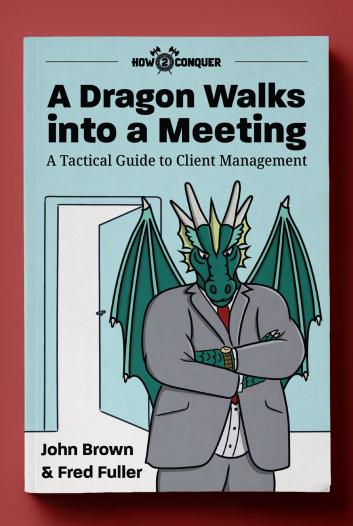
A Dragon Walks into a Meeting



Including:

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Great client management is built on fundamental principles and then mastered with practice.

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About John Brown

John Brown has over 25 years of experience as a client manager and operations leader. He is currently Chief Operating Officer at ParkMobile. Previously, John was Vice President of Client Operations at Clutch Technologies, built the bank client-facing team at Cardlytics, and served as Vice President of Strategic Accounts for Fiserv. John began his career as an officer in the U.S. Navy onboard a nuclear submarine.



About Fred Fuller

With over 20 years of corporate experience, Fred Fuller started in the world of finance but moved into client management, taking responsibility for the Financial Institution Account Management team at Cardlytics. He is currently the Director of Business Development and Account Management at Levvel. Fred spent time in the US Navy, participated in BUD/S, explored theater, worked as a radio DJ, and spent time in residential real estate.



About A Dragon Walks into a Meeting

Whether you were just thrust into a client-facing role or are already in one and want to hone your skills, A Dragon Walks into a Meeting presents valuable tips, tricks, and tools for client success. Focusing on everything that happens after the sale, including some of the hardest pitfalls and challenges in business, John Brown and Fred Fuller share tested and proven methodologies, including:

- Unwritten rules of the job
- Practical tactics you can use today
- Critical skills to execute with clients
- Philosophical underpinnings for client management
- Illustrative stories designed to provide clarity and application

Relationship management (and how to handle sticky client situations) may not be covered in business school, but don't worry. John and Fred are here to teach you what they wish they'd known when they started.

Great client management is built on fundamental principles and then mastered with practice. Conquer them today.

Contents

Introduction

The Basics

Job #1: Build and Maintain the Client Relationship

- Chapter 1: We Have Relationships with People, Not Entities
- Chapter 2: Create Connections and Seek to Understand
- Chapter 3: When It Gets Negative, Start by Assuming All Sides Have the Best Intentions

Job #2: Build Success for Your Company

- Chapter 4: Think About Growth
- Chapter 5: Say Yes
- Chapter 6: Remind the Client Why You are There
- Chapter 7: Lead by Example

Job #3: Manage Tasks and Demands That Get in the Way

- Chapter 8: Business Travel
- Chapter 9: Meetings and Agendas
- Chapter 10: The Tricky Art of Client Entertainment
- · Chapter 11: Communicate

Wrap Up & Resources

- Wrap Up
- Resources







What Others are Saying

"Brown and Fuller's book focuses on a crucial but often under-examined function within any business that relies on recurring revenue from an existing client base. Imminently readable, their book uses real-life anecdotes to illustrate an overarching framework for client management while supplying practical everyday advice. Whether you want to know how to say "No" to a client, or how to handle a thorny client-entertainment situation, Brown and Fuller address it.

I'd recommend it for those new to client management, but those who have lived through a career of managing clients (and have the scars to prove it) might also pick up some useful ideas."

Chris Millner

Financial Technology Executive and Consultant

"Brown and Fuller have deep expertise in account management and bring that to bear in this entertaining book. It is light-hearted but full of useful insights, practical advice, and great stories and examples. I recommend it for anyone who regularly manages business clients, whether they are experienced or just starting out."

Amanda Setili

President, Setili & Associates and author, Fearless Growth and The Agility Advantage

"John and Fred are expert client managers, having worked with the most complex and demanding customers while at growing tech companies. This book is full of practical advice and implementable tactics for both those new to client management and seasoned veterans."

Jim Morgan Chief Financial Officer, CallRail "John and Fred have done a remarkable job of providing useful and comprehensive advice for anyone serving clients. They offer meaningful real-life examples of how to handle virtually any situation that can arise when dealing with client matters, showing that skillful client management is both an art and a science. I wish I'd had a resource like this when I was a relationship manager!"

Jeff Weikert Chief Strategy Officer, Abe Al

"Having done client management at the individual and executive level for the better part of a decade, this is a must-read for new client managers, and a great tune-up for those of us who have been doing this for a while! Unlike the average business book that crams 50 pages of content into a 400-page, 27-step 'simple' process, A Dragon Walks into a Meeting centers on three jobs and is something you can breeze through in a night or two. Better yet, the easy writing style and subtle humor actually make this one of the few enjoyable business books I've read.

