THE EMERGING MANAGER GROWTH SHOW WITH GUI COSTIN

EPISODE 46

Presentations

Emerging Manager Growth Show #46

Agenda

1. Opening Remarks from Gui Costin, Founder & CEO
2. Who is Dakota?
3. Be Kind & The Dakota Way Books
4. Key Insights for Emerging Managers: The Foundational Operating Model
5. Dakota Research Note: Fund Presentations
6. Fundraising Channels Beyond RIAs and Family Offices
7. Using AI and CRM Discipline for Leverage
8. Building Your Brand on LinkedIn

The Dakota Way & Be Kind Books

- The Dakota Way is available now on Amazon in both Kindle and softcover. The book outlines Dakota's four core principles of investment sales:
    1. Set Expectations
    2. Know Who to Call On
    3. What to Say
    4. Execute a Killer Follow-Up System
- **Be Kind:** is a lessons-learned leadership book.Email gui@dakota.com with your mailing address to receive a signed copy of either book.

Key Insights for Emerging Managers: The Foundational Operating Model

Gui and Rob walked through the core playbook Dakota uses every day with emerging managers — the theme of the episode: "**do more with less.**"

- **Quarterly webinar:** A free, fully controllable 20-minute update on the portfolio and market. Consistency builds the mailing list over time, even if early sessions draw few attendees. Follow each session with a replay, transcript, and abstract (key takeaways) — content clients often forward to their own stakeholders.
- **Cold outreach:** Keep 5 cities active on the calendar at all times, sending 20–25 cold emails per city push. Emails should be 1–2 sentences max — who you are, what you do, why the recipient should care — closing with a specific, clear call to action (e.g., "Can you meet in Chicago May 4th at 3 o'clock?").

- **The dual benefit of cold outreach:** Beyond booking the meeting, every email is a brand-awareness touchpoint — allocators often file emails into asset-class folders for later research, so consistent, professional outreach builds familiarity even without an immediate response.
- **Warming up cold outreach:** Research the recipient before reaching out. Reference a podcast, blog post, white paper, or shared alma mater to shift the email from cold to warm. Dakota Marketplace surfaces alma mater data for every allocator in the database.
- **Time management:** Presentation decks and websites matter, but shouldn't consume daytime hours — save that work for after hours. Daytime should be spent booking and running meetings.

Fundraising Channels Beyond RIAs and Family Offices

- RIAs and family offices remain the top two channels for discretionary capital and should be prioritized first, starting with those local to you (concentric circles outward).
- **Emerging manager programs at consultants and public pension funds:** treat as R&D — lower fee, longer sales cycle, but valuable for visibility and potential AUM bumps.
- **Bank platforms:** the large wirehouses (Morgan Stanley, UBS, Merrill Lynch) are a long shot without an existing relationship, but many other bank platforms are worth introducing yourself to, especially when already traveling to that city.
- **Funds of funds:** relevant primarily for private and hedge fund strategies, not long-only. Same principle applies — get on their radar, add them to the mailing list, and let the quarterly webinar cadence build familiarity over time.
- **Track record and AUM myths:** don't assume a firm's stated minimum ($100M, $150M, etc.) disqualifies you from a conversation. Getting in front of allocators early — even before you hit their target AUM — keeps you on their radar for when you do.

Dakota Research Note: Fund Presentations

Gui referenced Dakota's newest research report, built from tens of thousands of manager presentation decks collected over the past seven years through FOIA requests to public pension funds. Dakota's research team reviewed the decks (with help from Claude to synthesize the findings) and identified eight common characteristics shared by the funds that have raised the most money.

- Gui was clear that a presentation deck doesn't raise money on its own — but the funds that raise the most consistently execute on these eight characteristics better than others.
- The report is titled "Fund Presentations: 8 Common Trends from Top GPs" and is available to Dakota customers and listeners, and can also be found inside Dakota Marketplace under the Documents section.
- Dakota's research team plans to continue rolling out additional insights based on trends they're seeing, which will keep benefiting emerging managers.

Using AI and CRM Discipline for Leverage

- Every meeting needs to be logged in a CRM, along with meeting notes — this is the single biggest leverage point for a salesperson, especially as AI tools increasingly extract and surface CRM data.
- **Workflow:** dictate meeting notes into Claude immediately after a meeting (Claude pulls attendees from your calendar), have Claude write the notes, push them into Slack, and funnel them into your CRM via integration.
- Once logged, run an opportunity pipeline report with two custom fields — current status and next step — and review it daily to keep opportunities moving.

Building Your Brand on LinkedIn

- LinkedIn is free, allocators are active on it, and emerging managers have an advantage over larger firms because there's less red tape around what they can post.
- Be personal, not promotional — no product pitches, no white papers. Share what you're building, what you've learned, and what has and hasn't worked.
- Personal content builds recognition passively — allocators have reached

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Next Show:

Join us for the next Emerging Manager Growth Show

🗓️ **Episode #47 airs Tuesday, September 8th, 2026 at 1 PM EST.**

Thanks for joining us. See you next month!
– The Dakota Team

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