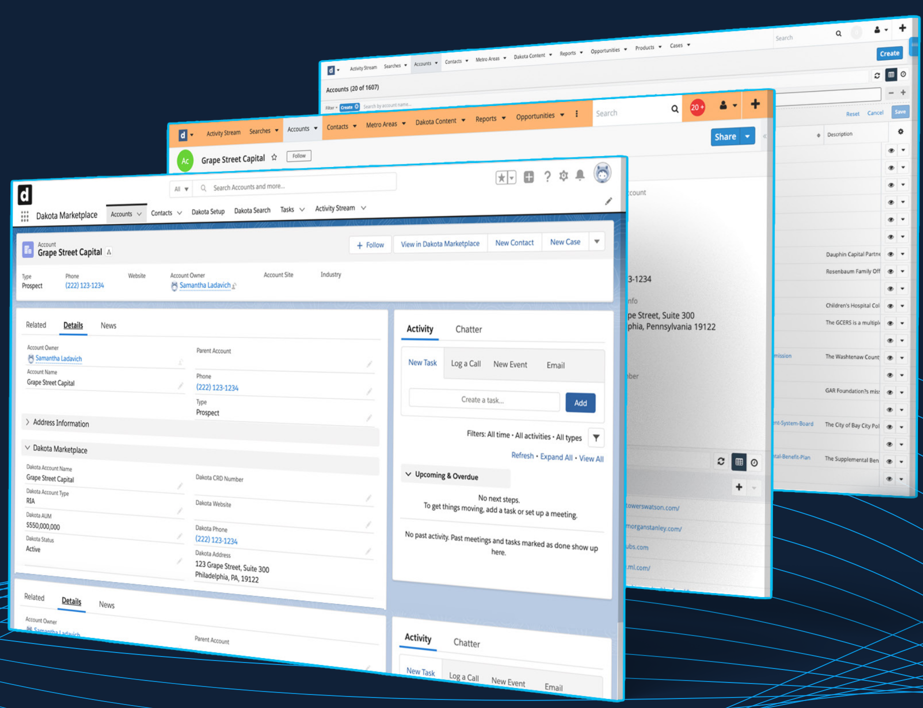
dakota marketplace

WE MAKE THE LIFE OF AN INVESTMENT SALESPERSON EASIER

Your complete guide to Dakota Marketplace



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INTRODUCTION

It's no secret the investment industry has been behind when it comes to staying up to date on technology and trends. It's crucial to stay up to date on modern technology, particularly when it comes to data if your firm wants to succeed in today's market. **CRM usage**, which we'll focus on in this ebook, has increased from 56% in 2018 to 74% in 2019, and has only continued to increase since.

Our database is the backbone of our sales process, and it's part of our culture to have every person on our sales team use it effectively.

In this eBook we'll review the importance of a database that contains clean, accurate data, why Dakota Marketplace is the only database you should be purchasing, and the features you need to be utilizing to excel in investment sales.

THE IMPORTANCE OF CLEAN, ACCURATE DATA

Set up meetings and drive revenue to your business - that is your role as an investment sales person. In order to do this successfully, you need a database to make your life easier. It's impossible to do this job properly without it. However, this comes as a double edged sword.

Your database is only as good as the data within it. Many users assume that their data housed within their platform is clean and ready to be used. Without daily maintenance and a team dedicated to making sure it's completely up to date, this likely isn't true. **85% of people** have reported that stale data is leading to incorrect decisions and lost revenue.

> ***The three problems with sales contact data are incompleteness, inaccuracy, and outdated. In this section we'll dive into each of these, and tell you how to fix them.***

1. Incomplete Data

Let's say you're planning a trip to Boston for meetings. As you open up your database, you see a list of 100 contacts, whereas we know there are 500+ investment contacts in Boston. You're missing nearly 80% of your TAM. Realistically you need this complete, while having it organized by channel and custom list views: i.e., show me all RIAs in Boston or show me all Private Credit investors in Boston. This way you can focus on who is buying what you're selling and what matters most to you.

2. Inaccurate Data

Continuing on with your 100 contacts in Boston, say you decide to call on John Doe from XYZ firm, and they no longer work there. Reaching out to someone with the wrong title, wrong fit, or someone who no longer works at the firm is useless. It wastes your time and now you have to backtrack to figure out where they went and who the correct person to call on is.