For new client managers, Chapter 3 on Managing Tasks and Demands is a valuable guide through all of the tactical things your manager might forget to tell you and that you're too green (or embarrassed) to ask. For us vets, Chapter 1 does a great job reframing our perspective away from managing entities, contracts, and scoring the most wins, and reminds us that the things we are managing are actually people and therefore must be managed as such."

Brandon Horne

GM, Head of Partnerships & SaaS, Greenlight Financial Technology



"I've been in the client management hot seat, and I've helped to design and execute training for sales and client management professionals across my career, and for the first time there is a book that provides the critical foundations to confidently enter into client meetings and be prepared to handle its many complexities. It doesn't matter if you are new to the client management profession or a seasoned professional, this book contains all the tips and tactical how-tos to be prepared for the unpredictable and provide success for you and your client. It should be a part of any organization's client management onboarding or training program."

Darren McAdams

VP, Strategy, Technology, Operations, a global media content & technology company

"With A Dragon Walks into a Meeting, Fred and John have created a highly readable guide for those new to the field of account management. If you're looking to learn more about this important part of running a business (or are an experienced account manager looking for new tricks), I highly recommend this book."

Jardon Bouska

Chief Operations Officer, Safe-Guard Products International, LLC.

"Having managed many account teams, I can tell you that Fred and John deliver fantastic advice that any practicing account manager can implement today. They cover the topic well and deliver it with humor and great real-world stories."

Craig Potts

Former CEO, Assurance Software

"John and Fred are among the best in the business in managing and growing client relationships. I have personally witnessed them handle some of the most challenging client situations and relationships with the strategies and tactics they outline in this book. This is not only a must-read for people who are client facing, but also anyone who is interested in forming and maintaining any professional relationship."

Joe Schab COO, Leasequery

"A Dragon Walks into a Meeting could not have been better timed. In a world that has gone 100% virtual, it's time to relearn how to reconnect and be a better human again. This book's forgotten insights on how everyone must learn to build relationships and sell is helping me rethink how I can help our business grow. We have 2,250 people in 38 countries selling for Microsoft, Cisco, and Google, and there is a way to make selling a nutritive, sustainable activity that is not transactional."

Shannon Copeland COO, N3

"This is a great read for anyone interested in how to engage clients and how to ensure they are looking at their client relationships with a clientfirst mentality."

Melissa Jankowski SVP, Global Strategy and Innovation, FIS



"John Brown knows client management. He was my first 'teacher' and literally is the reason I got into the profession that has driven my career. I can recall going through many of these situations with John first-hand. Having the principles documented in this book will be an excellent learning tool for new client executives as well as a good reminder for experienced professionals. John's the perfect balance of intellect, EQ and relationship focus, and he does so in the most genuine way possible."

Barry Danz

Account Management Senior Executive

"John and Fred know how to keep calm and carry on, even when the client is dropping bombs and breathing fire."

Lynne Laube
CEO & Co-Founder, Cardlytics

"The authors distill their years of front-line experience managing clients into what is an essential resource for anyone new to account management. Written in a highly accessible style, it offers practical, simple-to-follow advice for navigating even the most challenging client situations"

Rob Shields
CEO/Founder Acadia Shutters, Inc.



Dates to Target

- January 14: Clean Off Your Desk Day
- January 17: Get to Know Your Customers Day
- March 4: National Grammar Day
- March 8: National Proofreading Day
- March 31: World Backup Day
- July 26: Talk in an Elevator Day
- September 30: International Podcast Day
- April 16: National Wear Your Pajamas to Work Day
- April 18: Get to Know Your Customers Day
- April 24: National Administrative Professionals Day
- April 25: National Telephone Day
- May: College graduations
- May 8: National Receptionist Day
- May 17: National Bike to Work Day
- May 21: National Memo Day
- **June 3:** Leave the Office Early Day

- June 21: Take Your Dog to Work Day
- June 27: National Handshake Day
- October 1: International Coffee Day
- October 16: Bosses Day
- October 17: Get to Know Your Customers Day
- November 19: National Entrepreneurs Day
- November 21: World Hello Day
- November 30: Small Business Saturday

Potential Topics for Press

Client Management 101

- The three main jobs of client management
- Principles of client management
- Account deposits and the 7:1 ratio
- No woobies
- When (and how) to communicate
- "Things I wish I'd know before becoming a client/account manager..."

Remote Client Relationship Building

- Video conferencing tactics
- Client entertainment when you are remote

Think About Growth

- Growth beyond revenue
- Goal setting
- Expanding your relationship map

When It Gets Negative

- Take greater ownership
- Avoid micro-communication mistakes
- Reinforce the value proposition

About the Authors

- Fred and John's time in the Navy
- John's time at the North Pole



Suggested Social Media Posts

Great client management is built on fundamental principles and then mastered with practice. Though relationship management (and how to handle sticky client situations) may not be covered in business school, many develop skill and expertise while on the job.

