2019 TRAINING PROGRAMS

Sun Life

	CORE AREA/COMPETENCY	COURSE TITLE	COURSE DESCRIPTION	DELIVERY METHOD	DURATION (HOUR)	PRE-REQUISITE/S	TARGET PARTICIPANTS	FACILITATOR/TRAINER
1	Mandatory	Code of Business Conduct*	Each year, all employees are asked to complete a mandatory Code training and an Annual Code Acknowledgement in which we confirm our compliance with the Code and reaffirm our commitment to apply the Code in the future.	E-learning	16	None	All employees	External
2	Mandatory	Financial Crime Awareness*	The training has been designed to provide general awareness, regardless of your role in the Company, as well, ensure employees have the knowledge to comply with SLF's Anti-Money Laundering and Anti-Terrorist Financing Policy, Fraud Risk Management Policy and Prevention of Bribery and Corruption Policy, as well as SLF's Code of Business Conduct.	E-learning	30 Mins	None	All employees	Internal
3	Mandatory	Workplace Awareness and Respect		E-learning	30 Mins	None	All employees	Internal
4	Mandatory	Business Continuity*	All employees are trained annually on their role during a business disruption and where appropriate their role in the Business Continuity Program. This will help to ensure that teams work together effectively in adverse conditions, gaining expertise in enacting the measures needed to respond and developing the confidence to implement the right decisions at the time of a disruption.	E-learning	20 Mins	None	All employees	Internal
5	Mandatory	Protecting Info and Data Privacy*		E-learning	45 Min	None	All employees	Internal
6	Agility	Agile and Scrum Fundamentals	Particpants will learn the following: * Core Agile Principles and Key concepts in SCRUM * Correct Agile implementation and how SCRUM framework works in delivering successful projects * Industry standards and best practices * Agile mindset * Sun Life Agile Methodology currently implemented with Agile projects	Instructor-led	30 Mins	None	*Highly recommended to business partners involved with IT projects * Open to anyone interested to know more about Agile and SCRUM and to practice core principles/ key concepts that can be leveragd in their business area	External
7	Communication	Effective Business Writing	Review and apply the strategies designed to increase the clarity, impact, and professionalism of e-mail, memos, letters, and reports that employees write.	Instructor-led	16	None	All employees	External
8	Client Centricity	Service Plus	Service Plus® helps particpants eliminate customer defections and strengthen customer satisfaction and loyalty. Through its proven design and comprehensive approach, Service Plus® creates leaders and frontline service providers. •Deliver service that consistently delights customers. •Think and act in ways that put the customer at the heart of your organization. •Create unprecedented new levels of customer satisfaction and loyalty. •Ensure repeat business from established customers and inspire loyalty in new customers. •Increase word-of-mouth business referrals.	Instructor-led	16	None	All employees	Internal
9	Communication	Effective Presentation Skills	Apply strategies for delivering a strong, clear message, whether to a single listener or an audience of hundreds through interactive exercises by participants. Prepare and deliver effective presentations by applying elements of body language, eye contact, vocal projection, content, nervousness, and confidence.	Instructor-led	8	None	All employees	Internal
10	Communication	Communicating with Impact	Explore the kind of impact you want to have back in the workplace. Learn about a set of interaction process skills that will help you enhance your impact by helping you communicate more effectively with others.	Instructor-led	8	None	All employees	Internal
11	Data Analytics	Spreading the Analytics Culture	This is a one (1) day workshop which covers building, instilling and maintaining the right analytics culture in the organization. Includes analytics maturity assessment checklist, analytical competencies, best practices in spreading the analytics culture as well as case study discussions: •Assessing the organization's analytical maturity •The right analytics mindset •Concrete steps in building, instilling and maintaining analytics culture •How reports and models can be effectively communicated •The analytical competencies needed to support the right culture •Ethics in doing good data science work	Instructor-led	16	None	People Managers	External

