

The Trading Desk

AI for bankers, analysts & capital-markets teams · Your desk runbook

AI isn't here to replace you — it's here to make you the analyst who gets it.

If you can send a text message, you can do this. Two tools, one method, real deal work — by your second cup of coffee you'll have a win you can take to the desk.

01 Start Here

WHAT THIS IS & THE TWO TOOLS YOU'LL USE

This is your **Trading Desk runbook** — a short, no-jargon guide to using AI for the work your desk actually does: CRM pulls, proformas, comps, sourcing, intros, teasers, and deal screening. No coding. No theory. Just moves you'll repeat every day.

TOOL 1 · THE ON-RAMP

Microsoft Copilot — lives inside Outlook, Excel, Word, Teams & PowerPoint. Start here: summarize a thread, clean a sheet, draft a memo. Familiar surface, fast win.

TOOL 2 · THE EDGE

Claude — your reasoning analyst. Connects to your own data (Cloze CRM, your models, your pipeline) so every answer is precise, contextual, and right the first time. This is where the hours disappear.

02 Your First 5 Minutes

ONE TASK, ONE WIN, RIGHT NOW

Don't try to learn everything. Pick **one** task you do weekly and hand it over. Here's the fastest first win:

► The 5-Minute Win — Pipeline Triage

"Pull my active pipeline and give me the 10 deals worth a call today, ranked by close probability. One line each: who, stage, dollar size, and the reason it's hot."

Paste it. Read the list. That's a real result before your coffee's cold — and you just learned the loop: **ask plainly** → **get a usable answer** → **refine**.

03 The GCES Method

HOW TO GET IT RIGHT THE FIRST TIME

Weak prompts get weak answers. **GCES** is the 4-part formula that makes the AI land precise every time — same method across every academy.

G — Goal · what you want

"Build a one-page deal screen."

C — Context · the situation

"120-unit value-add multifamily, Charlotte NC, ~\$24M, our LP wants 15% IRR."

E — Expectations · format

"Table: metric, our deal, market range, pass/flag. Keep it to one page."

S — Source · the data

"Use the proforma in this sheet and comps from the CRM, nothing made up."

✗ WEAK

Look at this deal.

→ vague summary you can't use

✓ GCES

Screen this 120-unit Charlotte deal vs. our 15% IRR hurdle using the attached proforma; table format, flag anything off-market.

→ a desk-ready screen

The 24 Desks & How to Work Them

04 The 24 Desks & Scenarios

EVERY WORKFLOW ON THE FLOOR HAS A DESK

Your floor is organized into **24 desks**. Each is a real job AI can speed up. Find your desk, grab the move.

Origination

Source new deals & targets

Pipeline

Triage & rank live deals

CRM Search

Query Cloze, ~18k leads

Proformas

Underwrite in Excel

Comps

Sale & rent comparables

Deal Screen

Pass / flag a deal fast

Capital Sourcing

Find new LP & debt groups

Investor Lists

FINRA-eligible registers

Teasers

One-pager deal flyers

Decks

IC & pitch presentations

Deal Intros

Warm-intro outreach

Memos

IC write-ups & summaries

Models

Sensitivities & scenarios

Market Read

Sector & rate context

Diligence

Doc review & red flags

Client Comms

Updates & replies

Follow-Ups

Chase signatures & LOIs

Meeting Prep

Agendas & talking points

Action Items

Pull owners & deadlines

Reporting

Desk & portfolio rollups

Data Cleanup

Fix messy exports

Fact Check

Pressure-test claims

Exec Summary

One-paragraph for the MD

Tone Shift

Reframe for the reader

SCENARIO · COMPS DESK

"Pull rent comps within 3 miles of this asset, same vintage and unit mix, and tell me where our underwriting sits vs. market — high, low, or in line."

SCENARIO · TEASER DESK

"Turn this proforma into a one-page teaser: headline returns, location story, and the 3 reasons a capital group says yes. No fluff."

05 Your Personal Tools

WHAT EVERY ANALYST GETS ON THE PLATFORM

The Deal Book

Your saved-prompts bag. Tap a Power Card and a battle-tested prompt is ready to run — built for the moves you make most.

The Managing Director

Your in-app helper bot. Ask it anything in plain English; it coaches you through the next move, no jargon.

Quick Search (Ctrl/Cmd + K)

Jump to any desk, Power Card, or scenario instantly. Don't hunt — search.

Progress & Ranks

Track your climb and print a certificate when you hit the floor. Fresh prompts daily, agent drops weekly.

Analyst

First wins on the desk



Associate

Running workflows solo



VP

Connecting steps end-to-end



Managing Director

The one who gets it

Cheat Sheet & FAQ



Desk Cheat Sheet

FIVE PROMPTS TO KEEP WITHIN REACH

- ▶ **TRIAGE** — "Rank my pipeline; 10 deals to call today, why each is hot."
- ▶ **SCREEN** — "Screen this deal vs. our IRR hurdle using the attached proforma; flag off-market."
- ▶ **COMPS** — "Rent comps, same vintage & mix, 3-mi radius; where do we sit vs. market?"
- ▶ **TEASER** — "Proforma → one-page teaser: returns, location story, 3 reasons to say yes."
- ▶ **EXEC** — "One-paragraph summary for the MD: the ask, why, decision needed."

06

FAQ

THE QUESTIONS EVERY ANALYST ASKS

Is my deal data safe?

Yes — and it's the point. The system connects securely to your own data so answers are precise, not generic. Your information stays protected. The Managing Director can walk your team through exactly how on a call.

Will this replace analysts?

No. It removes the manual grind — the exports, the cleanup, the first drafts — so you spend your time on judgment, relationships, and deals. You become the analyst who moves faster than the desk.

I'm not technical. Can I really do this?

If you can send a text message, you can do this. Every move in this guide is plain English. Start with the 5-Minute Win and build from there.

Copilot or Claude — which do I use?

Both. Copilot for quick work inside Office (email, Excel, decks). Claude for reasoning over your own data — screening, comps, sourcing. Start in Copilot, graduate to Claude for the heavy lifting.

What if the answer is wrong?

Always tell it the Source (the "S" in GCES) and say "nothing made up." Then spot-check the numbers — you're the analyst, it's the assistant. Refine the prompt and it sharpens fast.

How do I get better?

Run one real task a day from your Deal Book, climb the ranks, and grab the fresh daily prompts. Proficiency comes in a couple of hours — mastery comes from reps.

Ready to set this up for your desk?

The Trading Desk can be customized and securely connected to your team's own data. Book a free call to see it tuned to your pipeline.

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