DAKOTA EVENTS PLAYBOOK

EP. 1: GETTING STARTED

WEBINAR POST-CALL NOTES

August 12, 2026

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Dakota Events Playbook

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Episode Overview

In the first episode of the Dakota Events Playbook, Catherine Begier and Dominique Mortelliti discussed what stops firms from hosting their first event and how to get past it. Between them they have built and run Dakota Cocktails, the Dakota Annual Conference, and Dakota's Data Summits, and the conversation drew on five years of running those programs in-house.

The discussion focused on the roadblocks that appear before a single venue is booked: unclear objectives, too many internal stakeholders, approval chains that compress timelines, and ROI expectations set so high that firms never start. A recurring theme was that scale comes later. Dakota now runs roughly 30 events a year, but it began with a single event and no plan beyond seeing how it went.

Common Roadblocks to Getting Started

Skipping the Outline

- The starting point is the simplest set of questions: who, what, when, where, and why. Who is the event for, what does the audience look like, what is the firm trying to accomplish, where does it make sense to hold it, and why host it at all.

- The “why” is the most important and the most often skipped. Firms tend to jump straight to logistics.
- A clearly documented “why” becomes the tiebreaker later. When the team disagrees on a decision, the original objective resolves most of it.

Too Many Stakeholders

- Too many opinions in the planning process makes it difficult to define and target the event.
- Multiple layers of internal approval compress an already short timeline. Planning an event two months out while collecting sign-off from several parties leaves little room to execute well.
- Alignment has to come before planning. Everyone internally should be working toward the same goal rather than acting as a barrier to it.

ROI Paralysis

- Firms frequently fixate on the return of a single event to the point that it prevents them from running one.
- Some trial and error is unavoidable. Dakota tested Detroit and Birmingham, saw weaker turnout, and pivoted… which is a normal part of building a program.
- The first event determines whether there is a second. A large goal is not a prerequisite for starting.

What Firms Lose by Not Hosting Events

- The short answer is face time with customers and prospects.
- Events create an informal setting where clients and prospects get to know the firm beyond a business relationship.
- The approach is deliberately not a hard sell or a product pitch. The goal is to be a person in the room and let the relationship do the work.
- People do business with people they like and feel connected to.

Earring the Trust to Run

- Start with one event, not five. A single well-run event proves the team can execute.
- Document everything. Dakota still refers back to the notes taken on its first five events in 2021.
- Pause after the first event and turn what worked into a repeatable process before adding volume.
- One or two well-run events is usually all it takes to bring internal stakeholders on board.
- Trust extends beyond execution to judgment. Five years in, the team makes decisions without internal review because the groundwork established what they can and cannot do.
- A vision of 50 events a year will overwhelm the team and create internal conflict. Starting small builds the trust that allows a team to run.
- The effect compounds externally as well. Attendees who enjoy a well-run event become a base of people who want to come back.

Budget Parameters That Create Freedom

- Dakota sets a per-person cost parameter of $150 a head. Multiplied by expected attendance, that produces the budget for each event.
- The parameter is not a constraint on creativity, it is what allows the team to move fast. Because the boundaries are defined in advance, the team can source a venue, request a contract, and sign without seeking approval on every line item.
- The per-head figure also rolls up into an annual view: cost per head multiplied by number of events gives the yearly budget.
- That annual view creates room to balance markets. A more expensive city such as New York can run closer to $175 a head and be offset by a less expensive market such as Minneapolis.
- The result is flexibility on where and how to host while still landing on budget at year end.
- $150 a head is Dakota's parameter, not a universal one. The point is having a defined parameter, whatever the number.

Venue Relationships

- Repeat venues that understand the budget will proactively bring options that fit, which makes booking faster.
- Established relationships can also reduce cost. Venues that enjoy working with the team are often more flexible on price.
- Go-to venues should still be mixed with new ones so the program does not become repetitive.
- Treating venue event coordinators well is a genuine differentiator. Not every organization does, and it affects the quality of the relationship over time.

Staffing the Room

- Travel costs add up quickly, so attendance from the internal team is defined by role rather than interest.
- The core team for each event:
    - The account executive covering the territory, plus their BDRs, who schedule meetings throughout the trip and invite those contacts to the event
    - The CSM with the most clients in that market, or a substitute CSM if they cannot attend
    - One person handling event logistics and coordinating with the venue on site
- Keeping the core group tight makes it easy to add executives or others as additional bodies when they are able to attend.
- Understaffing is the greater risk. If a room holds 400 clients and there are not enough team members present, the opportunity is missed… attendees came to build relationships too.

Planning for Imperfection

- No event is perfect. Scenarios will occur that cannot be planned for, even five years and dozens of events in, a recent London event had the fire alarm going off for the first hour.
- Attendees do not know what was supposed to happen. Most problems are invisible to the room.
- Clear division of labor on site: the events team solves the problem, while the sales and customer success teams work the floor and keep attendees engaged.
- Trust and pre-set parameters mean the team does not need to debate, escalate, or stress in the moment. Everyone knows their role.
- The culture that makes this possible is established at the start, not during the event.

Key Takeaways

- Nothing is ever perfect, you simply have to start. Or, as the Dakota-ism goes, throw your hat over the wall.
- Neither presenter began as a full-time event planner. The program was built by starting, documenting, and iterating.
- Put a process in place, trust the team, and host one event. Whether it becomes a program is a decision that can wait.

Check out our **upcoming Dakota Cocktail Events here!**