dakota events

DAKOTA EVENTS PLAYBOOK

EP. 2: BUILDING DAKOTA COCKTAILS —VENUES, EXECUTION & FOLLOW-UP

WEBINAR POST-CALL NOTES

September 9, 2026

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Agenda

Episode Overview

In the second episode of the Dakota Events Playbook, Catherine Begier and Dominique Mortelliti joined host Rob Robertson to go deeper into how Dakota Cocktails started and how the program actually runs today: venue selection, city and calendar planning, budget negotiation, headcount management, the firm's no-pitch philosophy, and follow-up after the event.

The conversation traced Dakota Cocktails back to a single rooftop event in New York right after COVID, when the investment sales team's usual travel schedule had stalled and the founder wanted to rebuild social connection with clients and prospects. That first event, and a follow-up in LA, set the tone for a program that now runs more than 30 events a year.

How Dakota Cocktails Started

- Dakota Cocktails began right after COVID, when the investment sales team's regular travel and in-person client visits had come to a stop.
- The founder wanted to restart social interaction, believing people were craving it after being stuck at home for so long.
- The first test was a rooftop event in New York with 50 invitees. It was a success, and no one was hesitant about gathering again.
- A follow-up event in LA reinforced the model: the team expected 30 attendees and got 75, with only two team members on site to work the room.
- Momentum built quickly. Clients and prospects talking to each other, rather than the Dakota team selling to them, became the defining feature of the events, and the team now runs more than 30 a year.

What Makes The Right Venue

- Dakota looks for three things in a venue: exclusivity, cost-effectiveness, and atmosphere.
- Private clubs are a favorite because they are often less expensive than restaurants. Clubs aren't trying to generate revenue from the space the way a restaurant protects its dinner service, so they can be more flexible on price.
- Atmosphere matters as much as cost. The goal is a space compelling enough that Dakota doesn't need to bring in additional décor or production to create the right vibe.
- Research is constant. The team tracks emerging restaurants and spaces in cities where they don't live, using recommendations from press, online research, and AI tools to find upcoming venues before they're widely known. A recent example: booking a venue in London before it earned a Michelin star.
- For every new city, the team builds a full workup: a deck with venue photos, floor plans, cost, and proximity to relevant business districts. The wider events team reviews the options together and keeps a running shortlist of vetted venues to revisit in future years.
- Word of mouth plays a real role too. Personal contacts, clients, and even team members' families are tapped for city-specific recommendations.
- Layout matters at the venue level: open spaces with a bar and room to move work best. Furniture that can't be moved, and especially seating, discourages mingling, so most Dakota Cocktails events are set up with high tops rather than fixed seating.

Deciding Which Cities To Visit

- City selection starts with Salesforce data: mapping where the largest concentrations of prospects and customers are located.
- Major markets like New York get visited roughly every other month; other large metros such as Boston, Philadelphia, and LA are visited about once a quarter.
- Smaller markets like DC, Minneapolis, and Denver are typically visited about every six months.

- Seasonality factors into the calendar. The team avoids cities during predictable low-attendance windows, such as Palm Beach or Miami in July, or Chicago in the depth of winter.
- The calendar also flexes around industry activity. If clients or prospects are already going to be in a city for another event or conference, Dakota will add a cocktail event to take advantage of the concentration of attendees.
- The annual schedule is a starting point, not a fixed plan. Dakota typically begins the year around two events per month and scales up to four or five per month during busier stretches like September and October.

Negotiating Budgets With Venues

- The $150-per-head parameter established in Episode 1 still anchors budgeting, but there is usually room to negotiate within it.
- Smaller, private-room events have more flexibility. Pushing back on an initial quote, or restructuring how drinks are charged (for example, on consumption rather than an open package), can close the gap between a venue's first number and Dakota's budget.
- The team's approach is simply to ask. Venues will often say no, but negotiating on price is a normal and expected part of the process.

Managing Headcount & RSVP

- Invitations go out through three channels: personal outreach from the sales team to top prospects, soft invitations from CSMs during regular client check-ins, and a broader mass email to everyone else.
- Historically, roughly 60–70% of registrants actually attend. Dakota now deliberately over-invites relative to venue capacity, aiming for RSVPs at about 30% above the room's true capacity so that turnout lands close to the number the budget was built for.
- This takes some getting comfortable with: letting RSVPs run higher than the room can technically hold, trusting that a meaningful share won't show, so spend and attendance line up.
- The team stays flexible on the night of the event. Plus-ones and walk-ins who ask to bring a colleague are generally accommodated, which tends to offset no-shows.

