

ROLE PROFILE TEMPLATE

Canara HSBC Life Insurance Company Limited

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

ROLE PROFILE TEMPLATE

Canara HSBC Life Insurance Company Limited

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

ROLE PROFILE TEMPLATE

Canara HSBC Life Insurance Company Limited

ROLE PROFILE TEMPLATE

Canara HSBC Life Insurance Company Limited

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.)