

LIVINGSTON 2024

Serving our customers

Introducing our personas

Version: May 2024



FOR ALL EMPLOYEES

MEET OUR PERSONAS



SMALL BUSINESS
OWNER



LOGISTICS
EXECUTIVE



PROCUREMENT
EXECUTIVE



SUPPLY CHAIN
EXECUTIVE



FINANCE
EXECUTIVE



COMPLIANCE
EXECUTIVE

SMALL BUSINESS OWNER

Small business owners have many responsibilities, including:

Business planning: Creating a business plan and strategy that determines the company's direction and how to get there

Marketing and sales: Promoting products or services, attracting customers, and generating revenue

Legal tasks: Handling legal and compliance responsibilities, including government risk and compliance regulations

Financials: Keeping track of income and expenses, and accurately reporting business financials when tax season rolls around

Customer service: Offering excellent customer service to build relationships with clients and increase sales and repeat customers

Staffing and management: Organizing and managing the business, including identifying hiring and HR needs, training the team, and overseeing the team



SMALL BUSINESS OWNER

Key wants: Product that combines brokerage and freight without the disconnect or need for multiple points of contact. Fast responses to delays and work with team that is familiar with account and products they ship.

Goals:

1. Partners who are proactive vs. just crisis mode
2. Increase revenue and streamline costs
3. Reduce cost to serve customers
4. Better visibility and control of the processes

Challenges:

1. Meeting budgetary requirements
2. Finding partners for long term vs. quick fixes
3. Ineffective processes
4. Lack time to be strategic

Common customs concerns:

1. Delays
2. Documentation
3. Communication
4. Tracking

Needs and preferences for vendors:

1. Proactive customer service
2. Better pricing
3. Bundled offering
4. Prefer emails and relevant webinars



Decision making:

1. Primary decision maker
2. Collaborates with logistics and operations managers
3. 0–3 months acquisition period

Reasons they don't pick us:

1. Operational issues
2. Price
3. Technical system outage

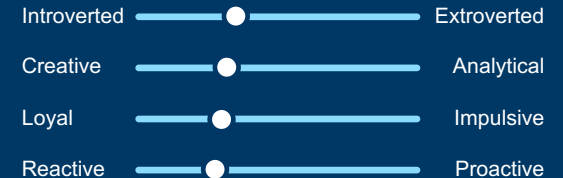
Tools / resources to make their life easier:

1. Effective workflow tools
2. Comprehensive training
3. Realtime collaboration features

Lines of business they ask about:

1. Customs brokerage
2. Freight forwarding
3. Compliance services

Personality traits:



Brands they admire:

Microsoft tools , LinkedIn, Amazon

SMALL BUSINESS OWNER

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Freight forwarding
3. Managed services

Key decision factors to decide to look for a new broker:

1. Service dissatisfaction
2. Costs don't offer effective ROI
3. Communication issues

Key information needed to select a customs broker:

1. Responsiveness
2. Proactive customer service
3. Price

Biggest concerns about changing brokers:

1. Disruption to operations
2. Competitive pricing
3. Uncertainty about service reliability

Possible rational or irrational fears:

1. Shipment delays
2. Diminishing profit margin
3. Penalty fees

Roles involved in selecting a vendor:

1. Logistics managers
2. Operations manager
3. Import/Export manager + Procurement/supply chain

Research methods they use to select a new service provider:

1. Online search engines
2. Company websites
3. Recommendations from colleagues, peers or clients

Challenges this role face when selecting a new supplier:

1. Meeting budgetary requirements
2. Assessing communication and responsiveness
3. Change management

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Lack of exec buy-in + Lack of product fit

The role this position plays in selecting a customs broker:

Decision maker

Typical acquisition timeline:

0-3 months

Interest in bundled offerings:

Yes

SMALL BUSINESS OWNER

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Meeting budgetary requirements
2. Assessing communication and responsiveness capabilities
3. Applicable regulatory compliance expertise

Key decision factors why this role would consider another broker:

1. Service dissatisfaction
2. Costs don't offer effective ROI
3. Communication issues

Research methods they use to select a new service provider:

1. Online search engines
2. Company websites
3. Recommendations from colleagues/peers/clients

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Regulatory services
3. Tailored solutions + portfolio of services + proactive support

Common customs-related issues they typically face:

1. Customs delays
2. Incorrect documentation
3. Shipping cost issues

Biggest concerns about changing brokers:

1. Disruption to operations
2. Competitive pricing
3. Potential delays to clearances

Ranked understanding of our product and services:

1. Customs brokerage
2. Freight forwarding
3. Managed services

Common issues they can resolved independently using our digital platform:

1. Shipment tracking + Billing and payment
2. Document creation
3. Account management

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Technical system outages
3. Competitive offering

Top 3 daily responsibilities:

1. Communicate with suppliers and vendors for updates and issues
2. Prepare shipments and documentations
3. Track shipments and communicate with customers

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Exec buy-in + products and services don't fit + delivery requirements

Their possible rational or irrational fears:

1. Shipment delays
2. Diminishing profit margins
3. Penalty fees

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Respond quickly and effectively via approved communication channels
3. Meet internally on how to troubleshoot the problem

What we should know but didn't ask:

1. They are looking for active partners who can guide them
2. They are novices and don't know where to start
3. Less interested in automation but rather human support

Their typical acquisition timeline:

0-3 months

SMALL BUSINESS OWNER

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. Document competition service
2. An assigned team who is familiar with their business
3. Guidance through process as knowledge is limited

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Billing and payment
3. Document creation

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Regulatory services
3. Tailored solutions

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Working with partners than empower their career
3. Increase revenue and streamline costs

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Common customs-related issues they typically face:

1. Customs delays
2. Incorrect documentation
3. Shipping cost issues

Their company business goals:

1. Improve best practices
2. Increase revenue and streamline costs
3. Find partners who compliment business

Their company business challenges:

1. Inefficient processes
2. Erratic supply chain costs
3. Lack of awareness of trade program benefits

Top 3 daily responsibilities:

1. Prepare documentation and keep updated on customs changes
2. Sales, customer service and finances
3. Monitor and manage issues like incorrect paperwork or billing

Their company technology goals:

1. Improve task efficiencies and accuracy
2. Reduce cost to serve customers
3. Visibility to their business

Their company technology challenges:

1. Existing technology is not used to its potential
2. Challenging to gain tech adoption by team
3. Hard to implement new processes

What we should know but didn't ask:

1. Typically, novice and require a lot of support
2. Sometimes lack knowledge of their responsibilities as importer of record
3. They often aren't aware of the breath of services we provide

Their company process goals:

1. Increase efficiency in supply chain
2. Visibility and control of the process
3. Optimize customs processing

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Antiquated, manual processes that result in fines, suspensions and more.
3. Lack centralized data source. Manual process for government regulations

