

## ROLE PROFILE TEMPLATE

Canara HSBC Life Insurance Company Limited

<b>Role Title:</b>	Relationship Officer (RO)/SRO/ERO/ Relationship Manager-Direct Distribution	<b>Role Profile Date:</b>	
		<b>Job Code:</b>	
<b>New or Existing Role?</b> <input type="checkbox"/> New <b>-Yes</b> <input type="checkbox"/> Existing			
<b>Role Holder's Name</b>			
<b>Line Manager's Name &amp; Role Title:</b>		<b>Job Code:</b>	
CBM- Direct Distribution			
<b>Functional Line Manager(s)' Name(s) &amp; Role Title(s)-</b>		<b>Job Code(s):</b>	
Sumit Bhargav (AVP- Direct Distribution )			
<b>Business/Function</b>	PAN India		
<b>&amp; Location:</b>			
<b>Role Purpose</b> <i>(overall high level summary of the role)</i>			
Role includes lead generation through references and conversion of leads – with defined %age Conversion			
<b>Principal Accountabilities: Key activities and decision making areas</b>		<b>Typical Targets and Measures</b>	
Impact on the Business / Function [COMPLETE 3-4 AREAS] <ul style="list-style-type: none"> <li>Number of Customer meeting per day</li> <li>Delivery of Minimum business guarantee</li> <li>Creating Leads through campaigns /Cold calling</li> <li>Documentation, logins &amp; Issuance tracking.</li> <li>Lead / Feedback / Referral Updating on LMS</li> <li>Meeting Business targets: Achievement of Business plan</li> <li>Customer servicing/ Renewals</li> <li>Being the quality ambassador and doing a thorough on the round u/w and ensure correct disclosures</li> </ul>		<ul style="list-style-type: none"> <li>Closure on Leads provided by company</li> <li>Average ticket size</li> <li>Number of policy per month</li> <li>APE per month</li> </ul>	

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Customers / Stakeholders [COMPLETE 3-4 AREAS] <ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>• Timely response to internal and external queries.</li><li>• Branch Operation</li></ul>
Leadership & Teamwork [COMPLETE 3-4 AREAS]	
Operational Effectiveness & Control [COMPLETE 3-4 AREAS] <ul style="list-style-type: none"><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>
<b>Major Challenges</b> <i>(The challenges inherent in the role that require a continual test of the role holder's abilities)</i>	
<ul style="list-style-type: none"><li>• Number of leads/ appointments</li></ul>	
<b>Role Context</b> <i>(The environment and operating conditions of the role including the extent of guidance and authority)</i>	

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<b>Management &amp; Leadership of Regulatory, Compliance &amp; Operational Risk</b> ( <i>Operational Risk / Control requirements</i> )						
Report any operational risk or operational risk loss to the line manager and the Risk & Control team immediately if the jobholder becomes aware of emerging or inadequately controlled operational risk or identify an operational risk loss in accordance with Company's Risk policy.						
<b>Observation of Internal Controls</b> ( <i>Compliance Policy / Control requirements</i> )						
Maintain and observe Company's internal control standards, implement and observe the Company's Compliance Policy, including the timely implementation of recommendations made by internal/external auditors and external regulators. Foster a compliance culture and implement the Compliance Policy by managing compliance risk and optimising relations with regulators						
<b>Role Dimensions</b> ( <i>e.g. Revenue targets etc. in INR'000</i> )						
<ul style="list-style-type: none"><li>As defined</li></ul>						
<b>Headcount reporting to this role</b> <i>(All staff in the dept/section, including direct &amp; indirect subordinates. Do not include dotted/functional reportees headcount here.)</i>	<b>Direct:</b>	<b>0</b>	<b>Indirect:</b>	<b>0</b>	<b>Total:</b>	<b>0</b>
<b>Dotted/functional reportees to this role, if any</b> ( <i>state title of the job</i> ):						
<b>Knowledge &amp; Experience / Qualifications</b> ( <i>For the role – not the role holder. Minimum requirements of the role.</i> )						

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☐ B. University (BA) or (BS) ☐ C. Post Graduate (Masters)

☐ A. Two years or less ☐ B. Two to five years ☐ C. Five to ten years ☐ D. Over ten years

[COMPLETE]

**Organizational Chart** *(Insert or attach the high level organization chart of the department plus the detailed sectional organization chart showing where this job sits in the overall structure, its reporting line, its peers and subordinates, if any, bearing job title and job code.)*