

Rocky Mountain Memo

THE BENEFITS OF CONTRIBUTING TO BKD THOUGHTWARE™

Writing Thoughtware articles should be a part of your BKD Trusted Advisor™ client service and business development strategy. There are numerous potential benefits to sharing your knowledge through Thoughtware, including:

1. Supports overall firm marketing strategy
2. Improves search engine rankings
3. Demonstrates Unmatched Client Service®
4. Advances your career and enhances your personal brand
5. Provides you with CPE credits

For more about the process, visit our [Article Submission page](#) on **keynet**, which includes submission guidelines and helpful resources such as [“You Wrote a BKD Thoughtware® Article – What Happens Now?”](#)

When you're ready to be a thought leader, contact your office marketing manager or national industry marketing leader to arrange support. Our marketing team can steer your article through the process, magnify the effectiveness of your efforts, and reduce the impact on your billable hours.

COLORADO-SALT LAKE WINS

Congratulations to Director Lisa Horn!

For five years, Lisa built up a relationship with City of Golden. She utilized client services tools such as Thoughtware and BKD webinars to highlight BKD's expertise as a full service firm and to stay connected with City of Golden's Finance Director. After learning the city was at risk of noncompliance with PCI's debit and credit card processing standards, Lisa connected them with Johnny Sanders, a certified PCI Qualified Security Assessor (QSA) in BKD's IT Risk Services Department.

Because of Lisa's dedication to being a trusted advisor in her network, the door for more opportunities with City of Golden is now wide open! Great job Lisa!

Client: City of Golden (Golden)

Services: Payment Card Industry (PCI) Compliance

Fees:

- 2021 = \$127,000
- 2022 = \$106,000
- 2023 = \$106,000



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SPECIAL POINTS OF INTEREST

- City of Golden won over by trusted advisor Lisa Horn
- Private Equity Team wins United Land Services Holdings
- NFPG Team of specialized experts makes impact on Denver School of Science and Technology



COLORADO-SALT LAKE WINS

Congratulations to Jeff Ronsse, Robb Conner, Brian Myeroff, and Erica Von Stein!

Colorado's private equity team created a regular touch-base process in which they video call private equity groups the team works with on a regular basis. In a recent call, a private equity partner mentioned working on a new deal and our team asked how they could help. The private equity partner sent the BKD team its diligence report for additional input.

The BKD team crafted a budget, discussed day one items that needed accomplished and outlined how BKD could help. The private equity partner appreciated the

information, thoughtfulness, and proactive approach. The BKD team's previous Unmatched Client Service® for the private equity group, along with the relationships we built with one of its private equity partners, resulted in the award of the audit, tax and purchase accounting for United Land Services Holdings without a bid process.

Client: United Land Services Holdings is a private equity backed landscaping service.

Services: Audit, tax, and purchase accounting

Fees: \$110,000 to \$130,000 first year

“Every champion was once a contender that didn't give up.”

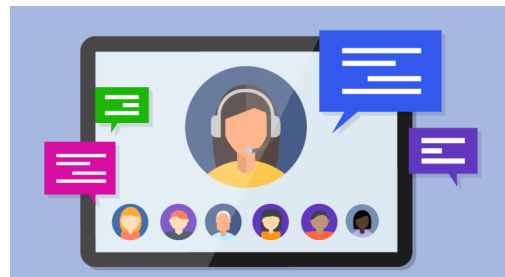
– Gabby Douglas, Olympic Gold Medalist

MAKE THE MOST OF WEBINAR ATTENDEE REPORTS

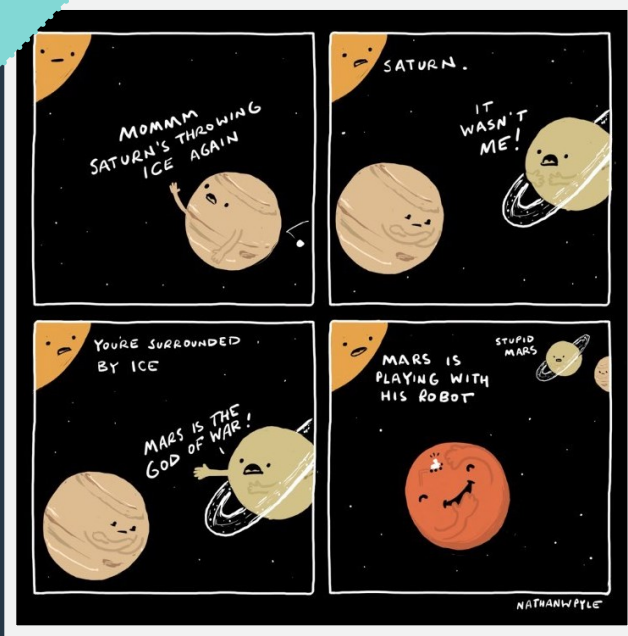
Webinar attendees are warm leads and much more likely to purchase services than cold prospects. When your managing partner, office industry leader, or marketer sends you a webinar attendee report, take time to do these three things:

1. **Review Topic Suggestions:** Attendees can suggest topics, so look at what they suggested, and if there are any topics for which you could author an article or present a webinar, let our national industry partner or national industry marketing leader know.
2. **Check Relationships & Follow Up with Your Prospects:** Go to the state filter, click the drop-down for your state and review the attendees. Look to see if the prospects you consider yours have you listed as the relationship manager. If you're not connected to the right relationships, ask your marketer to make an update in Salesforce. Follow up with attendees for which you're the relationship manager. Use the email templates marketers provide for easy and pertinent messaging.
3. **Take on New Prospects:** Coordinate with your marketer and industry team to plan who can reach out to prospects who don't have a relationship manager assigned. By being willing to follow up with a new prospect, you can build your prospect list.