SMALL BUSINESS OWNER

MARKETING TEAM



Key information needed to select a customs broker:

1. Responsiveness
2. Proactive customer service
3. Price

Roles involved in selecting a vendor

1. Operations + Logistics manager
2. Procurement/supply chain manager
3. Import/export manager

The role this position plays in selecting a vendor:

- Decision maker

Interest in bundled offerings:

- Yes

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Facebook
3. Industry specific forums

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Working with partners than empower their career
3. Increase revenue and streamline costs

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Professional networking they participate in:

1. Member of online groups like LinkedIn
2. Attend webinars
3. Follow competitor businesses and service providers

Their company business goals:

1. Improve best practices
2. Increase revenue and streamline costs
3. Find partners who compliment business

Their company business challenges:

1. Inefficient processes
2. Erratic supply chain costs
3. Lack of awareness of trade program benefits

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2. Antiquated, manual processes that result in fines, suspensions and more.
3. Lack centralized data source. Manual process for government regulations

LOGISTICS EXECUTIVE

Logistics executives are responsible for the planning, organization, and direction of supply chain and logistics operations. Their responsibilities include:

Inventory management: Maintaining enough inventory to meet customer demands while minimizing carrying costs

Budget management: Budgeting for staffing, shipping, facility, and external supplier costs

Compliance: Ensuring the company follows all laws and regulations regarding the transportation of goods

Customer service: Building and maintaining relationships with customers

Transportation: Overseeing the transportation of goods to consumers in a timely manner, including coordinating the storage and distribution of goods from manufacturing locations to their final location.



LOGISTICS EXECUTIVE

Key wants: One stop solution combining freight and customs brokerage with compliance, a dedicated team who is focused on long term business success and documentation management product.

Goals:

1. Partners that empower their careers
2. Increase revenue and streamline costs
3. Increase efficiency in supply chain
4. Better visibility and control of the process

Challenges:

1. Finding suppliers for long term vs. quick fixes
2. Lack of investment/budget
3. Lack of time to assess current processes
4. Data sources challenge

Common customs concerns:

1. Delays
2. Erratic shipping costs
3. Documentation accuracy and management
4. Communication issues

Needs and preferences for vendors:

1. Responsiveness
2. Better pricing
3. Bundled offering
4. Streamlined reporting systems



Decision making:

1. Influencer
2. Close collaboration with procurement manager
3. 4–6 months acquisition period

Reasons they don't pick us:

1. Afraid of change
2. Price
3. Operational issues

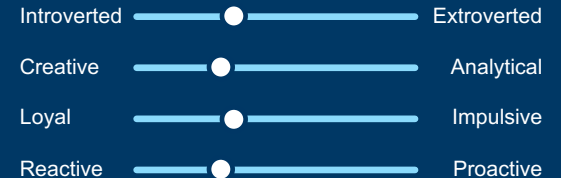
Tools / resources to make their life easier:

1. Effective workflow tools
2. Streamlined reporting systems
3. Access to industry information

Lines of business they ask about:

1. Freight forwarding
2. Customs brokerage
3. Managed services

Personality traits:



Brands they admire:

LinkedIn, Microsoft tools, Amazon

LOGISTICS EXECUTIVE

SALES TEAM



Ranked understanding of our product and services:

1. Freight forwarding
2. Customs brokerage
3. Managed services

Key decision factors to decide to look for a new broker:

1. Service dissatisfaction
2. Communication issues
3. Cyber security issues

Key information needed to select a customs broker:

1. Responsiveness
2. Price
3. Proactive customer service

Biggest concerns about changing brokers:

1. Potential delays to clearances
2. Uncertainty about service reliability
3. Disruption to operations

Possible rational or irrational fears:

1. Shipment delays
2. Diminishing profit margin
3. Forecasting errors

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers, CFO and business owner

Research methods they use to select a new service provider:

1. Online search engines
2. Company websites
3. Online reviews and ratings

Challenges this role face when selecting a new supplier:

1. Meeting budgetary requirements
2. Assessing communication and responsiveness
3. Change management

Reasons not to select Livingston:

1. Afraid of change
2. Price + lack of delivery requirements
3. Lack of exec buy-in

The role this position plays in selecting a customs broker:

Influencer

Typical acquisition timeline:

4-6 months

Interest in bundled offerings:

Yes

LOGISTICS EXECUTIVE

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Meeting budgetary requirements
2. Assessing communication and responsiveness capabilities
3. Change management

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Tailored solutions
3. Competitive pricing

Ranked understanding of our product and services:

1. Freight forwarding
2. Customs brokerage
3. Managed services

Top 3 daily responsibilities:

1. Dealing with delays and urgent shipments
2. Inventory management
3. Scheduling and document preparation

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Meet internally on how to troubleshoot the problem
3. Respond quickly and effectively via approved communication channels

Key decision factors why this role would consider another broker:

1. Service dissatisfaction
2. Communication issues
3. Cyber security issues

Common customs-related issues they typically face:

1. Customs delays
2. Incorrect documentation
3. Shipping cost issues

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Account management
3. Document creation

Reasons that stop them from selecting us:

1. Afraid of change
2. Price
3. Lack of delivery requirements

What we should know but didn't ask:

1. Stressed and very busy
2. Driven by cost and customer service. Compliance is secondary
3. Very organized, good at networking and willing to test services

Research methods they use to find a service provider:

1. Online search engines
2. Company websites
3. Online reviews and ratings

Biggest concern they face about changing brokers:

1. Potential delays to clearances
2. Uncertainty about service reliability
3. Disruption to operations

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Pricing issues
3. Technical system outages

Their possible rational or irrational fears:

1. Shipment delays
2. Diminishing profit margins
3. Forecasting errors

Their typical acquisition timeline:

4-6 months

LOGISTICS EXECUTIVE

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. One stop shipping solution combining freight, customs and compliance
2. Robust trade management platform
3. Documentation end-2-end creation service

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Account management
3. Document creation

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Tailored solutions
3. Competitive pricing

Their individual professional goals:

1. Working with partners than empower their career
2. Partners that are proactive vs. just crisis mode
3. Increase strategic influence with leadership

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Common customs-related issues they typically face:

1. Customs delays
2. Incorrect documentation
3. Shipping cost issues

Their company business goals:

1. Increase revenue and streamline costs
2. Work with partners that more than pay for their costs in savings/profits
3. Find partners who compliment business

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Top 3 daily responsibilities:

1. Dealing with delays and urgent shipments
2. Inventory management
3. Scheduling and document preparation

Their company technology goals:

1. Visibility to their business
2. Reduce cost to serve customers
3. Improve task efficiencies and accuracy

Their company technology challenges:

1. Existing technology is not used to its potential
2. Lacks key features
3. Setting up effective reports

What we should know but didn't ask:

1. Compliance is a low priority. Only driven by cost and customer service
2. They are busy and focused on solution that save them time
3. Depends on the broker to inform them in a proactive manner

Their company process goals:

1. Increase efficiency in supply chain
2. Visibility and control of the process
3. Improve strategic planning

Their company process challenges:

1. Lack centralized data source. Manual process for government regulations
2. Lack of time to step back and assess current processes
3. Invest in change management processes

LOGISTICS EXECUTIVE

MARKETING TEAM



Key information needed to select a customs broker:

1. Responsiveness
2. Price
3. Proactive customer service

Roles involved in selecting a vendor

1. Procurement/Supply Chain Managers + Logistics manager
2. Import/export manager + Finance leader + Business owner
3. Compliance officer

The role this position plays in selecting a vendor:

- Influencer / Recommender

Interest in bundled offerings:

- Yes

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Industry specific forums
3. Company blogs

Their individual professional goals:

1. Working with partners than empower their career
2. Partners that are proactive vs. just crisis mode
3. Increase strategic influence with leadership

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Professional networking they participate in:

1. Follows competitor businesses and service providers
2. Member of online groups like LinkedIn
3. Member of organization or associations

Their company business goals:

1. Increase revenue and streamline costs
2. Work with partners that more than pay for their costs in savings/profits
3. Find partners who compliment business

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Top 3 daily responsibilities:

1. Dealing with delays and urgent shipments
2. Inventory management
3. Scheduling and document preparation

Their company technology goals:

1. Visibility to their business
2. Reduce cost to serve customers
3. Improve task efficiencies and accuracy

Their company technology challenges:

1. Existing technology is not used to its potential
2. Lacks key features
3. Setting up effective reports

What we should know but didn't ask:

1. Actively listen and document their concerns
2. Meet internally on how to troubleshoot the problem
3. Respond quickly and effectively via approved communication channels

Their company process goals:

1. Increase efficiency in supply chain
2. Visibility and control of the process
3. Improve strategic planning

Their company process challenges:

1. Lack centralized data source. Manual process for government regulations
2. Lack of time to step back and assess current processes
3. Invest in change management processes

PROCUREMENT EXECUTIVE

Procurement executives are responsible for making sure that a company purchases products and services ethically, in a timely manner, and at a cost-effective price. They may also be responsible for:

Sourcing: Devising and using strategies to find profitable suppliers

Evaluating suppliers: Researching potential suppliers and making sure they can meet the company's quality and cost requirements

Negotiating: Securing advantageous terms with external vendors

Examining contracts: Examining and testing existing contracts

Tracking metrics: Tracking and reporting key functional metrics to reduce expenses and improve effectiveness

Collaborating: Collaborating with key people to ensure clarity of the company's specifications and expectations



PROCUREMENT EXECUTIVE

Key wants: Stay informed on regulatory changes, integration with ERP to create shipping docs and consolidated view of entire supply chain including costs, quality, timings and performance.

Goals:

1. Increase revenue and streamline costs
2. Increase budget for department
3. Increase efficiency in supply chain
4. Reduce cost to serve customers

Challenges:

1. Customs expertise, budgetary needs, and investment.
2. Erratic supply chain costs
3. Underutilization of existing technology
4. Lack of time to be strategic

Common customs concerns:

1. Staying compliant
2. Duty disputes and incorrect documentations
3. Ineffective brokerage prices
4. Tracking and delays

Needs and preferences for vendors:

1. Price that offer ROI
2. Proactive customer service
3. Bundled offering
4. Prefers webinars and in-person workshops



Decision making:

1. Decision maker and collaborator in vendor selection
2. Consult with supply chain, online searches + websites
3. Known reputable brand

Reasons they don't pick us:

1. Price
2. Fear of change
3. Lack of executive buy-in

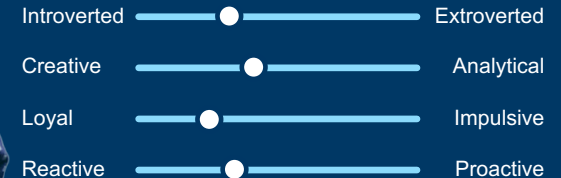
Tools / resources to make their life easier:

1. Integrated analytics
2. Streamlined reporting systems
3. Access to industry information

Lines of business they ask about:

1. Customs brokerage
2. Freight forwarding
3. Compliance services

Personality traits:



Brands they admire:

SAP, Oracle, LinkedIn, Microsoft tools

PROCUREMENT EXECUTIVE

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Key decision factors to decide to look for a new broker:

1. Costs don't offer effective ROI
2. Competitive offering
3. Service dissatisfaction

Key information needed to select a customs broker:

1. Price
2. Responsiveness
3. Known reputable brands

Biggest concerns about changing brokers:

1. Competitive pricing
2. Fear of cost increases
3. Disruption to operations

Possible rational or irrational fears:

1. Diminishing profit margin
2. Forecasting errors
3. Economic instability

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers, CFO and business owner

Research methods they use to select a new service provider:

1. Recommendation from colleagues, peer or clients
2. Online search engines
3. Company websites

Challenges this role face when selecting a new supplier:

1. Meeting budgetary requirements
2. Geographic coverage of knowledge and services
3. Change management

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Lack of exec buy-in

The role this position plays in selecting a customs broker:

Decision maker

Typical acquisition timeline:

4-12 months

Interest in bundled offerings:

Yes

PROCUREMENT EXECUTIVE

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Meeting budgetary requirements
2. Geographic coverage of knowledge and services
3. Change management

If we disappeared tomorrow, this role would miss:

1. Diversified portfolio of services
2. Proactive support
3. Industry expertise

Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Top 3 daily responsibilities:

1. Negotiating costs and preparing contracts
2. Risk management including supply chain disruptions and laws
3. Timely clearance of goods

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Build strategy, define owners, and execute
3. Respond quickly and effectively via approved communication channels

Key decision factors why this role would consider another broker:

1. Costs don't offer effective ROI
2. Competitive offerings
3. Service dissatisfaction

Common customs-related issues they typically face:

1. Compliance challenges
2. Customs delays
3. Incorrect documentation

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Record keeping
3. Document creation

Reasons that stop them from selecting us:

1. Price
2. Afraid of change
3. Lack of executive buy-in

What we should know but didn't ask:

1. Cost savings can compete with investments into custom brokerage
2. Customs brokerage is a smaller part of their list of responsibilities
3. Can be disconnected from brokerage operations

Research methods they use to find a service provider:

1. Recommendations from colleagues/peers/clients
2. Online search engines
3. Company websites

Biggest concern they face about changing brokers:

1. Fear of cost increases
2. Competitive pricing
3. Disruption to operations

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Pricing issues
3. Technical system outages

Their possible rational or irrational fears:

1. Diminishing profit margins
2. Forecasting errors
3. Economic instability

Their typical acquisition timeline:

4-12 months

PROCUREMENT EXECUTIVE

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. One stop shipping solution combining freight, customs and compliance
2. Robust trade management platform
3. Documentation end-2-end creation service

If we disappeared tomorrow, this role would miss:

1. Diversified portfolio of services
2. Industry expertise
3. Regulatory services

Common customs-related issues they typically face:

1. Compliance challenges
2. Customs delays
3. Incorrect documentation

Top 3 daily responsibilities:

1. Sourcing: Negotiate contracts, manage relationships and monitor results
2. Finances: Analyze spending, negotiate pricing & launch saving programs
3. Risk management: monitor disruptions, laws, quality issue and pricing

What we should know but didn't ask:

This role involves acquiring goods and services from external suppliers across various aspects of the supply chain, including cost, quality, delivery times, supplier relationships, and overall supply chain performance. Ultimately, cost saving is a highly priority over a focus on compliance.

