



Rainmaker
PODCAST

EPISODE #15

JONATHAN KINGERY
FRANKLIN TEMPLETON

Welcome to the Rainmaker Podcast with your host Gui Costin. The goal of this podcast is to give listeners a unique look into sales strategies from top industry executives. We introduce you to the heads of sales and heads of distribution who will help you understand the inner workings of the successful sales organizations from philosophy to execution. This podcast is essential for sales professionals seeking wisdom from the best in the field. If you're not familiar with Dakota and their Dakota Rainmaker content, please check out dakota.com to learn more about their services.

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Gui Costin: What's up, everybody? It's Gui Costin, founder, CEO of Dakota. Welcome to the latest edition of the Rainmaker Podcast. I am joined by Jonathan Kingery. Jonathan, welcome.

Jonathan Kingery: Thank you, Gui. I'm honored to be here.

Gui Costin: It's great to have you here. So, Jonathan Kingery is the Senior Vice President and head of US wealth management sales for Franklin Templeton. In this role, he is responsible for leading territory sales for wires, RBI, RAA, private banks, and the internal sales desk. His team works closely with investment committees and manager research analysts across the full spectrum of Franklin Templeton's investment and research capabilities. In addition, he serves on Franklin Templeton's management committee and is a board member for Fiduciary Trust Company International, a subsidiary of Franklin Templeton. Mr. Kingery has over 20 years of experience in the financial services industry. Prior to joining Franklin Templeton Investments in 2019, he spent 14 years at Lord Abbott and Company, where he served in several roles, most recently, leading the institutional RAA team. At Lord Abbott, Mr. Kingery served on the Client Services Leadership Institute, the institutional strategy team, and SMA operating committee. Before joining Lord Abbott and

Company, Mr. Kingery served as Vice President for Bisys Insurance Services and began his career in the financial services as a financial advisor and certified financial planner. In our industry, there's really not a venue where you can hear from distribution leaders that are running big businesses, that in order to run those businesses they have to have a very clear set of principles, ways of doing things, culture. And what we're doing on these podcasts is bringing that information out so all of us in a sales and distribution role can learn, learn what I would consider from the best. And having done now so many of these, there's such common characteristics about how you as big distribution leaders run your organization. So, with that, let's kick into it. So, Jonathan, could you just give us a little background on your career, family, and everything before we kick into it?

Jonathan Kingery: Sure, happy to. As far as my career is concerned, I think I'm a proof statement that there's not one path to take. I'm a product of educators, multi-generational educators, not coming from the financial services. Coming out of college, very liberal arts education, predominantly history and physical therapy were what I studied. And then I got to my senior year. I started taking finance, econ classes, went to career fairs. I thought, where has this been? Very intrigued by it. Started at the age of 22 as a financial advisor, in the bullpen smiling and dialing for dollars with my cohorts.

Gui Costin: And where was that?

Jonathan Kingery: I started with American Express Financial Advisors, now Ameriprise in Wilmington, Delaware.

Gui Costin: Nice.

Jonathan Kingery: Yes. Had some great leaders, mentors there to learn from. I was a financial advisor till age 29 but was always intrigued when the wholesalers were coming in, more of the business-to-business sale than the business-to-consumer sale. So, at age 29 made the pivot to become a wholesaler and was very fortunate. I didn't know the job existed when I was growing up.

Gui Costin: Right.

Jonathan Kingery: So, what do you want to be when you grow up? I didn't know it existed and loved it. I carried the bag for north of 15 years, had the opportunity to call on wire-houses for 10 years, banks

and independents for a couple of years, RIAs. I spent time in the institutional world within consultant relations.

Gui Costin: So, let me let me ask you this. So, someone made a comment on one of the prior podcasts is that if a recommendation is made early, he said go retail. And the reason he said retail or intermediary, if you want to call it, is because of the reps that you get. Can you talk a little about that? Because clearly, you got in the reps.

Jonathan Kingery: Yeah, absolutely. It's a contact sport. And so, the more you can fail, fail fast, fail often, fail better, you just get better at it. So, you have to put yourself out there. And having 10, 12 meetings a day, day in, day out, you're going to get better. And so, it's very true. And the sales cycles quick, a little bit quicker in the institutional side. And you get more reps. So clearly, you get a chance to polish yourself a little bit more.

Gui Costin: Gotcha. So, I know you told me you live in New Jersey, married.

