

Bridge Investment Group

BRIDGE INVESTMENT GROUP

\$49.4B AUM

2011 Year
Founded

\$5,000+ Employees Including
Affiliates

About Bridge Investment Group

Bridge is a leading alternative investment manager, diversified across specialized asset classes, with approximately \$49.4 billion of assets under management as of September 30, 2023. Bridge combines its nationwide operating platform with dedicated teams of investment professionals focused on select U.S. verticals across real estate, credit, renewable energy and secondaries strategies.

What challenges were you facing that led you to consider a Salesforce integration?

Our internal Salesforce database previously contained outdated information regarding assets under management (AUM), billing addresses, and primary contacts. Upon comparison with the Dakota data sources, we observed significantly enhanced accuracy and usefulness. For that reason, we undertook the implementation of a Salesforce integration to synchronize with Dakota's data, which we have been very satisfied with.

Why was Dakota's Salesforce app the solution?

We compared Dakota to several competing platforms with which we had previous subscriptions and ultimately came to the conclusion that Dakota offers comprehensive and accurate data that we have been able to use for outreach efforts.

What were you looking for in a Salesforce integration?

We were looking for the most updated and reliable information both at the account and contact levels, while also aiming for improved ease of manipulation. We have seen that Dakota still does not have current data as it relates to public documents and information for institutional account types, for example Annual Reports for Endowments and hoping this can improve, however it has drastically improved our Salesforce data.

What is your favorite feature and/or functionality of the Salesforce app?

One of the features we use the most is the "Contacts" section which includes biographies and LinkedIn URLs for many of the key contacts for our accounts.

How have you seen benefits to using the Salesforce app?

Our confidence in the comprehensiveness of our data has significantly increased since implementing the Dakota Salesforce App. Moreover, the process of synchronizing accounts between our internal Salesforce system and the Dakota Salesforce App provided us with an opportunity to take a step back and conduct a thorough review internally to enhance the quality of our original data. This exercise allowed us to approach data management with a fresh perspective to ensure a high level of precision and reliability.