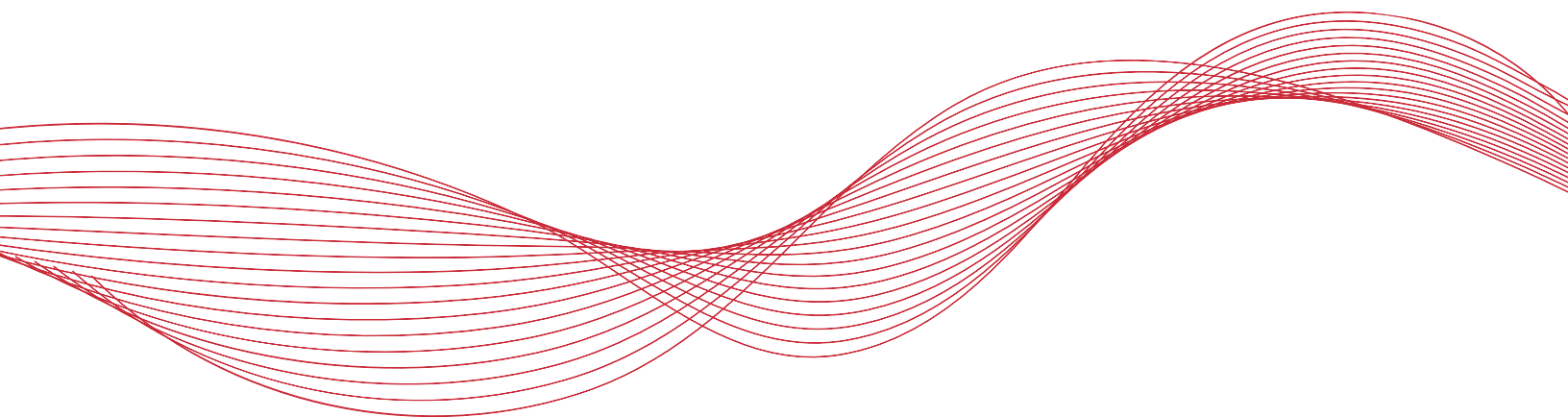


Li Costi

Sales Leadership in the Investment Industry

WITH GUI COSTIN

The Enlightenment of Change Podcast



Sales Leadership in the Investment Industry

In this episode of *Enlightenment of Change*, Gui Costin, founder and CEO of Dakota, shares his insights into scaling businesses, developing high-performing sales teams, and fostering a positive workplace culture. Host Connie Whitman explores Gui's strategies for leadership, mentorship, and creating efficient sales processes.

Gui explains that Dakota has raised over \$40 billion through a systematic, repeatable sales process and the use of a proprietary database of institutional investors. He emphasizes the importance of maintaining up-to-date CRM systems to track meetings, client data, and follow-ups, which ensures efficiency and scalability. By creating systems that are easy to replicate, Dakota has streamlined its operations and empowered both its internal sales teams and clients to achieve consistent results.

Drawing from his book, *The Dakota Way*, Gui outlines four core principles of sales success: setting clear expectations, targeting the right buyers (Total Addressable Market or TAM), mastering storytelling, and leveraging CRM tools. He stresses that success begins with clear alignment between salespeople and leadership on goals and day-to-day activities. Gui also highlights the importance of concise storytelling, using the “short answer first” approach to keep presentations focused and engaging while allowing clients to guide the conversation.

Culture is a central theme of the episode, as Gui defines it as how people are treated within an organization. He advocates for creating “low-stress, high-performance” environments where employees feel valued and supported. Toxic behaviors, even from high performers or clients, are not tolerated at Dakota to preserve a positive and cohesive culture. Gui believes that effective leadership involves mentoring team members to grow their careers and providing them with the tools and processes needed to succeed.

Gui also addresses the emotional challenges of sales, such as frequent rejection, and stresses the importance of resilience, preparation, and confidence. He advises salespeople to “know the knowable” about their products to approach their work with clarity and conviction. Metrics like first-time demos and re-engaged demos are critical indicators of success at Dakota, helping the team stay focused on what truly drives results.

The episode concludes with Gui emphasizing the importance of face-to-face meetings over virtual interactions for building stronger relationships, although he acknowledges the efficiency of Zoom when travel is not feasible. This episode is packed with actionable insights for sales professionals, leaders, and entrepreneurs looking to scale their businesses, enhance team performance, and build thriving workplace cultures.

