



Rocky Mountain Memo

COSL MARKETING RESOURCES

- Client Service Personnel [expectations for conferences](#) :
This resource will provide you with ways to leverage conferences to make the most out of them as marketing opportunities.
Challenge: for those attending a conference in the next couple of months, focus on a couple of the suggestions listed on this document to up your conference game!
- NAS [service matrix](#) :
Use this when reviewing ways you can offer cross serving opportunities to existing clients, and to identify all the areas we may be able to help a prospect.
Challenge: utilize this tool as part of your regular marketing meetings within your niche!
- [Marketing Guide:](#)
We will be rolling out some of the ideas outlined in this recently updated guide at upcoming meetings. Feel free to review the guide as it offers our firm’s marketing strategy and provides you with best practices to develop and implement your own marketing plan.
- [Marketing Checklist](#)
The purpose of this guide is to educate BKDeers on the tools and tactics that you have available to you and why all of these things are critical for growth – both for your career opportunities and the overall business development efforts of the firm. Whether you’re a seasoned business development pro or new to the marketing process, this checklist has activities and links to more info to help you in your marketing efforts.
Challenge: try one of these tactics over the next couple of weeks and then start checking off more items as you move forward.



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BKD WIN! EXCEL UTILITY CONTRACTORS

Investment bank Lincoln International and our Springfield office introduced Excel Utility Contractors (Excel), a portfolio company of Miami Nation Enterprises (MNE), to BKDCA upon learning that MNE was seeking to diversify its portfolio of companies.

BKD Capital Advisors (BKDCA) provided sell-side advisory services to Excel in its sale to Revive Holdings, an affiliate of independent sponsor Sileo Capital (Sileo), in partnership with Brightwood Capital Advisors and Mizzen Capital.

The BKDCA team went to market and sourced potential buyers who had relevant industry experience as well as a shared focus on offering quality services.

Sileo had previously completed a successful transaction in the utility infrastructure construction and service space. Brightwood, as the majority equity and debt provider, has an experienced investment team focused on family-owned businesses in the \$5M to \$75M in

EBITDA range.

Although this engagement took more than two years to close, Excel successfully operated through the pandemic with EBITDA more than doubling from just under \$3M to more than \$7M—resulting in an outstanding outcome for our client with a strong multiple for a construction/water infrastructure company!

The diligence of our Trusted Advisors in remaining steadfast and patient to source the right buyer paid off. Additionally, we believe there will be future opportunities for BKDCA to act as the investment banker for other MNE portfolio companies with potentially additional TS & M&A Tax services required. BKDCA has already been hired to sell another portfolio company of MNE.

Fees:

BKDCA fees: \$1,037,952

Potential earnout fees: \$70,000

Transaction Services fees: \$78,750

BKD WIN! FORTIS PRIVATE BANK

Denver Partner Omar Yassine connected fellow Denver Partner Bud Hollenkamp and Senior Manager Jenica Shippy with Fortis Private Bank, and the BKD Colorado financial services team built a relationship. Not too long after, the BKD team presented to the audit committee and executive management team.

Our approach was twofold. First, we wanted to show the Fortis executives our deep industry expertise, by including engagement team members—BKD National Financial Services Group Regional Industry Leader Lyle Alexander and IT Risk Services Director Rick Lucy. Second, we wanted to showcase the local BKD team members, Bud and Jenica, who would be working on the project. Within an hour of the presentation, the BKD team was notified our firm had won the work.

The engagement covers the next two years and could go into additional years as the bank grows. This win reinforces how team members can successfully refer connections across industries and how truly showcasing our experience, success stories, and strong local and national resources can yield a new client.

Client: Fortis Private Bank is a premier banking source for personal and business banking affluent and high-net-worth individuals.

Services: FDICIA Implementation, Readiness ICFR Testing and ICFR Testing; and targeted internal audit procedures

Fees: \$200,000

JUST FOR FUN!



