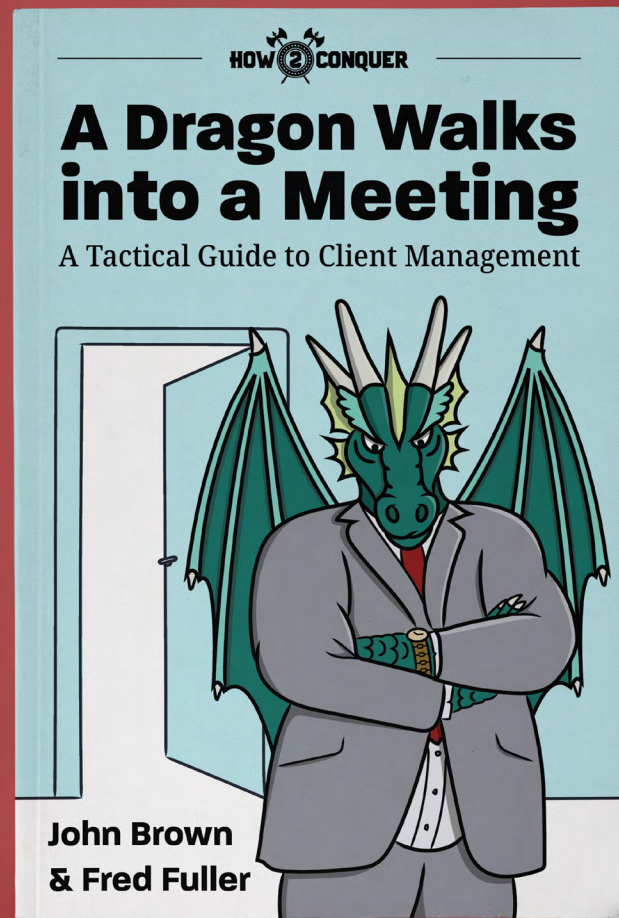


A Dragon Walks into a Meeting



Including:

- About John Brown and Fred Fuller
- About *A Dragon Walks into a Meeting*
- Contents
- What Others are Saying
- Dates to Target
- Potential Topics for Press
- Suggested Social Media Posts
- Sample Interview Questions





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

CONTACT

How2Conquer
team@how2conquer.com
404-228-0875
1990 Hosea L. Williams Drive NE
Atlanta, Georgia 30317

CONNECT

www.how2conquer.com

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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 Level. 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

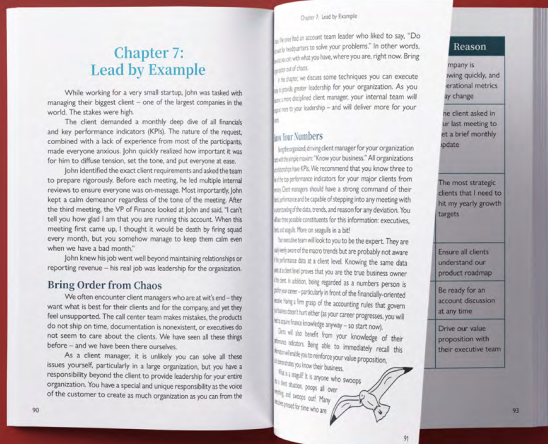
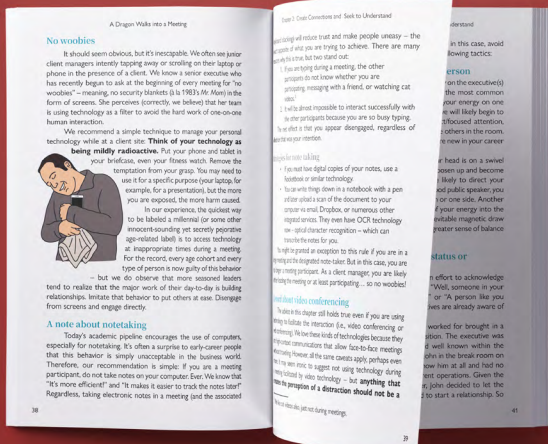
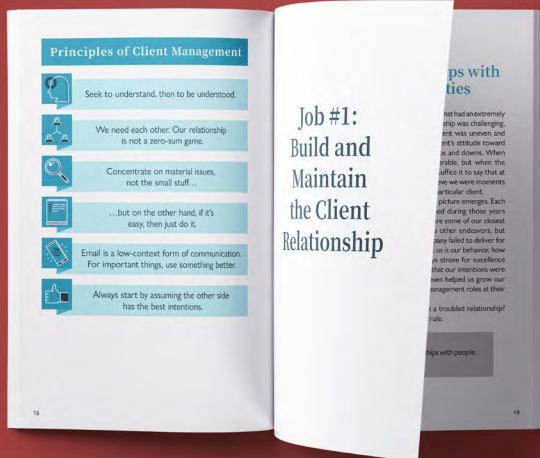
- **Chapter 4:** Think About Growth
- **Chapter 5:** Say Yes
- **Chapter 6:** Remind the Client Why You are There
- **Chapter 7:** Lead by Example

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



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

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!

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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.

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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.