2. Outdated Data

Accuracy and updates go hand in hand. To have accurate data is to have everything housed within your database up to date with job title, correct email, correct metro location, etc. Many organizations don't have a system for updating their data, which leads to a bigger issue down the line for the entire firm. Salespeople aren't generating revenue because they're now searching high and low for information that should be up to date within their database.

If so many people are reporting having stale data within a database, why do we recommend you purchase one you might be wondering. The answer is simple: you haven't used Dakota Marketplace. In the next section we'll dive into it.

WHY DAKOTA MARKETPLACE IS YOUR SOLUTION

Now that we've made it abundantly clear that data within your database needs to be accurate and up to date, we can dive into why Dakota Marketplace is your one stop shop to provide you data and insights that are complete, accurate and updated.

We firsthandidly understand the struggle of fundraising in today's economy because we are out there doing it with you. Our Investment Sales team has been around since 2006, and has raised over $36B with Dakota Marketplace, that is to say...Dakota Marketplace is built by fundraisers, for fundraisers.

Our mission with Dakota Marketplace is to make the life of an investment sales professional easier. The Dakota team built Marketplace with investment salespeople in mind, meaning it has an intuitive, easy to use interface, is broken into easily navigable metro areas, and helps you focus on the firms that matter most to you.

With that, let's get into what you'll have access to with your Dakota Marketplace subscription.

Overview

Containing a vast number of accounts, contacts, and metro areas, Dakota Marketplace is your all in one database for any investment sales professional who is fundraising. These accounts and contacts can easily be filtered by channel focus, by metro area, by firm, AUM and more. If you're looking for Portfolio Managers in Chicago for your next trip, this can easily be filtered down specifically to the list of people you'll want to call on before heading out. If you're looking for Broker Dealers in Dallas for an upcoming work trip, this can also easily be filtered down to a curated list.

Our platform enables members with:

- *Fresh data with daily updates by industry experts*
- *Valuable insights before calling on a firm*
- *Dakota Live! Call overviews and data analysis*

Benefits to Marketplace

Dakota Marketplace is a revolutionary platform, built by fundraisers for fundraisers. With a membership to Marketplace, covering all LPs, not only will you 10x your productivity, you'll have insights to industry trends, firms and data. Our endless resources will give you a fresh look into the investment landscape.

With that, let's get into the benefits and resources you will have access to upon starting your partnership.

Institutional Searches

Receive comprehensive institutional investment search alerts delivered directly to your inbox via email. Over 350 searches were found in 2022.

Public Plan Minutes

Compiled daily by our data team, receive key insights from public pension committee meetings as they happen including recent hires, RFPs, portfolio allocation changes, and more.

Industry Turnover

Access job and role changes in the investment industry daily so you can make sure you're always calling on the right person, in the right role, at the right place, without wasting any time on bad emails and contact information.

Public Pension Investments

Access investment details including investment name, account, investment strategy, funding date, and fund balance.

13F Filings

All Institutional Money Managers with at least $100M assets are required to disclose a Form 13F. For the 1,300 RIAs we have within our platform that are investing in active outside managers, we can see what they are holding from an ETF lens to gain insight into asset class and sub asset classes preferences, or where they have exposure.

Field Consultant Information

Access details including name, account, and email. Marketplace has over 1,000 field consultants tagged to 172 consulting firms.

Manager Presentations

Access over 2,000 presentations from other managers for insights into what they're saying, investing in, and get a competitive advantage on your competitors.

Fee Studies

See what fees each public pension is paying their managers with fee structures tagged to public pension funds.

Insurance Company Data

View insurance details with key contacts, underlying holdings, and additional information on the holdings themselves.

Conference & Event Information

Gain access to hundreds of upcoming investment industry conferences across all investment channels. Determine where you should be traveling, which events are worth your time, and more with this feature.

Past Webinar Library

Access all past Dakota Live! webinars that feature a profile on a key account, exclusive insights from allocators, and metro area highlights from our team. In addition, you can access all Emerging Manager Growth episodes, tailored towards new emerging managers, and Rainmaker Live! classes tailored to sales professionals who have more experience in the industry.