Jonathan Kingery: Married, 18-year anniversary coming up.

Gui Costin: Congrats.

Jonathan Kingery: 16-year-old daughter. Thank you.

Gui Costin: That's great.

Jonathan Kingery: 14-year-old son, 11th grade, and 9th grade.

Gui Costin: Nice. So, walk me through, have you with intent set up the divisions? Walk me through how you're structured to be able to operate that kind of a large organization.

Jonathan Kingery: Sure. Well, it starts with leadership. And we did make some changes, where our divisional sales managers, our divisional sales leaders are cross-channel, with the exception of RIA. So, whether they're wire-house, regional bank, independent firm, our divisional sales leaders oversee the wholesalers there.

Gui Costin: So, they would be generalists covering the independents and the wires in the territories?

Jonathan Kingery: So, when we get to the territories, we're channelized in the major metropolitan areas.

Gui Costin: Makes sense, gotcha.

Jonathan Kingery: We're dechannelized in the secondary cities. It's really about advisor density. So, if you're in New York City, you need several wholesalers in New York City. So, it makes sense to have a dedicated wire-house, a dedicated regional bank, independent wholesaler. When you get to Albuquerque, New Mexico, one person is better suited to cover everyone there because they're going to have more time with advisors and less time on planes and automobiles. So, it's really about the density so that we can spend as much time with clients as possible.

Gui Costin: Makes total sense. OK, let's talk about one of my favorite topics is communication. So, walk me through... now, you have a large organization. But let's talk communication in two different ways. One, how do you communicate with your team on a weekly basis around progress, sales check-ins? And how are they set up? And do you let them all do it on their own? Or do you have a structure you want them to follow?

Jonathan Kingery: Definitely have a structure we want to follow. And for a larger organization, it's imperative. I believe the speed of decision making and the flow of information are going to be what allows us to be nimble and agile. Those are the two ingredients we have to have. So, from a flow of information perspective, we have weekly meetings. I report to the head of the US. His team gets together once a week. Our leadership team then gets together once a week. And then each of the divisional sales leaders gets together with their team once a week. So that flow of information, whether it's cascading down or it's pushing up, is constant.

Gui Costin: Gotcha. So, let's just talk about one point that you just made because I think it's really important around bureaucracy is quick decisions and flow of information. Just unpack that a little bit because if you think about our listeners right now, where organizations obviously get held up is decisions don't get made. It frustrates people. Walk me through how you're able to accomplish that, especially in a large organization.

Jonathan Kingery: Well, and you can have a scenario where decisions get made, but the information doesn't flow.

Gui Costin: Love it.

Jonathan Kingery: They go hand in hand. It's critical that you do both.

Gui Costin: So, at the end of the day, your belief is number one, obviously, quick decisions, but make sure you're sharing information because I always think that communication is truly the lifeblood of an organization. The better you communicate the better people are informed. And what I've learned is it's not natural to people. You think it would be, right? And there are certain groups that it's just not natural. And so, you do need to create systems.

Jonathan Kingery: Structure to it, absolutely. Communication is one of the tenets of leadership. Cannot read a leadership book that does not have communication in it. So, you have to be very deliberate with it. So, we all have those weekly team calls. We'll have scheduled one-on-one calls. I think it's important to have the two up, two down scenarios, where I should be communicating with individuals two layers above me on the org system, two layers below, and vice versa. That just ensures alignment.

Gui Costin: Yeah, OK. So, let's talk about that, especially as if you think about this podcast. And you're going to have a lot of people that are one salesperson at a firm. You have 260 people just in your team alone. But the concept of communication and setting expectations and reporting progress against a plan, could you just unpack that if you're consulting with a one-person sales organization, do you believe they should have the same process and procedures mentally as a 260-person firm?

Jonathan Kingery: Sure, because they have the same goals. So, our communication, what we ask our team is what we call let's start off with a FAST update, Flows, Activity, Segmentation, Training. I want to know what we're doing on those. So, it's a one-person organization. It's a 10-person organization. It's a 200-person organization. Do they care about the flows, the financials of the business? Do you care about the activity? Segmentation, are you calling on the right clients? And then training, or you can use technical proficiency, are you getting better every day? We want to start each call off with that. And then we can open up.

