



PR/159261 | Sales Operation Associate (Financial Services)

Job Information

Recruiter

JAC Recruitment Malaysia

Job ID

1548231

Industry

Bank, Trust Bank

Job Type

Permanent Full-time

Location

Malaysia

Salary

Negotiable, based on experience

Refreshed

July 8th, 2025 16:37

General Requirements

Minimum Experience Level

Over 3 years

Career Level

Mid Career

Minimum English Level

Business Level

Minimum Japanese Level

Business Level

Minimum Education Level

Associate Degree/Diploma

Visa Status

No permission to work in Japan required

Job Description

JOB RESPONSIBILITIES:

- Provide comprehensive sales support to the New Business team and Consultants.
- Coordinate medical appointments, prepare necessary documentation, and accurately transfer client information into required formats.
- Assist in organizing meetings and medical arrangements, and support both new and ongoing insurance applications, including policy issuance and delivery.
- Ensure adherence to the sales operations process by maintaining accurate pipeline updates and logging all relevant activities, including sales meetings, in the system.
- Verify that all client documentation is complete, compliant with internal standards, and meets insurance company requirements for due diligence.
- Manage assigned cases through to completion, including timely follow-ups and negotiations with insurers and underwriters.
- Collaborate effectively with internal and external stakeholders to ensure smooth workflow and client satisfaction.
- Perform any additional tasks as assigned by the line manager.

JOB REQUIREMENTS:

- Degree holder in any discipline
- Good people / relationship skill
- Ability to multi-task and work under extreme deadlines
- Good functional and technical knowledge and skills to do the job at a high level of accomplishment
- Able to build appropriate rapport & use diplomacy and tact
- Highly organized and proactive in following up cases and also daily work Effectively cope with changes
- Min 1-2 years of administration, customer service or relationship management experience preferably in insurance or banking industry
- Proficiency in English and Mandarin, Cantonese will be added advantage

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Company Description