

---

**Job Ref. No: JAML017**

**Position: Customer Experience Officer**

---

Jubilee Insurance was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Insurance has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, General and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 450,000 clients. Jubilee Insurance has a network of offices in Kenya, Uganda, Tanzania, Burundi, and Mauritius. It is the only ISO certified insurance group listed on the three East Africa stock exchanges – The Nairobi Securities Exchange (NSE), Dar es Salaam Stock Exchange and Uganda Securities Exchange. Its regional offices are highly rated on leadership, quality and risk management and have been awarded an AA- in Kenya and Uganda, and an A+ in Tanzania. For more information, visit [www.JubileeInsurance.com](http://www.JubileeInsurance.com).

**Jubilee Asset Management Limited (JAML)** is a wholly owned subsidiary of Jubilee Holdings Limited, that focuses on providing fund management and investment advisory products and services to institutional and retail clients. It is licensed and regulated by the Capital Markets Authority (CMA).

We currently have an exciting career opportunity for a **Customer Experience Officer** within **Jubilee Asset Management Limited**. The position holder will report to the **Manager – Fund Services** and will be based at our Head Office in Nairobi.

---

### **Role Purpose**

The role holder interacts with all customers to provide them with information to address inquiries regarding products and services. In addition, they deal with and help resolve any customer complaints and implement initiatives to improve customer satisfaction levels and loyalty, while ensuring that the customers receive world class customer service experience.

### **Main Responsibilities**

#### **Operational**

1. Greet and welcome clients visiting the office, providing a warm and friendly environment.
2. Ensuring customer inquiries and complaints are promptly and effectively resolved within the required turnaround time.
3. Interacting with the clients as the first point of contact between the company and the customers at service center.
4. Selling additional products by recognizing opportunities to cross-sell or up-sell new benefits.
5. Identifying and escalating complex customer issues to the appropriate departments for resolution.
6. Collaborating with team members and other departments to resolve customer problems effectively.
7. Contributing to team effort by accomplishing related results as needed.
8. Listen to clients' inquiries, concerns, and requests, and provide accurate and timely responses.
9. Assist clients with unit trust-related questions, claims inquiries, and general unit trust servicing.
10. Process unit trust changes, endorsements, and cancellations accurately and efficiently.
11. Update client information and unit trust details in the database.
12. Build and maintain strong relationships with clients, fostering trust and loyalty.
13. Identify and address client needs, offering suitable solutions and assistance.
14. Follow up with clients to ensure their satisfaction and resolve any outstanding issues.
15. Maintain accurate and up-to-date client records, ensuring confidentiality and data protection.
16. Handle client correspondence via email, mail, or other communication channels.
17. Investigate and resolve client complaints or issues promptly and effectively.
18. Escalate complex or unresolved issues to the appropriate departments for further action.
19. Keep detailed records of client interactions, inquiries, and issue resolutions.

### **Corporate Governance**

1. Compliance: Stay updated with industry best practices to ensure compliance with industry standards

2. Adherence to the laws and regulations of Kenya, the policies and regulations within the asset management industry and all internal company policies and procedures.
3. Ensuring compliance with applicable statutory and regulatory requirements and establishing mitigation measures against emerging business risks.

**Culture**

1. Fostering a corporate culture that promotes ethical practices and good corporate citizenship while maintaining a conducive work environment.
2. Collaborate with cross-functional teams to develop initiatives that promote a positive and inclusive company culture.
3. Individualized Development Planning: Create personalized development plans that align with your career aspirations and the organization's objectives.

**Key Competencies**

1. Customer service and complaint resolution.
2. Product and service knowledge.
3. Database management and record keeping.
4. Communication and interpersonal skills.
5. Problem-solving and decision-making.
6. Analytical skills for data analysis and reporting.
7. Unit trust interpretation and communication

**Qualifications**

1. Bachelor's degree in Business, Marketing or any other related course

**Relevant Experience**

1. Minimum 1-2 years' experience in a similar role.
2. Experience in effectively resolving customer inquiries and complaints.
3. Familiarity with asset management or financial products and services is advantageous.

**If you are qualified and seeking an exciting new challenge, please apply via [Recruitment@jubileekenya.com](mailto:Recruitment@jubileekenya.com) quoting the Job Reference Number and Position by 12<sup>th</sup> February 2024**

**Only shortlisted candidates will be contacted.**