



Job Ref. No: JLIL 380

Position: Senior Officer- Bancassurance

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 **Senior Officer- Bancassurance** within **Jubilee Life Insurance Limited**. The position holder will report to the **Manager- Bancassurance** and will be based at our Head Office in Nairobi.

Role Purpose

The job holder will be responsible for building, maintaining and growing Bancassurance relationships and increase revenue by delivering a world class customer service in a very proactive manner. The role holder must meet the set retention target, increase portfolio profitability and grow the portfolio through upselling of benefits, proper loading, and claims control.

Main Responsibilities

1. Strategy

- Process Improvement. Continuously assess and improve bancassurance processes to enhance efficiency, accuracy, and overall customer experience. Identify opportunities for automation, digitization, and streamlining of premium administration activities.
- Operational Excellence. Drive operational excellence within bancassurance processes by setting clear goals and performance metrics, monitoring performance, and implementing improvement initiatives to achieve service level agreements and operational targets.
- Technology and Systems. Collaborate with IT and operations teams to assess, select, and implement appropriate technology solutions for the bancassurance. Leverage digital tools, policy administration systems, and workflow automation to optimize processes and enhance productivity.

2. Operational

- Proactively manage allocated bancassurance retail portfolio by meeting your retention targets, maintaining, increasing premium & lives volume through organic growth and by selling additional benefits and enhancements.
- Bancassurance Partnership Management. Cultivate and manage productive partnerships with partner banks. Develop a deep understanding of their business models, sales processes, and customer segments. Provide a dedicated and comprehensive service to Bancassurance intermediaries/clients, always acting as the primary point of contact between Client/Bank and JLIL and deliver the highest level of customer care to meet and exceed expectations.
- Life Insurance Sales. Promote life insurance products and services to bank clients. Leverage the bank's customer base and referral network to generate leads and close life insurance sales.
- Open Network Partnerships - Cultivate and manage productive partnerships with non-bank financial institutions. Develop a deep understanding of their business models, sales processes, and customer segments. Provide a

dedicated and comprehensive service to them always acting as the primary point of contact and deliver the highest level of customer care to meet and exceed expectations.

- Organization and timely attendance of regular client/bank meetings. Take minutes and include required actions with TATs for circulation to all attendees and Team Leader. Ensure all required action as agreed is acted upon correctly and within TAT's. Identify service gaps and address the same.
- Gathering of market intelligence on all renewals including tender business and working with BSO's support to ensure no business is lost due to pricing.
- Ensure clients are provided with correct quotes for new and existing business in a timely manner, revisions are prompt and in accordance with specified requirements and JLIL renewal and risk strategy. Follow the renewal process and secure renewals of assigned schemes within TATs.
- Implement Customer service journeys and put in place an annual customer touch point for each client and ensure that this is adhered to, and records maintained.
- Liaising closely with specific teams to ensure that all client debits/credits/cards/documents are issued correctly and dispatched promptly within the set TATs. Monitor progress of all/any improvements agreed upon with client and to be implemented by various teams.
- Assist related teams in getting information needed for any pending action for claims, membership, cards etc. and ensuring that all actions are carried out within required TATs.
- Ensure reports/documents are verified and sent regularly and that SLA deliverables are always met. Make loyalty calls to clients/ intermediaries and ensure they are happy satisfied and timely feedback is provided.
- Respond to all incoming calls, letters, emails from clients/Bancassurance Intermediaries set TAT's and attend to walk in clients promptly and professionally. Ensure complaints are dealt with promptly and pro-actively by maintaining an issues/complaints log to track so that gaps can be identified, and solutions found.
- Provide the necessary support to intermediary and clients by training them on the medical products, Benefits and limits and other products features.
- Generate correct and complete monthly/quarterly and annual portfolio performance reports including claims experience regularly to monitor claim trends and provide the same to client as per SLA.
- Ensure that groups are advised immediately members reach 75% claims balance or exceed limits and that member statements go out on a regular basis as per client requirement.
- Implement regulatory/legal changes affecting clients. Ensure all JLIL - Know Your Customer, IRA and government regulations/rules are complied with.

3. Corporate Governance

- Compliance. Stay updated with insurance regulations and underwriting best practices to ensure compliance with industry standards.
- Adherence to the laws and regulations of Kenya, the policies and regulations within the insurance industry and all internal company policies and procedures.
- Ensuring compliance with applicable statutory and regulatory requirements and establishing mitigation measures against emerging business risks.

4. People & Culture

- Team Leadership: Build and lead cross-functional project teams, fostering collaboration, accountability, and high performance across diverse skill sets and departments.
- Employee Engagement Score (EES) KPI: Drive a 10% year-over-year increase in EES through team-building, transparent communication, and empowerment initiatives.
- 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.
- Skill Development: Provide mentorship and training to team members on your departmental tools, techniques, and industry-specific knowledge, enhancing capability.
- Conflict Resolution: Mediate and resolve team conflicts or stakeholder disputes, maintaining morale and focus on project goals.
- Resource Advocacy: Advocate for team needs (e.g., additional resources, training) to senior management, ensuring departmental success and staff well-being.

Key Competencies

- Strong relationship-building and networking skills.
- Excellent communication and negotiation abilities.
- Sales-driven and target-oriented mindset.
- Customer-centric approach and empathy.
- Financial acumen and understanding of life insurance products.

- Excellent data skills, Report writing and Presentational skills.
- Ability to priorities & deliver within set timelines.

Academic Background & Relevant Qualifications

- Bachelor's degree in Insurance, Finance, Business or any other related course
- Diploma in Insurance qualification will be an added advantage.
- LOMA/CII/IIK Qualification will be an added advantage.
- Minimum 3-4 years' experience in a similar role
- Exposure to sales or customer service roles, preferably within the insurance or financial services domain.
- Proven track record in sales and relationship management, preferably in the bancassurance or insurance sector.

**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 February 2026.
Only shortlisted candidates will be contacted.**