Sales Training Tab

If you are new to fundraising or you are simply looking for a refresher, check out our Sales Training tab which includes tips and tricks as well as best practices for fundraising in the investment industry from our CEO and Founder, Gui Costin.

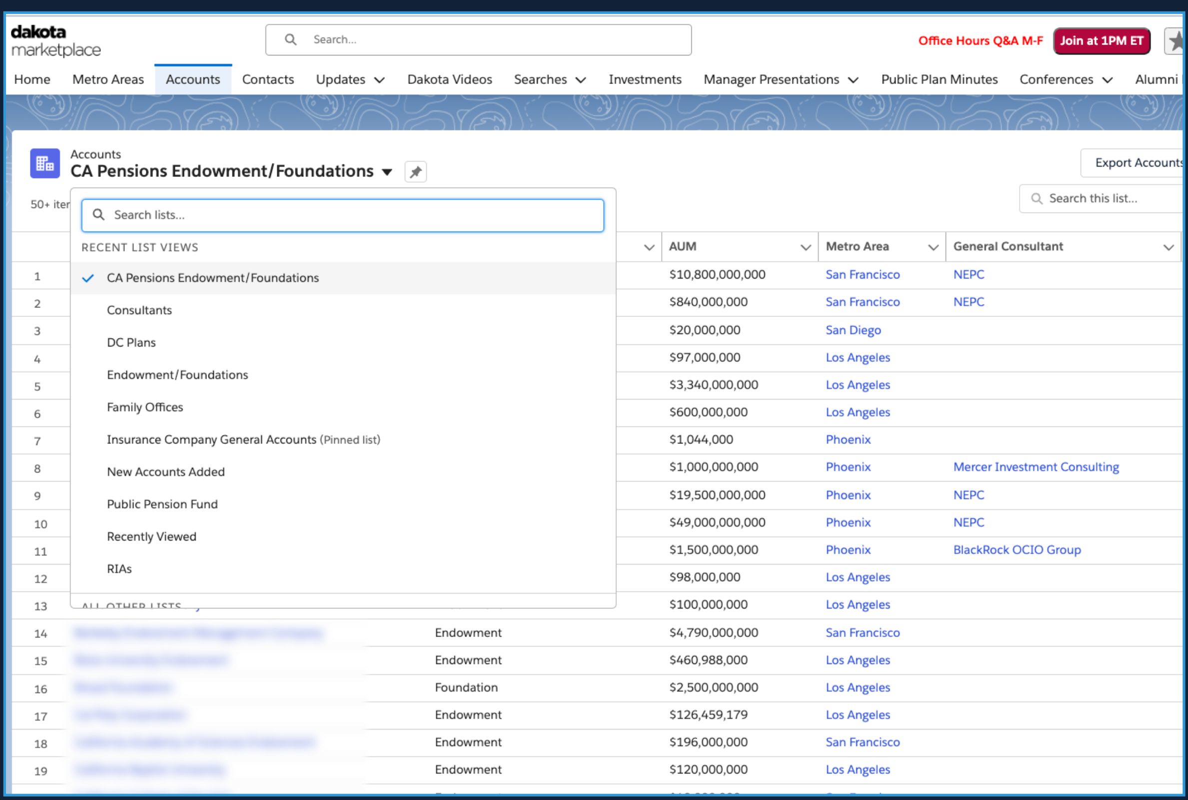
UTILIZING DAKOTA MARKETPLACE

At Dakota we make it a top priority to keep you informed of all the features you have access to within our database, so you're able to 10x your productivity during a typical day. Below we will get into three features that are loved most by our members that have helped them grow, and increase revenue.

1. Custom List Building

It can be a pain to source through thousands of accounts across asset classes. With Dakota Marketplace you can eliminate the noise and focus on what matters most by creating target lists based on Investor Type, Location, or Asset Class.

