














Livingston Style Manual

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Intro: Speaking Human

The Livingston brand isn't just how we look. It's what people think of us. And that's the result of everything we do, including how we communicate.

The look and feel and voice of the company are the most important impressions we create (after personal relationships with clients and a high level of service).

Decay happens. Everyone who can alter the look or words of the company is responsible for the integrity of the design/voice ecosystem because it can decay over time. The brand either gains or decays based on the firmness of that integrity.

Professionals use simple, direct, flavorful writing. There's no excuse for corporate-blah anymore. Yet corporate web content is still often written with a numbing pseudo-professionalism, meaningless phrases, and jargon.

(A caution: Where there's corporate-blah there's also casual-blah. A tone of faux chattiness to appear more personable is embarrassing.)

Think of style and voice as the Livingston personality. The same personality should run through everything we write, design, and publish. To depart from these standards is to go "off personality" and thus off brand.

Here are a few words that describe us *and, thus, our writing: clear, direct, energetic, helpful, friendly, clever (but never forced), interested, interesting, confident, optimistic, and solutions-focused.*

Simplifying — our company mandate — is also the goal for communications. We make things easy. Easy isn't always easy to do. Most of us write, but few of us write simply and clearly. It takes work and revision to capture the attention of the most reluctant readers and guide them through text.

No communication should be exempt. There's an opportunity to be clearly, warmly, helpfully communicative in everything from web headlines to news bulletins to social media posts to trend reports.

Inconsistency erodes web sites. (The Livingston site has suffered from this in the past.) When friendly clarity is the standard, anything flat and bureaucratic is contaminating. As small contaminating bits of content pile up, web sites quickly lose their polish.

Simple sophistication is subtle marketing. Livingston content, except perhaps the most functionally informative, should be subtly self-promoting. A crisp, direct style (with a dash of dry humour when appropriate) discreetly promotes the brand as classy and different. Few competitors have that.

Users judge almost instantly. It takes us all approximately 50 milliseconds (half a second) to form their opinion of a website. First impressions are based on look, feel, and voice. We have to capture attention instantly, make a strong impression, then keep impressing. If we fail, only motivated readers who need information will stick around. That's the brutal reality these days.

Writing they would miss. Most of us consider communications from companies, even those we want to hear from, as invasive to some degree. The way to score low on the invasion scale is to consistently create communications that our audience *would actually miss if they couldn't find them*, something they look forward to receiving.

A high bar. And reachable.

Behind the Words

What Livingston Stands For

Putting clients first.

We go above and beyond for customers. We relieve them of stress and worry by keeping their shipments moving. We provide peace of mind.

We get to know each client's business, then develop personal relationships with them, their supply-chain partners, their carriers, and often their customers.

We also educate and advise our customers. With over 65 years of experience and an unrivaled depth of knowledge in compliance, we are highly qualified.

We want customers to know that we are an ally. We anticipate their needs. We offer to help. We are by their sides when they need us.

Leading in our field.

Our primary businesses are customs clearance and trade compliance. We are widely viewed as a North American leader.

Livingston is the largest customs broker in Canada and the third-largest in North America. We are most likely the top compliance expert based on the number of trade consultants we employ.

We lead by simplifying the professional lives of importers and exporters. On their behalf, we manage the many moving parts of global trade: government agencies, regulations, protocols, information, deadlines — all the details that can be overwhelming for customers to navigate on their own.

Keeping trade flowing.

We are in the information moving business. We capture data, validate it, and deliver the information that our clients need to manage their supply chains.

We have the skills, systems, and speed to transform a data-intensive process into an efficient digital information flow — to and from importers, shippers, carriers, and governments.

Thanks to Livingston, companies move their goods faster and with less friction across international borders.

Reducing client risk.

Our clients face a number of risks, but it mostly comes down to mistakes that cause delays, delays that cost time and thus money, and penalties exacted by governments because of errors in customs declarations (which cause delays and cost money).

Our job is to stay on top of the entire process: logistics, information reporting, and regulatory hurdles. And to eliminate roadblocks by anticipating potential problems and reacting quickly to any that arise.

A company of experts.

We are a company of experts. We bring expert knowledge to problems. We are highly informed yet practical. The job is always to make trade work better for our customers.

The essence of the brand

- ▷ Knowledgeable
- ▷ Protective
- ▷ Trusted
- ▷ Well-connected
- ▷ Meticulous

How can those strengths be reflected in our communications and marketing?

What we stand for should be implied or stated in everything we write: client-first, leadership, devotion to flow, and minimization of risk. Behind it all is helpfulness, problem-solving, and rapid action.

The way we write should be warm, relaxed, concise, clear, and helpful. That way of writing shows a commitment to empowering people so that they can achieve more.

There's a sweet spot between formal and casual in writing for our audiences. Because Livingston offers premium services — a company of experts — too casual a tone of voice is a mistake (think Border Buddy). On the other hand, too formal a tone is removed and aloof, also not our personality. We are more like a large tech company that speaks informally but means business.

Our Difference

Our key differentiators are customs brokerage and compliance. Those are our primary strengths.

