

ICICI Prudential Life Insurance – Job Profile Description

"We Hire for attitude and train for Skills"

Agency 2.0

Job Description & Job Specification

<u>Position Title</u>	Unit Manager- Development
Channel	Agency 2.0
<u>Function</u>	Sales & Distribution
<u>Position Reports to</u>	Sales Manager/ Area Manager
<u>Grade</u>	I/2/3
<u>Location</u>	Across Maharashtra & Goa
Job Description:	
1. Build Agency Distribution	<ul style="list-style-type: none"> • As a unit manager, your primary responsibility will be training & stimulating team of advisors to generate business. • The advisor performs the role of suspecting, prospecting & referencing to acquire new customers. • And generating new customer leads and building a robust pipeline for business generation.
2. Achieve sales targets through advisors	
Job Specifications:	
1. Financial Sales Profile - Provide on and off field support to advisors.	
2. Providing need based "Financial planning for customers".	
3. Acquiring knowledge and developing skills on products and process through E-learning modules.	
4. Imbibe technology platforms to learn & educate about Financial Plans.	
5. Handling and managing customers and team members.	
6. Be self-motivated and drive to succeed	
7. Passion to learn and earn	
8. Sales orientation & willingness to extensively work outdoors	
9. Enjoys interacting with people and building relationships	

Career Progression – Agency2.0

Agency 2.0 is predominantly divided into three sections and the career path of each is mentioned below. At ICICI Prudential Life Insurance, the career progression framework has been designed to enable you grow in the sales role. It is transparent and linked to the individual & team performance

Level	Win	Grow	Lead
1 (I)	Unit Mgr - Relationship	Unit Mgr - Distribution Acquisition / Business Acquisition	Unit Mgr - Business Development
2 (I)	Development Mgr - Relationship	Development Mgr - Distribution Acquisition / Business Acquisition	Development Mgr - Business Development
2 (II)	Agency Mgr - Relationship	Agency Mgr - Distribution Acquisition / Business Acquisition	Agency Mgr - Business Development
3 (A)	Sr. Agency Mgr - Relationship	Sr. Agency Mgr - Distribution Acquisition / Business Acquisition	Sr. Agency Mgr - Business Development
3 (B)	Asso. Business Mgr. Mgr - Relationship	Asso. Business Mgr. Mgr - Distribution Acquisition / Business Acquisition	Asso. Business Mgr. Mgr - Business Development
4 (III)	Sales Mgr - Relationship	Sales Mgr - Distribution Acquisition / Business Acquisition	Sales Mgr - Business Development
5 (IV)	Area Mgr - Relationship	Area Mgr - Distribution Acquisition / Business Acquisition	Area Mgr - Business Development
6 (M1)	Mgr - Relationship	Mgr - Distribution Acquisition / Business Acquisition	Mgr - Business Development
7 (V)	Asso. Regional Mgr - Relationship	Asso. Regional Mgr - Distribution Acquisition / Business Acquisition	Asso. Regional Mgr - Business Development
8 (VI)	Regional Mgr - Relationship	Regional Mgr - Distribution Acquisition / Business Acquisition	Regional Mgr - Business Development

Compensation Structure:

1. Fixed salary (AGP)
2. Annual Bonus based on performance rating
3. Top up bonus based on predefined performance criteria
4. Mobile and Conveyance allowances
5. E-medicalim & Group Term policy
6. ESIC benefits

Level	Lead	AGP	Experience in Years	Emedicalim	Group Term Medical Cover	Bonus
1 (I)	Unit Mgr - Business Development	1.7/1.75	(0-1)	3,50,000	7,50,000	Performance Based
2 (I)	Development Mgr - Business Development	2.25	(1-3)	3,50,000	7,50,000	Performance Based
2 (II)	Agency Mgr - Business Development	2.8	(3-4)	3,50,000	7,50,000	Performance Based
3 (A)	Sr. Agency Mgr - Business Development	3.55	(4-6)	3,50,000	7,50,000	Performance Based

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Bancassurance Channel – ICICI Bank

Job Description & Job Specification

<u>Position Title</u>	Financial Services Manager Associate Financial Services Manager Senior Associate Financial Manager
<u>Channel</u>	Bancassurance
<u>Function</u>	Sales & Distribution
<u>Position Reports to</u>	Sales Manager/ Area Manager
<u>Level</u>	1 / 2
<u>Location</u>	Across Maharashtra & Goa
Job Description:	
1. Lobby Management	Top City & Integrated Markets
<ul style="list-style-type: none"> • Address & resolve financial queries of walk-in customers. • Collect customer details 	
2. Partner Engagement	
<ul style="list-style-type: none"> • Build relationship with branch staff and support to the branch staff 	
Job Specifications:	
1.	Financial Sales Profile - Provide on and off field support to branch employees
2.	Providing need based "Financial planning for customers".
3.	Acquiring knowledge and developing skills on products and process through E-learning modules.
4.	Imbibe technology platforms to learn & educate about Financial Plans.
5.	Handling and managing customers and team members.
6.	Be self-motivated and drive to succeed
7.	Passion to learn and earn
8.	Sales orientation & willingness to extensively work outdoors
9.	Enjoys interacting with people and building relationships

Career Progression & Compensation Structure – Bancaasurance

At ICICI Prudential Life Insurance, the career progression framework has been designed to enable you grow in the sales role. It is transparent and linked to the individual & team performance

Compensation Structure:

1. Fixed salary (AGP)
2. Annual Bonus based on performance rating
3. Top up bonus based on predefined performance criteria
4. Mobile and Conveyance allowances
5. E-Medicalim & Group Term policy
6. ESIC benefits

Srno	Designation	Level	ROMG- AGP	Pune + Goa-AGP
1	Financial Services Consultant	1	1.5	1.7
2	Associate Financial Services Manager	1	1.7	1.85
3	Senior Financial Services Manager	2	2.75	3L
4	Associate Key Relationship Manager	3	3.25	3L
5	Deputy Key Relationship Manager	3	3.25	3L
6	Executive Key Relationship Manager	4	NA	NA
7	GBRM	4	NA	NA

Experience in Years	E-medicalim	Group Term Medical Cover	Incentive
(0-1)	3,50,000	7,50,000	As per monthly Incentive scheme
(1-3)	3,50,000	7,50,000	As per monthly Incentive scheme
(3-4)	3,50,000	7,50,000	As per monthly Incentive scheme
(4-6)	3,50,000	7,50,000	As per monthly Incentive scheme

Campus Placements – Process Note

ICICI Prudential selection program is designed to identify the right attitude as a measure to fitment in the roles offered. Throughout the process our motto would be to check fitment in organizations culture, candidate's career aspirations through various judgment tools.

Step-1 Personal profile of candidates in the below mentioned format

Srno.	Name	DOB	Experience If Any	Highest Education	Phone Number	Email_Id

All candidates will be allocated a unique application ID and an email communication from ICICI Prudential will be sent to complete their personal profile on candidate portal at ICICI Prudential career page.

Step-2 Group Discussion / Extempore

Srno	Topics
1	NarendraModi - The New India
2	Education System in India
3	What is Mobile Recruitment

Group Discussion or Extempore would be initiated where all participants would share their views/ opinion and their understanding of the subject matter. Score sheet would carry individual marks

Step-3 Written test would be conducted to general awareness about financial Industry, Insurance industry, ICICI Prudential Life Insurance.

Step-4 One – One behavioral Interviews

Step-5 Final Result

Cumulative score of all would get the final selections

Step-6 Offer Roll out Process at Regional HR and signing Code of conduct document