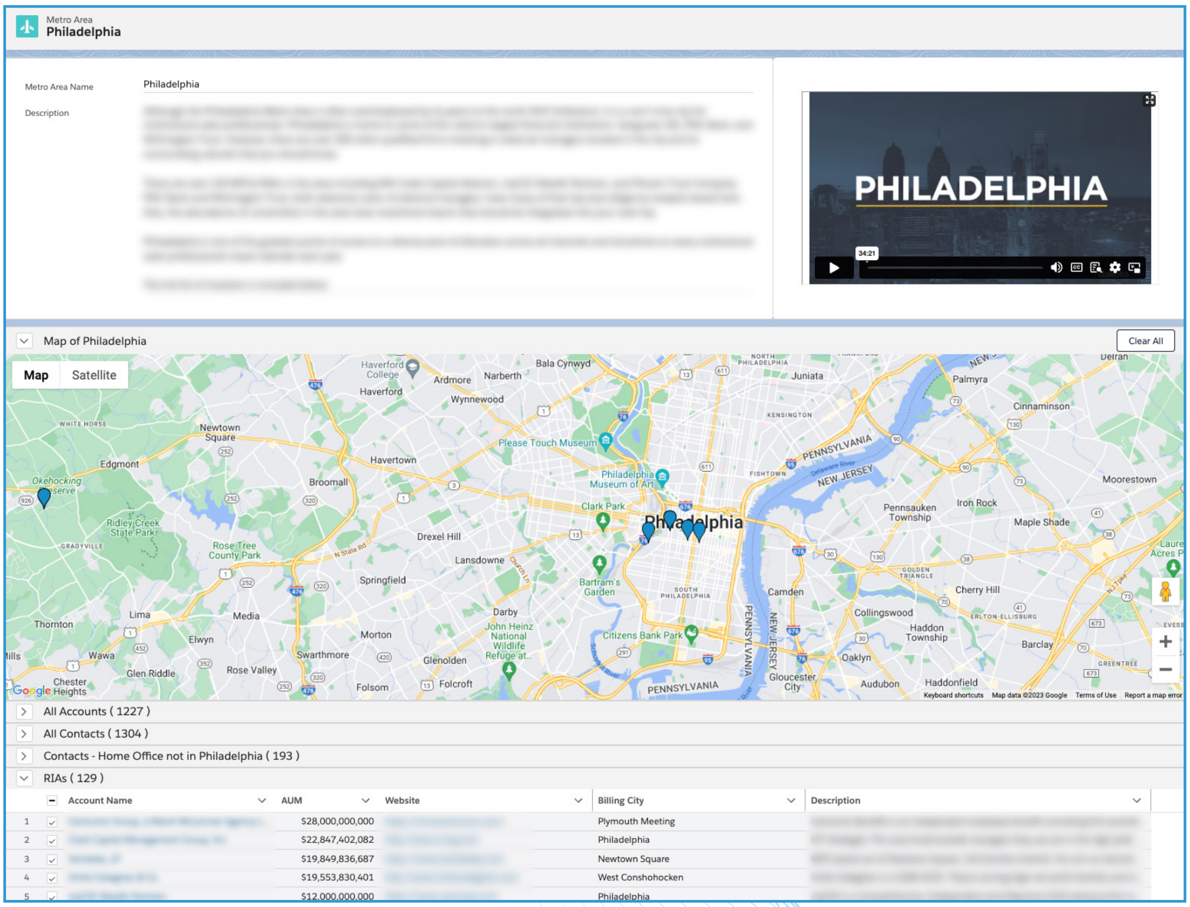
This is something our Customer Success team specializes in and often sends to our members upon request.



2. Metro Areas

Looking at endless lists can be daunting, but once broken out by a specific metro area it's quite achievable to reach out to your potential LPs. At Dakota, part of our sales process is implementing city scheduling. This has proven successful for us since 2006, which is why we added a Metro Area tab.

Within Dakota Marketplace, you can efficiently schedule meetings with our Map It feature, allowing you to see any desired channel in whichever metro. This leaves room to book additional meetings, identify firms that allocate to your type of investment strategy, and connect with due diligence professionals that sit remotely within a given city.