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12	Innovaton	Design Thinking	Design Thinking – Learn & Lead will have participants tackling a realistic challenge while applying the three phases of Design Thinking through a simulation, and then learning selected techniques in-depth through a focused Sun Life design challenge. •Use a common language for innovation •Put customers or Clients at the center of design efforts •Move from idea or problem to powerful solutions •Integrate design thinking into your work practices Learn design methods to create new/innovate. Use a process to help participants solve problems or create something new - human centered thinking approach. Empathize, ideate, refine, protype, execute	Instructor-led	8	None	All employees	Internal
13	Communication	Art of Asking Questions	As our world becomes more and more "connected", the sense of urgency to provide answers accelerates. We rush to answer questions from our clients, colleagues and superiors without much careful thought. But we must slow down and understand each other better in order to avoid poor decisions and succeed in this VUCA (volatile, uncertain, complex, and ambiguous) business environment. We need to start asking more and better questions that really matter. In this workshop participants will: • Discover and practice the mindset skills and attitude of the art of asking effective questions • Deepen their understanding and build their skills around Sun Life Philippines' Refreshed Competency Model, particularly "Delivers Innovative Solutions", "Leverages Data & Technology", and "Personal Agility". • Use the process of Action Learning to both practice the art of asking questions and to create innovative solutions for our organization's problems	Instructor-led	8	None	All employees	External
14	Process Improvement	Brighter Way - Lean Six Sigma Certifcation Programs (Yellowbelt, Greenbelt and Blackbelt)	Participants will learn and master the Lean philosophy, concepts, and tools.	Instructor-led	80 - 100 hours	Yes with pre-requisit	All employees	Internal
15	Leadership	Foundation of Supervision	Cross over to your new role smoothly. Equip yourself with knowledge and skills on basic supervisory functions. Get introduced to activities such as planning, leading, organizing and controlling. Master these skills and understand the scope of your authority and responsibility so you can manage people as effectively as they do their tasks. •distinguish the supervisor's function, authority and responsibility from that of other jobs •identify and articulate the four management functions and their applications; and •develop and action plan towards effectively performing the four management functions.	Instructor-led	8	None	New Managers	Internal
16	Leadership	Coaching for Success	Coaching for Success is a highly participative learning program designed to help managers develop the ability to talk with staff about their work in a way that leads to performance improvement and alignment with corporate objectives. Coaching for Success is a skill that can be learned through instruction, practice, observation and feedback. To coach effectively, managers learn to: • Objectively analyze their employee's perfprmance • Define performance gaps in terms of will (motivation) and/or skill (competence) • Coach their employees to close any performance gaps • Avoid the most common mistakes that managers tend to make.	Instructor-led	16	None	People Managers	External

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17	Leadership	Impact the Sun: Think on Your Feet	Think on your feet: Business Outcomes, Getting your message right the first time, and being remembered, is critical. It's both a huge time saver for you, your team, and your organisation AND It's the difference between ordinary and extraordinary when you want to convince others of your ideas. • Structure ideas simply and persuasively • Flesh-out ideas with memorable examples •Target listeners' core concerns •Simplify complex information. Avoid information overload — condense your thoughts •Get to the point and be remembered• Handle objections positively •Answer questions quickly and coherently •Deal with hostile situations and emotional issues	Instructor-led	16	None	People Managers	External
18	Leadership	Impact the Sun: Performance Management	2-Day Training Course: A Practical Guide to Improving Individual & Team Performance. You will be taken step by step through the intricacies of managing poor & good performance; covering everything from how to run performance reviews; setting benchmarks & objectives; key motivational & behavioural considerations; the role of the manager in maintaining performance	Instructor-led	16	None	People Managers	Internal
19	Leadership	Impact the Sun: Strategic Thinking	•Understand the essential points of the strategic process •Determine your current position by carrying out an external environment analysis using the PEST model •Learn how to carry out a competitor analysis to determine your position in the market •Assess your internal environment for strategic planning using McKinsey's 7 S model •Use the 3 Horizon technique to consider disruptions and focus on growth for your strategic plan •Learn how to measure and monitor progress towards strategic targets using the Balanced score Card method •Manage your key stakeholders and get the buy-in for strategy executionApply the learning from the programme using your ALP project plan	Instructor-led	16	None	People Managers	External
20	Leadership	Impact the Sun: Developing Your Team	Developing your team Workshop's key learning objectives are to: • Build an appreciation of the critical role leaders play in developing and retaining employees • Create an understanding of when to delegate, when to guide, when to develop • Know how to adjust your approach in each situation based on the employee's skill and willingness to take on the task • Build confidence in your ability to delegate in a way that fosters development and ensures success	Virtual Webinar	1.5	None	People Managers	Internal
21	Leadership	Impact the Sun: Emotional Intelligence	Emotional Intelligence is the ability to sense, understand and effectively apply the power and acumen of emotions to facilitate high levels of collaboration and productivity. (Cooper) At the end of the workshop, participants will be able to: •Recognize and use your emotional impulses correctly •Delay and control unhealthy impulses. •Enhance self-awareness; recognize own feelings and express them in an appropriate way. •Build up empathy for the feelings of others and learn how others think. •Build up confidence by enhancing optimism and a positive attitude. •Understand the dynamics of your team and how you fit in. •Create a high trust environment through compassion. •Respect others ideas and be assertive in giving your opinions. •Learn how to manage your own emotions when the workplace gets stressful.	Instructor-led	16	None	People Managers	External