Liz Climo @lizclimo

BUILD TRUST THROUGH SOCIAL MEDIA

Promoting content from bkd.com on social media helps increase brand awareness and grow trust in our firm. A study conducted by Nielsen found that 84 percent of consumers value recommendations from friends and family above all forms of advertising. By promoting [BKD Thoughtware®](https://www.bkd.com) services from a personal account, you can:

- Increase brand awareness by extending our reach to your connections
- Grow trust in our firm and services
- Introduce prospects and leads from your network

Leveraging social media to drive your professional development efforts can help grow your network of prospects and move the needle for our firm. Share content from bkd.com or from the BKD CPAs & Advisors [LinkedIn page](#) today to start positioning yourself in your connections' minds. Reach out to Social Media Marketing Team Leader [Mikayla Throne](#) or your [COSL Marketing Team](#) with any questions.

CONNECT WITH BKD ON SOCIAL MEDIA

Use the links below to connect with BKD's official social media accounts.

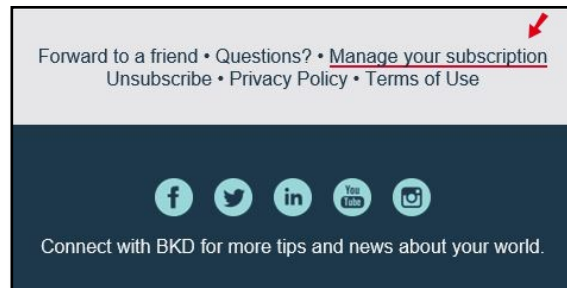


LEVERAGE NEW THOUGHTWARE SOLUTIONS

If the recent news headlines about cyberattacks have your clients and prospects rethinking their cyber strategy, we have resources to help. New to BKD Thoughtware® offerings is our Cybersecurity & Technology Solutions. Your clients and prospects can receive relevant IT-related content, upcoming CPE-eligible webinars, and other resources to help them boost

cybersecurity, modernize technology, maintain regulatory compliance and privacy, and more.

In your next interaction with a client or prospect, be sure to mention they can have these insights at their fingertips. They can manage their Thoughtware subscriptions at the bottom of any current Thoughtware email or sign up in our Subscription Center.



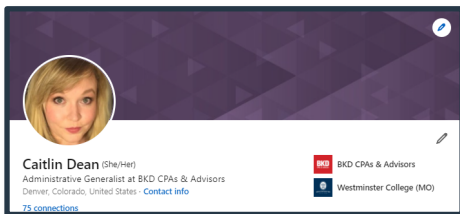
UPCOMING WEBINARS

Invite your clients and prospects to join these webinars in October.

Oct 4:	CHC Boot Camp: Front Desk
Oct 5:	BKD Tuesdays at Ten Webinar Series: CFR Reporting – The Challenges Continue
Oct 7:	Nonprofit Board Basics Part 3: Engaging Your Board for Mission Success
Oct 12:	BKD Tuesdays at Ten Webinar Series: Current Cyber Trends in Remote Work Environments
Oct 14:	How to Improve Financial Planning Without Complicated Spreadsheets
Oct 19:	BKD Tuesdays at Ten Webinar Series: Internal Control & Updated Policies in Virtual Environments
Oct 19:	How to Improve Cash Flow Without Cutting Programs
Oct 19:	Navigating GASB Standards 101: Your 2021 Guide
Oct 20:	2021 BKD Asset Management Seminar
Oct 26:	BKD Tuesdays at Ten Webinar Series: Strategic Benchmarking & Analytics Tool