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Record keeping
3. Document creation

Their individual professional goals:

1. Increase budget for department
2. Partners that are proactive vs. just crisis mode
3. Increase strategic influence with leadership

Their company business goals:

1. Increase revenue and streamline costs
2. Find partners who compliment business
3. Work with partners that more than pay for their costs in savings/profits

Their company technology goals:

1. Reduce cost to serve customers
2. Improve task efficiencies and accuracy
3. Visibility to their business

Their company process goals:

1. Increase efficiency in supply chain
2. Improve strategic planning
3. Visibility and control of the process

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Their company technology challenges:

1. Hard to implement new processes at client side
2. Existing technology is not used to its potential
3. Challenging to gain tech adoption by client

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Lack agility to adapt training to respond to market changes
3. Lack centralized data source. Manual process for government regulations

PROCUREMENT EXECUTIVE

MARKETING TEAM



Key information needed to select a customs broker:

1. Price
2. Responsiveness
3. Known reputable brands

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Industry specific forums
3. Company blogs

Professional networking they participate in:

1. Member of online groups like LinkedIn
2. Member of organization or associations
3. Attends webinars and major conferences

Top 3 daily responsibilities:

1. Sourcing: Negotiate contracts, manage relationships and monitor results
2. Finances: Analyze spending, negotiate pricing & launch saving programs
3. Risk management: monitor disruptions, laws, quality issue and pricing

What we should know but didn't ask:

This role involves acquiring goods and services from external suppliers across various aspects of the supply chain, including cost, quality, delivery times, supplier relationships, and overall supply chain performance. Ultimately, cost saving is a highly priority over a focus on compliance.

Roles involved in selecting a vendor

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers, CFO and business owner

Their individual professional goals:

1. Increase budget for department
2. Partners that are proactive vs. just crisis mode
3. Increase strategic influence with leadership

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Their company process goals:

1. Increase efficiency in supply chain
2. Improve strategic planning
3. Visibility and control of the process

The role this position plays in selecting a vendor:

- Decision maker

Interest in bundled offerings:

- Yes

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Their company technology challenges:

1. Hard to implement new processes at client side
2. Existing technology is not used to its potential
3. Challenging to gain tech adoption by client

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Lack agility to adapt training to respond to market changes
3. Lack centralized data source. Manual process for government regulations

SUPPLY CHAIN EXECUTIVE

A supply chain executive is responsible for planning and directing the organization's supply chain policies, objectives, and initiatives. Some of the responsibilities of a supply chain executive include:

Identifying acquisition targets: Improving the supply chain through acquisition targets

Creating and refining supply chain procedures: Creating and refining supply chain procedures

Improving manufacturing processes: Improving manufacturing processes

Applying lean management principles: Applying lean management principles to supply chain operations

Inventory management: Overseeing and controlling the movement of goods and products, from the point of purchase or production, to the point of sale

Sourcing and procurement: Deciding if the company wants to perform all the exercises internally or if it desires to get it done by any other independent firm



SUPPLY CHAIN EXECUTIVE

Key wants: One platform to streamline the entire supply chain, world class data analytics, automation for accounts payable and AI technology for tasks like classification.

Goals:

1. Find proactive partners vs. there for crisis
2. Increase revenue and streamline costs
3. Visibility to their business
4. Leverage data to Increase efficiency in supply chain

Challenges:

1. Lack of investment in customs expertise
2. Erratic supply chain costs
3. Tech adoption by clients
4. Geographic reach for services and knowledge

Common customs concerns:

1. Duty disputes and incorrect documentations
2. Service dissatisfaction
3. Billing and payment
4. Shipment tracking and record keeping

Needs and preferences for vendors:

1. Proactive and timely support
2. Bundled offering
3. Webinars and in-person workshops/seminars
4. Customs and industry knowledge



Decision making:

1. Decision maker and collaborator in vendor selection
2. Work w/ supply Chain + logistics + online searches
3. Responsiveness

Reasons they don't pick us:

1. Fear of change
2. Credit terms

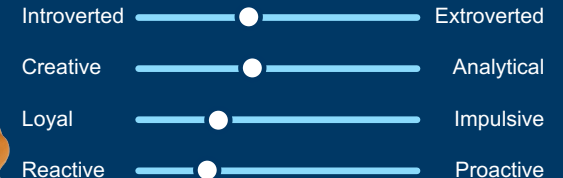
Tools / resources to make their life easier:

1. Streamlined reporting systems
2. Real-time internal collaboration tool
3. Efficient workflow tool

Lines of business they ask about:

1. Customs brokerage
2. Freight forwarding
3. Compliance services

Personality traits:



Brands they admire:

SAP, Microsoft tools, Oracle

SUPPLY CHAIN EXECUTIVE

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Biggest concerns about changing brokers:

1. Uncertainty about service reliability
2. Disruption to operations
3. Educating broker on needs and existing processes

Research methods they use to select a new service provider:

1. Recommendation from colleagues, peer or clients
2. Trade Shows and Conferences
3. Networking events

The role this position plays in selecting a customs broker:

Decision maker

Key decision factors to decide to look for a new broker:

1. Service dissatisfaction
2. Communication issues
3. Competitive offering

Possible rational or irrational fears:

1. Shipment delays
2. Economic instability
3. Penalty fees

Challenges this role face when selecting a new supplier:

1. Geographic coverage of knowledge and services
2. Technical compatibility with inhouse systems
3. Meeting budgetary requirements

Typical acquisition timeline:

7-12 months

Key information needed to select a customs broker:

1. Proactive customer service
2. Customs and industry knowledge
3. Responsiveness

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Product and/or services don't fit

Interest in bundled offerings:

Yes

SUPPLY CHAIN EXECUTIVE

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Geographic coverage of knowledge and services
2. Technical compatibility with inhouse systems
3. Meeting budgetary requirements

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Regulatory services
3. Proactive support and diversified portfolio of services

Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Top 3 daily responsibilities:

1. Monitor inventory levels to make sure they meet customer needs
2. Resolve logistical issues
3. Find ways to save money

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Respond quickly and effectively via approved communication channels
3. Build strategy, define owners, and execute

Key decision factors why this role would consider another broker:

1. Service dissatisfaction
2. Communication issues
3. Competitive offering

Common customs-related issues they typically face:

1. Tariff or duty disputes
2. Customs delays + Incorrect documentation
3. Compliance challenges

Common issues they can resolved independently using our digital platform:

1. Shipment tracking + Billing and payment
2. Document creation
3. Record keeping

Reasons that stop them from selecting us:

1. Price
2. Afraid of change
3. Products and/or services don't fit

What we should know but didn't ask:

1. Very intellectual and you need to know their business in depth
2. Focused more on freight and might not oversee customs
3. Very often a decision maker.