That's not true of our major competitors. Most are focused on freight forwarding and logistics. They describe themselves as "freight transportation specialists," "global logistics experts," and providers of "supply chain solutions." Customs brokerage is often just a supporting service, almost an afterthought.

We also offer a high level of service. Some competitors, intent on offering lower prices, can't offer the same quality of service and consultation.

Writing for Audiences

It is vitally important that we write for our various audiences: Enterprise, Frequent Shippers, and Single Shipment customers.

Ask: Who is going to read this? What do they need to know? What don't they need to know? How might they be feeling?

Appealing to emotions is an important way to frame messaging. Ask yourself how the intended audience might be feeling. Harried and confused? Worried about costs? Anxious about the corporate reputation?

Most importantly, based on their role, why should they care?

Care = priorities + emotions + return on time/attention invested. What's the key payoff?

What value does the service provide to people in a specific role? Is it best quantified in time, money, peace of mind, or some other big desire?

Example: This is written for a senior manager. It touches on several major priorities: "Eliminate errors made with manual keying and spreadsheets while cutting costs and increasing hassle-free border clearances."

Personas: Knowing who you are talking to.

We've done a fair bit of work to understand our three personas:

- ▷ Enterprise
- ▷ Frequent Shippers
- ▷ Single Shipments

Profiles were developed that describe priorities, incentives, and emotional triggers. Messaging was then written based on those traits. It was refined and organized to create a web page for each audience. (The profiles, messaging, and links to these pages are in the Resources section of this document.)

Tone of voice shifts with the audience.

Senior managers of large organizations are addressed with a kind of professional authority. Focus on their higher-level priorities, like making a department run more efficiently and reducing costs and labour. They also want ideas and cutting-edge thinking.

Frequent Shippers want straight talk about improving performance and the bottom line.

Small business owners with a single shipment can be addressed with more of a consumerist/self-help tone.

What doesn't change for all these audiences is voice and style. Everyone appreciates clarity, simple sentence structure, and a sense that Livingston can help make their jobs easier.

Writing Goals & Principles

Legendary GE CEO Jack Welch once said, "Insecure managers create complexity."

Writing simply and directly shows confidence.

We are confidently knowledgeable experts who have no need to hide behind vague wording.

Speak human, as if talking to another person in a conversation.

Write for skimmers. Some people will read every word you write. But many will just skim. Help them by grouping related ideas together and using descriptive headers and subheaders.

Use proof to validate all claims.

Additional capabilities and technical points can be described briefly in bullet lists.

This is important: Almost everything we write should be about the customer not Livingston. Talk about *how we solve their problems*.

All our customers need help. So our primary goal with most writing is to help or explain how we do that.

Many companies, and most of our competitors, are self-focused. They talk about their service offerings. Our way is to talk about how we solve specific customer problems. So our services are described by what we can do for customers. This is far more engaging.

Instead of writing, "No one has a broader or more knowledgeable range of trade specialists than we do" write:
"Whatever your trade issue, we have specialists who can help."

Instead of, "We deliver services and solutions tailored to our clients' unique needs, through our extensive, coast-to-coast network of people and technology" write: "With Livingston, our size is your advantage. People. Technology. Solutions. Across North America. Throughout the world."

Use straight talk. Straight to the point. Honest and real. Readers shouldn't be patronized with grandiose claims. They have other things to do. They want to understand fast what we can do to solve their problems.

Our content should always be:

Clear. Even though we are talking mostly to professionals who understand importing and exporting, write clearly so that anyone can understand what you are saying. Don't make the reader have to think. That might sound patronizing. It's just practical.

Easy to understand. Be respectful of short attention spans and time scarcity. We all want content that's easy to scan and unambiguous.

Useful/Helpful. Our job is to make things easier. Maintain a sense of helpfulness and utility. With us customers can do more.

Friendly. Picture your audience and write as if you are a friendly person of some authority who can actively help.

Trustworthy. Trust is built by offering far more than you ask for, using positive language without hyperbole, being direct, and telling the truth without exaggeration. What damages trust is jargon, over-statement, over-promising, and vagueness.

Respectful. Time-pressed audiences (almost everyone) ignore large blocks of writing. Even if the content is perceived as valuable, the effort to read it is unacceptable. So the content gets put aside for later, which never arrives. We all do this. But writers often don't respect time-pressed readers.

Specific. Show don't tell. No overstatement. No vague allusions. Zero bullshit. Reduce adjectives to the bare minimum. Be specific about service offerings, benefits, and how problems are solved.

This doesn't work: "Our state-of-the-art technologies process millions of e-filings every year. You can count on us to increase your speed and save you money."

This does: "Our technologies process hundreds of thousands of e-filings in minutes through the CBP ACE system. As standalone SaaS, they integrate smoothly with all customer systems. No IT intervention is needed. You'll be up and running in hours."

Be consistent across channels. A customer reading our articles and then transitioning to a social media account should have a sense that they are interacting with the same people. Tone of voice helps create that continuity.

Gratuitous addendum:

Sleep on everything you write. It can always be improved. That becomes obvious the next day. Several sleeps is better than one.