Let John Brown and Fred Fuller's hard-won experience help drive your success.

Focusing on everything that happens after the sale, including some the hardest pitfalls and challenges in business, John and Fred share tested and proven methodologies.

Whether you're new to the role or want to hone your skills, A Dragon Walks into a Meeting is your field guide to client management!

https://bit.ly/DragonMeet

#ClientManagement #AccountManagement #B2B #BusinessLeadership #Tactics

Whether you're new to a client-facing role or want to hone your skills, A Dragon Walks into a Meeting presents practical tactics you can use today. Consider it your field guide to client management!

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#ClientManagement #AccountManagement #B2B #Leadership

Do you wish they'd covered more about client relationship management in business school?

Whether you were just thrust into a client-facing role or are already in one and want to hone your skills, A Dragon Walks into a Meeting presents valuable tips, tricks, and tools for client success. With practical tactics you can use today and illustrative stories to demonstrate their use, consider this book your field guide to client management!

https://bit.ly/DragonMeet

#B2B #ClientManagement #AccountManagement #Tactics #BusinessLeadership

Relationship management isn't always covered in business school. Focusing on everything that happens after the sale, John and Fred share proven methodologies and practical tactics in A Dragon Walks into a Meeting.

https://bit.ly/DragonMeet

#ClientManagement #AccountManagement #B2B



Sample Interview Questions

How did you come to write A Dragon Walks into a Meeting?

We both spent many years in the trenches working to grow client relationships in a technically challenging environment. We were involved in multiple real-world, difficult client situations without any guide as to how to proceed. Most organizations lack even a clear role description other than "manage the client." We thought this could be improved with a clear definition of the role and the required skills.

We observed that there are many unwritten rules to client management that go beyond the typical customer-service oriented bromides ("the customer is always right"). We spent much of our time training our teams in these rules and the keys to success.

Interestingly, there is very little thought leadership or scholarship in the area of account management. If you are interested in client work, there are thousands of books on the topic of sales, and almost as many about the notions of "client service" – but very little for the B2B account manager who must develop relationships and provide day-to-day leadership to two separate organizations. As they say, they don't teach this one in business school!

What is the significance of the dragon?

To us the dragon is unpredictable, a volatile alter ego that, at times, cannot be controlled. Imagine the dragon who incinerates the room with his breath-of-rage while seemingly thinking he has it under control. The dragon who goes from frost to inferno over an ill-interpreted word.

Everyone will one day work with that dragon, if you haven't already. In fact, the harsh reality is that most of us will at some point be that dragon. The dragon is often oblivious to his power and

wields it unknowingly. It is not our belief that dragons are inherently bad but most certainly unpredictable, and the closer one gets to the dragon's gold, the greater the unpredictability.

As a client manager who is being paid by the client, you are always precariously close to the gold. It is with great forethought that we introduce the imagery of the client as a dragon, not because of a general negative connotation, but because of the role power they have, their ability to escalate quickly, and because as a client manager, you should always be on your toes.

For the first principle of client management, you borrow from Steven Covey's *The Seven Habits of Highly Effective People*: Seek to understand, then to be understood. How does this apply to client management?

We are all driven by our own agenda, and client-facing businesspeople tend to be more driven than most. Often, we can't get out of our own way and actively listen to other people. We believe the first job of client management is building relationships, so the most important thing you can do is actively listen to others.

What do you mean by "no woobies"?

We know a senior executive who has recently begun to ask at the beginning of every meeting for "no woobies" – meaning, no security blankets (à la 1983's *Mr. Mom*) in the form of screens. She noticed that her team was using technology as a filter to avoid the hard work of one-on-one human interaction.

In client management, job #1 is to create relationships. Our first principle of client management is: Seek to understand, then to be understood. Technology gets in the way of both.



Who is A Dragon Walks into a Meeting for?

Business professionals who are new to a B2B account/client management role, particularly if they have previous experience in a related area, are within our target audience. For example, many account managers come from other parts of a business, such as software development or operations. Thrust into the new role, they are often unsure how to proceed.

But we believe experienced client managers would also enjoy the book, whether they're looking to further their relationship management techniques or just brush up on the basics. Also, business leaders looking to improve their team's skill set may find A Dragon Walks into a Meeting to be a useful tool.



How2Conquer is a boutique nonfiction publisher specializing in unique how-to books that are designed to help you master new skills quickly. Each title in How2Conquer's knowledge fleet offers the opportunity to learn something highly specialized. With an emphasis on graphic elements, we create small-format books that are accessible and encouraging.

We partner with experts in a variety of fields to share their specialized expertise with our readers. From high-level corporate executives to experienced volunteers, from veterinarians to school board members, we have worked with a range of authors who all have one thing in common: the desire to share their knowledge.

