

DAKOTA MARKETPLACE · SALES EXCELLENCE SERIES

How the Best Investment Sales Professionals Use Dakota Marketplace.

Not all reps using the same database produce the same results. Here's exactly what top performers do differently — and how heads of distribution can build these workflows into their entire team.

The investment sales professionals who consistently outperform their peers are not smarter or better at the relationship conversation. They are more systematic about using the intelligence available to them before, during, and after every prospect interaction. The database does not create the performance gap. How the rep uses it does.

258,955

LP ACCOUNTS

386,689VERIFIED
CONTACTS**13,332**

GP FIRMS

226,000+FINANCIAL
ADVISORS**642,644**PRIVATE
COMPANIES

THE PERFORMANCE GAP

Every Rep Has Access to the Same Database. Not Every Rep Uses It the Same Way.

The investment sales professionals who consistently outperform their peers are not necessarily smarter or better at the actual relationship conversation. They are more systematic about using the intelligence available to them before, during, and after every prospect interaction. The database does not create the performance gap. How the rep uses it does.

THE AVERAGE REP'S APPROACH

Logs into Dakota to look up a specific contact they already know they need — using the database reactively, only when they have a defined search in mind.

Builds prospect lists from industry conferences, personal networks, and word of mouth — the same sources every other rep uses, producing the same overlapping pipeline.

Prepares for meetings by reviewing their own CRM notes and the fund's marketing deck — arrives at the conversation knowing less about the LP than they could.

Ignores Joe AI because report building feels technical — misses the cross-object intelligence that would surface their best opportunities.

Checks Dakota occasionally when they remember — not part of a daily workflow with consistent habits and consistent outputs.

THE TOP REP'S APPROACH

Starts every morning with a Joe AI report — surfacing accounts that match specific criteria for that week's focus — proactively discovering opportunities rather than reactively looking up known contacts.

Uses Dakota to build territory-specific prospect lists no competitor has, because most reps never build from the database — arriving at relationships before the crowd does.

Pulls the full Dakota profile on every LP before every meeting — AUM, allocation preferences, prior commitments, consultant relationship — arriving at every first conversation with second-meeting-level preparation.

Uses the Chrome Extension so Dakota intelligence appears on LinkedIn, news sites, and company websites without tab-switching — every browsing session surfaces opportunities.

Runs a weekly pipeline review using Dakota data — logging, updating, and prioritizing based on LP allocation cycles and investment activity, not gut feel.

“The reps on my team who use Dakota every day as a structured workflow — not just as a lookup tool when they need a phone number — are the ones consistently in the top quartile of our distribution organization. The database is the same for everyone. The system around using it is what separates a great quarter from an average one.”

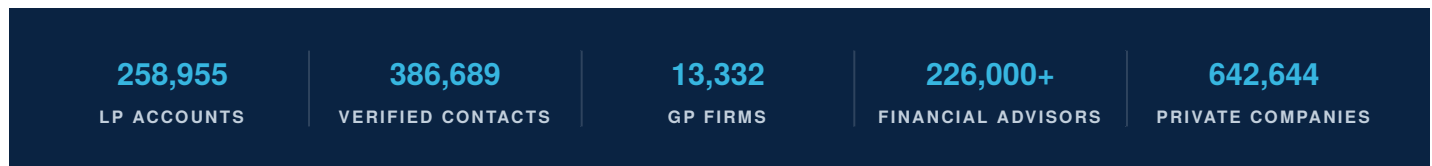
HEAD OF DISTRIBUTION — ALTERNATIVE ASSET MANAGER

WHY THIS MATTERS FOR HEADS OF DISTRIBUTION

A Database Is Only as Valuable as the Discipline With Which It Gets Used.

Dakota has spent nearly three decades building the most comprehensive LP, GP, and private company database in the investment industry. The team behind it has personally raised over \$40 billion and built this database because they knew, from experience, exactly what a fundraiser or wholesaler needs to know before making a call.

But a database is not a sales strategy. The intelligence in Dakota Marketplace produces results in direct proportion to how systematically the sales team uses it. The highest-performing reps on the best distribution teams in the industry have built six specific workflows into their daily and weekly routines — workflows that extract maximum value from every data point Dakota provides.



THE SIX WORKFLOWS

What Top-Performing Investment Sales Professionals Do Differently Inside Dakota Marketplace.

01 The Morning Intelligence Pull — Joe AI Before the First Call

Every morning before making a single call, the top rep opens Dakota and runs a Joe AI report — a natural language query that surfaces accounts matching that week's specific criteria. The result is a fresh, prioritized call list built from live data, not yesterday's gut feel.

