

Identifying Ideal Customers with Pamela Slim

Leading Learning Podcast Transcript for Episode 328

Pamela Slim: [00:00:00] You really want to look for ideal clients and listen very specifically to the way that they talk about their problem, challenges, or aspirations.

Celisa Steele: [00:00:13] I'm Celisa Steele.

Jeff Cobb: [00:00:15] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Jeff Cobb: [00:00:24] Welcome to episode 328, which features a conversation with Pamela Slim. Pam is a writer, a speaker, and a business coach who works with small business owners ready to scale their businesses and intellectual property. She's the author of *Escape from Cubicle Nation*, *Body of Work*, and, most recently, *The Widest Net*. Pam and her husband, Darryl, co-founded the Main Street Learning Lab in Mesa, Arizona, where they host diverse community leaders and regular small business programing. Pam and Celisa talked about the need for businesses to adopt an ecosystem point of view; how to find your ideal clients and customers; the importance of using problems, challenges, or aspirations to identify ideal customers; four categories of obstacles that typically prevent customers from solving their own problems; diversity, equity, and inclusion; and more. Pam and Celisa spoke in September 2022.

Celisa Steele: [00:01:29] Well, I happen to know your latest book is called *The Widest Net*. I actually have it right here with me, and so I want to talk about that a little bit. And one of the things that you do in that book is you make the case that businesses need to adopt this ecosystem point of view. And so I would love to have you explain what ecosystem means to you in this context. And then maybe you could also talk about how you contrast that with the empire point of view.

Pamela Slim: [00:01:59] The idea for this book, really the core idea, came out of a lot of decades of doing work, and, being a high picture person, it's hard for me to give a specific answer without giving the context. Anybody who's had Myers-Briggs, I'm an ENFP, so I have to hit the end, I note. But the bigger context is, in the work that I've done, I'm really an author-

practitioner and just notice, as I'm doing work with clients, the kinds of questions that they have and the kinds of problems and challenges that they're trying to solve. So one thing that I found, especially in recent years of working with people to build an audience, is there is a lot of information out there that literally talks about building your business as an empire. So that's language we use commonly. I'm excited to build my empire. I want to crush my competitors. I want to dominate. We use terms like "fans" and "followers," and there's really this whole idea of pulling people, one way, into you and positioning yourself as that supreme authority who has the answers to all the questions. And, in that, a bit of an extreme version of that model. But really, for people who are really looking at that as an example of how to grow a business, it can create quite a bit of anxiety for people.

Pamela Slim: [00:03:13] First of all, just thinking I have to be the one who has all the answers. I have to have the perfect qualifications. And it's funny for me, who works with people who have pretty amazing qualifications at what they do, that never stops people from feeling some imposter syndrome. And it also means that it can be a limiting way that you can actually help your customers solve their business if you're trying to create something that often goes far beyond your capabilities and your particular areas of expertise. So what I found more in the work that I've done for decades—that was actually my major in college, was community development and economic development, using non-formal education as a tool for social and economic change in Latin America. That was my whole foundation early on. All the models I looked at were really integrated. When you're making a change as a business owner trying to solve a problem—like, for my clients, to grow their business—there is never just one place that they're looking for information. They're always looking for information, resources, support. They use software and tools.

Pamela Slim: [00:04:18] They listen to podcasts, they read books, they go to conferences. They often work with a whole number of different service professionals like me. My clients work with CPAs, intellectual property attorneys, graphic designers, Web developers, etc. So, in this model, which is based on the ecosystem, I center the ideal client and in the middle of the ecosystem, and really the work is just to identify where are those natural places, in person and online, where they are going to look for answers to the problem that you, as the business owner or organization, are also trying to solve. And so by doing that strategically and looking to find those partners and places—I call them watering holes—that are really aligned with your values and the way that you like to work, it's the difference between just trying to holler out to the Internet and get everybody to rush to you in the empire model or identifying strategically where in their ecosystem has somebody else kind and generous already created a group of

people where, when you show up to speak at a conference or be a guest on a podcast, you're automatically connected to all kinds of people who fit your mode of ideal client.