Take the time to identify and nurture these contacts and when they need help, you'll be the **BKD Trusted Advisor™** they call.



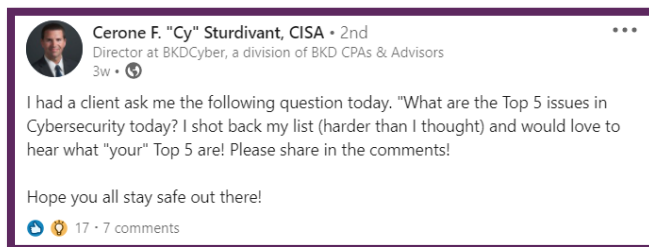
Just for Fun!



Strange Planet @nathanwpyestrangeplanet

LEVEL UP YOUR SOCIAL MEDIA SKILLS

Take a note from BKD Director Cy Sturdivant and use your social media page to start an engaging conversation with your followers.



You can get started on your own post using these tips:

1. Don't forget to use your **#hashtags!** Hashtags help connect content all across social media and can even broaden the scope of how many people see your posts!
2. Ask your followers to engage with your post in the comments, the more interaction with your post the more likely others will see it in their social media feeds.
3. Reply positively to the comments on your posts. Everyone loves positive feedback!
4. Cross post, don't be afraid to post on more than one social media page, Linked In and Twitter are great for engaging in discussions around specific topics.

Here is a simple template to get you started:

"I heard an interesting question today. "What are the Top 5 Issues in (insert industry)?" The list was harder to come up with than I thought! I'd love to hear what your Top 5 are! Please share in the comments!"

As always you can reach out to Jennifer Hallam or Caitlin Dean for social media marketing tips. #GoodLuck!

#HELPFULHACK

Know your BKD #Hashtags

Hashtag

#TrustedAdvisor

Referring to a BKDer in lieu of a job title

#BKDLife

Sharing the lives of BKDer's 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's 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

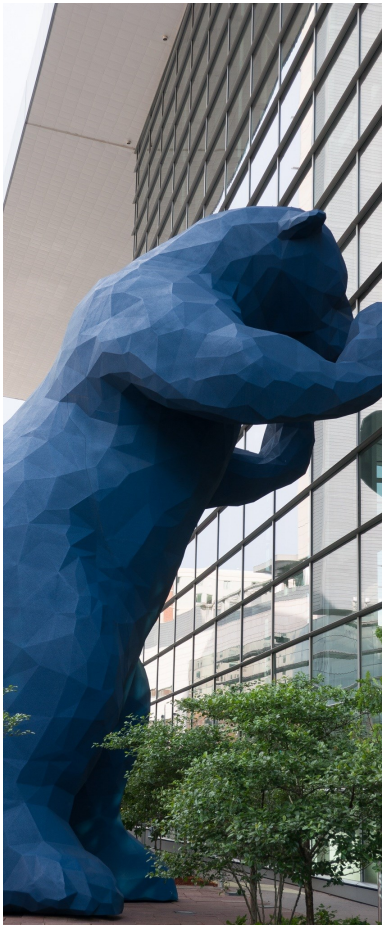
Sharing Thoughtware or spotlighting a trusted advisor

#BKDViews

Sharing fun or unique perspectives on your work life

#SimplyTax

Spotlighting Simply Tax



COLORADO-SALT LAKE WINS

Congratulations to Jodie Cates, Anna Thigpen, Adam Smith, and Shane Saginak!

BKD previously submitted a bid to Denver School of Science and Technology in 2016, and was a strong contender. But due to BKD's higher fees, DSST ultimately decided to stick with their existing auditor. During this proposal round, it was clear that the relationship the NFPG Team has with Aurora Public Schools, Denver Public Schools, and other large charter networks left a positive impression on the DSST leadership.

This year, an engagement team of expert advisors was formed to meet all of DSST's specific needs, including concerns related to their current financial reporting and 990 tax returns. The NFPG Team's familiarity working with the Colorado Department of Education and their experience with financial and tax related issues for school districts worked to win DSST's trust. Because of the NFPG Team's dedication to demonstrate Unmatched

Client Service, Denver School of Science and Technology chose BKD as their trusted advisor!

Client Description: Denver School of Science and Technology, an open enrollment STEM charter network within Denver Public Schools and Aurora Public Schools

Services: Financial Statement Audit, Single Audit, Form 900 and EBP Audit

Fees: \$72,750



EXPAND YOUR NETWORK

Need a quick Introhive summary about a client or prospect?

It's simple to get an On Demand Digest by email. The digest will include recent Introhive post-meeting notes, colleagues with

Send	From	cdean@bkd.com
	To	company@intel.introhive.com
	Cc	
	Bcc	
Subject		denvergov.org

strong relationships, recent email connections, and more!

1. Create a new email message to this email address: company@intel.introhive.com .
2. Put the company's email domain as the "Subject". (For example: "denvergov.com" for City and County of Denver)
3. Hit send.

Within 2-3 minutes you'll get a reply email with the Introhive company summary.

If you have any questions on how to use this feature of Introhive, reach out to Jennifer Hallam.

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