No Pitches, No Speeches

- Dakota Cocktails events have no formal speeches and no product pitches.
- The intent is for attendees to feel free to connect and network without pressure to buy anything. Any resulting sales relationship develops after the event, not during it.
- Many attendees are new to Dakota. The goal is for them to leave knowing the brand and feeling comfortable, not feeling sold to, so that they think of Dakota when they are ready to engage.

Why Dakota Doesn't Charge For Events

- Dakota Cocktails events are free to attend. Charging would change the intent of the event from bringing the industry together to running a paid events business.
- Dakota's business is data, not event ticketing, so events stay in service of relationship-building rather than becoming a revenue line.
- A free event may modestly reduce show-up incentive compared to a paid one, but the team is comfortable trading a slightly lower guaranteed attendance rate for a lower-pressure, more genuine format.

The Craziest Event: Three Cities, One Night

- Dakota occasionally runs two events on the same night simply because of how the annual calendar falls. In one case this year, that became three.
- With planned events already underway in Palm Beach and Chicago, a smaller team attending a conference in Denver found prospects and customers asking where that night's Dakota event was, since attendees had come to expect one.
- Leadership decided around 2 p.m. to add a Denver event that same evening. Within roughly 45 minutes, the team had sourced and booked a venue in downtown Denver, drawing on the same city-research process the team already had in place.
- A mass email went out acknowledging the short notice, and close to 40 people attended with strong turnout for a same-day event.
- The team pulled off three events in one night. Not a recommended standard practice, but proof that an established process and an experienced team can move fast when needed.

Measuring ROI

- Some portion of event ROI is impossible to attribute precisely. A prospect who has a strong conversation with an existing client at an event may renew or sign later for reasons that trace back to that moment, without Dakota ever being able to prove the connection.
- Dakota tracks and optimizes its overall events budget and city performance, but accepts that a portion of the return is, functionally, a black box.
- Relationships formed at events show up later, sometimes well after the event itself, when a prospect becomes a client because of trust built at the event or in the relationship that followed.
- ROI shows up in smaller, harder-to-quantify wins too: a previously unresponsive prospect finally attending an event, or a current client advocating for Dakota to a prospect in the room. Those moments add up across many events even when no single one produces an immediate, attributable deal.

The Follow-Up Process

- Because events involve many conversations in a short window, the sales team writes notes down immediately after each conversation, on their phones, and collects business cards or Salesforce information to keep contact details straight.
- Follow-up emails are personalized rather than a request for an immediate meeting. The tone is closer to reconnecting than selling, leaving room for the relationship to develop naturally.
- The team sends a company-wide thank-you, including a personalized video message to attendees, in addition to individual follow-up from the sales and CSM teams.
- The team also debriefs internally after each event to compare notes and share what worked.

Getting Started as a Smaller Firm

- The starting point is the same who, what, when, where, and why framework from Episode 1.
- Lock in a venue early, and designate one point of contact, even if that person isn't a dedicated events specialist, to manage logistics and serve as the venue's main contact.
- Build a simple email marketing plan: who is being invited, how they're being invited, and on what timeline.
- The process doesn't need to be complicated to start. A clear plan and a first event are enough; scale can come later.

Key Takeaways

- Dakota Cocktails started as a single, low-risk test event and grew into a 30-plus-event-a-year program by repeating what worked.
- Venue selection comes down to exclusivity, cost, and atmosphere, backed by continuous research and a growing shortlist of vetted spaces.
- City and calendar decisions are driven by CRM data, seasonality, and opportunities to piggyback on existing industry activity.
- Overbooking RSVPs relative to a venue's true capacity, informed by a consistent show-up rate, keeps spend and attendance aligned.
- No pitches, no speeches, and no admission charge keep the events focused on relationship-building rather than selling.
- An established process allowed the team to book and run a full event in about two hours when unplanned demand showed up.
- Not all ROI can be measured directly, but consistent relationship-building at events has translated into new and retained clients over five years.
- Fast, personal follow-up — not a hard pitch — is what keeps the relationship moving after the event ends.

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