Celisa Steele: [00:05:32] Well, thank you for giving that background, both your literal background—it's fascinating what you studied in school, and knowing that that's your educational background that you're drawing on for this current work—and then just how you came to appreciate the ecosystem view for businesses in particular. And so one of the things that occurs to me, you're talking about ecosystem. You're talking about potential partners. You're never going to be the legal resource for your clients or that certified financial planner for them. You're going to outsource that. You're going to partner with others. But, if you adopt this ecosystem view, are there competitors? Do those still exist, or is everyone a potential partner?

Pamela Slim: [00:06:14] It is all, I think, dependent upon how it is that you choose to define competition, and, in practice, the way I think about it in the context of my clients is really what I'm looking for are aligned partners. My clients are very deliberate. They come from a value set. They often have a way of working. It can be a little bit different for different people, based on what their personality and how they're wired and what they like. But, when I think about recommendations for them of people who would be an ideal fit, it's usually based on sharing values and having something specific that's going to fit the need for that client. There are certain cases where I can have somebody talk to me, even in the early stages of just exploring working together, where I might listen to who they are, what they want, and what they need and think about a peer that I have, a colleague who's another business coach, that might be a better fit for them and refer them to that person if that's really the best fit. Because I'm looking for the best fit for me, where I can be bringing my gifts and where I feel confident that I can really help them to solve their problem. Competition. I don't look at competition as bad. I'm a very competitive person. I laugh with my son all the time. I did martial arts for many years, about eight years, capoeira, the Afro-Brazilian martial art, and then mixed martial arts. So I actually love competition.

Pamela Slim: [00:07:36] And my son did soccer for a long time. Now he's doing MMA, so we always laugh about, you know, he says anytime he's in school, if there's a competition, he's 100-percent engaged. He's like, "If there's a competition, I'm going to win. If there's a quiz in class." And I have some of that energy too. When you think about it in the context of ecosystem versus empire, in an empire culture instead of values and lens, I might look, let's say you and I are peers in a space in the empire lens. I think I need to get her out of the way because she's competition to me of just showing everybody that I am the number-one person. In an ecosystem side, I look at it like, whatever your favorite sport is—I'm a sucker for sportsmanship too. I will

weep at good sportsmanship. It's watching competitors. If it's the basketball field or soccer field, wrestling mat, whatever it is, when they're going at it and absolutely pushing each other to do the best, their best, and then, once they break play, they are hugging each other and laughing and supporting each other and giving a hand up. That to me is more an ecosystem type of competition where you're pushing each other. There can be a way that you want to be the best in whatever it is that you're doing, but it's not with the energy or intention of crushing the other person. It's about elevating the total level of play and craft.

Celisa Steele: [00:08:59] That makes a lot of sense. And I especially like that you point to the fact that you can value both the competitive aspect and the good sportsmanship aspect. They aren't opposed necessarily.

Pamela Slim: [00:09:11] Yes.

Celisa Steele: [00:09:12] So, when you talked about the ecosystem, you did say and made it very clear that, at the center of that ecosystem, is the ideal client. And I know that when an organization sets out to identify that ideal client, you caution against demographics or at least demographics as a starting place. So what's a better place to start?

Pamela Slim: [00:09:36] I use a method from my friend and colleague Susan Baier from Audience Audit, and she's an audience segmentation specialist. She was my mastermind partner for five years, so we know each other very well, and she has a specific approach that I have embraced so much and that I write about in *The Widest Net*, which is, when you are looking to be extremely clear about who you want to connect with, it's actually unhelpful to start with something like demographics. So she often uses the example, if you're just saying my ideal client is 55 and drives a Subaru and lives in New Jersey, it doesn't really say anything at all about how to find them, about other people who might be serving those clients. Because, when you think about that, just in terms of demographics, if that, for example, is a business owner, you can say it's a business owner, and they make \$100,000 a year. Okay, that's a little bit more demographic information, but it still doesn't help you to identify what's a core problem or challenge. So Susan always says start with identifying a core problem or challenge this person has or aspiration that they want to attain. And, when you're defining first an audience definition that way, then you can add demographics if they are relevant.