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22	Leadership	Impact the Sun: Change Management	The workshop is focused on increasing the understanding of all aspects of organisational change as well as what effective ways are to manage change, increase buy-in to change and minimize resistance to change within an organisation. •Gain an appreciation for the impact of change management on organizational results. •Understand foundational aspects of change management and the critical role managers play in the change process. •Learn a practical framework for processing the many changes that impact managers. •Understand how to apply the Prosci ADKAR® Model to facilitate individual change and mitigate employee resistance. •Assess a current change impacting your team and practice using the tools available to you in the Change Management Guide for Managers toolkit. •Create action plans to move employees past barrier points and on to desired outcomes.	Instructor-led	16	None	People Managers	Internal
23	Leadership	Impact the Sun: Digital Leadership	Empower Asian teams with: •An understanding and ownership of the mind-sets needed to enable the organization to be a digital leader. •The confidence to engage key stakeholders in digital strategies through a better understanding of digital landscapes, challenges and opportunities. •Tools and techniques to practice digital innovation in their work areas.	Instructor-led	8	None	People Managers	Internal
24	Leadership	Impact the Sun: Communication Styles	During this 90 minute virtual learning experience, we will discuss four styles of communication, the strengths and weaknesses of each style, and uncover tactics for adjusting and flexing your approach to work more effectively with other styles. The key learning objectives of this program are below: • Understand Style theory and what determines your Style • Recognize and identify other Styles in the population • Apply tactics for working more effectively with other people's Styles	Virtual Webinar	90 minutes	None	People Managers	Internal
25	Communication	Data Storytelling for Managers	•Explore how to go beyond your role as a subject matter expert, and tell a story that makes complex or technical data or information meaningful to your audience. •Practice skills that will allow to build connections with others, deliver a polished, clear message, and influence action. •Receive real-time practice and coaching to improve mindset, script, language and presence through inspiring storytelling.	Instructor-led	16	None	*Highly recommended to business partners involved in data presentation.	Internal
26	Domain	Sun Start	Orientation program that provide newly hired employees with an introduction to Sun Life, what's expected and where they fit in to overall goals. • learn the milestones of Sun Life's distinguished history •describe the company's vision, mission and values •identify the different departments and describe their respective functions •familiarize yourself with the company premises •identify staff development programs and state the general guidelines in availing them •express the rationale and features of our compensation system •learn the company's staff benefits and state the general guidelines governing their availment	Instructor-led	8	None	All employees	Internal