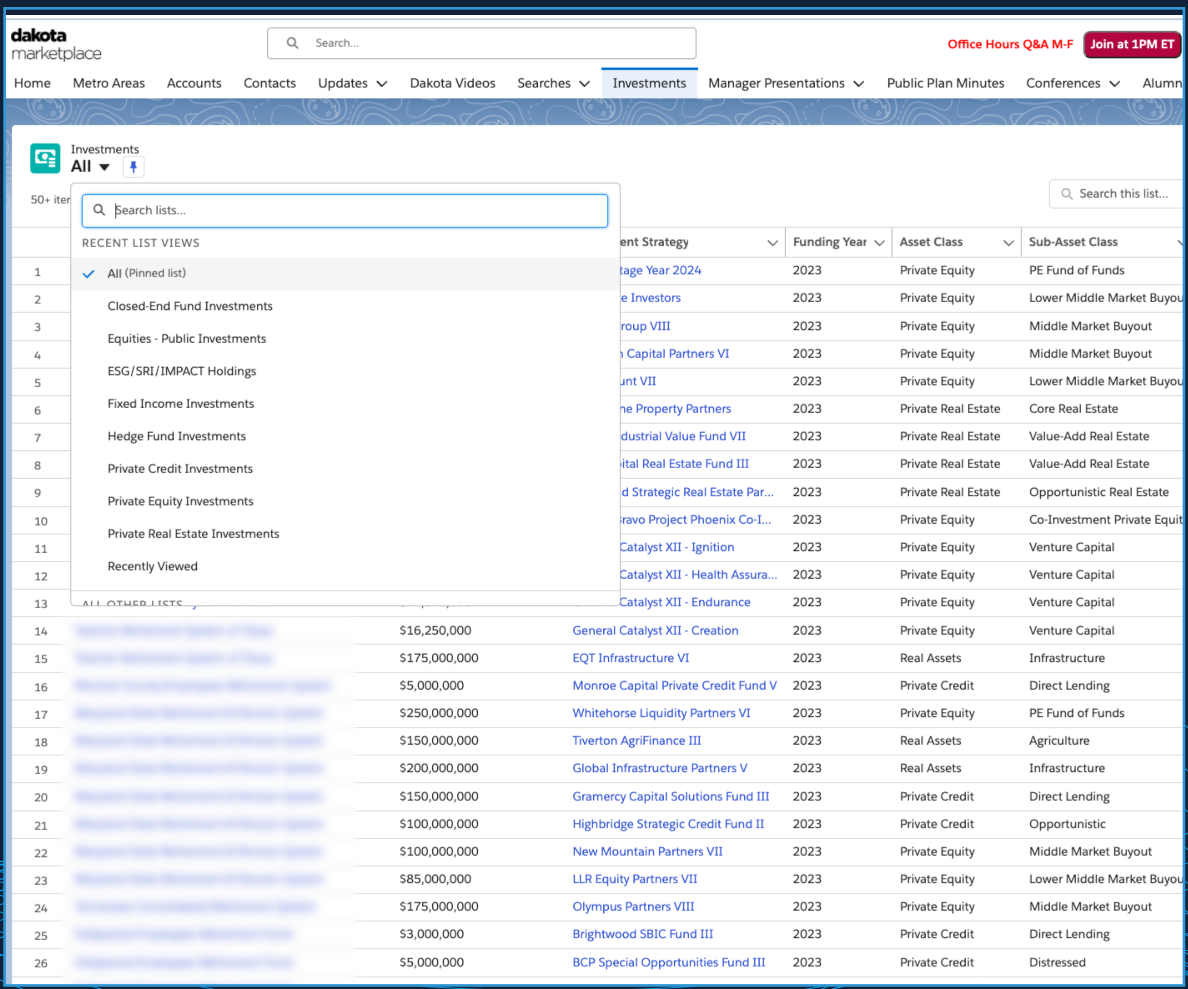


In the example above, you'll see a list of the RIAs in the Philadelphia metro area.