Pamela Slim: [00:10:56] So, for example, when I'm thinking about my clients who are scaling through IP, I work with people who are highly talented, who have developed a lot of IP like books and training programs and workshops, who really want to scale their income, but they

don't want to just trade time for money. And that's a description of an audience. So they could be 25. They could be 55. They could be any gender. They could live anywhere. The values piece can come in where they may want to scale their business without causing harm, without manipulating people—so that can be an approach they have to business. But it also opens the door for all of my other ecosystem partners to understand too. Always when you're talking IP, there's an IP attorney. When you're thinking about scaling a business through revenue, there's a CPA. There can be marketing folks, sales folks, branding folks. And so, by definition, when you start with that—describing your audience first by problem, challenge, or aspiration—then it really opens the door for first them just to identify themselves and then for you to look for effective ecosystem partners.

Jeff Cobb: [00:12:09] At Tagoras, we're experts in the global business of lifelong learning, and we use our expertise to help clients better understand their markets, connect with new customers, make the right investment decisions, and grow their learning businesses. We achieve these goals through expert market assessment, strategy formulation, and platform selection services. If you're looking for a partner to help your learning business achieve greater reach, revenue, and impact, learn more at tagoras.com/services.

Celisa Steele: [00:12:39] That focus on problems or challenges or aspirations, knowing that requires specific, intimate knowledge of those ideal customers or potential customers—their situation, their emotions. And I know you talked a little bit or mentioned at least watering holes, but I would be curious to know how would you recommend learning businesses go about uncovering those problems, challenges, aspirations?

Pamela Slim: [00:13:08] The best place is always in starting with people who you already do identify as being ideal clients. I'm just assuming most of the listeners have a base of clients to start with, and we know there's often a range of those that are most aligned, most ideal, and maybe those that are not quite as ideal. You really want to look for ideal clients and listen very specifically to the way that they talk about their problem, challenges, or aspirations. There's a concept I actually wrote a blog post about called The Magic Door, and that is, before somebody works with you, before they realize how amazing you are, I think of the metaphor of the Narnia books. I used to love to read all the Narnia books. The Lion, the Witch, and the Wardrobe. So, for folks who are familiar with that book or movie, there's a little girl, Lucy, that goes through the door of a wardrobe in her uncle's big house and opens up into this this magic land of Narnia. Before she went through that wardrobe magic door, she had no idea that Narnia existed. And that's the way that it is for clients who work with you. So, before they work with you, sometimes we get so stuck in our own language we use that we confuse them because we're not

using language that they use before they work with us. So people might come to me saying, "I want to grow a six-figure business or a seven-figure business."

Pamela Slim: [00:14:26] In my head, I'm thinking, "Are you sure that's what you want?" Maybe once we get through The Magic Door, we start to work together, we can get very specific that, yes, it might be a dollar number. It also might be something more specifically around profit, or it might be something that you want to design a business model that gives you a lot more time. Or whatever. But, before that client starts to work with you, you just listen to the kinds of things that they are saying that they want, and that's often the language that you can begin to dig into with them once they begin to engage with you. And, once you begin to do the work, then you can really figure out what are the specific issues. I remember in the first ten years of my business, when I was a management consultant in Silicon Valley, people would often say, "We need to do people training." Anybody listening who's ever heard that question? You're like, "Could you say a little more about that? What things are you observing that lead you to the conclusion that you need people training?" And just listening to that language, noticing what people are saying, very specifically watching comments on LinkedIn, listening to conversations, noticing the kinds of conversations that people have is a way you can begin to tune in. But I really like to center it around your ideal clients because you want to be reaching more of those people.

Celisa Steele: [00:15:47] If you think about organizations trying to talk to those ideal clients about their problems, challenges, aspirations, in your mind, is that better done one on one? Is it a place where you could potentially do more of a mass online survey, again even if you were targeting just ideal customers, so it would be a little less personal? Any thoughts on the right mix for how those types of exchanges happen?

Pamela Slim: [00:16:13] I always look at it as a combination of things. Some of it depends on the time and the resources that are available to an organization. It feels to me like if we buy a pack of gum these days that we get an e-mail asking us to do a survey. So, while I am a fan, and they could be amazing when well-designed, I think sometimes it's becoming harder and harder for people to fill them out just because there's so much demand from every business to have it. But it's a very useful tool to have consistently. I think, in a well executed listening plan, if you will, which I write about a lot in the book, because in our case here at the Main Street Learning Lab, we spend a lot of time just literally listening to people as they would walk through the door. And you can do a similar thing if people are walking through your Web site if you're mainly doing that, where you might engage people in questions. What's the biggest question that you have about whatever area you're trying to help them with?

