

dakota CRM Integrations



Webinar

Post-Call Notes

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Overview

Dakota hosted a product webinar discussing the HubSpot CRM Integration, a capability that allows investment firms using both Dakota Marketplace and HubSpot to seamlessly push high-quality account and contact data into their HubSpot 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 HubSpot CRM Integration allows customers to push Dakota Marketplace accounts and contacts directly into their HubSpot instance
- All data syncs in real time, eliminating the need for manual copying and pasting
- Users can link existing HubSpot records or create new ones directly from Dakota Marketplace
- Custom Dakota fields and sections are created within HubSpot so Dakota data sits side by side with your existing information without overriding anything
- Data packages are customizable – customers work with Dakota's team to select which data sets are most relevant, avoiding flooding HubSpot with unnecessary information
- Once data is in HubSpot, users can build dashboards, run reports, and leverage Dakota data for email campaigns and mail merges
- Includes Dakota descriptions written by the investment sales team, providing additional context when calling on accounts and contacts

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 within Marketplace to begin pulling accounts and contacts into HubSpot
- Up to 200 records can be pulled at a time by adjusting the rows per page setting

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- A link icon appears on connected records as a visual indicator that Dakota data is already synced
 - Users can preview all Dakota Marketplace data before deciding to link or create

Linking vs. Creating Records

- Two methods to bring data into HubSpot:
 - Link existing records to match HubSpot accounts with Dakota Marketplace accounts, avoiding duplicates
 - Create new records for accounts and contacts not yet in your HubSpot instance
- Fuzzy matching connects records based on account name, phone number, CRD, or website
- On the contact level, matching uses email address, full name, last name, or CRD
- Teams can pick and choose which contacts to pull over for each account based on who they call on

Filtering & Search Capabilities

- The Data Integrations page includes filtering options for targeted searches
- Filter accounts by account type, CRD, AUM, metro area, country, and Marketplace Created Date
- Contacts can also be searched and filtered independently
- A Dakota Logs tab provides a full audit trail of integration activity, including updates, creates, links, and status changes at the account and contact level

FAQs

Where does Dakota data live in HubSpot?

- Customers have the option to map Dakota data to standard HubSpot fields or to custom Dakota fields created during the install call
- Custom Dakota sections and fields keep Dakota information organized and separate from your existing data
- You don't have to pull over all account details – select only the specific tabs and data sets that are relevant to your firm

What does the setup process look like?

- A one-hour install call covers page layouts, implementation, and hands-on training
- A two-week check-in is scheduled after install to answer any questions as you start using the product
- Dakota's customer success team is fully trained on all integrations and available for ongoing support with reports, linking, creating, and more

What happens to the data if you do not renew?

- All data pulled into HubSpot belongs to the customer

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- If a Dakota subscription ends, the connection is turned off but the data remains in HubSpot
 - Only real-time updates are discontinued – data may become stale over time without an active subscription

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!
- Explore the Data Integrations tab in Dakota Marketplace to see the integration in action

Ready to get started?

[Book a demo here!](#)