Gui Costin: I love that. So, one, it reeks of focus on what matters most, number one, which that's one of our core tenets is focus on what matters most, and clarity of process. You just went through your four things. And you ripped it off in three seconds. So, it's complete clarity of your process right and what matters most.

Jonathan Kingery: Yes.

Gui Costin: Love that. OK, so as we're talking and our listeners are trying to figure out... because I always think that when you're in an organization, that you want to be from a distribution perspective, as a salesperson, however you want to think of it, you want to be the dog and not the tail. So many people unfortunately make themselves the tail because they don't create the structure, a sales plan, and then get buy-in from senior leadership under what good looks like, and then a regular reporting cadence against the plan. What I'm hearing from you is you address all of that up front. So, you are the dog. And then you're reporting up and not being—

Jonathan Kingery: I had the pleasure of meeting with our CEO, Jenny Johnson, last week. I had one question for her. Jenny, what are your three priorities? That's all I wanted to know.

Gui Costin: Did she riff them off?

Jonathan Kingery: She ripped them off.

Gui Costin: I love that. That's great. All right, so now we're going to dovetail into what I would consider to be my favorite topic on this. There's a lot of favorite topics when I get to leadership. But I'm a CRM nerd. I'm a Salesforce Gui, like going out of style. As you know, as a subscriber to Dakota Marketplace, we're built on Salesforce. And I know you guys use Salesforce. So, walk me through the importance of a CRM. And this is such a key question for you, for all the listeners on what a CRM means to you as a distribution leader.

Jonathan Kingery: We actually... we transitioned. We use Microsoft.

Gui Costin: Oh, you do. OK. Sorry, last time we spoke—

Jonathan Kingery: That's OK. A CRM should be a financial asset to a company. If someone's coming in to buy your company, one of the things that they should look at is the CRM and say, that is an asset. It should be the brains to the organization to a degree, really where you

memorialize what's happening. So, we went through the segmentation. That is so important. And then you have an organization that's larger, like ours. We employ a generalist practitioner specialist model within our distribution. We want to make sure that we can customize and meet the client where they are. So, we have an alternatives team. We have custom indexing. We have ETFs. We own over a dozen different autonomous investment firms. So, there's not one person that's going to have the ability, just like a doctor, to be an expert on everything. So, we have got to leverage the specialists with the generalist practitioner. And the main hub for that has to be the CRM system. You take from Jeff Bezos at Amazon, his COO came out and said, we want our people to be able to run autonomously, parallel to one another, quickly, and communicate through technology. The bureaucracy comes in when I have to pick up the phone to call you or you have to pick up the phone to call me to understand what's going on with the client, where if we have a CRM system, where we're both using it, we're both out hustling, and we can look in, and all the details are there, we're running parallel, autonomously, quickly, and still in communication. And that's what the CRM really allows us to do.

Gui Costin: That's amazing. So, I haven't heard it described like that. But I really love what you're saying. So, if it doesn't go in the CRM, as we talked about earlier, it doesn't count. So, unpack that a little bit around... because I've never had an issue with buy-in just because it runs our business. It always has since we started in 2006. But talk to me about how people generally, how your sales team generally utilizes it. And what's most important to get into the CRM?

Jonathan Kingery: If it's not recorded, did not happen. And that's as we say. And as I mentioned, I carried the bag for over 15 years. And one of my least favorite things to do, probably the two least favorite things to do as everyone is entering into the CRM and doing your expenses.

Gui Costin: Right.

Jonathan Kingery: Any salesperson wants to be out hunting and not spending time doing that. But it makes your life so much more efficient when next time see the client and you understand, OK, Jonathan has a 16-year-old daughter and a 14-year-old son, and lives here, and these are the things they care about, and this is what we spoke about. That number one is the most important part. And it does allow us to understand what the team is doing as well. And then

within our organization, as I mentioned with the generalist/specialist model... and it's not just us. It's anyone within the organization that can go in and understand what's happening with the client.

Gui Costin: As I keep mentioning, there's different people listening to this podcast. If you were consulting to a salesperson, smaller firm, might have a couple of salespeople, or what have you. Could be a private equity firm that just has one or two biz dev people, IR people, however you want to say it. What advice would you give to them around utilizing a CRM even as a small firm?

