Job Ref. No: JLIL 427

Position: Head of Customer Retention

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.](http://www.JubileeInsurance.com)

We currently have an exciting career opportunity for a **Head of Customer Retention** within **Jubilee Life Insurance Limited.** The position holder will report to the **Chief Executive Officer** and will be based at our Head Office in Nairobi.

Role Purpose

The role holder will work closely with the Chief Executive Officer in executing the Customer Retention Strategy for Pension and Group Life corporate accounts. The role is responsible for overseeing the retention, growth and servicing of Pension and Group Life accounts through effective client relationship management, proactive stakeholder engagement and customer-centric service delivery, while maintaining strong relationships with direct clients, brokers and intermediaries. The role also serves as a key representative of the company's brand, promoting the organization's reputation through professional interactions with key stakeholders and the consistent delivery of high-quality service and adherence to all applicable laws, regulations, governance standards and company policies.

Main Responsibilities

Strategy

- Collaborate with the Chief Executive Officer in developing and executing customer retention, growth and market expansion strategies for Pension and Group Life corporate accounts.
- Provide strategic leadership in managing relationships with pension trustees, scheme sponsors, members, institutional clients, brokers and intermediaries to enhance client satisfaction, strengthen retention, and support business growth.
- Oversee the identification and assessment of client needs, ensuring the delivery of tailored Pension and Group Life solutions, value-added services and recommendations that support clients' retirement and financial objectives.
- Lead client engagement initiatives and ensure stakeholders receive timely insights on portfolio performance, market developments, regulatory changes and emerging opportunities to support informed decision-making.
- Drive the identification of new business opportunities, while overseeing client proposals, solution development, presentations, and strategic engagements that contribute to revenue growth, market expansion, and increased market share.

- Monitor industry trends, competitor activities, regulatory developments and market dynamics, and champion the enhancement and positioning of Pension and Group Life products and solutions to meet evolving client needs, strengthen competitiveness and drive sustainable portfolio growth.

Operational

- Oversee the day-to-day servicing and administration of Pension and Group Life portfolios, ensuring consistent delivery of high-quality services and agreed service standards.
- Monitor portfolio performance, retention rates, scheme renewals, and client service metrics, implementing corrective actions where necessary.
- Coordinate governance meetings, portfolio reviews, client presentations, and stakeholder engagements, ensuring timely execution and follow-up of agreed actions.
- Ensure the prompt resolution of client queries, complaints, and service issues, while maintaining effective service delivery controls and escalation processes.
- Oversee the preparation and delivery of client reports, portfolio updates, renewal documentation, proposals, and management reports within agreed timelines.
- Coordinate cross-functional support from Operations, Investments, Finance, Compliance, and other internal teams to ensure seamless implementation of solutions, regulatory compliance, and achievement of portfolio performance objectives

Jubilee Life Brand

- Ensuring effective public relations and enhancing the company's corporate image with all stakeholders and partners.

Governance and Compliance

- Ensure adherence and compliance with all applicable laws, regulations, industry standards, investment mandates, and internal policies governing Pension and Group Life business operations.
- Provide oversight and guidance to pension trustees to support effective governance, fulfilment of fiduciary responsibilities, and compliance with regulatory requirements.
- Oversee adherence to Investment Policy Statements (IPS), approved investment mandates, and other scheme governance frameworks.
- Ensure the timely preparation and submission of statutory returns, regulatory filings, and compliance reports in line with prescribed requirements.
- Maintain effective relationships with regulators, auditors, custodians, trustees, and other stakeholders to support governance, compliance, and audit processes.
- Identify and mitigate operational, financial, regulatory, and reputational risks through effective risk management practices and robust internal controls

Leadership and People

- Provide transformational leadership to meet stakeholder expectations.
- Lead and guide the retention team to deliver on strategy and objectives.
- Foster a corporate culture of ethical practices and good corporate citizenship.
- Ensure adequate recruitment, development, and performance evaluation of the customer retention staff.
- Conduct regular team meetings and training sessions to enhance skills and knowledge.

Key Competencies

1. Strong Knowledge of Pension and Group Life Business. Understands the intricacies of the sector, including products, processes, and regulatory compliance.
2. Client Centricity: Ability to anticipate and respond to client needs, delivering exceptional service and tailored investment solutions.
3. Leadership. Demonstrates strong leadership qualities to effectively manage and motivate the retention team.
4. Communication and Stakeholder Management. Excellent interpersonal and communication skills to interact with internal and external stakeholders effectively.

5. Risk Management. Proficient in identifying and mitigating strategic and operational risks to ensure retention and growth of our clients
6. Strategic Thinking. Ability to think strategically and contribute to the development of retention strategies aligned with organizational goals.
7. Financial Acumen: Deep understanding of portfolio management, financial analysis, pension fund performance measurement and loss ratios. Demonstrated track record of driving revenue and profit growth through strategic initiatives.
8. Business Acumen. Possesses a good understanding of business operations and how customer decisions impact overall performance.

Academic Background & Relevant Qualifications

- Bachelor's degree in Finance, Economics, Actuarial Science, Business Administration, Insurance, or a related field from a recognized institution.
- Master's degree in Finance, Business Administration, Economics, or a related field will be an added advantage.
- Professional qualification in Investments or Finance such as CFA, CISI, CPA, is an added advantage
- Relevant insurance or pensions qualification such as CII, IIK, LOMA, or equivalent will be an added advantage.
- Minimum of 8-10 years' experience in the financial services industry, with significant exposure to Pensions, Group Life Insurance or Corporate Relationship Management.
- Proven experience in managing institutional client portfolios, customer retention and relationship management.
- Proven track record in driving client retention, portfolio growth, stakeholder engagement and service excellence.
- Strong understanding of pensions and insurance regulations, governance, risk management and corporate account management.

If you are qualified and seeking an exciting new challenge, please apply via
Recruitment@jubileekenya.com
quoting the Job Reference Number and Position by 10th August 2026.
Only shortlisted candidates will be contacted.