporting; interim contest, YES (Young Entrepreneur Scheme) report (AFS), DAL Program, MAPA report and daily NB production (Mgmt)
- Liaising closely with sales team and all contest related matter and provide updates; weekly con-calls on their sales progress; MAPA report.
- Prepare simulation, expected budget and production for all tactical challenge
- Provide ad-hoc analysis on agent segmentation, past year sales performance and agency realistic target.
- Prepare quarterly post implementation report (tactical challenge)
- Tracking and administer Contest clawback (6,12,15&18 months); reduce agency abuse on contest rewards.
- Liaise and provide reports datas with respective stakeholders; (Compliance, Finance and product) on ad-hoc request
- Prepare Regional report to Regional management and Top Management on a quarterly basis

Projects :-

- Set-up and automate MDRT report (2019) to Agency Portal
- Set-up on Tracking of New Business & Production (Management) and MAPA report (both Company & Agency Portal) (2020)

**August 2013 to July 2018**  
**Senior Manager**

**AIA**  
**Kuala Lumpur (Head Office)**

Head of Agency Registration Section (Jan 2016 till July 2018)

- Oversee and Administer of Agency Registration; Agents/Leaders; Financing Scheme, DAUM & DADM; NPA program.
- Liaising closely with sales team and recruitment team on all Agency registration matters and provide updates; weekly con-calls
- Prepare proposals to streamline processing of new agent application from T+7 to T+3
- Committee to Agency Recruitment & Retention (Work Stream) providing inputs and providing statistical summary to management. (Jan to Nov 2017)
- Committee for implementation of new agent application for agency force - providing inputs and business rules (Nov 2017 till now)
- Committee for Takaful Association providing inputs and business rules to business partners (monthly meeting with Takaful operators)
- Regional Road-Show to all agency branches on walk-through on Agent/leader Appointment and (E-recruit) - online platform (2017 to 2018)

Head of Agency Movement Section (2013 - Jan 2016)

- Oversee and Administer of Agency Movement; promotion, demotion, termination, succession/retirement for agency leader.
- Oversee & Administer on transfer of policies (TOP) for orphan policies (integration)
- Liaising closely with sales team and recruitment team on all agency movement matters and provide updates; monthly meeting with sales team
- Committee to Agency Compensation Structure providing inputs and proposals to the change of Agency Structure (integration of single license)
- Prepare all and implementation SOP process for agency movement (integration of single license)
- Prepare proposals and optional plans to top management on Massive Agency Movement.

Projects :-

- prepare UAT test scenarios for users to test on Callidus (Phase 1); validation of migration of agent profile (Aug 2013 to Jan 2014)
- prepare change request on enhancement on Callidus - Agent profile (2014 till current)
- Liaising and co-ordinate between china & Callidus vendors and local IT on Agent data migration profile; phase 2 (March 2015 to September 2015)
- Revamping of agency name – single license integration for easy reference on dispatching of correspondence and mails
- Upkeep of agency family tree for succession/retirement and agency expansion
- Has conduct nation wide road shows to 12 branches; west & east Malaysia on the Agency Registration process and updates (March 2017 to May 2017)

**February 2008 to August 2013**  
**Manager**

**Prudential Assurance Msia Bhd**  
**Kuala Lumpur (Head Office)**

**Agency Compensation (Manager)**

- Administration and payment of Agency Financing Scheme and Agency Development Financing - financial scheme for newly joined agents.
- Administration Replacement of Policies (ROP), internal, inter-company (Life & Takaful) and External; as a committee of ROP appeals; representative for Agency Admin.
- validating commission and overrides commission tables for all new products for agents/leaders
- Validating hierarchy for agency movement; promotion, demotion, transfer of agency to ensure agency compensation are paid accordingly.
- Liaising closely with respective stakeholders; compliance, customer service and sales team on projects, agency compensation benefits.
- administer agency leader succession planning and deceased of agency leader
- upkeep of agency leader family tree; promotion, succession; deceased/retired leader

**Projects :-**

New implementation on New Agency Structure and commission table; 2011 - 2013

Prepare and present up to 7th generation of agency leaders on new agency structure to management and agency force.

New implementation on Agency Development Incentives; 2013

Revision of Agency Contract; change of agency commission structure (2011 to 2013)

Set-up and enhancing of Agency Financing Scheme (Tapered Model) (2012 to 2013)

Set-up of splitting overrides commission (Project :- Agent Get Agent) (2011- 2012)

System enhancement on Separation of transfer of servicing and commission (servicing agent)

**August 1995 to Feb 2008**  
**Clerk to Executive**

**Allianz Life**  
**Kuala Lumpur (Head Office)**

- As a clerk working under Agency Administration; processing of agent application, creating codes and later move to Agency Movement;
- Reviewing agency force (MOC), preparing movement report, specialized on preparing and reviewing potential candidate for promotion to higher rank, demotion exercise (Not meeting MOC)
- Liaising with sales team and agency force on all agency movement queries.
- Job rotation to do agency contest & report; preparing monthly report to SLT
- Provide contest result to agency force (monitoring of their track records).
- Secondment to IT as a Business Analyst (BA) - OPUS project as representative for Agency Admin; preparing user requirement on the agency admin module, liaising and co-ordinate with IT personnel on agency admin development, prepare user test script, test on the module and liaising with admin peers.
- Conduct on job training to peers on the enhancement of admin module. Post monitoring on the admin module. Discuss with peers to how to enhance work process and turn it to automation (reduce manual work)

## **Education**

**2000 – 2002**

**Diploma in Business Studies**

**Systematic College  
Kuala Lumpur**

**1994 to 1995**

**Diploma in Computer Studies**

**Informatic College  
Kuala Lumpur**

## **References**

- Reena Sari Binti Abdul Halim  
Head of Governance  
AIA Takaful  
HP No. 016-293 9085
- Lim Ai Wui  
Head of Agency Admin  
Zurich  
HP No. 016-2675068
- Hei Kim Yin (Retired)  
Head of Agency Distribution  
Great Eastern Life  
HP No. 016-2159451