Voice, Style, Structure

Voice & Tone

Our voice is how we talk to people. It's the blend of personality, substance, tone, and style. It also embodies our perspective on our business (international trade) and the values we stand for.

Voice is constant. Tone is situational. Tone can shift in the way energy levels shift. News is often conveyed with some urgency. Technical explanations are much more modulated. It's like the shift in one's tone when talking to a friend.

Voice and tone have a big effect on how people perceive Livingston. The right voice builds a connection with our audience. In one study, 65% of customers said that they are emotionally connected to a brand that makes them feel like the company cares about them. A caring or friendly attitude invites greater interaction. That's what we want. A cold voice or a wordy message do the opposite.

Consistent tone of voice is recognizable. Livingston should be known as clear thinking and clear speaking. All the best brands are.

We express big ideas clearly and warmly in fewer words.

The goal is to strike a balance between head and heart — with heart always showing through, even in more technical writing.

Other descriptors that come to mind:

Relaxed

Conversational

Grounded

Polished.

Use an active voice not a passive one. With an active voice, the subject of the sentence acts. There's energy. With a passive voice, the subject of the sentence has the action done to it.

Write this: We know every wrinkle.

Not this: Every wrinkle is known to our people.

The tone should be adapted to the context of the communication and the customer's likely state of mind. It can be serious, empathetic, sometimes enthusiastic, sometimes helpfully instructive — depending on the challenges the audience is facing.

These audiences require gradations of tone:

- A VP wanting to outsource shipping processes.
- A logistics manager whose company is growing faster than the department can handle.
- A one-time shipper wanting rate information and worried about cost.
- A car owner checking out several companies that ship personal vehicles across the country.

Style

Easy reading. Even though we are talking to business professionals, they want easy reading. Simple language. Short sentences. Short paragraphs.

Simple is sophisticated.

Short, declarative sentences are usually best. If sentences are longer, punctuate frequently. Always be easy on the eye.

Be concise. Microsoft calls it *crisp minimalism* in their style guide.

Replace this: "If you're ready to talk to a Livingston representative about the amount of duty you might be paying needlessly, contact us today."

With this: "Ready to reclaim duty over-payments? Contact us."

Be specific. Avoid vague language. Cut fluff.

Use second-person pronouns. Direct, second-person pronouns (such as "you") and simple, casual phrases create a friendly and inviting tone. Using only third-person pronouns ("he," "she" or "they"), complex phrasing, technical terms, and industry jargon creates a distant tone.

Use positive language not negative language. Negative language shows up in words like "can't," "don't," etc.

Write this: "The fastest shippers have all their paperwork in order."

Not this: "You can't clear the border with inaccurate paperwork."

Don't use formal or long words when short ones will do. Use "buy" instead of "purchase," "help" instead of "assist," "about" instead of "approximately," etc.

Front load key words for scanning.

It's often good to lead with verbs that speak to enablement or motivation, especially in headlines. Examples: "Automate at the next level of efficiency." Or "Accelerate your e-commerce shipments."

Replace this: "Templates provide a starting point for creating new documents. Customs clearance includes classification of goods, shipping manifests, and special forms depending on the type of goods you're shipping. Consider using our convenient templates if you often ship the same products."

With this: "Save time and money by using Livingston's pre-prepared declaration templates that include classifications, manifests, and all required forms."

Edit out: "you can" and "there is," "there are," and "there were."

Replace this: "You can access Livingston apps from all your devices, or through the Livingston portal."

With this: "Work anywhere using Livingston apps on your devices or through the Livingston Portal."

Make choices and next steps obvious.

Give customers just enough information to make decisions confidently and feel encouraged. Eliminate every excess word.

Replace this: "When shipping softwood lumber across the border, errors can cause delays and lost opportunity for your business. We help you comply with the changing legislation, meet your obligations to government agencies and minimize the risks."

With this: "With Livingston, you'll avoid errors that cause delays when shipping softwood lumber. We'll help you meet all government regulations for smooth clearance."

Don't use vague terms like "minimize risk" and "meet your obligations."

Don't allow anything to just lay there. Show value constantly while offering encouragement. Like this: "We'll help you meet all government regulations for smooth clearance."

Short sentences and fragments (non-sentences) are easier to scan and read. Fragments only work if they are properly written and fit in smoothly with the rest of the text. They will seem contrived if not.

Flow is essential. Each paragraph should have rhythm. If reading a paragraph is work, it likely doesn't have rhythm and is too wordy.

Always ask: "If I reduce the words even more what's lost?" Probably less than you might think. Keep chiseling.

Use contractions. They are conversational and friendly.

Open up lots of white space.

Bullet lists are good. They break up the text, guide the eye, and convey a lot of information fast. Make them iterate when possible, even using short sentences. Like subheadings, bullet points are an opportunity to describe value, not merely provide information.

Starting with a verb often works. For example:

- Process more filings
- Pay in seconds not days
- Improve carrier relationships
- Know every docket is accurate

Headlines should convey personality if possible. Here are examples from the Livingston home page:

- More than a customs broker.
- We are with you.
- Don't leave money at the border.
- Be ready for anything.
- Our team is your team.
- We know the ropes.
- We save you time.
- We empower your people.
- Know more. Trade better.
- How can we help you?