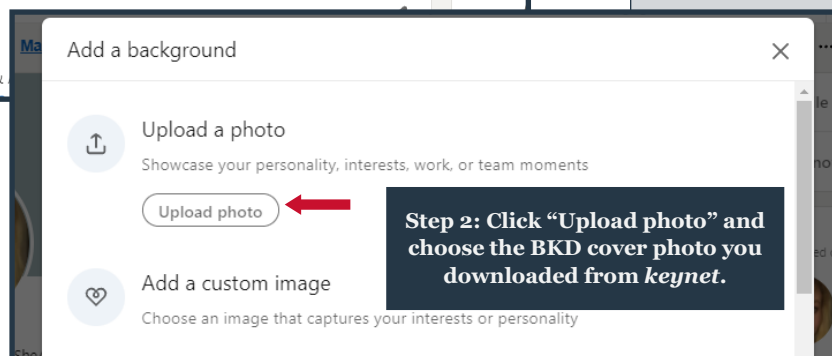
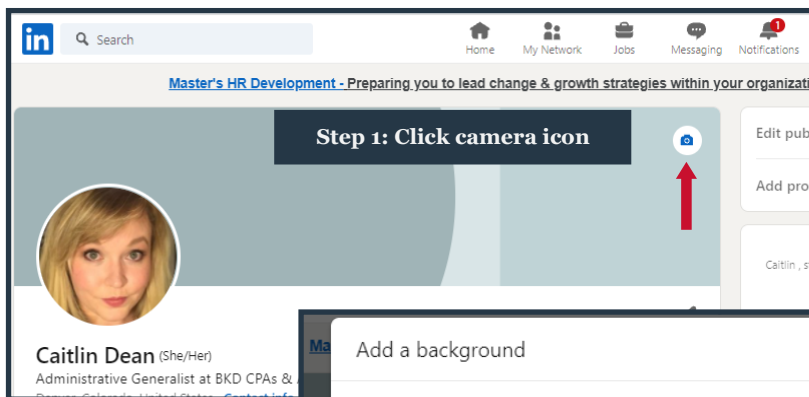
BKD #HASHTAGS FOR SOCIAL MEDIA

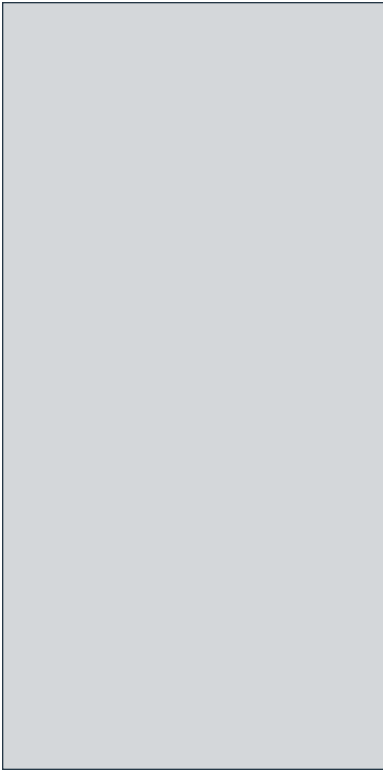
Hashtag	When to Use
#TrustedAdvisor	Referring to a BKDer in lieu of a job title
#BKDLife	Sharing the lives of BKDer inside and outside of work
#BKDGivesBack	Displaying community involvement or charitable giving
#BKDWomenLead	Sharing SKY and other women's initiatives or highlighting the achievements of our women leaders
#PressForProgress	Highlighting advancements and innovation
#BKDPRIDE	Showcasing PRIDE award winners (along with associated press/collateral) or BKDer exhibiting BKD PRIDE
#OneGreatFirm	Announcing M&A activities or welcoming new locations and team members
#BKDWow	Highlighting Wow! Award winners or showcasing BKD culture, career opportunities, recognition or expertise
#BecomeTrusted	Recruiting purposes
#YourNextPlay	Recruiting purposes
#GlassCeiling	Discussing career progression and advancement
#ThoughtwareTuesday	Sharing Thoughtware
#TrustedThursday	Sharing Thoughtware or spotlighting a trusted advisor
#BKDViews	Sharing fun or unique perspectives on your work life
#SimplyTax	Spotlighting Simply Tax



POLISH YOUR PROFILE

An easy way to make your LinkedIn Profile look professional is adding a BKD Branded cover photo. Click [here](#) to access the Cover Photo Library.





COSL MARKETING TEAM

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