Jonathan Kingery: I have a tough time understanding why you would not want to use a CRM. Why would you not want to memorialize what matters to the client? We finish this conversation. And it's an important conversation. So, our meeting process is centered around four things, the relationship, discovery, application, and territory management. That's where we want our salespeople every meeting spending time. Are you advancing the relationship, understanding it? Are you asking the right questions? Did you discover anything about that person's business? What application did you provide to their capital market thesis? And then your territory management, did you ask for any referrals? Did you get any? Did you schedule your next appointment? Every one of those four things should live in the CRM system, whether you're a one-person shop or a 200-person shop. It's almost troubling that people don't see the value in recording that and memorializing it.

Gui Costin: So, the reason I delved so deeply into the question is because my philosophy has for every single salesperson globally should look at themselves as Gui Costin Inc. And you should operate that one-person sales group as your own company and have all of the most sophisticated processes of a big organization. Leverage technology in every way that you can because when I look at it, one of the key aspects... and you're doing recall. And you recall. But there's also all the meetings that you've done and being able to look back in the last 100 meetings you've done, 200 meetings, it's going to trigger sales actions. You can't get that out of an Excel spreadsheet, or a yellow pad of paper, or anything like that. To be able to go in and trigger sales actions on your past activity is vital to leverage of a salesperson.

Jonathan Kingery: How often do you have a moment where you go, oh my goodness, I didn't realize it's been six months since we last saw each other? It felt like it was two months ago.

Gui Costin: All right, well, I'll give you that. So, we're calling on Merrill Lynch, home office. I'm in the eighth-year sales cycle from '06. And I looked at our sales team. And I said, hey, when's the last time we met with Yvonne from Merrill Lynch? And this was April. He goes, in November. It's like a long pause. I said, November. It's 2015. We're April 2015. And I said, November of 2014? He goes, yep. I said, do me a favor. I said, check that. He pulls up Salesforce, goes in. He goes, November of 2013.

Jonathan Kingery: And then you add COVID, the pandemic. And time really does blur. We live in an age of technology. You have the ability... talk about creating leverage... creating scale within yourself.

Gui Costin: Yes.

Jonathan Kingery: Technology allows us to do that.

Gui Costin: I'm just so happy you unpacked it to that level of depth because that's really what I wanted to bring out in this conversation is I just think it's so important. If I could wave my magic wand, I'd have everybody in our community that's in a fundraising role absolutely have the CRM run their life.

Jonathan Kingery: If you think about it this way, we talked about this as being a financial asset to a company, and ways to measure, and understand what's happening, and memorialize what's happened. Think about it from the client perspective. Isn't that where we should start?

Gui Costin: Right.

Jonathan Kingery: So if we start from the client, and we're client-centric, and if I'm the client, and you come in, and you don't know when you last saw me, you don't know what we talked about, someone else comes in, one of the specialists comes in, and it doesn't look like you and the specialist had any communication, how do I feel as a client?

Gui Costin: Right. So well said.

Jonathan Kingery: Just take it from the client perspective. Forget everything else. That's what's going to allow you to be better at your job.

Gui Costin: Right. So really what you're getting at is you're disrespecting the client to a large degree. I would say if you send an email without a clear call to action for a meeting, you're actually disrespecting the person because you're making them do all the work.

Jonathan Kingery: And we all talk about time being our only finite resource.

Gui Costin: Right.

Jonathan Kingery: That person is giving you their time.

Gui Costin: I love that. OK, so moving on to leadership, I know this is near and dear to your heart. In fact, I want you all to know Jonathan was kind enough to send over this unbelievable sort of printout of his leadership philosophies, which I love because we have it written out ourselves as well. We call them Dakotaisms. So, could you just start to talk about what leadership means to you? And then that's going to turn into a question about culture, et cetera. So, I'll let you go on.

Jonathan Kingery: There's a lot to unpack here. Leadership begins with self-awareness. That's the first thing. So, to be self-aware and understand... so if you're new in the business or long-tenured, whether you're doing a caliper, an MBTI... there's a great book called StrengthsFinder 2.0. It's very simple. Understand yourself and what your leadership traits are because everyone is different. There's different ways to be a leader. So, for me, it's really about finding what's unique about that individual and pulling that strength out. We all have a superpower of some sort, some part. That's what I aim to do. But leadership overall, leadership number one, sets the example. That's the first and foremost. Leadership sets the example. You cannot ask someone to do something you're not willing to do. You have to set the pace. You have to set the tone. I mentioned it begins with self-awareness. I think leadership first presents itself when you're willing to be vulnerable. And then you have to be adaptable to have it survive. Leadership has to foster an environment of communication and trust. And at the end of the day, leadership is all about service for the greater good. If you think leadership is for yourself, you will fail.