Exclamation marks should be banished. They are a lax attempt to convey excitement and on some level they feel like a tiny irritating prod. If we weren't so accustomed to them (thanks to social media) we'd resent them. Zero tolerance for exclamation marks would be a classy move.

Never miss the opportunity to find a better word. This is an extraordinary tool: [Power Thesaurus](#)

Structure

Wasted effort. Beautiful sentences and perfectly fine language are wasted without a comprehensible structure. This applies to most forms of content (except ads and other ultra-short sound bites).

Break up the text. Large chunks of text overwhelm readers. All the work that goes into long-form writing can be wasted if it's not read. Use plenty of subheadings. They provide clear narrative structure for readers in a hurry.

Get to the point immediately. Convey benefit immediately, if possible, or at least state what point is being made. Tell them why they should care.

Write this: "Automated border clearance with Livingston can save days of time on a shipment."

Not this: "With port congestion at an all-time high and e-commerce volumes soaring, importers are wise to take advantage of automated processes. Livingston..."

Order content logically. Lead the reader point by point. This simple structure works:

- Start with why they should care — the value proposition, the irresistible offer.
- Thereafter, each sentence and point builds upon the previous one. The proposition grows.
- Anything that doesn't move the proposition forward fast should be left out or rethought.
- Include credible evidence.
- Conclude by summarizing the key points and re-stating the value proposition.

One way of doing it. At Livingston, we often set up the problem in a single line, then offer the solution and the payoff — why do it, what to do, and how it will pay. All in one paragraph.

Like this: "Congestion at ports has become intolerable. The only way to beat the crowd is with automation. Livingston has all the tools you need. You'll save time, money, and the heartache of disappointed customers."

Subheadings should indicate what's important and what can be expected in each section.

Example: "Automation to accelerate."

A Note About Grammar

This style guide isn't about grammar or usage. Grammar is corrected by proof-readers using guides such as *The Chicago Manual of Style* and *The Elements of Style* by Strunk & White.

The Serial Comma. There's one perpetual punctuation error — *the serial comma* — worth mentioning because it's so often left out. There should always be a comma before the conjunction at the end of a list.

Strunk & White says: "In a series of three or more terms with a single conjunction, use a comma after each term except the last. Thus write 'red, white, and blue' or 'He opened the letter, read it, and made note of its contents.'"

Microsoft, in its style guide, says: "Remember the last comma. In a list of three or more items, include a comma before the conjunction. (The comma that comes before the conjunction is known as the Oxford or serial comma.)"

Common Pitfalls to Avoid

[We all fall into these traps once in a while. Please add to this list.]

Don't make the reader have to think. Remove ambiguity. Always ask, "Could this in any way be confusing to a non-expert?"

Don't get in the way of easy reading with excessive writing or "educating" that isn't necessary.

Don't open with a rhetorical question like "Worried about border clearance?" or "Feeling the heat at the border these days?" It's a lazy way to engage the reader. Stating the problem is more effective.

Avoid vague statements that sound fine but contain very little, like "Your opportunity is to..."

We should banish forever fear-based messaging that tries to scare people into using our services. We use "costly mistakes" a lot. It's vague and fear-laden without specifics. Likewise, any sense that monsters are waiting at the border.

Avoid being non-specific to fill space.

Get rid of overblown and vague adjectives that may or may not be true — words like "advanced" and "unprecedented" and "best-in-class."

Avoid getting trapped in the same old language that has been used for years — words like "robust", "cost-effectively", "mitigation," and "seamlessly."

The word "solutions" has been beaten into submission by the corporate world. If there's a way not to use it, please choose that way.

Shun jargon and acronyms unless they are so accepted among the audience that not to use them would seem strange.

Avoid subheadings that are merely placeholders that stimulate no interest.

Examples: "Success in e-Commerce," "Supply Chain Issues", and "U.S. Import Process". They say nothing.

Use subheadings to tell the story in short and convey value if possible. For example: "Five Ways to Protect e-Commerce Profits," "Third-Party Marketplaces: A Solution?" or "Three Changes You Need to Know About".

Avoid clickbait-style subheadings that over-promise or sensationalize.

Avoid sentences that run on. Readers no longer have the patience for more than one or two thoughts in a sentence. One is best.

Avoid cliches. We all know them.

Shrink big words. Turn big words — like "unprecedented" and "developments" and "implement" and "infrastructure" — into short words wherever possible.

No boasting or alluding to competitors not being competent.

Web Writing

Headlines

Headings and subheadings organize content for readers. They should include the most relevant keywords and highlight the main points of the page. Read sequentially, they should tell the story in brief. Subheadings break web pages and articles into scannable sections.

We want to entice with value, urgency, emotion, bluntness, and humour.

Examples: "Your risks drop drastically." and "Information. Every step of the way."

Sometimes a little mystery is enticing: "The fastest way to your customers might be through another country."

Bold is good. But there's a sweet spot between too bold and not bold enough. You want to be declarative without being loud. Bold for the sake of bold can be off-putting. Bold with heart is always welcome.