"Show me public pensions above \$2B in my territory that committed to PE in the last 18 months but haven't been contacted in 90 days."

→ **Outcome:** A daily call list built from data, not memory — surfacing accounts competitors missed because they never thought to query for them.

02 Territory Mapping — Building the Complete Universe Before Conference Season

Twice a year — before major conference season and at year-start — top reps build a complete territory map in Dakota. Every LP account in their geography that fits their strategy, filtered by asset class, AUM, allocation preferences, and institution type. This produces a definitive prospect universe, typically 2–3x larger than what the rep knew from conference relationships.

→ **Outcome:** A territory prospect list that includes every relevant LP — including the ones who never attend conferences and are invisible to relationship-based prospecting.

03 Pre-Meeting Intelligence Pull — Arriving at Every First Meeting Prepared Like a Second Meeting

The night before any LP meeting, top reps pull the full Dakota profile — AUM, alternatives allocation percentage, prior fund commitments and vintages, current consultant advisory relationship, investment committee structure, and the specific contacts who will be in the room with their roles and backgrounds.

→ **Outcome:** First meetings that feel like second meetings — because the rep arrives with knowledge the LP does not expect from a first conversation.

04 The Allocation Timing Signal — Calling When the Window Is Open

Dakota tracks LP allocation activity — prior commitment history, investment patterns, and the consultant-driven search processes that signal when an LP is actively in market. Calling an LP two weeks after they completed their annual PE allocation is a wasted call; calling them two months before their next allocation window opens is a conversation that can convert.

→ **Outcome:** Outreach that lands in active decision windows rather than passive ones — a fundamental change in conversion probability.

05 Ambient Intelligence — The Chrome Extension Turns Every Browser Tab Into a Dakota Lookup

Top reps install the Dakota Chrome Extension and never look back. Every firm's website, every LinkedIn profile, every news article about a company — the extension recognizes the entity and surfaces the full Dakota profile automatically. Conference agendas, email signatures, LinkedIn connections — every entity encountered during the day becomes an instant intelligence trigger.

→ **Outcome:** The rep discovers 3–5 additional quality prospects per day from intelligence that surfaces automatically — prospects they would never have found with intentional searching.

06 Weekly Pipeline Review — Logging, Prioritizing & Pruning With Data

Every Friday, top reps run a Joe AI pipeline report — accounts in active conversation, days since last contact, allocation cycle status, and next-step prioritization — and use it to prepare their Monday call list. This creates a data-driven weekly discipline that keeps the pipeline accurate, current, and honest.

→ **Outcome:** A pipeline that reflects reality rather than optimism — giving heads of distribution accurate forecasting data and giving reps a clear Monday morning priority list.

A DAY IN THE LIFE — TOP PERFORMER EDITION

What a Best-in-Class Investment Sales Day Actually Looks Like.

This is the daily rhythm of a top-quartile investment sales professional using Dakota Marketplace as systematic infrastructure — not as an occasional reference tool. Every touchpoint with data is purposeful, fast, and integrated into the workflow rather than interrupting it.

7:30 AM

DAKOTA JOE AI

Morning Intelligence Pull — Build Today's Call List From Data

Opens Dakota Marketplace and runs a Joe AI prompt: "Show me institutional LPs in my territory above \$1B AUM with a PE allocation who have not been contacted in the last 60 days, sorted by AUM." Joe returns a clean, filtered list in seconds. The rep also scans Dakota Fundraising News for any LP news that creates a timely conversation hook.

→ 12-account call list built from live data — including 3 accounts the rep had not thought to contact this week.

8:15 AM

DAKOTA MARKETPLACE — LP PROFILE

Pre-Call Prep — Pull Full Profile on the 9 AM Appointment

Pulls the complete Dakota profile on the family office CIO the rep is meeting at 9 AM. Reviews AUM (\$780M, alternatives allocation 28%), prior PE and venture commitments by vintage, the investment consultant advising the family office, and the names and roles of the two investment professionals in the meeting.

→ Meeting preparation that takes 8 minutes and produces second-meeting-level context for a first conversation.

11:00 AM

CHROME EXTENSION — AMBIENT INTELLIGENCE

Conference Prep — Extension Fires on Every Name in the Attendee List

Reviewing the attendee list for next week's conference. The Chrome Extension recognizes 14 firm names on the page and surfaces Dakota profiles for each — AUM, allocation preferences, CIO contacts, recent commitments — without leaving the page or switching tabs.

