Job Ref. No: JAML087

Position: Client Engagement Officer

Jubilee Group was established in August 1937, as the first locally incorporated Insurance Company based in Mombasa. Jubilee Group has spread its sphere of influence throughout the region to become the largest Composite insurer in East Africa, handling Life, Pensions, Asset Management and Medical Insurance. Today, Jubilee is the number one insurer in East Africa with over 1.9 million clients. Jubilee Group has a network of offices in Kenya, Uganda, Tanzania, Burundi. 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.

Jubilee Asset Management Limited (JAML) is a wholly owned subsidiary of Jubilee Group, with a focus on providing fund management and investment advisory products and services to retail and institutional clients. JAML is licensed as a Fund Manager and regulated by the Capital Markets Authority (CMA) and the Retirement Benefits Authority (RBA).

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

Role Purpose:

The role holder interacts with Jubilee Asset Management customers to provide them with information, address inquiries regarding products, processes, 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.

Main Responsibilities:
Operational:

- Accountable for day-to-day communication with clients regarding product promotions, customer engagement initiatives, and campaigns.
- Proactively contact clients with unfunded accounts, follow up to encourage account funding, and achieve the set funding targets.
- Manage customer inquiries received through telephone, email, social media platforms, and customer portals, ensuring prompt and professional responses.
- Provide portal support by assisting clients with account access, navigation, transaction queries, and resolving technical issues.
- Receive, investigate, resolve, and escalate customer complaints through all communication channels, ensuring timely resolution and excellent customer service.
- Collaborate with fund services department to ensure accurate and timely execution of withdrawal transactions.

- Monitor customer feedback and engagement trends, providing recommendations to improve service delivery and customer experience.

Corporate Governance (Regulatory and Compliance):

- Identify operational risks within the function and implement appropriate mitigation measures.
- Maintain accurate, complete, and confidential client records in accordance with data protection policies and regulatory requirements.
- Compliance: Stay updated with investments, Fund management, CIS, CBK, and RBA regulations and customer services best practices to ensure compliance with industry standards
- Ensure compliance with internal policies, regulatory requirements, and service level agreements in all customer interactions and operational activities.

People and Culture:

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

Key Competencies:

- **Customer Service:** Ability to provide excellent service and resolve customer inquiries and complaints.
- **Communication**: Strong verbal and written communication skills to interact with customers and agents effectively.
- **Problem-solving**: Aptitude for identifying and resolving customer issues by providing suitable solutions.
- **Active Listening:** Ability to listen attentively to customers and understand their needs.
- **Adaptability:** Flexibility to handle various customer situations and adapt to changing priorities.
- **Attention to Detail:** Thoroughness in maintaining accurate customer records and analyzing information.
- **Teamwork:** Collaborative mindset to work effectively with colleagues and support team objectives.
- **Empathy:** Ability to understand and empathize with customers' concerns and provide appropriate support.

Academic Background & Relevant Qualifications:

- Bachelor's degree in Finance, Business or any other related course.
- Customer service training is an added advantage
- Minimum 2 years' experience in a similar role.
- Experience in effectively resolving customer inquiries and complaints.
- Experience in financial service industry is an added 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 Monday, 17th August 2026.