This is nicely bold: "Talk to people who have the answers."

This is bold for the sake of bold (to be avoided): "You need this."

This is bold with heart: "We designed this with you in mind."

This is bold with humour: "Ridiculously fast clearance."

This is bold with gravity: "A no-miss deadline is coming. We've got you covered."

This is not bold: "The 2021 Trend Report"

This would be better: "The 2021 Trend Report: Five Big Takeaways"

Intro Copy

Intro copy should convey the main point of what's to follow and tempt readers to carry on to the rest of the page. Intro copy is like the copy you see beneath the headlines of magazine stories. It stimulates the appetite.

Like this: "U.S. e-commerce recently grew five years in one. Naturally, there were problems. Deliveries faltered. Costs soared. Reputations suffered. Now there's a way to fix the problems and save money."

Or this: "With Livingston, one dedicated service-delivery team works with your team. That's one efficient point of contact. One call when you need an answer. In the background are all our formidable resources."

Banner Ads

These have to be clever to get attention. Nail the value proposition in a few words. The job is to stimulate curiosity, to entertain a little, and convey enough value to induce a click.

Blog Posts & Short Articles

Readers are looking for specific content. They're searching for a solution. Reading isn't the goal. It's finding answers to improve their business.

Blog posts are best when they are about one idea. Brevity is vital. To be brief and yet substantial is the goal.

The headline should communicate value or importance, preferably both. It should contain a reason to read more.

Good headlines: "Are you ready for full CARM? It's coming." "Five New Ways to Clear E-Commerce Shipments Faster" "The Supply Chain Domino Effect Explained" "A Better Way to Automate DTC Shipments"

Half-baked versions of the same headlines: "CARM: Interacting with CBSA" "E-Commerce Challenges" "Supply Chain Woes" "DTC Shipping Opportunities"

Short whole sentences for headlines are usually preferable but not always. Like: "Clearing customs is different this year." or "Most occasional shippers forget to check this."

The hook: Get straight to the point in the first few sentences. Always state why the post matters to the audience. For example: "This coming spring, all functions of the CBSA Assessment and Revenue Management (CARM) portal will finally be released. That means that every importer, customs broker, and trade consultant will have to be on the system. The goal is better service. The reality is some short-term pain."

The body paragraphs are the key supporting points of the main thesis. Give examples and statistics. Make everything concise. Offer further resources if possible.

Write with a beginning, middle, and end. This seems obvious, but it's hard to remember when you're deep into a blog post. Outline your posts so you see the progression - the reason to read, the reason proven, a summary that drives the point home.

SEO

It's better to write for humans than machines. SEO techniques like keyword stuffing to bump search results are like a cheap trick that usually works against readability.

Make it easy. The best ways to make it easy for people and search engines to find and share our content:

- Organize a page around one topic.
- Use clear, descriptive terms in headings that relate to the topic.
- Highlight important information.

All Other Writing

[Note from Tony: I'm assuming Dan and Vera will write most of this section since I work almost exclusively on the website. I included some quick advice on presentations because I used to run presentation workshops for a Fortune 500 client. Even in that league, presentations are often mishandled. If there's a desire for more about presentations, I can add to this section and include visuals.]

Presentations

There are two kinds of slide decks: those that are projected on walls and those that are handed out.

They shouldn't be confused but usually are.

Projected decks used by speakers should be simple and powerful and mostly imagery. They are visual support for the speaker. They are not meant to be read or handed out later. You need a presenter to make sense of the deck.

The projected deck is composed of strong images (that might be all you see on many slides) and strong, short statements, phrases, or single words.

The effect of these slides is meant to be instant. You see it. You get it. The images and statements illustrate and emphasize the speaker's storytelling.

Handout decks — also called "docu-decks" or "slidedocs" — are meant to be read and viewed at greater length. They stand alone. No speaker needed.

Projected decks

- No bullets
- No complexity
- One thought per slide

Handout decks

- Bold headings that take the reader through the deck, telling the story or making the pitch
- Very tight writing that's easy to read
- Preferably no bullets or use them sparingly
- Simple charts
- More than one thought can be on a slide, but not many thoughts.

In both cases, the goal is to tell a persuasive story, not create a reference document. (That can be another, more detailed handout.)

Competitor Websites

[Clear It](#)

[C.H. Robinson](#)

[Flexport](#)

[Cole International](#) (customs brokers)

[Uber Freight](#)

[UPS](#)

[Expeditors, International](#)

[DHL](#)

[A.N. Deringer](#)

[Border Buddy](#)

[Farrow](#)

[FEDEX](#)

[Pacific Customs Broker](#)

Outstanding Sites

[Please add examples with links here.]

Personas & Messaging

Enterprise Persona

[Livingston Enterprise page](#)

Karen: “They are professionals in trade and logistics who focus on risk mitigation. They are looking to their service providers (e.g, freight, customs brokerage, trade consulting providers) to execute their trade strategy. They want their service provider to leverage trade data to help gain competitive advantage. (e.g., if Ford can import goods at lower cost and duty rate than Chrysler...that’s a competitive advantage).”