Research methods they use to find a service provider:

1. Recommendations from colleagues/peers/clients
2. Trade shows and conferences
3. Networking events

Biggest concern they face about changing brokers:

1. Uncertainty about service reliability
2. Disruption to operations
3. Educating broker on business needs and existing processes

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Technical system outages
3. Competitive offering

Their possible rational or irrational fears:

1. Shipment delays
2. Economic instability
3. Penalty fees

Their typical acquisition timeline:

7-12 months

SUPPLY CHAIN EXECUTIVE

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. One stop shipping solution combining freight, customs and compliance
2. Robust trade management platform
3. Documentation end-2-end creation service

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Regulatory services
3. Proactive support and diversified portfolio of services

Common customs-related issues they typically face:

1. Tariff or duty disputes
2. Customs delays + Incorrect documentation
3. Compliance challenges

Top 3 daily responsibilities:

1. Monitor inventory levels to make sure they meet customer needs
2. Resolve logistical issues
3. Find ways to save money

What we should know but didn't ask:

1. Very intellectual and you need to know their business in depth
2. Focused more on freight and might not oversee customs
3. Very often a decision maker.

Common issues they can resolved independently using our digital platform:

1. Shipment tracking + Billing and payment
2. Document creation
3. Record keeping

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Increase strategic influence with leadership
3. Working with partners that empowers their career

Their company business goals:

1. Increase revenue and streamline costs
2. Leverage data more effectively
3. Find partners who compliment business

Their company technology goals:

1. Visibility to their business
2. Improve task efficiencies and accuracy
3. Reduce cost to serve customers

Their company process goals:

1. Increase efficiency in supply chain
2. Improve strategic planning
3. Visibility and control of the process

Their individual professional challenges:

1. Lack of investment in customs expertise
2. Suppliers who focus on short term needs vs. strategic partnerships
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Their company technology challenges:

1. Existing technology is not used to its potential
2. Hard to implement new processes at client side
3. Challenging to gain tech adoption by client

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Invest in change management processes
3. Inconsistent usage across team

SUPPLY CHAIN EXECUTIVE

MARKETING TEAM



Key information needed to select a customs broker:

1. Proactive customer service
2. Customs and industry knowledge
3. Responsiveness

Roles involved in selecting a vendor

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers

The role this position plays in selecting a vendor:

- Decision maker

Interest in bundled offerings:

- Yes

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Company blogs
3. Industry specific forums

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Increase strategic influence with leadership
3. Working with partners that empowers their career

Their individual professional challenges:

1. Lack of investment in customs expertise
2. Suppliers who focus on short term needs vs. strategic partnerships
3. Limited role advancement path

Professional networking they participate in:

1. Attends webinars and major conferences
2. Member of organization or associations
3. Member of online groups like LinkedIn

Their company business goals:

1. Increase revenue and streamline costs
2. Leverage data more effectively
3. Find partners who compliment business

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Top 3 daily responsibilities:

1. Monitor inventory levels to make sure they meet customer needs
2. Resolve logistical issues
3. Find ways to save money

Their company technology goals:

1. Visibility to their business
2. Improve task efficiencies and accuracy
3. Reduce cost to serve customers

Their company technology challenges:

1. Existing technology is not used to its potential
2. Hard to implement new processes at client side
3. Challenging to gain tech adoption by client

What we should know but didn't ask:

1. Very intellectual and you need to know their business in depth
2. Focused more on freight and might not oversee customs
3. Very often a decision maker.

Their company process goals:

1. Increase efficiency in supply chain
2. Improve strategic planning
3. Visibility and control of the process

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Invest in change management processes
3. Inconsistent usage across team

FINANCE EXECUTIVE

A finance executive is responsible for managing a company's finances. Their responsibilities may include:

Financial policies: Creating and implementing financial policies to reduce inefficiencies

Balance sheets: Creating balance sheets that accurately and consistently represent the company's cash flow

Budgeting and Invoices: Drafting invoices, including validation, processing, coding for payment and building budgets

Financial records + Audits: Ensuring financial records are updated and performing external audits

Cash flow: Preparing cash flow statements and analyzing the potential effects of economic conditions on revenues

Taxes: Understanding financial regulations and ensuring the company is compliant



FINANCE EXECUTIVE

Key points: cost saving services, reduce their risk, increase visibility on processes, increase profit margin and a proactive partner that sees solutions they wouldn't normally consider.

Goals:

1. Increase strategic influence with leadership
2. Partnering for profitable and low-risk ventures.
3. Increase revenue and reduce cost to serve customers
4. Leverage data more effectively

Challenges:

1. Lack of investment in customs expertise
2. Erratic supply chain costs
3. Manual processes that triggers fines, suspensions, etc.
4. Reconcile multiple data source effectively

Common customs concerns:

1. Tariff or duty disputes
2. Ineffective brokerage prices
3. Auditing
4. Billing and payment

Needs and preferences for vendors:

1. Bundle offering with better pricing
2. Email, Webinars and online articles/blogs
3. Streamlined reporting systems
4. Known reputable brands



Decision making:

1. Collaborator in vendor selection
2. Work w/ supply chain + logistics + online searches
3. 7–12 months acquisition period

Reasons they don't pick us:

1. Fear of change
2. Price
3. Technical system outage

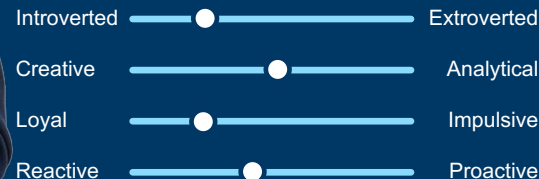
Tools / resources to make their life easier:

1. Streamlined reporting systems
2. Integrated analytics
3. Efficient workflow tools

Lines of business they ask about:

1. Compliance services
2. Customs brokerage
3. Freight forwarding

Personality traits:



