



Rocky Mountain Memo

MAKE TIME FOR BUSINESS DEVELOPMENT

One common mistake in business development is trying to find time for it instead of making time for it. Create a positive routine for business development by blocking time on your calendar, even during your busiest client service times. BKD Sales Training Institute Consultant Amy Franko’s advice is to schedule one to two hours each week to focus solely on business development. “I’m a big believer that what gets scheduled into very focused time blocks gets done,” Amy says. Consider these key tips:

- **Get It on the Calendar:** Look at the month ahead and schedule business development blocks directly in Outlook.
- **Get Laser Focused:** When it’s time for the business development block, set a timer on your phone and turn off all other notifications, so you can be laser focused and productive.
- **Set Goals:** Have a plan on what you’ll accomplish regarding prospects during your business development block, such as extending a personal invitation to a webinar, scheduling a virtual coffee to connect, following up on information you promised to send during your last meeting, or connecting them to a NAS team member to help solve specialized challenges.
- **Don’t Go It Alone:** Leverage internal resources like “Easy Button” email templates and work with Marketing & Business Development personnel to build a plan that can help you make the most of your business development time.

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SPECIAL POINTS OF INTEREST

- Capital Advisors win with sale of FAS Inc. to Pye-Barker
- Trigger Events are opportunities for growth
- Expand BKD’s brand on Social Media



COLORADO-SALT LAKE WINS!

Congratulations to Tony Giordano, Joe Nelson, Brian Myeroff, Michael McElreath, Lexi James, & Blythe Berka!

BKD Capital Advisors (BKDCA) provided sell-side advisory services to the owners of Fire Alarm Services, Inc. (FAS) in its sale to Pye-Barker Fire & Safety (Pye-Barker), a portfolio company of Leonard Green & Partners based in Los Angeles, California.

FAS is a full-service provider of fire protection products and has been a longstanding client of BKD. Tony was first introduced to the owners of FAS several years ago by Denver Tax Partner Joe Nelson.

After the owners expressed interest in selling the business, the BKDCA team was engaged in June 2020, and an initial buyer was lined up with a target close in December 2020. After an extensive diligence process our client ultimately decided they wanted more time to digest the process and revisit their transaction goal.

In January 2021 BKDCA reengaged discussions with FAS and the decision was made to revisit and pursue a transaction with Pye-Barker. By early February 2021 we were back under LOI. Pye-Barker was ultimately selected as the ideal partner. As a result of the targeted and competitive marketing effort of BKDCA, FAS received a purchase price that was approximately 40% higher than the initial offers received prior to engaging BKDCA.

The successful outcome of this transaction was a true team effort and great example of our One Great Firm approach. This could not be achieved without the dedication from trusted advisors across the firm. Brian Myeroff and Lexi James performed the quality of earnings work and Joe Nelson, Melissa Pozniak, and William Weatherford provided M&A tax planning.

BKDCA fees: \$1,804,375
Transaction Services fees: \$81,000
Accounting/other service fees: \$2,495

SOCIAL MEDIA POSTING DATES

Spring 2021 notable events and dates to post about on social media. Please see Jennifer Hallam or Caitlin Dean for ideas and assistance on how to elevate your Social Media presence with clients and prospects.

MAY	
Graduation Season	Entire Month
Jewish American Heritage Month	Entire Month
National Small Business Week	2-8
Star Wars Day	4
Teacher Appreciation Week	3-7
Cinco de Mayo	5
Mother's Day	9
Memorial Day	31
OTHER IMPORTANT HAPPENINGS	
PRIDE Winners Announced	

JUNE	
LGBTQ Pride Month	Entire Month
Wow! Award Winner Drawing	1
National Doughnut Day	4
Best Friends Day	8
Innovation of the Year Award	15
Leadership Conference	16-18
First Day of Summer	20
Father's Day	20
National Selfie Day	21
Social Media Day	30
OTHER IMPORTANT HAPPENINGS	
PRIDE Winner/Announcement Videos	
AAM Awards	
PRIDE Award Ceremony	

Just for Fun!



