

Jennifer Navarrete: Welcome to the show that shares insights into how you can **Build Your Business Once** with hosts Sherry Lowry, and Jennifer Navarrete.

Thank you for joining us today. I am here with Sherry Lowry who is sharing with us her 20-plus years of knowledge on what it takes to **Build Your Business Once**. From the title, you know our topic today is **Identifying Your Ideal Client Profile**.

We can really teach you a mostly stressless business life. Sherry, tell us how we do that.

Sherry Lowry: Ok, and first, I want to talk about why we do this. These are the things you learn over time but could know much of this and develop an advantage at the very beginning, or when you are making a business or career pivot. One of the reasons we will talk more about profiling is because we will actually have you profile **YOU** first, as **Owner (or Partner)** first. That has to do a lot to do with who you will naturally draw to you, and it will give you more control than you think you have in the days when a lot of the future is still unfolding.

It will also help you recognize these **Ideal People** for you to be working with as they start to cross your path or literally show up and possibly initiate and reach out to you. It makes it a lot easier to know – with some notice – about what you are looking for. It will also increasingly clarify for you how you actually work best and with whom you work best. You know more than you think you know, but most of the time too many of us are not taking the time to identify what that is really clearly.

We spend so much time on our craft, or know-how, or our how-to, and things related, and with our Clients that sometime we are not paying the same attention to crafting and refining us. That is part of what we are doing here. If you do undertake this approach, it will also begin to give you a lot of help in educating your referral sources around whom, why and how they may best refer to you and make that easier for you (both.)

We will talk about that more in detail, and along with giving testimonials and gaining testimonials, too, as we go along. Probably most importantly and most subtly, if you do think about the way that you are already put together to work with some Clients in better ways than others, you will gradually begin to notice an

automatic, progressive upgrading of your over-all Clientbase quality because you have, in different ways, put some focus on just that happening.

So, the easiest route into this, and I am going to provide you with a template if you want to do this for yourself, is to develop a profile of you – yourself – both professionally and personally, and to do that in one document.

Jennifer, you and I have been talking a lot about how we, over time, began to make our own business, our process, and way of working with people more seamless. It will also explain how we go about parts of our life.

JN: I also think I kind of had to get burned a little bit to really hone in on that. When I was first building my business I was taking anything and everything that was to come my way. I needed to get burned to recognize, to know these things and actually listen to my different selves, profession and personal. Now, I am pretty fine-tuned.

SL: Yes, it is a lot like that. Like if you are a vocalist, you begin to realize that you are more in charge of your voice than you think you are, and also protecting it as well as continuing to refine it and educating it, no matter how many venues or modalities of genre, you sing well in, there is always more to learn there.

To start with, I have been doing this a long time informally anyway, and with Clients. But at one point around 20 years ago of the 23 I have been in this business, I actually began to write down what it was I wanted to know. So first I had to know that about myself.

My first Profile portion of the template I am going to give all of you will guide you through building yours. You will be able to see this on paper if you want to do the downloads.

I had to figure out what my **Intellectual Traits** were, for example. The “Head” aspect is important to me, I like working with some people who either have a tendency, regardless of their personality and style and way of working, may also like a head-to-head match – for example. Then I also appreciate research, and people who take the time to do that and for the detail, and for facts a lot of people may just prefer to skip over. I want to have enough people I am working with who have intellectual traits to ultimately, over time. So I may have a natural curiosity about how some become more and more global thinkers and more conceptual

thinkers. Often they can visit and live part of the time in the big picture, but part of the time being very grounded to earth. So they have that capability of sliding from the big over-all, to the detail. So I came to feel there are some **Intellectual Traits** I had to know about myself that matched well with those types of qualities with my Clients.

I had to identify those; then the second category was **Physical Traits** and **Natural Interests** that are somehow bodily related (or not) – like highly physically active, hiking, daring sports – or a contrast such as meditative sitting, walking a Labrynth. This area of responses would have to do with the level of energy I tend to have available, quality of calm, being somewhat physically fit, and in the case of others, that may involve engagement in the martial arts, tai chi, or being a regular nap-taker. Or then again it could be how you may describe if you really like to do things one at a time, and to have a more simplified, down-to-earth lifestyle. Because the work with those types of people differ from the way I may deliver and the way I pace, and I can match to them, it is also important for me to these elements into consideration in my Client matches. This also helps inform me how many of various types I may work well with at the same time, where in contrast, I may want a waitlist for certain types ‘til I have a different type of spaciousness.

The third category you’ll find on this template will be **Personality and Social Traits**, which could bring forward more as to introversion or extroversion, or a curiosity kind of quality; is this potential Client funny? Have a super-strong work ethic? Very peaceful, caring, generous-in-spirit? A natural leader? Conservative, or not so much? Really generous with their time?

I have to say I can be nosy about some things, and every good researcher or person quite interested in facts, who is in the process of documenting something better be a bit to a lot nosy. And – I may want to know who is a big picture person; or very much, or not at all; into detail; what about ambitious or more laid back and take it as it comes? How about shy, or outgoing, and do they love the underdog? Are they a striver? As you see there are huge numbers of different **Personality and Style Traits**. What a difference all this makes!