Brands they admire:

SAP, Oracle, LinkedIn, Microsoft tools

FINANCE EXECUTIVE

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Biggest concerns about changing brokers:

1. Fear of cost increases
2. Competitive pricing
3. Disruption to operations and payment processing

Research methods they use to select a new service provider:

1. Recommendation from colleagues, peer or clients
2. Company websites
3. Online search engines (e.g., google)

The role this position plays in selecting a customs broker:

Collaborator in decision making process

Key decision factors to decide to look for a new broker:

1. Costs don't offer effective ROI
2. Service dissatisfaction
3. Cyber security concerns

Possible rational or irrational fears:

1. Penalty fees
2. Shipment delays
3. Diminishing profit margin

Challenges this role face when selecting a new supplier:

1. Change management
2. Meeting budgetary requirements
3. Technical compatibility with inhouse systems

Typical acquisition timeline:

7-12 months

Key information needed to select a customs broker:

1. Price
2. Responsiveness
3. Known reputable brand

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. CFOs or finance team
3. Logistics managers + Import/Export managers

Reasons not to select Livingston:

1. Afraid of change
2. Price
3. Product and/or services don't fit + lack of exec buy-in

Interest in bundled offerings:

Yes

FINANCE EXECUTIVE

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Change management
2. Meeting budgetary requirements
3. Technical compatibility with inhouse systems

If we disappeared tomorrow, this role would miss:

1. Competitive pricing
2. Industry expertise
3. Proactive support

Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Top 3 daily responsibilities:

1. Manage receivables and financial operations
2. Keep an eye on profitability and keep reviewing opportunities to save
3. Develop monthly/quarterly/annual reporting for forecasting and budgeting

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Respond quickly and effectively via approved communication channels
3. Meet internally on how to troubleshoot the problem

Key decision factors why this role would consider another broker:

1. Costs don't offer effective ROI
2. Service dissatisfaction
3. Cyber security concerns

Common customs-related issues they typically face:

1. Tariff or duty disputes
2. Shipping cost issues
3. Currency exchange problems

Common issues they can resolved independently using our digital platform:

1. Auditing
2. Billing and payment
3. Record keeping

Reasons that stop them from selecting us:

1. Afraid of change
2. Price
3. Product and/or services don't fit + lack of exec buy-in

What we should know but didn't ask:

1. Wear many hats and are stretch.
2. Not involved in the custom process so lack knowledge of needs
3. Need a supportive partner who is a reliable and proactive partner

Research methods they use to find a service provider:

1. Recommendations from colleagues/peers/clients
2. Company websites
3. Online search engines

Biggest concern they face about changing brokers:

1. Fear of cost increases
2. Competitive pricing
3. Disruption to operations and payment processing

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Technical system outages
2. Pricing issues
3. Client went to RFP

Their possible rational or irrational fears:

1. Penalty fees
2. Shipment delays
3. Diminishing profit margin

Their typical acquisition timeline:

7-12 months

FINANCE EXECUTIVE

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. Onboarding compliance conversation to be reassured they are compliant
2. Customs related conversations related to cost savings
3. Product that reduces risk, increases visibility and increases productivity

If we disappeared tomorrow, this role would miss:

1. Competitive pricing
2. Industry expertise
3. Proactive support

Common customs-related issues they typically face:

1. Tariff or duty disputes
2. Shipping cost issues
3. Currency exchange problems

Top 3 daily responsibilities:

1. Manage receivables and financial operations
2. Keep an eye on profitability and keep reviewing opportunities to save
3. Develop monthly/quarterly/annual reporting for forecasting and budgeting

What we should know but didn't ask:

1. Wear many hats and are stretch.
2. Not involved in the custom process so lack knowledge of needs
3. Need a supportive partner who is a reliable and proactive partner

Common issues they can resolved independently using our digital platform:

1. Auditing
2. Billing and payment
3. Record keeping

Their individual professional goals:

1. Increase budget for department
2. Increase strategic influence with leadership
3. Partners that are proactive vs. just crisis mode

Their company business goals:

1. Increase revenue and streamline costs
2. Find partners who compliment business
3. Leverage data more effectively

Their company technology goals:

1. Reduce cost to serve customers
2. Improve task efficiencies and accuracy
3. Improve reporting

Their company process goals:

1. Improve strategic planning
2. Increase efficiency in supply chain
3. Visibility and control of the process

Their individual professional challenges:

1. Lack of investment in customs expertise
2. Suppliers who focus on short term needs vs. strategic partnerships
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Lack of awareness of trade program benefits
3. Inefficient processes

Their company technology challenges:

1. Setting up effective reporting
2. Existing technology is not used to its potential
3. Hard to implement new processes at client side

Their company process challenges:

1. Antiquated, manual processes that can result in fines and more
2. Lack of time to step back and assess current processes
3. Lack centralized data source. Manual process for government regulations

FINANCE EXECUTIVE

MARKETING TEAM



Key information needed to select a customs broker:

1. Price
2. Responsiveness
3. Known reputable brand

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Industry specific forums
3. Company blogs

Professional networking they participate in:

1. Member of online groups like LinkedIn
2. Member of organization or associations
3. Subscribes to online and offline publications

Top 3 daily responsibilities:

1. Manage receivables and financial operations
2. Keep an eye on profitability and keep reviewing opportunities to save
3. Develop monthly/quarterly/annual reporting for forecasting and budgeting

What we should know but didn't ask:

1. Wear many hats and are stretch.
2. Not involved in the custom process so lack knowledge of needs
3. Need a supportive partner who is a reliable and proactive partner

Roles involved in selecting a vendor

1. Procurement/ Supply chain manager + CFOs or Finance Team
2. Logistics managers + Compliance Officers
3. Import/Export managers

Their individual professional goals:

1. Increase budget for department
2. Increase strategic influence with leadership
3. Partners that are proactive vs. just crisis mode

Their company business goals:

1. Increase revenue and streamline costs
2. Find partners who compliment business
3. Leverage data more effectively

Their company technology goals:

1. Reduce cost to serve customers
2. Improve task efficiencies and accuracy
3. Improve reporting

Their company process goals:

1. Improve strategic planning
2. Increase efficiency in supply chain
3. Visibility and control of the process

The role this position plays in selecting a vendor:

- Collaborator (participates in the decision-making process)

Interest in bundled offerings:

- Yes

Their individual professional challenges:

1. Lack of investment in customs expertise
2. Suppliers who focus on short term needs vs. strategic partnerships
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Lack of awareness of trade program benefits
3. Inefficient processes

Their company technology challenges:

1. Setting up effective reporting
2. Existing technology is not used to its potential
3. Hard to implement new processes at client side

Their company process challenges:

1. Antiquated, manual processes that can result in fines and more
2. Lack of time to step back and assess current processes
3. Lack centralized data source. Manual process for government regulations