Pamela Slim: [00:17:14] So there are ways, I think, that you can listen on a deeper one-on-one level, but to have things built into the process of how you do business, where you're gathering information from people. A lot of companies or organizations do thought leadership research, the kind of research I was mentioning that Susan Baier does from Audience Audit, where you're specifically looking at gathering some more specific data from your clients. But I also like to stay tuned to the kinds of publications people are reading, and really social media can be a great listening tool when you notice the kinds of things people post, how they talk about questions, how they respond back. So usually from a strategic perspective, when working with clients, it's really looking at the big picture—what are their goals and objectives, what do they know and not know—and then activating some of the areas where they can start to have more of a comprehensive assessment process.

Celisa Steele: [00:18:11] I was also thinking about, when you have this focus on the problems and challenges and aspirations, that means then it's very valuable to understand what is preventing them from solving their own problem or challenge or reaching that aspiration. And I know that's something you devote some pages to in *The Widest Net*. So would you just tell listeners about those four typical categories of obstacles that tend to prevent people from addressing their own problems or achieving their own aspirations?

Pamela Slim: [00:18:41] Yes. I am a training and development person through and through, for 30 years. So performance improvement has influenced me greatly. So a lot of these four categories are really influenced by my work in training and development. But one can just be specifically knowledge, skills, or information. They just truly do not have the skills or knowledge needed to do what it is that they're trying to do. Sometimes there are thoughts, there are ways that they're thinking about what they're trying to do that are getting in the way of them having success. So somebody might think, "Gosh, I just have a degree in liberal arts. Who in the world am I to think that I could be a successful entrepreneur? I need to have an MBA and further training." That's actually a limiting belief. It doesn't really have a lot to do at all with business success as long as you have a clear plan. So sometimes thoughts get in the way of people getting what they want. Tools. There are specific tools sometimes that can just make things easier for people to get done, and that has been a really specific focus that I've always had within my business, coaching practice is developing tools, methodologies, frameworks that just help people to get things done easier and faster. And then other times you need people. It may not make sense for you to be doing the thing that you're going to do. Like I could learn how to put a roof on my house, but I would rather pay qualified roofing professionals to do that kind of work. So sometimes it's helping people to identify the specific folks they need to solve the problem.

Celisa Steele: [00:20:11] It's interesting to hear your emphasis on your background in training and development because it occurred to me, in looking at those obstacles, that really a course or a workshop or any educational offering could or arguably actually should address at least one of those things. The people can be that peer-to-peer networking and access to others in a network, and of course the knowledge, skills, and information, a lot of coursework does that anyhow. It seems to me that it makes a lot of sense to focus on these obstacles.

Pamela Slim: [00:20:42] Well, it does, and it's one of the critiques I have when I'm the ranting person shaking my fist at the Internet of often—which folks in the profession know—training is not the solution to every problem. And so it's very often the first thing is business owners think of either "I just want to increase my revenue, so I'm going to create an online class." Or "My folks have this problem. Let me create a class to address it." And it only is true if knowledge, skills, or information is the thing that they're lacking, and quite often that's not what is preventing them from solving the problem.

Celisa Steele: [00:21:15] Right. And I think that thinking about what else a learning business could offer that might address some of those other obstacles—because, again, I do think, even if it's not a specific course but just that access to the network that so many learning businesses, because they focus on a particular trade or industry or profession, they can connect other people. And that speaks to the community aspect that I know resonates with you.

Celisa Steele: [00:21:47] The Widest Net Method, which is what you talk about in *The Widest Net*, for you that really starts with a business's need to understand its root mission. And, in the book, you share a bit about your root mission and this desire to address the lack of visibility of Native American leadership and entrepreneurship and how that led to this Main Street Learning Lab that you've talked about a little bit. I would love to get your thoughts on, big picture, broadly, what role leaders need to play in diversity, equity, and inclusion. And if you have any specific thoughts around learning leaders and their role around, I would love to hear that as well.