They typically lead a departmental team that handles shipping and logistics. A major concern is helping the team win.

They also want to protect the enterprise from risk of all kinds. Reputation. Lack of quality. Customer letdown. None are acceptable.

They are looking for a partner that is an extension of the team not an impediment or complication. They want insight and advice that doesn’t exist in house. They want to work with a full-service supplier that’s large but agile and able to pivot with changing demand and regulations.

Business Priorities

Dan: “The changes that have taken place in recent years have resulted in more pressure on compliance managers and procurement officers from the top of the organizations to preempt/mitigate risk. The volume and pace of change is overwhelming and while these individuals are experts in their own right, they can’t keep up with the demands.”

Dan: “They know they need support, but they’re also afraid of losing control and that a third-party might make them look bad. They want confidence that the third party isn’t just an extension of the team, but an extension that complements or enhances the overall level of expertise they bring. They don’t want to have to hand-hold.”

- Want more strategic input
- Want full risk mitigation
- Want turnkey solutions
- Want a full menu of services
- Want predictability
- Want to work with leaders who are pleasant to deal with
- Want to lift in-house team to new heights of performance
- Want to improve the bottom line
- Would love to find unexpected money with minimal risk and effort and short time frames to realize the benefits
- Want continuous improvement; a partner they can innovate alongside
- Want partners who know more than they do
- Want ongoing insight and advice that have a business impact
- Want partners that integrate well with their systems and people
- Want the best technology and steady upgrades
- Want dashboard control

- Want a partner that understands e-commerce, social commerce, blockchain, etc.
- Want procedural excellence, best practices
- Want solutions and service specifically built around their business
- Want someone to take the time and understand everything about their business and how they trade
- Want a single business team to lead them
- Want top-level executive visibility and support
- Want partners of size but flexibility to amp up or scale back with demand
- Want to eliminate inefficiency and mistakes
- Want to stay in control. (Losing control is a distraction and risk to reputation.)
- Want to contain hiring and automate where possible
- Want help to access new markets where they don't have experience or understand the customs regime
- As volumes increase, want access to strong trade consulting to uncover opportunities
- Want COVID to be addressed now and post-pandemic

Incentives

- For maximizing profit and making good decisions
- For making good use of resources (people and technology)
- For developing strategies to improve the way things are done
- For looking ahead so that growth and change don't hamstring the company or steal focus
- For making their team successful (Want their team to run well, improve skills, and feel accomplished. They want to set up their team for success with the right tools and procedures.)
- For helping employees be more productive
- For being able to scale resources without adding fixed costs

Desires

- Want their people to succeed
- They want their service providers to follow their company-specific customs and shipping procedures and not just provide cookie-cutter procedures.
- Want to reduce risks and uncertainty
- Want consistency that doesn't depend on who's in the job
- Want to outperform the competition
- Want partners who can support them and their teams
- Want to eliminate mistakes that repeat. (Looks bad on everyone.)
- Want to protect the corporate reputation
- Want to be cited by their bosses as meeting and exceeding goals
- Want systems that coordinate between all parts of the company so other departments can solve problems through shipping and logistics (i.e. sourcing, finance, marketing)
- Want communication — visibility and transparency of operations, access to customized views on trade and data

- Want advice that will help them do their work better and improve team performance
- Want to keep up with technology (Outdated tech looks bad on everybody. Working with IT can also be onerous. To outsource to a trusted partner eliminates both impediments.)
- Want technology that solves business problems and makes things run better

Worries

- Looking bad
- Making bad decisions and not having the data to support their decisions
- Hurting the corporate reputation
- Hurting the reputation of the department within the enterprise
- Manual labor and inconsistent (variable) processes
- Making it hard for the team to meet productivity goals, thus hurting motivation
- Knowing what's coming and having enough lead time to make change
- Signing contracts that commit them to poor performance
- Not meeting financial and other performance metrics
- Cost creep
- Non-compliance
- Must reduce the carbon footprint of the supply chain
- Complicating rather than simplifying. More friction not less.
- Less visibility when more is wanted
- Compromises on quality and service
- Surprises (the opposite of predictability)
- Lack of control, in particular cost control and quality control
- Performance erosion due to complexity versus continuous improvement
- Outdated technology
- Outdated information and advice
- E-commerce and exploding distribution channels
- Worried about the amount of change happening around them and geopolitical risk
- Blockchain

Assurances With Us

Karen: "They want to leverage our knowledge and expertise. More trade data and information and insights that can assist them in their trade-related initiatives at the planning and strategy setting stages. Livingston isn't invited to the table for the planning and strategy sessions, but we provide them with trade data to augment their own data, trade patterns, and insights when planning international trade strategies."