COMPLIANCE EXECUTIVE

Compliance executives, also known as compliance officers or compliance managers, are responsible for ensuring an organization complies with internal and external regulations. Their responsibilities include:

Developing and implementing a compliance program: includes creating internal controls, drafting and revising policies, and ensuring that policies align with laws and regulations

Conduct audits: These identify potential weaknesses and noncompliance situations, and help to ensure that the organization is complying with regulations

Management reporting: Includes regularly reporting on the organization's compliance with laws and regulations

Employee communication: Includes educating and training employees on regulations and industry practices, and addressing employee concerns about legal compliance

Providing resources: Includes ensuring the availability of sufficient resources, such as compliance tools, to complete internal audits on time

Crisis management: This includes setting plans to manage a crisis or compliance violation



COMPLIANCE EXECUTIVE

Key points: Bundled brokerage and freight tools, tools to predict trade compliance risks, easier access to historical data, audit assistance and help improve internal perspective to increase funding + collaboration.

Goals:

1. Strategic influence with leadership
2. Data-driven decision making
3. Improvement of best practices, task efficiencies, and accuracy
4. Visibility and control of process

Challenges:

1. Finding partners for long term vs. quick fixes
2. Inefficiencies and hard-to-implement processes
3. Existing technology is not used to its potential
4. Technical compatibility with in-house system

Common customs concerns:

1. Incorrect documentation
2. Compliance challenges
3. Communication issues
4. Service dissatisfaction

Needs and preferences for vendors:

1. Customs and industry knowledge
2. Proactive customer service
3. Streamlined reporting systems
4. Prefer emails and relevant webinars



Decision making:

1. Primary Influencer for the vendor selection
2. Work with supply chain and online searches
3. 4–6 months acquisition period

Reasons they don't pick us:

1. Fear of change
2. Operational issues
3. Price

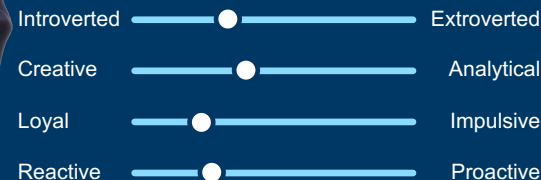
Tools / resources to make their life easier:

1. Streamlined reporting systems
2. Integrated analytics
3. Enhanced communication

Lines of business they ask about:

1. Compliance services
2. Customs brokerage
3. Classification services

Personality traits:



Brands they admire:

Microsoft tools, SAP, LinkedIn, Oracle

COMPLIANCE EXECUTIVE

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Biggest concerns about changing brokers:

1. Disruption to operations
2. Educating broker on needs and existing processes
3. Uncertainty about service reliability

Research methods they use to select a new service provider:

1. Recommendations from colleagues, peers or clients
2. Online search engines
3. Company websites

The role this position plays in selecting a customs broker:

Influencer

Key decision factors to decide to look for a new broker:

1. Service dissatisfaction
2. Communication issues
3. Lack commitment to understand business or needs

Possible rational or irrational fears:

1. Shipment delays
2. Penalty fees
3. Economic instability

Challenges this role face when selecting a new supplier:

1. Technical capability with internal systems
2. Applicable regulatory compliance expertise
3. Meeting budgetary requirements

Typical acquisition timeline:

4-6 months

Key information needed to select a customs broker:

1. Customs and industry knowledge
2. Proactive customer service
3. Responsiveness

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers

Reasons not to select Livingston:

1. Afraid of change
2. Price
3. Product and/or services aren't a fit

Interest in bundled offerings:

Yes

COMPLIANCE EXECUTIVE

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Technical compatibility with inhouse systems
2. Applicable regulatory compliance expertise
3. Meeting budgetary requirements

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Tailored solutions
3. Diversified portfolio of services

Ranked understanding of our product and services:

1. Customs brokerage
2. Trade consulting
3. Freight forwarding

Top 3 daily responsibilities:

1. Oversee and identify trade compliance risks
2. Access data to access budget needed to execute compliance tasks
3. Communicate required information to interested parties

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Build strategy, define owners, and execute plan
3. Respond quickly and effectively via approved communication channels

Key decision factors why this role would consider another broker:

1. Service dissatisfaction
2. Communication issues
3. Lack commitment to understanding their business and processes

Common customs-related issues they typically face:

1. Incorrect documentation
2. Compliance challenges
3. Tariff or duty disputes

Common issues they can resolved independently using our digital platform:

1. Record keeping
2. Shipment tracking
3. Account management

Reasons that stop them from selecting us:

1. Afraid of change
2. Price
3. Product and/or service don't fit

What we should know but didn't ask:

1. Unpopular in their company. Help them feel valuable
2. Underfunded and constrained on capacity to cover responsibilities
3. Wear many hats and lack skills to know or why to do things better

Research methods they use to find a service provider:

1. Recommendations from colleagues, peers or clients
2. Online search engines
3. Company websites

Biggest concern they face about changing brokers:

1. Disruption to operations
2. Educating broker on needs and existing processes
3. Uncertainty about service reliability

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Competitive offering
3. Technical system outages

Their possible rational or irrational fears:

1. Shipment delays
2. Penalty fees
3. Economic instability

Their typical acquisition timeline:

4-6 months

COMPLIANCE EXECUTIVE

PRODUCT TEAM



With a magic wand, they would pick the following single service or product:

1. AI tool to predict trade compliance risks
2. Tool to evaluate risk and provide guidance or contact us for assistance
3. Tool to simplify audit process

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Tailored solutions
3. Diversified portfolio of services

Common customs-related issues they typically face:

1. Incorrect documentation
2. Compliance challenges
3. Tariff or duty disputes

Top 3 daily responsibilities:

1. Oversee and identify trade compliance risks
2. Access data to access budget needed to execute compliance tasks
3. Communicate required information to interested parties

What we should know but didn't ask:

1. Unpopular in their company. Help them feel valuable
2. Underfunded and constrained on capacity to cover responsibilities
3. Wear many hats and lack skills to know or why to do things better

Common issues they can resolved independently using our digital platform:

1. Record keeping
2. Account management
3. Shipment tracking

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Increase strategic influence with leadership
3. Increase budget for department

Their company business goals:

1. Improve best practices
2. Leverage data more effectively
3. Stay informed with latest industry intel

Their company technology goals:

1. Improve task efficiencies and accuracy
2. Visibility to their business
3. Improve reporting

Their company process goals:

1. Visibility and control of the process
2. Increase efficiency in supply chain
3. Plan time to allow agility to respond to regulatory changes

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Their company business challenges:

1. Inefficient processes
2. Staff retention
3. Erratic supply chain costs

Their company technology challenges:

1. Hard to implement new processes at client side
2. Existing technology is not used to its potential
3. Challenging to gain tech adoption by client team

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Lack centralized data source. Manual process for government regulations
3. Antiquated, manual processes that can result in fine, suspensions, etc...

