



Jarod Lee

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PROFESSIONAL SUMMARY

Over 15 years of experiences in Life and General insurance industry. Started career from front line as agency trainer and agency business development and strategically improving business sense and strategic planning taking a role as Product Development & Marketing Manager. 6 years ago, journey in Marketing is a great opportunity to consolidate all experiences to provide customer-centric solutions to customers. I am passionate about technology and digital transformation that will provide a positive impact to the business and therefore self- sponsor to complete 2 certifications to widen knowledge in the area of Social Digital Marketing by Hoot-suite and FinTech in Future Commerce by Massachusetts Institute of Technology. Believe by marrying insurance products and technology, more people will be protected and enjoying great product benefits.

CAREER ACHIEVEMENTS

1. Best employee for 2002 & 2003
2. National Trainer for Life and General Insurance Product 2002 – 2004
3. Achieve 100% Sales Target and Recruitment Target 2005 – 2007
4. Implemented AXA Malaysia Sales Blue Print 2007 – 2008
5. Pioneering Product Marketing Team in Prudential 2010 – 2014
6. Business Lead for Online Insurance development 2015
7. Develop 2 breakthrough insurance product in AIA. 2016 – 2018
8. Achieve Customer Repurchase Rate 9.7% and Retention Rate 97% - 2018
9. Business Lead for Customer Relationship Management system - 2018

WORK EXPERIENCE

AIA Berhad – September 2015 till now

1. **Senior Manager - Customer Marketing** – May 2017 – June 2019
 - Lead and develop 1st Customer Relationship Management system in AIA entity.
 - Plan and executive Campaigns that promote Life, General and Takaful insurance products and achieved Repurchase Rate 9.7% & Retention Rate of 97%.
 2. **Senior Manager, Product Marketing** – September 2015 – April 2017
 - Plan and coordinate resources according to the 3 years Product Roadmap that includes Life and General products development cycle.
 - Provide marketing support to sales channel for product positioning and sales strategy.
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Prudential Assurance Malaysia Berhad – December 2010 - September 2015

1. **Mobile Solutions Application Manager**- May 2015 – September 2015
 - Pilot Online Insurance Project and ensure all key milestones is achieved according to timeline.
 - Coordinate all Mobile Application Solutions in the company and sync up with the Digital Strategy Master plan for next 3 years.

- Product Marketing Manager- December 2010 – April 2015
 - Actively support the Life and Banca product development cycle by creating marketing proposition for the distributor and incorporating the marketing proposition in sales collateral and product training materials.
 - Support for all tactical initiatives through review of marketing material and recommendation of product packaging/bundling.
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Allianz Life Insurance Berhad – April 2008 - November 2010

1. Agency Training & Development Manager –March 2009 – November2010
 - Conduct training programs for the whole nation of agents and agency leaders.
 - Support Head of Training on Training Need Analysis for tied agency, including conduct focus group and new training program development.
 - Support and organize events and projects
 2. Agency Development Manager – April 2008 – February 2009
 - Support Regional Manager to achieved sales and recruitment target for the region by providing close supervision on sales and recruitment activities in the branch.
 - Initiate sales campaign and recruitment campaign to drive for sales and recruitment result.
 - Conduct training in branch to fulfill the CPD hour requirement for the agency force.
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AXA AFFIN Life Insurance Berhad –May 2007 – April 2008

Agency Sales Support Manager

- Support Chief of Agency on implementing AXA-AFFIN Malaysia Blueprint within 12 months to Tahan Insurance.
 - Support Regional Sales Manager on sales and recruitment activities nationwide.
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Prudential Assurance Malaysia Berhad – 2002 – 2007

1. Business Development – 2006 - 2007
 - Support 41 agencies and achieve RM 43 million sales target in the biggest branch in Malaysia.
 - Execute & implement business development strategies, i.e recruitment program, product launch-ing and events.
 - Perform analysis for reporting on overall business growth to Regional Development Manager
2. Trainer – 2002 - 2005
 - Support and accountable for Training Programmes for whole Malaysia.
 - Support and organize sales and recruitment activities.
 - Being awarded continuously 2 years as one of the Best Employee.

EDUCATION

Bachelor of Art - Economics major in Business Administration

Universiti Putra Malaysia – 1999 – 2001

Certification:

Year 2004

PROGRAMME : Registered Financial Planner, Module I, Train The Trainer

Year 2005

PROGRAMME : Registered Financial Planner, Module II, Train The Trainer

PROGRAMME : Certified Practitioner in NLP

Year 2008

PROGRAMME : Effective Communication through NLP

Year 2010

PROGRAMME : Emergent Personality Profiling Tools

Year 2012

PROGRAMME : 7 Habits of Highly Effective People

PROGRAMME : Effective Execution

Year 2016

PROGRAMME : Fellow, Life Management Institute.

PROGRAMME : Hootsuite Social Media Marketing Course

PROGRAMME : Massachusetts Institute of Technology Fintech Certification – Future Commerce

Year 2017

PROGRAMME : An Introduction to Consumer Neurosciences & Neuromarketing

PROGRAMME : Digital Competition in Financial Services

REFEREES

Ms. Fiona Liao
Chief Branding Officer
Prudential Assurance Malaysia Berhad
(Former superior)

Mr Darrel Cheong
Vice President, Head of Business Proposition
Etika Insurance & Takaful
(Former superior)