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27	Domain	Sunny Solutions	Front liner or not, newcomer or old-timer, who want to discover or polish their command of life insurance and mutual funds' basic concepts and principles. Participants will learn the root concepts and principles of our business lines and our very own Sun Life Financial products. •Experience and gain a general understanding of the importance of personal financial management •Create a personal action plan for meeting your individual financial goals through financial planning •Explain the basic principles behind life insurance and mutual funds •Define several basic insurance and mutual fund terms •Name the different products of Sun Life Financial and their features •Compute for policy and mutual fund values	Instructor-led	24	None	All employees	Internal
28	Domain	LOMA Certification Program Level 1	Level 1: Insurance Fundamentals: Provides need-to-know information about insurance products and operations so employees quickly gain confidence, serve the customer effectively, and contribute to company success LOMA 280—Principles of Life Insurance / LOMA 281—Meeting Customer Needs with Insurance and Annuities LOMA 290—Insurance Company Operations / LOMA 291—Improving the Bottom Line: Insurance Company Operations	E-learning	16	None	Identified business units	External
29	Domain	LOMA Certification Program Associate Customer Service (ACS), Life Insurance	ACS Program include the following modules. Required: LOMA 100 / 101 - Customer Service LOMA 280 / 281 - Insurance Principles LOMA 290 / 291 / ARA 440 - Insurance Principles Elective Courses (at least 2) LOMA 301/302 - Insurance Administration LOMA 307/308 - Business & Financial Concepts LOMA 320/321 - Marketing	E-learning			Identified business units	External
30	Domain	LOMA Certification Program Associate, Life Management Institute (ALMI)	ALMI: Provides job-relevant knowledge about the core insurance functions and strengthens business and financial acumen. ALMI Program includes the following modules: LOMA 301/302 - Insurance Administration LOMA 307/308 - Business and Financial Concepts LOMA 320/321 - Marketing	E-learning		LOMA Certification Program Level 1	Identified business units	External
31	Domain	LOMA Certification Program Fellow, Life Management Institute (FLMI)	FLMI: Teaches advanced insurance and financial concepts to build a deeper understanding of the insurance business. FLMI Program include the following modules: LOMA 311 -Law LOMA 335 - Management LOMA 357 - Investments LOMA 361 - Accounting LOMA 371 - Risk Management and Product Design	E-learning			Identified business units	External
32	Diversity and Inclusion	Respect the Sun: Enhancing Generational Diversity	•Understanding the differences between the four generations •Fostering a generational inclusive workplace and diminish misconceptions •A personal Toolkit of best practices •Build on results on your Employee Engagement Survey	Instructor-led	1.5	None	All employees	Internal
33	Diversity and Inclusion	Respect the Sun : Embracing Cultural Differences	•Improve cultural interactions •Improve talent decisions •Achieve diversity goals •Build internal inclusivity between cultures	Instructor-led	1.5	None	All employees	Internal
34	Diversity and Inclusion	Respect the Sun: Respectful Workplace	Understanding respect in workplace free from Sexual Harassment and Discrimination	Instructor-led	2	None	All employees	Internal
35	Health and Wellness	Wellness related training programs for employees offered in 2019	I-Know Heart Attack Lecture	Instructor-led	1	None	All employees	External

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36	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS A - HIV Awareness and Prevention	Instructor-led	1	None	All employees	External
37	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS B - Nutirition and Diet	Instructor-led	1	None	All employees	External
38	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS C - Gut and Health Nutrition	Instructor-led	1	None	All employees	External
39	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS D - Fertility and Infertility Preservation	Instructor-led	1	None	All employees	External
40	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS E - Embracing the SEED Lifestyle	Instructor-led	1	None	All employees	External
41	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS I- Skin Care 101 and Make Up Tutorial	Instructor-led	1	None	All employees	External
42	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS F - Posture and Productivity in the WP	Instructor-led	1	None	All employees	External
43	Health and Wellness	Wellness related training programs for employees offered in 2019	CLASS H - Ready, Set Grow, Supporting Children to Thrive	Instructor-led	1	None	All employees	External
44	Health and Wellness	Wellness related training programs for employees offered in 2019	Basic Life Support Lecture	Instructor-led	1	None	All employees	External
45	Health and Wellness	Wellness related training programs for employees offered in 2019	Nutrition Lecture	Instructor-led	1	None	All employees	External
46	Health and Wellness	Wellness related training programs for employees offered in 2019	Mental Health Awareness Workshop Seminar	Instructor-led	1	None	All employees	External
47	Health and Wellness	Wellness related training programs for employees offered in 2019	Maleficent: Misbeliefs on Diabetes Lecture	Instructor-led	1	None	All employees	External