Gui Costin: Gotcha. So, talk to me about leadership, and culture, and how you treat people because I really think at the end of the day, we can talk about culture all we want. But we have to live it.

Jonathan Kingery: Sure.

Gui Costin: And it all comes down to how you treat people. So, tell me, how does that manifest itself in a 260-person team that you're on?

Jonathan Kingery: We talk about culture a lot. And culture is one of these I call fuzzy words. What do you mean by culture? You're interviewing someone. They're looking for a great culture. What do you mean by culture? I've been fortunate to have two definitions of culture presented to me. Number one is the lowest standard you're willing to accept will define your culture. That's a standards-based, performance-based culture. The other one though is the root meaning of culture. The root meaning of culture is the word care. You can come to work and be your authentic self. I care about you as a teammate. Now, if I go back to the standards-based culture, all you do, because when I say the lowest standard that you're willing to accept is going to define your culture, that doesn't really feel... maybe it feels a little cold. It's performance-based. If that's all you do, you do become toxic as a culture. On the flip side, if all you do is care and you don't have standards, you're going to become bankrupt. So, the way I look at culture is culture equals standards plus care. We want to hold each other accountable. We want iron to sharpen iron in the organization. But we also want people to come in and be their authentic self and care for one another. And I think having standards is caring for one another. And so, if we can all rally around that same definition, it doesn't matter how large the organization is.

Gui Costin: So, I was on a Zoom call about a year ago, business school kind of thing. This conversation came up. And one guy happened to mention, I got a lot of value out of my coaches yelling at me, like Bobby Knight type yelling. And I couldn't help having, for me, 65 teammates as a CEO. And I said, dude, you know you're playing with fire. He goes, yeah, I don't know why that's not acceptable because I think at the end of day, being yelled at or whatever. And I said, do you understand you're dealing with human beings who are spending the majority of their time of their lives with their coworkers? And it's how you treat them. They go home. It's how their day was with their kids, their wife, everything like that. This is not like a fun thing. You just can't like be willy nilly with how you treat

people. Now, maybe 10 years ago, 20 years ago, 30 years ago, definitely 40, 50 years ago, there just wasn't as much care. But today... I mean, people are going home. And you think that it's just... You really recommend having a Bobby Knight approach to leadership and culture? I said, you're playing with people's lives every day.

Jonathan Kingery: Well, you can't get through life without being humble. That's, I think, the one shared human experience is that we all go through a period. Something happens. Something's happened in your life. And if I know you care about me during that period, I'm going to run through a wall for you. When that recruiter calls me, I'm not going to take the call because when I needed someone the most, I knew you cared. So, it doesn't mean you have to be lax on someone.

Gui Costin: No.

Jonathan Kingery: It's just you know the person is there for you when you need them.

Gui Costin: 100%.

Jonathan Kingery: Advice I would ever give to another sales leader, which I've spoken with other sales leaders about this, is you have to treat the security guard that you're walking into this office today the exact same way you treat the CEO inside the building. Treat everyone with respect. I think respect is something you give quickly. And you earn it slowly. But treat everyone that way.

Gui Costin: That's so well said. So next question I have for you, because this dovetails perfectly, what advice would you give a young salesperson entering the investment industry today?

Jonathan Kingery: That's a good one. Can I give a couple?

Gui Costin: 100%.

Jonathan Kingery: OK, three things if they do. If they show up, if they give their best effort, and they get out of their comfort zone, they do those three things, they're going to be successful. Sounds simple.

Gui Costin: Yeah.

Jonathan Kingery: But it's not. So just show up. And when you show up, give it your best. And once you give it your best, stretch yourself. Get out of the comfort zone. Just keep that in mind. Now, I think that the foundation to those three things are the foundation. And even an accelerator would be two additional things. One, I would tell them be brave. And second, I would tell them to focus on their strengths.

Gui Costin: And be brave, well, unpack that a little bit.

Jonathan Kingery: So, the reason I say be brave is you don't always want to show up. There are times maybe you're nervous to show up. Maybe you don't want to get on that podium. Maybe you had a rough day. And it takes you being brave to show up. Sometimes giving your best effort in front of your peers... so let's say we're doing peer-to-peer presentations and you've got to give your best effort. That takes being brave. And then of all of them, getting out of your comfort zone. You have to be willing to fail. And that takes being brave.