→ A conference priority list built from allocation data, not badge scanning — the rep knows who to seek out before the event starts.

2:30 PM

DAKOTA JOE AI — CROSS-OBJECT QUERY

Opportunity Discovery — Accounts That Committed to Comparable Funds

Runs a Joe AI query: "Show me LP accounts that committed to mid-market buyout funds in the 2021–2023 vintage with commitment sizes between \$25M and \$75M, in the South and Southeast, that have no logged activity in our CRM." A report that would take 45 minutes to build manually returns 22 accounts in seconds.

→ 8 high-probability prospects from a comparable-fund query — accounts predisposed to the fund's strategy based on demonstrated allocation history.

4:45 PM

SALESFORCE + DAKOTA MARKETPLACE

Pipeline Update — Log Activity, Refresh Profiles, Set Next Steps

Updates CRM with today's call outcomes. Pulls refreshed Dakota profiles on accounts that moved forward to confirm AUM and allocation status. Updates Dakota-sourced contact records where roles have changed. Uses Joe AI to generate the week's pipeline summary in presentation-ready format for the Friday team call.

→ A current, accurate pipeline with refreshed contact data and a Friday team report built in under two minutes.

THREE TOOLS THAT TOP REPS USE EVERY DAY

Joe AI, the Chrome Extension & Salesforce Integration — The Daily Infrastructure of High Performance.

These three capabilities — included with every Dakota Marketplace subscription — are what separate the top-performer workflow from the average-rep workflow. Most reps use the search function and the contact directory. The best reps use all three of these in addition.

DAKOTA JOE AI — NATURAL LANGUAGE REPORT BUILDER

Ask Any Question. Get a Report in Seconds.

Joe translates plain English queries into Salesforce reports — cross-referencing accounts, contacts, investments, and fund data simultaneously. The reports that used to require a Salesforce admin and a 48-hour wait now take seconds. 10,000+ reports run since launch in November 2025.

CHROME EXTENSION — AMBIENT INTELLIGENCE

Dakota Intelligence on Every Page You Browse.

Recognizes firms, funds, and professionals on any webpage — LinkedIn, news articles, company websites, conference pages — and surfaces the full Dakota profile automatically. Zero tab-switching. Zero manual searching. Install once, and every browser session becomes an active intelligence session.

SALESFORCE INTEGRATION — DATA IN YOUR CRM

Dakota Intelligence Inside the CRM Your Team Already Uses.

Dakota Marketplace is built natively on Salesforce. LP account data, contact records, investment history, and allocation preferences push directly into your team's existing CRM workflows — no separate login, no manual data entry, no parallel system to maintain.

FOR HEADS OF DISTRIBUTION

How to Evaluate Whether Your Team Is Using Dakota at Full Depth — or Leaving Performance on the Table.

The most common feedback from heads of distribution who improve their team's Dakota utilization: the team always had access to the same data. They were not using it with the same system. These are the questions and metrics that reveal utilization depth.

SIX DIAGNOSTIC QUESTIONS

The Questions That Reveal Whether Your Team Is at Top-Performer Depth.

Are Reps Running Joe AI Reports — or Just Doing Manual Searches?

The single most diagnostic question for Dakota utilization depth. A rep who uses Joe AI is proactively discovering opportunities from cross-object intelligence. A rep who only does manual searches is reactively looking up known contacts. The difference in opportunity discovery between these behaviors is not marginal — it is the entire category of prospects the average rep never finds.

*Ask every rep: “What Joe AI report did you run this morning?”
— Silence is an action item.*

How Big Is Each Rep’s Territory Universe — and Where Did It Come From?

Ask each rep to show you their territory prospect list. If it is smaller than 200 qualified accounts, they have not built from the database — they have built from their conference network and prior relationships. The full Dakota universe for any territory will include accounts the rep has never encountered, and those accounts represent unclaimed pipeline.

Compare rep list vs. Dakota universe for their geography — the gap is unclaimed pipeline.

Is the Weekly Pipeline Review Built From Data or Intuition?

The most common source of pipeline inaccuracy in distribution organizations: reps defining their pipeline from optimism and memory rather than from measurable interaction data. Joe AI pipeline reports — “accounts in active conversation with no logged activity in 21+ days” — make pipeline hygiene automatic and auditable.

Institute the Friday Joe AI pipeline pull as a team standard. The report takes 90 seconds and gives the head of distribution the accurate forecast they are currently missing.

Is the Chrome Extension Installed on Every Rep’s Browser?

