Job Ref. No: JLIL 438

Position: Branch Administrator (Nakuru Branch)

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.

We currently have an exciting career opportunity for a **Branch Administrator** within **Jubilee Life Insurance Limited.** The position holder will report to the **Team Leader- Branches** and will be based in our Nakuru Branch.

Role Purpose

The role holder will be responsible for providing operational and administrative support to the Agency sales force, intermediaries, and customers, ensuring efficient end-to-end business processing and service delivery. The role supports new business acquisition, policy administration, underwriting coordination, customer onboarding, KYC management, policy servicing, and persistency initiatives. The position serves as a key liaison between agents, intermediaries, customers, and internal support functions, ensuring timely resolution of queries, accurate maintenance of customer records, compliance with regulatory requirements, and proactive follow-up of outstanding business. The role contributes to advisor productivity, intermediary satisfaction, customer experience, policy retention, business growth, and overall sales performance within the agency distribution channel.

Main Responsibilities

Customer Service & Operational Excellence

- Serve as the primary point of contact for walk-in customers and agents, providing timely and professional assistance.
- Provide accurate information on insurance products, policies, premiums, claims, benefits, and pension services.
- Resolve customer and agent inquiries and complaints within agreed turnaround times, escalating complex cases where necessary.
- Investigate service issues, follow up on outstanding requests, and support service recovery initiatives.
- Maintain a professional, clean, and welcoming branch service environment.
- Identify opportunities to improve customer satisfaction, service delivery, and operational efficiency.

Policy Servicing & Business Support.

- Process policy-related transactions, including endorsements, renewals, reinstatements, and cancellations, in accordance with established procedures.
- Receive, verify and submit new business applications and support documentation, following up on outstanding requirements and pending underwriting decisions with the relevant teams.
- Support pension servicing and administration by coordinating documentation, responding to member inquiries and following up on outstanding transactions with the Pension Administration and Servicing teams.

- Collect, verify, update and maintain customer identification documents and KYC records in compliance with regulatory and internal requirements.
- Monitor missing or incomplete KYC documentation and coordinate follow-ups with customers and agents to ensure timely updates.
- Monitor lapsed policies, premium arrears and renewal requirements, collaborating with agents and customers to facilitate policy revival and improve persistency.
- Identify reasons for policy lapses, track revival efforts and escalate recurring trends or retention challenges for appropriate intervention.
- Maintain accurate customer, policy, and pension records in the relevant systems, ensuring proper documentation, confidentiality, and data integrity.
- Generate and issue policy statements, renewal notices, lapse notices, and arrears notifications, as applicable.
- Identify and escalate documentation discrepancies, compliance concerns, and outstanding operational issues to the relevant teams.

Communication & Client Engagement

- Maintain regular communication with customers and agents through calls, emails, and physical interactions.
- Communicate policy changes, premium adjustments, and service updates clearly and professionally.
- Educate customers on product features, benefits, and procedures.
- Promote self-service and digital platforms where applicable.
- Build strong relationships with customers and agents to enhance loyalty and retention.

Reporting, Analysis & Continuous Improvement

- Prepare periodic reports on customer inquiries, complaints, outstanding service requests, underwriting applications, pension servicing, KYC compliance and policy persistency.
- Monitor pending transactions, turnaround times, lapsed policies and follow-up outcomes to identify service gaps.
- Analyse customer and operational data to identify trends, recurring issues, and opportunities for improvement.
- Document and escalate operational challenges, service delays and compliance exceptions to the relevant teams.
- Recommend and support process improvements aimed at enhancing service delivery, data accuracy, and operational efficiency.

Sales Support & Business Growth

- Identify cross-selling and up-selling opportunities and refer to potential leads to the relevant sales and relationship management teams.
- Support branch marketing activities, customer activation initiatives, and business development campaigns.
- Collaborate with agents to strengthen customer engagement, improve retention and support portfolio growth.
- Promote Jubilee Group products and services in line with approved product information and communication guidelines.
- Contribute to branch business objectives through effective customer service, policy retention, and timely resolution of customer needs.

Corporate Governance, Compliance & Risk Management

- Apply established underwriting guidelines, policy administration procedures and internal controls when processing customer applications and requests.
- Ensure compliance with Insurance Regulatory Authority (IRA) requirements, applicable Kenyan laws, pension-related regulatory requirements, and company policies.
- Adhere to KYC, customer due diligence, anti-fraud, anti-money laundering and data protection requirements applicable to the role.
- Maintain complete, accurate and audit-ready customer, policy, pension and KYC records.
- Identify and promptly report operational, regulatory and compliance risks to the appropriate teams.
- Support internal and external audits, compliance reviews and implementation of risk mitigation measures.
- Ensure customer information is handled confidentially and shared only through authorized channels.

People & 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

1. Customer Focus: Demonstrates a strong commitment to customer satisfaction and timely service delivery.
2. Communication: Communicates clearly and professionally with customers, agents, and colleagues.
3. Problem-Solving: Identifies service challenges and implements appropriate solutions within established procedures.
4. Attention to Detail: Maintains accurate records and verifies documentation to minimize errors and compliance gaps.
5. Collaboration: Works effectively with agents and internal departments to resolve customer and operational issues.
6. Planning & Organization: Prioritizes customer requests, monitors outstanding transactions, and meets agreed turnaround times.
7. Analytical Thinking: Interprets operational reports and identifies trends affecting service delivery and policy persistency.
8. Integrity & Confidentiality: Handles customer information responsibly and adheres to ethical and regulatory requirements.
9. Adaptability: Responds effectively to changing customer needs, operational demands, and business priorities.
10. Initiative & Accountability: Proactively follows up on pending requests, identifies retention opportunities, and takes ownership of assigned responsibilities.

Academic Background & Relevant Qualifications

- Bachelor's degree in Insurance, Finance, Business or any other related course.
- Diploma in Insurance will be an added advantage.
- Minimum of 1–2 years' experience in customer service, insurance operations, policy administration, or a related role.
- Experience handling customer inquiries, complaints and policy servicing transactions.
- Exposure to underwriting support, pension administration, KYC management, or policy retention processes will be an added advantage.
- Experience working with insurance systems, customer databases, and operational reporting tools will be beneficial.

If you are qualified and seeking an exciting new challenge, please apply via Recruitment@jubileekenya.com quoting the Job Reference Number and Position by 13th November 2026.
Only shortlisted candidates will be contacted.