Job Ref. No. **JAML050**

Position: **Customer Experience Intern**

Jubilee Asset Management Limited (JAML) is a premier Asset Manager that offers differentiated investment products and solutions across core assets, alternative assets and across all market cycles. Our clients include institutions, high net worth individuals (HNWI) and retail clients. Our differentiated investments products and solutions include Insurance Fund Management, Segregated Portfolio Management, Unit Trusts, Alternative Investments, Offshore Investments and Structured Investment Products. For more information, visit https://jubileeinsurance.com/ke/asset-management/.

We currently have an exciting internship opportunity for a **Customer Experience Intern** within **Jubilee Asset Management Limited**. The position holder will report to the **Customer Experience Manager** and will be based in **Nairobi**.

Role Purpose

The Customer Experience Intern is responsible for supporting the delivery of exceptional client experiences by assisting in client inquiry resolution, engagement initiatives, and feedback analysis to enhance client satisfaction and loyalty. This role focuses on supporting client onboarding, documenting interactions, and contributing to process improvements to strengthen JAML's client-centric culture. The intern will gain practical experience in client relationship management and contribute to positioning JAML as a leader in wealth and institutional management solutions. This position reports to the Customer Experience Manager and works closely with the Customer Experience, Business Development, and Portfolio Management teams.

Key Responsibilities:

Strategic and Business Development Functions:

Client Engagement and Support

- Assist in responding to client inquiries regarding investment products, account management, and service processes, ensuring timely and accurate support.
- Support the execution of client engagement initiatives, including onboarding sessions, product updates, and feedback surveys, to enhance client satisfaction.

- Collaborate with Business Development and Portfolio Management teams to ensure seamless client experiences during onboarding and ongoing interactions.

Documentation and Feedback Management

- Document client interactions and feedback using CRM systems (e.g., Salesforce) to maintain accurate records for audit and follow-up purposes.
- Assist in resolving client issues and managing suspense accounts under supervision to uphold service quality.
- Support the preparation of client communication materials, such as product guides or newsletters, to promote engagement.

Process Improvement and Analysis

- Analyze client feedback to identify trends and opportunities for improving customer experience and service delivery.
- Contribute to process improvement initiatives by providing insights from client interactions and supporting the implementation of digital tools.
- Assist in streamlining client interaction workflows to enhance operational efficiency.

Compliance and Governance

- Ensure all client interactions and documentation comply with relevant regulatory frameworks (Capital Markets Authority, Data Protection Act) and internal audit standards.
- Maintain accurate and comprehensive records of client engagement activities to meet audit, reporting, and quality assurance requirements.

Key Competencies:

- **Client-Centric Focus:** Strong commitment to delivering exceptional client experiences and building trust.
- **Communication Skills:** Excellent written and verbal communication skills for engaging clients and collaborating with teams.
- **Analytical Thinking:** Ability to analyze client feedback and identify actionable insights for improvement.
- **Attention to Detail:** Precision in documenting interactions and ensuring compliance with procedures.
- **Stakeholder Collaboration:** Proven ability to work effectively with cross-functional teams to achieve customer experience objectives.
- **Adaptability:** Eagerness to learn and adapt to new tools, processes, and industry trends.

- **Ethical Conduct:** High standards of integrity, confidentiality, and professionalism in handling client data and interactions.

Education Requirements:

- Bachelor's Degree in Business Administration, Finance, Marketing, Customer Service, or a related field from a recognized university.
- Coursework or certifications in Customer Service, Finance, or Investment Management is an added advantage.

Relevant Experience:

- 6-months of work experience required; previous internships, volunteer work, or projects in customer service, financial services, or client engagement is a plus.
- Familiarity with CRM systems (e.g., Salesforce) and Microsoft Office (Excel, Word, PowerPoint) is desirable.
- Exposure to financial services, insurance, or asset management sectors through coursework or projects is an advantage.

If you are qualified and seeking an exciting new challenge,
please apply via recruitment@jubileekenya.com quoting the Job Reference Number
and Position by 25th May 2025.
Only shortlisted candidates will be contacted.