The extension is free, takes 60 seconds to install, and changes how every browsing session works. It is the single easiest high-leverage improvement available to any rep. Its absence is a choice, not a constraint — and it is a choice that leaves ambient intelligence opportunities on the table every day.

Extension installation is a binary metric — it should be 100% for every rep within their first week.

Are Reps Arriving at First Meetings With Second-Meeting Preparation?

Ask a rep who just had a first meeting with an LP: “What were their prior three PE commitments and in what vintages? Who is their investment consultant? What is their alternatives allocation target?” If they don’t know, they did not pull the Dakota profile before the meeting. The LP notices the preparation gap immediately.

Pre-meeting Dakota pull should be a non-negotiable standard — verifiable by post-meeting debrief questions only a prepared rep can answer.

Are Reps Calling When LP Windows Are Open — or When They Feel Like Calling?

Dakota’s allocation history and investment search data tells reps when LPs are in an active decision window. Reps who use this data to time their outreach experience categorically different response rates than reps who call on an arbitrary cadence. Ask reps to explain why they called a specific LP this week. The answer should reference allocation timing, not personal preference.

“I called because they finished their last PE commitment in Q2 2023 and are approaching their next window” beats “I hadn’t talked to them in a while.”

WHAT SYSTEMATIC DAKOTA USAGE PRODUCES

Four Measurable Outcomes for Distribution Teams That Build the Workflow, Not Just the Access.

The ROI of Dakota Marketplace is not measured in database queries. It is measured in the quality of the pipeline it populates, the preparation it enables before consequential meetings, and the opportunities it surfaces that the team never found through relationship-based prospecting alone.

Larger

Territory Pipeline — From the Accounts No Competitor Is Calling

Reps who build their territory universe from Dakota discover accounts that every relationship-based rep in the market has missed — because those accounts do not attend conferences, are not in any existing connection's rolodex, and are invisible to everyone building their pipeline from personal networks.

The unclaimed pipeline gap is consistently 2–3x the size of the average rep's active pipeline.

Higher

First-Meeting Conversion — Because Preparation Changes the Conversation

The conversion rate from first meeting to second meeting is a direct function of how well the rep understood the LP's situation before the conversation started. A rep who arrives knowing the LP's prior commitments, their consultant relationship, and their current allocation cycle communicates expertise that immediately differentiates them.

Distribution teams that standardize pre-meeting Dakota pulls see measurably higher first-to-second-meeting conversion rates.

Faster

Sales Cycle — Joe AI Compresses Research Time to Seconds

Every hour a rep spends building a prospect list, researching an LP, or preparing for a meeting is an hour they are not spending on the phone, in meetings, or building relationships. Joe AI eliminates the research bottleneck entirely — morning call lists that took 45 minutes to build now take 90 seconds.

The 3–5 research hours Joe AI recovers per rep per week translate directly into additional call volume, additional meetings, and a compressed sales cycle.

Better

Forecast Accuracy — Data-Driven Pipeline vs. Optimism-Driven Pipeline

The head of distribution's most persistent challenge is pipeline accuracy — the gap between what reps report as "active" and what is actually progressing toward a close. Joe AI pipeline reports built on measurable interaction data produce a pipeline view that reflects reality rather than aspiration.

When pipeline hygiene is enforced through weekly Joe AI reports, forecast accuracy improves dramatically because the data, not the rep, defines what is truly active.

THE UNIFYING INSIGHT

Access Without Discipline Is Just a Subscription.

In every workflow above, the same dynamic is at work. Dakota provides the most comprehensive LP, GP, and private company database in the industry. Joe AI makes that database conversational. The Chrome Extension makes it ambient. Salesforce integration makes it native to the CRM your team already uses. The data is raw material; the workflow gives it discipline. Larger pipeline, higher conversion, faster cycle, better forecast accuracy — all follow directly from how systematically the team builds these six habits into their week.

Ready to Build These Workflows Into Your Team?

The six workflows in this document are part of Dakota's broader Fundraising Best Practices library — a complete operating playbook for the highest-performing investment sales teams in the industry, covering territory mapping, prospect prioritization, pipeline discipline, and the daily habits that separate top performers from the rest of the field.

- ✓ The complete six-workflow framework, end to end
- ✓ Joe AI prompt libraries for every territory and strategy
- ✓ Pre-meeting prep checklists and LP profile templates
- ✓ Weekly pipeline review templates and cadences
- ✓ Diagnostic frameworks for evaluating team utilization
- ✓ Resources from the team that has raised over \$40B

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