Gui Costin: And so, you said, focus on your strengths. I like that one. Talk to me about that for a young salesperson.

Jonathan Kingery: Sure. So, everything I just walked through I'm a Philadelphia 76ers fan. We're here in Philadelphia. Joel Embiid's on the sidelines right now. If I showed up at 76ers practice and I said, I want to be the center, I'm going to show up today. I'm going to give my best effort. And I'm going to get out of my comfort zone. How successful do you think I'll be on the 76ers? It's not my strength. I'm not meant to be a center in the NBA. So, you can go through all that. But if you're going against the grain of your DNA, you're going against what you are best at, you're just going to be pushing water up the hill. You'll hear people say make your weaknesses better. I don't necessarily agree with that. I think if you have the ability to delegate your weaknesses, if you have the ability to put processes, structure around your weaknesses so you can manage those, and then maximize your strengths. What is it that makes you, you?

Gui Costin: Yeah.

Jonathan Kingery: What are you best at? And if you put your effort into that... and that's why I said being brave and focusing on your strengths, if you take those as your foundation and as an accelerator to those three, show up, give your best effort, get out of your comfort zone, and you're being brave, and you're using your strengths, you're going to succeed.

Gui Costin: I love that. Normally I don't answer the question. But you just made me think of something. If I could give advice to a young person in sales, in business, I'd say get over yourself. If I could do it again, I would have outsourced everything I possibly could that I wasn't good at and only focused on that.

It took me so long to embrace basically outsourcing activities. And the ego can get in the way. Oh no, I can do it. I should be doing this. I read a book. To get it done right, do it yourself. I mean, all that stuff. And it's like if I knew what I know now, I would have done so much more of that outsourcing. So last question, dynamic world always. It's a dynamic world every day. It's never stopping. It's ever changing. Talk to me about obstacles, the biggest obstacle you're facing as a distribution leader today.

Jonathan Kingery: It's got to be almost the same for everyone. You mentioned there's some consistency. It's focus. And I would say focus in that the industry, we always say the industry is changing and it's changing rapidly. I think in the last four years you've seen so much disruption, not just from the pandemic, but just in the industry. Passive disrupts active. Direct indexing disrupts passive. Private is disrupting public. There's constant movement. And right now, it's accelerating. So how can we stay focused on the client, the client needs, our strategic initiatives in a world that is just changing by the day? And it really is. I would say starting the mid to late '90s to 2010, 40 Act mutual funds were the way of the world. It's not the case today. So that would just be maintaining that focus, making sure that we're staying centered on the client's needs. Our strategic initiatives are aligned with it. That's the obstacle.

Gui Costin: What you're getting at is the obstacle is lack of focus because there's so much stuff out there. And so, the discipline to stay focused with all the sort of noise.

Jonathan Kingery: Sure, you've got to pick your spots. Put more wood behind fewer arrows. Where you're going to have the biggest impact, it's very easy to, what's this firm doing over here? What's happening over here? Franklin Templeton, as I mentioned, we come with customized solutions across the board. I mentioned alternatives. I mentioned direct indexing. I mentioned ETFs, 40 Act funds, SMEs. We offer those solutions. So that's where I say for us, and I think for anyone, how to stay focused and execute. But all of those things that I just went through ultimately lead back to what the client needs and

what the client wants. So, it's just getting back to that center of gravity.

Gui Costin: I love it. Well, Jonathan, you've shared so many amazing insights around leadership, culture, technology, CRM, everything. I can't thank you enough. The insights have been tremendous.

Jonathan Kingery: My pleasure. Thank you for having me.

Gui Costin: Love having you on. So that's a wrap for another Rainmaker Podcast. Jonathan, thanks so much for being on. And I can't wait to see you on the next Rainmaker Podcast.

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Gui Costin: Hey, thanks so much for joining Rainmaker Podcast. I hope you enjoyed the show, enjoyed the interview. I know I loved it. And hey, if you wake up in the morning, and you raise money for an investment firm, you do cold outreach, whether you're a sales leader or a salesperson, and you don't know about Dakota Marketplace, we would love to show it to you. It's world class. It's used by over 880 investment firms and over 3,600 individual salespeople. To learn more go to [dakota.com](#) and click on a free trial.