- We automate the growing complexities
- We reduce friction, speed results, and lower costs
- Large consulting group specializes in global trade intelligence and advice

- A large compliance team that specializes in ensuring compliance worldwide
- The size to provide integrated services at scale and turnkey solutions
- Data-focused to identify weakness and apply technology to strengthen, optimize systems
- Able to minimize risk across the supply chain
- Highly attuned to cost minimization
- Highly experienced in the needs of and solutions for enterprise clients
- Technology for full trade visibility on demand
- Technology for all global trade processes
- Readiness for compliance audits, planning, processes, and testing

Benefits

- Confidence that the internal team will be augmented with added skills, processes, and technology
- Continuous improvement through people, processes and tech
- Partnership with a customs brokerage leader
- Risk mitigation throughout the supply chain
- Trade insight and intelligence built into supply chain operations daily
- The latest thinking on trade compliance opportunities and duty reduction strategies
- Constantly evolving technologies without having to interface with IT or own systems
- Consistently outstanding customer service
- Data and measurement to identify weaknesses and drive efficiencies
- Integration with corporate data systems
- Audit readiness at all times
- Capability to stay ahead of shifting international regulations and free trade agreements (regulatory affairs, trade consulting, GTM)
- Single supplier relationship to handle all customs-related needs

Frequent Persona

Livingston Frequent Shippers page

Small-to-medium-size business owners or managers. They are often entrepreneurs or people who work for them. The shipping requirements of the business might be outstripping the capabilities of the staff. Time is in short supply. Serving customers well is a competitive necessity. Any third-party supplier can help and earn loyalty or complicate things and add to the problem list. They want assurance of smooth processes, competent people, and empathy with business needs. The risk of letting their customers down is a major concern. They embrace change, love technology, and hate bullshit.

Dan: “Risk is a major concern, particularly amongst mid-sized firms that have their sights set on eventual acquisition or IPO. They have to demonstrate to prospective suitors that they have proactively guarded against risk. Also, when it comes to customs, they don’t necessarily know where the hidden risks are. They’re looking for us to provide counsel/guidance as to which rocks to look under to uncover those hidden risks and help them do so.”

Business Priorities

- Want to save time and money
- Want to improve continuously
- People are overworked
- Owner-managers are time starved
- Internal systems are often overwhelmed by growth
- Want proactive setup that removes uncertainties and optimizes the process
- Want resulting data to be clean and accessible
- Value still matters but isn't personal
- Smaller businesses are customer-obsessed
- They expect that same level of care from their suppliers.
- Karen: "They expect responsiveness and they expect proactive notification when something has gone wrong or is about to go wrong."
- Advice upfront about all opportunities that they likely don't know about
- Entrepreneurs are ready adopters of innovative change - new ways to work better
- Karen: "They want simple digital solutions and that are easy to use. They don't want to have to invest much time to use a software or online app as they won't be using it that often. They are occasional shippers."
- Dan: These two are particularly important — want spare capacity to accommodate growth, and suppliers who can grow with them. "Scalability is critical for occasional shippers, particularly those in a high-growth stage of business."
- Need to think one step ahead about their business and hence their business processes
- While they might want a general understanding of regulations, they don't care about regulatory change. They want Livingston to be on top of changes.
- Making sure they are getting all available government support through COVID

Worries

- Worried that their staff is working inefficiently because shipping/customs is part time, and that the changing demands of the supply chain are endlessly problematic (or that staff is functioning fine but unable to accommodate change)
- Dan says this is more important than ever: That they won't be empowered to handle their side of the processes, the supplier will just take over without informing adequately.
- Dan: "Businesses want more and more visibility into what's going on. So, while they want us to 'just take care of it,' they also want to be able to see clearly exactly what we've taken care of and how and when."
- Dan: "It's important to remember that a growing contingent of these businesses are now leveraging e-commerce and many are engaging in direct-to-consumer sales via a third-party platform like Amazon. Reliability and speed to market will be critical in garnering a solid reputation."
- Karen: "Worried that their company/organization is making decisions on suppliers that have an impact on importing/exporting without involving Customs, Shipping and Logistics departments."
- Financial uncertainty is common
- Money is wasted through constant catch-up
- Worried about delays that hurt business

- Worried that inefficiencies and mistakes will hurt working and fixed-capital productivity
- Worried that cost-to-serve will rise
- Worried about paying too much for too little
- Worried that more problems will be added to the many they face; too much friction and frustration
- Worried that they won't be able to easily contact the right Livingston rep
- Worried that they won't be onboarded well
- Worried that their business will not be known and what's important to them will not be well understood (i.e proper classifications)
- Worried about missing duty and tax opportunities (don't know what they don't know)
- Worried they won't be notified of impending changes
- Worried they won't have the data they need to make better decisions
- Worried they will have to go back and re-work things manually
- Worried that cycle times will increase as the business grows, which works against growth
- Worried they will have to manage their suppliers, and manage multiple suppliers (freight, customs, last mile)
- Worried they won't be able to work with a supplier
- Worried that there will not be adequate self-serve for simple things, hence time-consuming bureaucracy
- Worry that customers will be unhappy with service quality in third-party hands
- Risk aversion isn't as high as with corporate managers but there's low tolerance for mistakes
- Worried that they are low priority with a large customs specialist
- Worried that technology will not allow them to access shipping documents from anywhere (i.e. mobile devices)
- Worried that growing e-commerce will not be accommodated cleanly