Pamela Slim: [00:22:28] For sure. So my husband is Navajo, is Diné. And that's one specific interest that really has made me connected to a lot of folks here in the Arizona area. We have 22 federally recognized tribes. So really part of that root mission came when I did a 23-city tour around the United States, teaching the early stages of a framework for *The Widest Net* book. It

was research for the book. And, on a whim, I just asked from the first city in Berkeley, California, "How many of you have ever seen a Native American business presenter at a business conference speaking on a business topic?" And then I asked the same question in 23 other cities—Seattle, New York, Chicago, all over the place. Only seven people ever had, and four of those were in Canada, in Vancouver, Canada. Knowing that my husband had been an entrepreneur for a long time, I had been in conference rooms of tens of thousands of Native entrepreneurs, so the problem wasn't that they didn't exist. It's that there wasn't any visibility. And so this was a germ in the seed for the Learning Lab, which we structured in order to highlight the leadership that exists but is rarely seen in community. And, as a model that really is baked into a lot of the way that I see community, I think overall we all can have things that we miss based on our own lived identity, what we're used to seeing and not. I have done work around inclusive community building for the last three decades, formally and informally. But even folks who are really deeply steeped in that work acknowledged, as we started to talk about it more, that they weren't often even thinking about inviting a Native American speaker.

Pamela Slim: [00:24:11] There's such lack of visibility. So there's one thing when approaching your work and thinking about work, a favorite series of questions I have is: Who is here? Who is not here? And why aren't they here? This can be a foundational place if you're thinking about your own organization, and you're looking at learning in your organization, you can use that lens to understand who might be in a room, who might be in a position of leadership. If you think about it in the context of your customers, you can also ask those same kinds of questions. It's relevant for a lot of people these days to look at it in their employee base. The thing about answering the question of both who is not here and why aren't they here, sometimes you need other perspectives in your ecosystem. You need people that represent different communities to say, hey, have you thought about folks from this particular background or identity that you might not think about? You, if you are not the identity that you're looking for that's missing, you can't answer the question of why aren't they here. That's a matter of deeper engagement, of listening. And, to me, the overall issue of equity and inclusion is we want our organizations, our customer base, our communities to be representative of the people who live there, and we want to create a system and structure that supports access and equity for all people. And so it's more a matter of—to me, I can't imagine not focusing on that because it's just something that I think is fundamental to what's going to create a more healthy, flourishing kind of environment.

Celisa Steele: [00:25:55] Well, this is interesting since we talked a little bit about demographics at the beginning. This seems like a place where actually looking at demographics can help you understand better who's not there. Because, if you have this broader definition of the ideal client, but then you can look at the demographic level and say, okay, even of folks who meet

this criteria, we're still not seeing enough Native American representation or enough people with a disability representation or whatever it might be.

Pamela Slim: [00:26:22] Exactly. And that's where it becomes so important where you are looking. I always use the statistics around venture capital investing within the startup world. The latest stats, I think the high is 2.9 percent of women-led companies get funding from VCs—and that's the high from like 2.1 percent. So you can see where we—and that's from all identity backgrounds. So you can imagine for a Black woman, for a Native woman. I think I saw the statistics for a Black woman was 0.35 percent within that 2.9. So that's where you start to see, when you slice some of the demographics, how different it is and how important it is to look that way. But fundamentally, at first, if we look at making sure that great ideas are funded, making sure that we're bringing the very best technology and companies to light and growth in the market to solve our problems, that might be the biggest problem we have. Then we start to look through the lens of what is the current behavior of venture capitalists and who's getting funded and not. And then it really goes into a theory of change of why do we think that they're not getting funding, and people can have different ideas as to what women in this case need to do in order to get funding.

Celisa Steele: [00:27:39] I would love to have you talk a little bit more about the Main Street Learning Lab, and in particular I'm intrigued by the name and thinking about our listeners who are all about providing learning, mostly formal learning in the case of continuing education or professional development. But talk a little bit more about how you envision this Learning Lab and what it's doing.