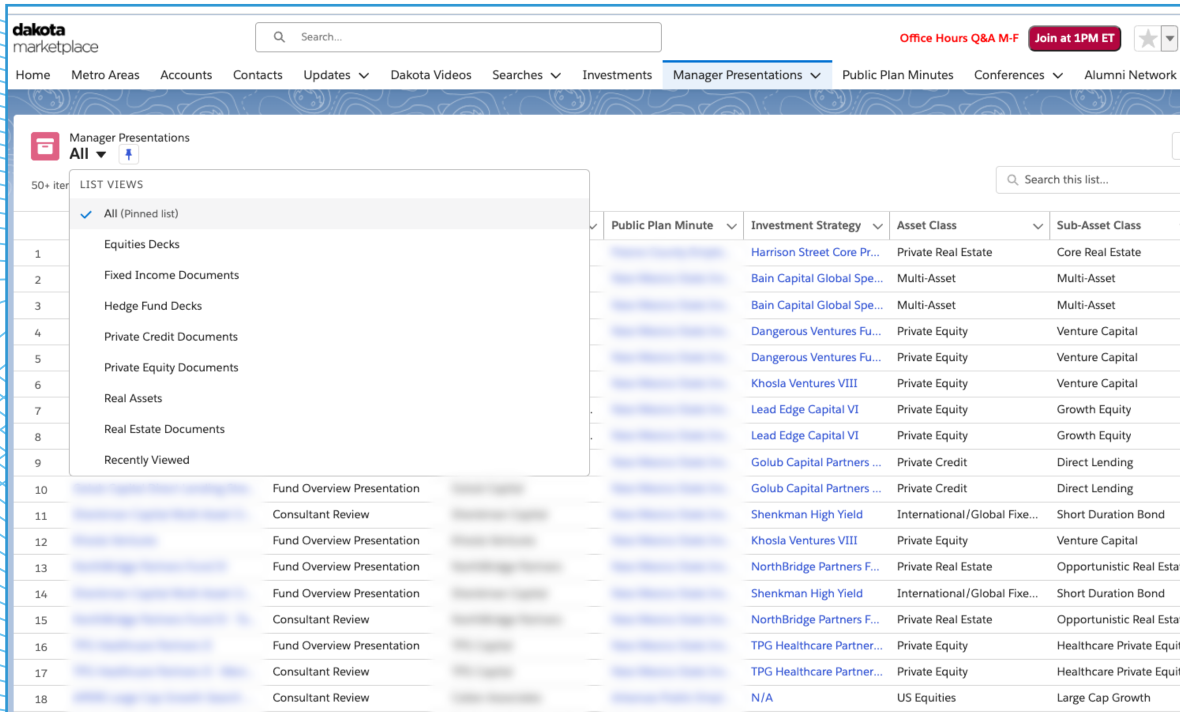
3. Investments and Manager Decks

The Investments and Manager Presentations tab within Dakota Marketplace serves as a critical resource, providing an array of strategic details on investment funds.

Our Investments tab showcases where pools of capital are currently being allocated segmented by Asset Class - whether it be Equities, Fixed Income, or Alternatives - allowing fundraisers to identify and concentrate their efforts on investors with active interests in their specific asset class.



Our Manager Presentations tab further enhances this utility by providing an array of strategic details on investment funds, performance histories, fee terms, and more. Gain insight from consultant reviews presentations and pension investment staff reviews of specific funds. These presentations also offer a unique perspective into how competing firms present their strategies to investors, equipping fundraisers with the knowledge to refine their own presentations and align more closely with investor expectations.



WHAT TO EXPECT FROM YOUR MEMBERSHIP

A membership with Dakota is not as simple as signing your contract and closing a business deal. We have a dedicated Customer Success team whose goal is to ensure that you're more than satisfied with our database, and are there to help throughout the entirety of your membership.

In this section we will review three things you can count on from your membership with Dakota.

1. A Comprehensive Onboarding

Our onboarding process at Dakota is personalized to each client. From the minute you sign your contract, you'll have a designated Customer Success Manager to assist you through your partnership. From a simple welcome email, to specific check in dates they set the standards high with unmatched support.

On the onboarding call, your customer success manager will ask intuitive questions to get a better understanding of your target market and what your team is looking to get out of this partnership. We'll also go through a detailed walkthrough of Dakota Marketplace that fits your case - looking at specific asset classes you call on or specific metro areas you cover.

30 days from the onboarding your customer success manager will connect with you again to ensure you and your team are finding everything you need to leverage fundraising with Dakota Marketplace. Additionally, we have three, six, and nine month check-ins.

2. Unmatched Support

Throughout your entire Dakota Marketplace membership, our Customer Success team offers unmatched support through curated lists, custom reports, and keeping you up to date on new features of the database.

Your Customer Success Manager is available to you 24/7 via email and phone. In addition to this, we have office hours Monday-Friday 1-2pm. If these options don't work, we offer live chat functionality within the Dakota Marketplace platform.

3. Providing value added content

Finally, your Customer Success Manager will provide you with as much value added content as possible. This ranges from post-call notes from our weekly Dakota Live! Calls, notes on our Emerging Manager Growth Show, monthly Public Pension briefs by specific asset classes, or even a blog from our website.

