dakota CRM Integrations

INTAPP DealCloud

Webinar

Post-Call Notes

PATRICK TIGHE

Head of Product

DOMINIQUE MORTELLITI

Account Executive for CRM Integrations

September 22, 2026

Overview

Dakota hosted a product webinar discussing the DealCloud CRM Integration, a new capability that allows investment firms using both Dakota Marketplace and DealCloud to seamlessly push high-quality account and contact data into their DealCloud instance. The session covered the integration's core features, a live demo walkthrough, frequently asked questions, and pricing details. The webinar was presented by Patrick Tighe, Head of Product, and Dominique Mortelliti, Account Executive for CRM Integrations.

Agenda

1. Integration Overview & Key Benefits
2. Live Demo Walkthrough
3. FAQs
4. Pricing & Next Steps

Integration Overview & Key Benefits

- The DealCloud CRM Integration allows customers to push Dakota Marketplace accounts and contacts directly into their DealCloud instance
- All data syncs in real time, eliminating the need for manual copying and pasting
- Dakota data lives in a dedicated "Dakota" tab within DealCloud, sitting side by side with your existing data without overriding anything
- Custom Dakota fields are mapped separately so information is additive to your CRM records
- Includes Dakota descriptions written by the investment sales team, providing additional context when calling on accounts and contacts
- All Marketplace data tabs are available within DealCloud, including Consultants, Alternatives, Equities, Fixed Income, and more
- Once data is in DealCloud, users can build dashboards and run reports on it freely

Live Demo Walkthrough

- The demo walked through how the integration works directly from Dakota Marketplace's Data Integrations page
- Users navigate to the Data Integrations tab under "More" within Marketplace to begin pulling accounts and contacts into DealCloud
- Up to 200 records can be pulled at a time

- Individual accounts and contacts can also be pushed one at a time via the “Add to CRM” button on any Marketplace profile page
- A link icon appears on connected records as a visual indicator that Dakota data is already synced

Linking vs. Creating Records

- Two methods to bring data into DealCloud:
  - Link existing records to match DealCloud accounts with Dakota Marketplace accounts, avoiding duplicates
  - Create new records for accounts and contacts not yet in your DealCloud instance
- Fuzzy matching connects records based on account name, phone number, CRD, website, email, or contact name
- **Linking & Syncing Service:** Dakota offers a managed service for the initial connection
  - Firms export their existing accounts and contacts and send the file to Dakota
  - Dakota’s development team runs a matching process across multiple fields and sends back a confirmation file
  - Once approved, Dakota connects everything on the back end. No manual linking required
  - Ideal for firms with hundreds or thousands of existing records

Filtering & Search Capabilities

- The Data Integrations page includes a robust filtering panel for targeted searches
- Filter accounts by AUM range, account type, metro, country, and investment preferences (private credit, venture capital, global equities, etc.)
- Contacts can also be searched and filtered independently
- A Logs tab provides a full audit trail of integration activity, including updates, creates, links, and any failures
- Designed to function as a reporting tool, allowing teams to build targeted lists before pushing data into DealCloud

FAQs

Is the DealCloud available on the DataCortex?

- Dakota is not yet available on DealCloud’s DataCortex, but it is in progress and expected soon!

What would happen to the data you’ve pulled over to your DealCloud if you do not renew?

- All data pulled into DealCloud belongs to the client
- If your Dakota subscription ends, the data remains in the CRM. Only real-time updates are discontinued

- Firms retain full ability to build dashboards, run reports, and use the data however they choose

Pricing & Next Steps

- Pricing is customizable and based on two factors:
  - The specific data sets selected (e.g., endowments, foundations, consultants)
  - The number of users who will access the data
- A menu of available data sets is available on dakota.com for review
- Book a demo to discuss your specific needs and receive a tailored quote!

Next Steps

- Book a live demo with the Dakota team at dakota.com under Data Integrations!
- Review the data set menu to identify which categories are most relevant to your firm

Ready to get started?

Book a demo here!