THE DONALDSON TRUST

The National Body for Neurodiversity

Customer Executive

Role Profile

November 2026



About The Donaldson Trust

As the National Body for Neurodiversity, we are a catalyst for change. We believe there is a genuine opportunity to change society for better. We aim to be at the forefront of driving this change, and make a difference with, and for, neurodivergent people.

We're a team filled with caring and talented individuals who work together to create positive change. You will be part of a team dedicated to giving neurodivergent people a voice and contributing to our vision of a society in which neurodivergent people are understood, accepted, treated fairly and valued.

Our Values

We share what we know

We share our knowledge so that more neurodivergent people can thrive.

We connect people

We build partnerships and collaborations to increase opportunity and inclusion for neurodivergent individuals. We achieve more together.

We remove barriers

We work together to look for win-win solutions. We make it easier for neurodivergent people to feel accepted, valued and for their voice to be heard.



The Role: Customer Executive

Job Purpose

To take ownership of customer enquiries and activity from initial contact through to completion, ensuring actions are progressed proactively, opportunities for ongoing engagement are identified and followed up, and customers receive an excellent experience.

The Customer Executive will provide high-quality customer service, coordination and administrative support for the Connect training and consultancy service, acting as a key point of contact for customers, trainers and learners. The role is responsible for managing enquiries, coordinating training and consultancy activity, maintaining accurate systems and records, and delivering effective customer communications to support the efficient day-to-day operation and growth of Connect.

Working closely with the Head of Connect, the postholder will coordinate customer engagement activities, maintain customer and service data, contribute to service development and reporting, and support the generation of repeat business and customer retention. The postholder will demonstrate a commitment to excellent customer service, continuous improvement and the values of The Donaldson Trust.

Key Responsibilities

Customer Engagement and Relationship Support

- Maintain positive relationships with customers and key stakeholders through regular communication and follow-up activity.
- Support Head of Connect to identify opportunities for ongoing engagement, contract renewal, repeat business and upselling of additional training services
- Coordinate onboarding and communications for new customers, ensuring a positive and responsive customer experience.
- Act as the first point of contact for enquiries relating to training, consultancy, workshops, keynote speaking and advisory services, coordinating responses and escalating where appropriate.
- Take ownership of proposals, quotations and customer enquiries, proactively following up actions to maintain momentum, progress opportunities and ensure timely resolution.



Training and Service Coordination

- Coordinate training, consultancy and event bookings, scheduling and administration, including attendance records, evaluations and supporting documentation.
- Prepare joining instructions, training materials and participant communications.
- Ensure trainers and participants have the resources and information required for successful delivery.
- Coordinate the collection and collation of feedback and evaluation data following training and events.
- Support the development and costing of bespoke customer proposals in collaboration with the Head of Connect.
- Maintain accurate customer, activity and pipeline information within CRM and related systems.

Quality Assurance, Reporting and Service Development

- Maintain and update service pipeline, monitoring activity, engagement and progress.
- Gather and collate data relating to customer engagement, growth, outcomes and impact.
- Collate customer feedback and service data, compile reports that enable evaluation and service improvement activity.
- Support the implementation of service improvements and process updates as agreed with the Head of Connect.



General

- Attend networking events, conferences and stakeholder activities as required.
- Champion neuro-inclusion and organisational values in all aspects of the role.
- Ensure compliance with organisational policies, procedures and relevant legislation.
- Participate in professional learning, personal development and continuous improvement activity.
- Undertake any other duties reasonably requested by the line manager.
- Takes responsible care for personal and others' safety by following procedures, reporting risks and incidents, and contributing to a positive health and safety culture.

Please note this list of duties is not exhaustive.

About You

Below are the key qualifications, experience and knowledge, and skills and attributes required for the role. Please note each criteria is assigned as **Essential** or **Desirable**.

Qualifications

- Relevant qualification or substantial equivalent experience in relationship management, administration, business support, customer service, events, project coordination or learning and development — **Essential**
- Ability to travel to meetings, events and training delivery locations where required — **Desirable**

Experience and Knowledge

- Experience in a customer service or operational support role — **Essential**
- Experience coordinating projects, training events or activities — **Essential**
- Experience delivering excellent customer service and managing stakeholder relationships in a professional service, consultancy or sales environment — **Essential**
- Experience maintaining databases, CRM systems and administrative records — **Essential**
- Experience managing customer enquiries or service requests through to resolution, maintaining high levels of customer satisfaction — **Essential**

• Experience supporting financial administration processes including invoicing and payment tracking	**Essential**
• Experience managing multiple priorities and working to deadlines	**Essential**
• Understanding of inclusive practice, accessibility and customer needs	**Essential**
• Knowledge and awareness of data protection, confidentiality and GDPR requirements	**Essential**
• Experience collating, analysing and reporting on data and service activity	**Desirable**
• Knowledge and understanding of neurodiversity and reasonable adjustments	**Desirable**
• Experience supporting digital content and resources	**Desirable**

Skills and Attributes

• Professional and Proactive; takes ownership of enquiries, commitments and follow-up actions, ensuring opportunities are progressed and customers receive a responsive, high-quality service	**Essential**
• Dependable; demonstrates consistency, reliability and accountability, building trust with colleagues and stakeholders	**Essential**
• Collaborative; committed to working positively with colleagues, trainers, partners and stakeholders to deliver excellent outcomes	**Essential**

• Curious; demonstrates willingness to learn, develop new skills and continuously improve processes and services	**Essential**
• Adaptable; responds positively and flexibly to changing priorities and operational requirements	**Essential**
• Excellent organisational, coordination and administrative skills	**Essential**
• Excellent communication and relationship-building skills, with the ability to engage professionally with a range of customers and stakeholders.	**Essential**
• Strong attention to detail and accuracy	**Essential**
• Ability to work independently and use initiative	**Essential**
• Ability to identify issues and escalate appropriately.	**Essential**
• Competent in the use of Microsoft 365, CRM systems, databases and online collaboration platforms	**Essential**
• Ability to handle sensitive and confidential information professionally	**Essential**
• Commitment to the values, vision and purpose of the Donaldson Trust	**Essential**

Please note this list of duties is not exhaustive.



Remuneration:

Salary: £28,570 pro rata, per annum

Hours: Full time, 35 hours per week (1 FTE)

Location: Linlithgow campus / Hybrid

Pension: AEGON (up to 12% employer contribution)

Benefits:

- Life Assurance Scheme (three times the salary)
- Employee Assistance Programme
- Health Cash Plan
- Doctorline
- Colleague Discount Scheme
- Family Friendly Policies
- Strong commitment to learning and development

To Apply:

To apply, please complete an online application via our website:

https://www.donaldsons.org.uk/application-form/

If you would like to discuss the role further, have any questions, or would like any assistance with your application, please contact us on people@donaldsons.org.uk and we would be happy to help.

Closing date: **Monday 7th December 2026**

Interviews: **w/c 14th December 2026**