This personalized content comes from your interests as a company, and if you have specific requests they can follow up with these as well.

At the end of the day, the Customer Success team is here to aid you through your partnership with Dakota. Whether this is a check in every three months, a refresher onboarding of the platform's features, sending a list of all the consultants in the Dallas area for you to call on, they're here for you with whatever you need.

WHAT OUR CUSTOMERS ARE SAYING

If you still need more convincing, here are some words from our current customers of Dakota Marketplace, and how the platform has helped them:

How has partnering with Dakota Marketplace helped your firm in the fundraising industry?

$2B AUM
Long-only Equity manager

Prior to getting access to Marketplace, we were somewhat operating in the dark with respect to potential prospects and, more importantly, contacts. Marketplace has made our marketing efforts and trips far more efficient and effective. We have also used the manager search information to submit RFPs for searches that we may not have been aware of had it not been for Marketplace.

Saratoga came to Dakota not knowing the full scope of their data needs, just that they needed something to fill in the gaps. They've found the prospect and contact data, the metro area reviews, and Dakota Cocktails events tremendously helpful since getting started with Dakota Marketplace.

Why was Dakota Marketplace the solution to help fundraising efforts?

$43.4B AUM Private Equity Real Estate firm

In addition to good reviews from our peer GPs, we found Dakota Marketplace to be a great solution because it was user-friendly and integrated with our CRM. We also liked that Dakota is a "hungry" newcomer to the space, and is always looking to get better rather than be complacent with the product. We've been able to grow our commitments by using the accurate and up-to-date Marketplace contact information.

What problems did Dakota Marketplace help you overcome?

BRIDGE INVESTMENT GROUP

$7.3B AUM
Real Estate Investment Firm

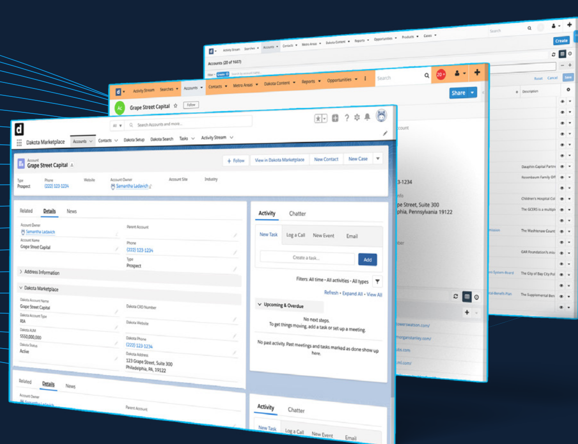
We were looking for a system to help set up new team members for success in a new role. While new team members may have had contacts from previous roles, they're unable to take any information with them. We've found Dakota Marketplace to be a place where we can easily access the contact information for those existing relationships. Since there's been a lot of people making career changes and moving around within the alternative investment industry, we've found it helpful to have a "team" to keep the data accurate and up to date.

What growth have you seen since becoming a member of Dakota Marketplace?

RIVERWATER PARTNERS

$800M AUM
Long-only Equity Manager

As an emerging manager, we wanted a reliable source of information to increase sales prospecting efficiency and have a built-in tool to help maintain a disciplined sales process. As a result of Dakota's interaction with our firm, we have built a sales reporting structure around the Dakota model, and now provide a quarterly update internally to the team about our institutional development efforts. On the sales development front, we have become one of the most recognized emerging manager brands in eVestment and are actively growing consulting relationships. The single biggest opportunity we have is a result of their event series that has put us into the final decision position with one of the largest wirehouses for their platform.



GET STARTED

Start Streamlining Your Fundraising Efforts Today

Partnering with Dakota is simple. We work to understand your firm's needs, and provide the resources to make fundraising efforts easier.

A Dakota Partnership is Simple

Partnering with Dakota is easy. We work to understand your firm's needs, and provide the resources you need to be a better salesperson.

1. Request a Free Trial
2. Access Dakota Marketplace
3. Fundraise

dakota marketplace

Request a Demo

PRICING: **$15,500/year**

$1,000 for each additional user login.

Becoming a member of Dakota Marketplace is becoming a part of our firm, we hope you can see this through our dedicated onboarding process and continuous, 24/7 support throughout your partnership.