Pamela Slim: [00:28:01] Yeah, so we have here in downtown Mesa—we always laugh because in the Phoenix metro area, Mesa is often seen as the poor cousin who has to sit at the kids' table at the holidays. We've had this reputation for many years of nobody really thinks about us. And actually there's been huge, tremendous growth that's been happening in our area. There's a whole field of study around innovation districts which say that, where you're trying to stimulate economic development within an area, that you want to make sure that you have a couple different kinds of primary organizations. So there's an academic institution. We have a brand-spanking-new building from Arizona State University that was just built two blocks down. That's really critical, to have an academic anchor. You want to have things like learning labs, makerspaces. We have a makerspace a couple of doors down. We have what we create more of like an innovation type of studio, as well as businesses, cafes, art places, all of that. Our innovation district in downtown Mesa is around the creative economy. And so our space, I always think about it in the context of that, that part of what we recognized was missing as we

thought, well, something is wrong here. We know so many Native American entrepreneurs, but there's no visibility, and there's no connection to opportunities for the kind of investment that's going into our community.

Pamela Slim: [00:29:21] So we created a physical space where primarily people from those communities, and, for us, it's not just Native American. It's often BIPOC, Black, Indigenous, Latinx, Asian American folks can really come together and do what they feel that they want to do. All events are led by and for the community. And so we've had everything from the launch of a Native American entrepreneur group here. We've had political campaigns that were launched from here from candidates of color. We've had Navajo language classes. We have had a startup life support group, mastermind groups. But, from a diagnosis and learning perspective, a fundamental belief that I have is generally community knows what it needs. And for me, to be supportive, we create a beautiful space. It's very beautiful, filled with art, beautiful light. We have an entire white board wall, flexible furniture so that people can set it up the way that they want. And it is a magic thing. And for anybody listening, whoever has a chance to visit, we'd love to have you here. But something just magical happens when people walk through the door where I think they feel good. My husband is a traditional healer, so there's just good vibe and energy here.

Pamela Slim: [00:30:36] People walk in, and they just tend to exhale, and then, through conversation that we have, begin to dream and think about doing things. So we have what's called—and I detail this a lot within the book in terms of a method of building community—we have it's called the Sprouting Effect. So I mentioned we had the Navajo language classes, which we did in partnership with the Phoenix Indian Center to have classes here in Mesa. Somebody showed up and attended, Bobbi Nez. She was in the space. She looked around, and she was like, "This is really cool." And she said, "Can we have our Native American book club meeting here?" And I was like, "Sure, absolutely." So then the Native American book club started meeting here. And then, from there another group, somebody attended who said, "Oh, I'd love to shoot a YouTube series here. Can I start that?" So it's a natural sprouting effect. Looking at it from a root perspective of what these leaders need is not more training. It's beautiful space, supportive space where they can just stretch and grow. We fund it ourselves, so there's no charge for people who use it.

Pamela Slim: [00:31:42] What the benefits have been is we look, over six years, is there's something that's very important in Main Street for people who do any kind of local work. A lot of folks have not felt safe here. They don't feel safe. They can be profiled. They've had a bad experience. The relatives have had a bad experience historically here downtown. So just the fact

that people are showing up physically and coming into the space and getting comfortable, has become a place where then also they might be more inclined to come back to visit other cafes, to visit stores, and to have what we always love—there was a there was a older Navajo grandma who stopped by the other day, and she was just walking by and saw the space because we have art in the windows as well and came in, and we just got to know her, and she sat down. We started talking to her, and then she just had a big smile, and she said, "Now I have a home base here in Mesa. I kind of have a home here." And that's that feeling of having a place of connection and belonging that, as we know in so many different ways, learning and community development is such a critical thing.

Jeff Cobb: [00:32:54] Pamela Slim is author of *The Widest Net, Body of Work,* and *Escape from Cubicle Nation*. You'll find links to Pam's site and her LinkedIn profile in the show notes for this episode at leadinglearning.com/episode328.

Celisa Steele: [00:33:10] At leadinglearning.com/episode328, you will also see options for subscribing to the podcast, and we'd be grateful if you would subscribe if you haven't yet, as subscriptions give us some data on the impact of the podcast.

Jeff Cobb: [00:33:24] We'd also be grateful if you would take a minute to rate us on Apple Podcasts or wherever you listen, especially if you enjoy the show. Celisa and I personally appreciate reviews and ratings, and they help the podcast show up when people search for content on leading a learning business.

Celisa Steele: [00:33:40] Lastly, please spread the word about Leading Learning. At leadinglearning.com/episode328, there are links to find us on Twitter, LinkedIn, and Facebook.

Jeff Cobb: [00:33:50] Thanks again, and see you next time on the Leading Learning Podcast.

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