Assurances With Us

- Karen: "They want us to educate, anticipate and provide reports and insights about their trade data."
- Services designed to lower your costs through efficiency while increasing your visibility through technology
- We are geared for mid-sized companies and their needs and expectations.
- Experienced people who have seen it all, plus domain experience in verticals
- We help your people do their work better, and leverage existing resources
- Clarity and transparency throughout the process
- We offload your risks
- We simplify the growing complexities
- We prevent mistakes that cost time and money
- We handle all the details
- We provide on-demand trade data
- Personalized service reduces friction and frustration
- The answers you need from informed people
- Visibility through advanced technology for tracking and clearing
- The support you need whatever the shipping challenge

- Friendly, professional people trained in customer service and aware of business challenges
- We take the load off, an extension of your business
- A customs leader by your side who is in direct contact with government and on top of impending change
- A team of trade consultants who can analyze trade data to extract opportunities
- Working with company that has a reputation to uphold
- We have a large capacity for finding solutions and innovate constantly through the solutions we find
- We act fast
- We are always thinking ahead on your behalf
- We are improving continuously, like you.
- Ongoing investment in the latest technology
- We are scalable as you grow, with every service you need
- Smooth onboarding
- Innovate continually as trends (like e-commerce) arise
- Solutions built around your trading volume, not one size fits all

Benefits

- Free up time and resources
- Get to market faster
- More strategic input
- Leveraging of existing resources
- Continuous improvements and efficiencies
- Prevent errors that cost time and money
- Confidently outsource the management of growing trade volumes when it doesn't make sense to house staff and develop in-house technologies
- Single supplier for streamlined processing and working relationship
- Single supplier relationship for customs and freight if required
- A supplier that understands the impact of regulatory change and makes process changes to mitigate those impacts
- Your customers are better served by a larger provider
- Proactive communications and advice
- Any question can be answered at any time
- Confidence that any problem can be quickly solved
- A partner large enough and equipped enough to solve unforeseen importing/exporting challenges

One-Time Persona

[Livingston One-Time Shippers page](#)

This customer works in a business (not a consumer). They are often an administrative or clerical person tasked with getting this one-time shipment into the country. If more than one time, just a few shipments per year. Typically, they

are shipping skids or partial containers. Example: an engineering firm that needs a special piece of equipment shipped that's not typical for their business.

Many come to Livingston because a carrier or another customs broker has referred them. Because these customers usually need a lot of hand holding, smaller customs brokerage competitors don't have the bandwidth. (Livingston is well structured to serve one-to-occasional customers.)

They are not price sensitive. They would like a low price but no customs broker will give them a low price, including Livingston. Most of these customers are willing to spend \$300 or more just on customs brokerage service fees because it's worth it to eliminate the hassles of importing — especially since they don't know or care about the process.

A few more things: They want clear answers from real people and ease of process. They want help with all the details, from start to finish. They want assurance that the shipment will arrive quickly and in good shape. They don't want rabbit holes and up-selling.

Business/Personal Priorities

- Save time and avoid hassle
- Responsiveness because shipments are often high priority
- Simple, clear, decisive advice and answers
- Ease of accessing support when needed
- Worry-free process
- Minimize duties and taxes
- Value for money (at least perceived)
- To not be oversold or ripped off
- No fussy/uncertain detail work
- Happy customer/contact

Worries

- Confusion leading to mistakes
- Not knowing what a customs broker does and how they help
- Not knowing what to do or who to talk to
- Getting fined
- Not knowing what paperwork is involved
- Making a mistake with paperwork that costs time or money
- Being gouged or misled or both
- Poor treatment as a small customer
- Hidden complications, surprises, costs
- Shipments will disappear into a black box with no visibility
- Customs difficulties and speed of clearance
- Not asking the right questions or having the right information ready

- Not understanding how long documents must be kept
- Needing a bond
- Account set up will be time consuming and invasive
- Want to deal with real people who have answers they can trust

Assurances With Us

- Fast, easy account set up
- Clarity on what we'll do
- Guidance through every step
- Easy process, quote, and credit card payment
- Transparent pricing
- The right level of service for the fee
- Geared to serve thousands of one-time shippers every year
- One contact, no call centers
- The answers you need from informed people
- The advice that will save money and time
- Assured compliance with no surprises
- Proactive gathering of information
- We handle the details and know the ropes
- You'll be fully prepared to ensure no holdups
- We handle all documents and forms
- No mistakes

Benefits

- Peace of mind
- The money you spend saves headaches and holdups and reduces risk
- No need to research customs information or deal with people who might mislead you
- You can feel confident that you are dealing with trustworthy professionals who have your best interests at heart
- We offer unbiased suggestions based on what is best for clearing your shipment in the shortest time possible

Resources

Writing

- [Axios](#) — masters of clear, concise writing

Presentations

- [Duarte](#) — masters of presentations
- Nancy Duarte's books [Slide:ology](#) and [Resonate](#)

Team brainstorm

How can we improve this style guide?

Once everyone has added their ideas to the table, talk through them as a group and organize into categories. Feel free to edit or add new categories as you go. You could also try this [brainstorm template](#).

⚡ Clear template

Team brainstorm

💡 Add idea

Uncategorized 1

TL Tony Leighton