



Job Ref. No: JLIL 361

Position: Relationship 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 1.9 million 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.

We currently have an exciting career opportunity for a **Relationship Officer** within **Jubilee Life Insurance Limited**. The position holder will report to the **Team Leader- Group Life Servicing** and will be based at our Head Office in Nairobi.

Role Purpose

The role holder will be responsible for building and maintaining strong relationships with corporate clients, brokers and intermediaries to drive business growth and retention in the group life servicing sector. The role holder will support day-to-day group life servicing operations, analyzing business processes, identifying operational and strategic needs and delivering data-driven solutions to Optimize performance, enhance customer experience and ensure compliance with regulatory standards

Main Responsibilities

1. Strategy

- Execute the strategic plan for the Group Life Servicing department under the guidance of the Team Leader.
- Conduct market research and analysis to identify trends, competition, and evolving customer needs.
- Perform financial analysis to identify cost-saving opportunities and recommend strategies to improve profitability and operational efficiency.

2. Relationship Management

- Client Relationship Management: Build and maintain long-term relationships with corporate clients, brokers, intermediaries, and medical service providers through regular meetings.
- New & Renewal of Schemes: Assist the Business Development team in obtaining data for onboarding new clients and supporting existing clients during renewal.
- Market Intelligence & Reporting: Monitor competitor activity, client feedback, and regulatory changes; provide performance insights and reports to management.

3. Operational

- Policy Renewals: Coordinate renewals, prepare documentation, and communicate terms, including renewal negotiations.
- Stakeholder Engagement: Liaise with underwriters, actuaries, and internal departments to ensure smooth operations.
- Customer Service: Act as the primary contact for policyholders and stakeholders; promptly resolve inquiries and issues.
- Claims Support: Facilitate claims processing and provide assistance to policyholders.

- Compliance & Documentation: Maintain accurate records and ensure regulatory compliance.
- Reporting & Analysis: Generate performance, claims, and customer satisfaction reports.
- Commission Payments: Ensure broker/agent commissions are processed within 3 working days of premium receipt.

4. Jubilee Life Brand

- Promote effective public relations and enhance the company's corporate image in all client and intermediary interactions.
- Ensure clients experience a consistent, professional and high-quality service aligned with Jubilee Life's brand values.

5. Corporate Governance

- Adhere to all regulatory requirements, internal policies, and standard operating procedures.
- Implement data protection and privacy practices to safeguard customer information.
- Participate in audits and address identified gaps promptly.
- Stay updated with Kenyan insurance regulations and industry best practices.
- Mitigate emerging business risks proactively.

6. People and Culture

- Cross-Functional Collaboration: Actively participate in cross-functional project teams to drive collaboration, innovation, and accountability across departments and the Group.
- Employee Collaboration Index: Participate in a minimum of 2 company projects per year with an 80% success rate and engage in at least 1 Group-wide project per year.
- Skills and Competency Development Index: 100% compliance with your training plan annually to support personal and professional growth, ensuring alignment with career paths and future challenges.
- Cultural Alignment Index (CAI): Attain the Company's CAI target score by embedding Jubilee's values (e.g., innovation, teamwork, excellence) into project execution and team dynamics.
- Conflict Resolution: Address interpersonal or project-related conflicts constructively, maintaining team morale and focus on shared goals.
- Resource Advocacy: Communicate needs (e.g., tools, training, support) to supervisors to ensure personal and team success.

Key Competencies

- Investment Management Expertise: Strong understanding of insurance investments, portfolio construction, and ALM principles.
- Financial & Market Analysis: Advanced ability to interpret market data, economic indicators, and financial models.
- Regulatory Awareness: Deep understanding of IRA and CMA investment frameworks.
- Risk Management: Skilled in identifying and mitigating investment and liquidity risks.
- Analytical Tools: Proficiency in Excel, Bloomberg, Morningstar, or equivalent portfolio management systems.
- Communication: Strong report-writing and presentation skills for diverse audiences.
- Ethical Integrity: High professional and fiduciary standards.
- Collaboration: Effective teamwork across Finance, Actuarial, and Risk functions.

Academic Background & Relevant Qualifications

- Bachelor's degree in Insurance, Finance, Business or a related field
- Diploma in Insurance, LOMA, CII or IIK qualification is advantageous
- 2-3 years' experience in group life servicing, insurance operations or related roles.
- Proven experience in client relationship management and policy administration.
- Familiarity with insurance systems, compliance requirements and market research.
- Experiencing working in team-oriented roles and collaborating with multiple stakeholders.

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by 30th November 2025. Only shortlisted candidates will be contacted.