Dakota & Altvia Integration Overview

Turnkey Fundraising Enablement for Fund Managers

Why Dakota Altvia Integration?

Fund managers need more than just names. They need precise, actionable data and a CRM system that drives efficiency. Traditional solutions fall short with stale data and clunky interfaces, slowing the path to capital.

Dakota and Altvia have partnered to empower IR and fundraising teams with a streamlined, intelligent workflow. Dakota's investor intelligence meets Altvia's purpose-built CRM platform to seamlessly connect for actionable, up-to-date insights.

Integration Overview:

WHAT DAKOTA PROVIDES

- **Accurate and Up-to-Date Data**
  Focus on selling, not verifying. Dakota offers the most complete and current database of qualified institutional, intermediary, and RIA investors.
- **A Complete Database Solution**
  Connect with allocators and set more meetings that target your strategy.

WHAT ALTVIA PROVIDES

- **Pipeline History Tracking**
  Track every touch point and stage to understand momentum and bottlenecks.
- **Customization without Hassle**
  Tailor your CRM without the overhead of SFDC-style complexity.
- **Efficient CRM Adoption**
  Intuitive design and automation reduce admin load and speed up onboarding.

Benefits of Integration:

Dakota gives you the who to call, Altvia gives you the tools to act.

From accurate data to CRM execution, the partnership eliminates friction and accelerates fundraising.