Wawawiwa Comics @wawawiacomics

submit ideas for "Just for Fun!" ideas to Caitlin - cdean@bkd.com

LEVEL UP YOUR SOCIAL MEDIA SKILLS

Start the Conversation on Social Media

Consistency and frequency are key on social media. Each post is a new opportunity to reconnect with a client or prospective client. You want to be the first person they think of when they need assistance. One way you can develop your presence online is by leveraging current events, trending topics, and holidays. We list notable events and holidays in our [2021 Social Media Editorial Calendar](#), which you can use as a reference to inspire fun or thoughtful posts each month. The editorial calendar includes:

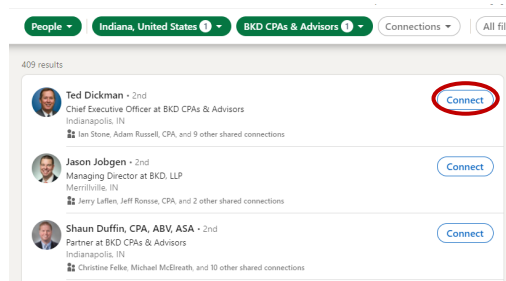
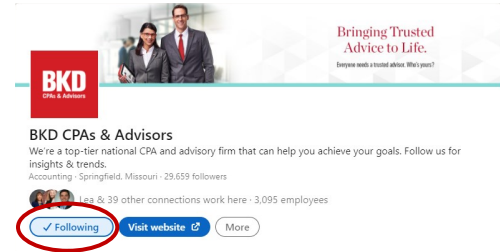
- Federal holidays
- Trending social media holidays
- Culturally significant occurrences
- Firm and accounting events

For a more targeted approach, especially if your office or region is involved in a 5-3-2-1 campaign, consider signing up for Google Alerts on your key targets and use important company news as an opportunity to reach out. This lets prospective BKD clients know that you're in tune with the industry and the important things happening within their organization.

Use the editorial calendar to plan your content strategy and create relevant, timely posts. Reach out to Jennifer Hallam or Caitlin Dean for social media marketing tips in our COSL Practice Unit! **#GoodLuck!**

USE SOCIAL MEDIA TO CONNECT WITH CLIENTS

Are you following your clients and prospective clients on social media? Follow the company and send personal connection invites to the employees.



Staying connected on platforms like LinkedIn can help you keep a finger on the pulse of a company's current events.

WATCH FOR TRIGGER EVENTS

A Trigger Event is a potentially significant change to a client's status quo. Trigger Events are valuable opportunities because you can use them to share something insightful with the client. Taking advantage of these opportunities shows the client that you are paying attention to them. Use Trigger Events to share relevant Thoughtware articles with your clients. Some examples of Trigger Events are:

1. Leadership Changes
2. Regulatory Updates
3. Industry Challenges
4. Client-specific Challenges

You can pick up on Trigger Events by scanning annual reports, investor briefs, C Level interviews, or press releases. Automate the process by setting up a Google Alert for your key clients.

HOW TO SET UP A GOOGLE ALERT

1. Go to [Google Alerts](#).
2. In the box at the top, enter a topic you want to follow.
3. To change your settings, click **Show options**. You can change:
 - How often you get notifications
 - The types of sites you'll see
 - Your language
 - The part of the world you want info from
 - How many results you want to see
 - What accounts get the alert
4. Click Create Alert. You'll get emails when matching search results are found.

For a video tutorial click [here](#).

REMINDER: USE INTROHIVE

If you haven't used Introhive yet, here's a [quick six-minute video](#) outlining three easy ways for you to get started:

1. Log in to the Introhive portal and search for specific organizations
2. Request an on-demand digest by emailing the domain for the organization you're searching to company@intel.introhive.com
3. Leverage your pre-meeting preps

BKD Trusted Advisors™ leverage our firm's data tools for career development and firm growth.



USE SOCIAL MEDIA TO EXPAND BKD'S BRAND

Social media allows BKD to expand our brand reach and drive people to our website to interact with our content. Sharing BKD resources and BKD Thoughtware® to your social media can yield new leads in the firm's prospect pipeline. Please follow these best practices to help grow BKD's brand awareness on social media:

- Stay updated on the latest Thoughtware, resources, and upcoming webinars.
- Market the value of the content in your post by commenting on a key takeaway that your followers would find important.
- Include a call to action and link to the article/webinar in your post.
- Use applicable hashtags related to the content along with firm-approved hashtags like **#TrustedAdvisor**. Expand the reach of your post even further by tagging [@BKDLLP](#) in addition to one of our industry accounts!

Expanding BKD's prospect pipeline helps grow the firm and increase brand awareness in the marketplace. For questions about how to create posts that help grow BKD's pipeline, reach out to Jennifer Hallam or Caitlin Dean.

BKD Social Media Accounts:

Twitter: @BKDLLP

Facebook: @BKDcpasandadvisors

Instagram: @bkdlp

LinkedIn: @BKD