The fourth category would be **Unique Gifts and/or Talents or Strengths**. Perfect pitch, artistic, accomplished in specific ways? Have obvious leadership

qualities? What about followship qualities? That is important as well. Are they intuitive? How much do they pay attention to their hunches if they are intuitive? Are they good conversationalists, and yet maybe small-talk may be really hard for them?

In terms of being a **Presenter or Speaker**, does that excite them and do they anticipate it, or does it scare them? (All this can change, but some may not change radically – so it has to be taken into consideration in goal-setting.) What about qualities of **Inclusiveness**; do they consider themselves **Generative**, **Productive**, **Proactive**, and a **Direct Communicator**, or not so much? What about **Dependability**, **Loyalty**, things like that those are **Unique Talents and Strengths**.

With those four categories, some of which we might think about applying to ourselves, in contrast to our Clients. This is enough if this (provided) template will help support what you start to think about and document. I will stop right there, then I will talk more about the actual documentation process.

JN: I think you are right, I figured out that through the **trial and terror!** Part of my business was that I like more fly-by-the-seat-of-my-pants opportunities than highly structured in my early years I would get frustrated by working with big Agencies and Corporate Clients because I was like a speedboat and I wanted to work with speedboat Clients. If it was a small business owner or entrepreneur, we could discuss something, they could make a decision and take action. While working with big (larger organization) Client, or big Agencies or Corporates, they are like a giant cruise ship, they don't make a left turn very quickly. Then, it was just frustrating to me.

With more of that speedboat mentality, I will say I have spent as my business has matured and I have come to like having both. I appreciate Corporate Clients and big Agency Clients who do move in their own way. Because, it takes some of the responsibility off of me, and I am a piece of that bigger puzzle. I have gotten comfortable with being that piece in that area, but that was totally not me in the early days.

So, I think those kinds of Ideal Clients can shift over time, but yeah, it took a lot of figuring it out. I was feeling unsatisfied and frustrated narrowing that niche down for me.

SL: That's really interesting. I did not know you went through that set of experiences. Early on, I tended to have two types of Profiles, and one is represented by the way I agree with you. Like you, I changed over time, too. What I came to early on fortunately instead of later, was that I really thrive on a mixture and especially with Clients and Companies that are in different phases of their growth potential. I love having two or three that are strongly established, mostly for them it is about periodic innovation. But periodically as to delivery, they are big on deliverables, and occasionally they have to go back to *the golden treasure chest* because they all have a rich history, and dig out all over, and make changes, make additions or that may have to recall first things first – however that may play out such overtly for their business.

But then there are also other people, for example, I may work with on an ongoing basis. I have had one client for 22 of 23 years and I work to be really, really, well paced with him because he is not going to make changes fast, but he is going to make them thoroughly and deeply when he makes them.

I had to learn to **manage me** when working with him, but he has been one of the most enjoyable clients out of all of them I have had. Because, we have been on a long journey together, I know that I will quite possibly have him included in my Clientbase on-going. He and I know we will expand and invent on his end in a comfortable way, and that he does not feel that I will pressure or push him. I don't think of having to wait on him, mainly joining him where he IS any given day we meet. That is just part of his unfolding process.

So, as I noticed such vast differences, I developed this **Profile for my Ideal Client**, and it turned out that I have quite a few variations on that. I also do this for **my Ideal Collaborator or Alliance**, or **Business or Project Partner**. In terms of collaboration potential, you and I probably should continue this project into other things. If so, when so, I will ask you to take a look at a worksheet you and I will work on a bit to identify our Ideal in our own business in certain ways, and include how we are different in Collaborator ways, or in Alliance ways..

I need to make sure I know what kind of **Space** or "**Stage**" you are most comfortable with, in this way of working. We have already found we pace well together, and that has been a real joy to me, because that is not easy to find. So,

knowing that, I bet that is also true of your Contractors and your Staff. I am sure you have had experience with that as well.

In the template we are going to provide, I am also talking about when you feel stuck, and maybe think you are dry, and don't know more, and you don't know as much as you are being asked for about yourself. If I don't know what to write next I just write whatever 'til something flows, so there are a few little light-touch techniques built into the template plate approach I will provide for you guys.

JN: That is great, we have been talking about all these great resources and where you can find them, and stay tuned, we are building up a resource guide or collection for you. At the end of the day, your sherrylowry.com site and sherrylowry.com/podcasts site section will both be the place to go to really get a sense of who Sherry is and what she offers for a better sense as we progress through the month.

SL: Thanks Jennifer, I appreciate that and look forward to next time. I think our topic for Show #11, will be about **Business Design** which is a natural outflow from what we are talking about today.

That will address more very concretely and specifically as to who do you want to work with, who we want to do more Collaboration with, and what it is we bring to those possibilities ourselves to qualify us, so to speak.

JN: Thanks for joining us, we will talk more tomorrow morning.

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