COMPLIANCE EXECUTIVE

MARKETING TEAM



Key information needed to select a customs broker:

1. Customs and industry knowledge
2. Proactive customer service
3. Responsiveness

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Industry specific forums
3. Company blogs

Professional networking they participate in:

1. Member of online groups like LinkedIn
2. Attend major conferences
3. Attend webinars

Top 3 daily responsibilities:

1. Oversee and identify trade compliance risks
2. Access data to access budget needed to execute compliance tasks
3. Communicate required information to interested parties

What we should know but didn't ask:

1. Unpopular in their company. Help them feel valuable
2. Underfunded and constrained on capacity to cover responsibilities
3. Wear many hats and lack skills to know or why to do things better

Roles involved in selecting a vendor

1. Procurement/ Supply chain manages
2. Logistics managers
3. Import/Export managers

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Increase strategic influence with leadership
3. Increase budget for department

Their company business goals:

1. Improve best practices
2. Leverage data more effectively
3. Stay informed with latest industry intel

Their company technology goals:

1. Improve task efficiencies and accuracy
2. Visibility to their business
3. Improve reporting

Their company process goals:

1. Visibility and control of the process
2. Increase efficiency in supply chain
3. Plan time to allow agility to respond to regulatory changes

The role this position plays in selecting a vendor:

- Influencer / Recommender

Interest in bundled offerings:

- Yes

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Their company business challenges:

1. Inefficient processes
2. Staff retention
3. Erratic supply chain costs

Their company technology challenges:

1. Hard to implement new processes at client side
2. Existing technology is not used to its potential
3. Challenging to gain tech adoption by client team

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Lack centralized data source. Manual process for government regulations
3. Antiquated, manual processes that can result in fine, suspensions, etc...

COMBINED PERSONA

HOLISTIC VIEWPOINTS



COMBINED PERSONA

SALES TEAM



Ranked understanding of our product and services:

1. Customs brokerage
2. Freight forwarding
3. Trade consulting

Biggest concerns about changing brokers:

1. Disruption to operations
2. Competitive pricing
3. Uncertainty about service reliability

Research methods they use to select a new service provider:

1. Recommendations from colleagues, peers or clients
2. Online search engines
3. Company websites

The role this position plays in selecting a customs broker:

Decision maker

Key decision factors to decide to look for a new broker:

1. Service dissatisfaction
2. Costs don't offer effective ROI
3. Communication issues

Possible rational or irrational fears:

1. Diminishing profit margin
2. Shipment delays
3. Economic instability

Challenges this role face when selecting a new supplier:

1. Meeting budgetary requirements
2. Change management
3. Technical capability with internal systems

Typical acquisition timeline:

4-6 months

Key information needed to select a customs broker:

1. Responsiveness
2. Price
3. Proactive customer service

Roles involved in selecting a vendor:

1. Procurement/ Supply chain manages
2. Logistics managers
3. CFOs or Finance Team

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Lack of executive buy-in

Interest in bundled offerings:

Yes

COMBINED PERSONA

CX TEAM



Challenges this role faces when selecting a new supplier:

1. Meeting budgetary requirements
2. Change management
3. Technical compatibility with inhouse systems

If we disappeared tomorrow, this role would miss:

1. Industry expertise
2. Regulatory services
3. Diversified portfolio of services

Ranked understanding of our product and services:

1. Customs brokerage
2. Freight forwarding
3. Trade consulting

Top 3 ways to proactively retain if an "at risk" client:

1. Actively listen and document their concerns
2. Respond quickly and effectively via agreed communication channels
3. Build strategy, define owners, and execute

Key decision factors why this role would consider another broker:

1. Service dissatisfaction
2. Costs don't offer effective ROI
3. Communication issues

Common customs-related issues they typically face:

1. Customs delays
2. Incorrect documentation
3. Tariff or duty disputes

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Record keeping
3. Billing and payment

Reasons not to select Livingston:

1. Price
2. Afraid of change
3. Lack of executive buy-in

Research methods they use to find a service provider:

1. Recommendations from colleagues/peers/clients
2. Online Search Engines (e.g., Google)
3. Company Websites

Biggest concern they face about changing brokers:

1. Disruption to operations
2. Competitive pricing
3. Uncertainty about service reliability

In 2023, these were the top 3 reasons this role and relationship moved into "at risk" category:

1. Operational issues
2. Technical system outages
3. Competitive offering

Their possible rational or irrational fears:

1. Diminishing profit margin
2. Shipment delays
3. Economic instability

Their typical acquisition timeline:

4-6 months

COMBINED PERSONA

PRODUCT TEAM



If we disappeared tomorrow, this role would miss:

1. Industry expertise
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3. Diversified portfolio of services

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1. Customs delays
2. Incorrect documentation
3. Tariff or duty disputes

Common issues they can resolved independently using our digital platform:

1. Shipment tracking
2. Record keeping
3. Billing and payments

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
2. Increase strategic influence with leadership
3. Working with partners that empowers my career

Their company business goals:

1. Increase revenue and streamline costs
2. Find partners who compliment business
3. Leverage data more effectively

Their company technology goals:

1. Reduce cost to serve customers
2. Improve task efficiencies and accuracy
3. Visibility to their business

Their company process goals:

1. Increase efficiency in supply chain
2. Visibility and control of the process
3. Improve strategic planning

Their individual professional challenges:

1. Suppliers who focus on short term needs vs. strategic partnerships
2. Lack of investment in customs expertise
3. Limited role advancement path

Their company business challenges:

1. Erratic supply chain costs
2. Inefficient processes
3. Lack of awareness of trade program benefits

Their company technology challenges:

1. Existing technology is not used to its potential
2. Hard to implement new processes at client side
3. Challenging to gain tech adoption by client team

Their company process challenges:

1. Lack of time to step back and assess current processes
2. Antiquated, manual processes that can result in fine, suspensions, etc...
3. Lack centralized data source. Manual process for government regulations

COMBINED PERSONA

MARKETING TEAM



Key information needed to select a customs broker:

1. Responsiveness
2. Price
3. Proactive customer service

Blogs, sites or social media platform used for work:

1. LinkedIn
2. Industry specific forums
3. Company blogs

Professional networking they participate in:

1. Member of online groups like LinkedIn
2. Member of organization or associations
3. Attend major conferences

Roles involved in selecting a vendor

1. Procurement/ Supply chain manages
2. Logistics managers
3. CFOs or Finance Team

The role this position plays in selecting a vendor:

Decision maker

Interest in bundled offerings:

Yes

Their individual professional goals:

1. Partners that are proactive vs. just crisis mode
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