## 🔷 1. Strategic Thinkers

**(Nick Garmulewicz, Will R.)**

### 🧩 Persona Canvas: *“The Strategic Architect”*

| **🧑 Profile** | **📍 Context** |
| --- | --- |
| **Role:** Director / Senior Associate | **Sector:** Industrials, Energy |
| **Experience:** 6–10+ years | **Focus:** Narrative shaping, deck scaffolding, clarity upstream |

### 🧠 Description

These bankers thrive on structure, context, and planning. They influence the pitch early, align with MDs on tone and flow, and often create reusable materials. They’re not doing the grunt work anymore — their value is in upstream orchestration.

### 🎯 Primary Goals

* Define direction and narrative before execution begins
* Build reusable scaffolds for juniors
* Maintain consistency in tone across teams and timelines

### 🔧 Tools

* Legacy deck libraries, outline templates, master KPI files

### 😣 Frustrations

* Decks built without context
* MDs pivoting late in the process
* Fragmentation of institutional knowledge

### 💡 Motivators

* Being the trusted “go-to” for sector or client pitch structure
* Leveraging past work efficiently
* Teaching juniors to think top-down

### 🧩 Personality Traits

| **Trait Axis** | **Value** |
| --- | --- |
| Strategic ↔ Tactical | ●●●●◉ |
| Collaborative ↔ Autonomous | ●●●◉○ |
| Reactive ↔ Proactive | ●●●●◉ |
| Polished ↔ Scrappy | ●●●●○ |
| Process-bound ↔ Flexible | ●●●●○ |
| Client-first ↔ Banker-first | ●●●◉○ |
| Control-seeking ↔ Delegator | ●●●●◉ |

## 🔶 2. Execution-Oriented Operators

**(Elana Bittker, Jason T., Jael Ortiz)**

### 🧩 Persona Canvas: *“The Precision Executor”*

| **🧑 Profile** | **📍 Context** |
| --- | --- |
| **Role:** Analyst / Associate | **Sector:** Industrials, Generalist, Tech |
| **Experience:** 1–3 years | **Focus:** High-volume deck production, repeatable workflows |

### 🧠 Description

These personas are laser-focused on execution. They want clear direction, stable outlines, and minimal ambiguity. They often operate under intense deadlines, take pride in accuracy, and are sensitive to formatting or data inconsistency.

### 🎯 Primary Goals

* Complete decks quickly and correctly
* Limit avoidable rework
* Get positive feedback from seniors

### 🔧 Tools

* Excel, PowerPoint, CapIQ, master templates

### 😣 Frustrations

* Poor or vague outlines
* Rebuilding slides for small changes
* Constant rechecking of data sources

### 💡 Motivators

* Praise for speed and cleanliness
* Automation that speeds repetitive work
* Being seen as “dependable” under pressure

### 🧩 Personality Traits

| **Trait Axis** | **Value** |
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| Client-first ↔ Banker-first | ●●◉○○ |
| Control-seeking ↔ Delegator | ●●◉○○ |

## 🔵 3. Collaborative Navigators

**(Mikayla, Jason Neumann)**

### 🧩 Persona Canvas: *“The Workflow Conductor”*

| **🧑 Profile** | **📍 Context** |
| --- | --- |
| **Role:** Associate / VP | **Sector:** Tech, Energy |
| **Experience:** 2–5 years | **Focus:** Cross-team collaboration, prep coordination, client focus |

### 🧠 Description

These bankers are the connectors. They manage the flow of decks and inputs across teams — M&A, ECM, DCM — and ensure alignment between product groups and client expectations. They often serve as the “glue” in time-sensitive meetings or cross-border projects.

### 🎯 Primary Goals

* Keep materials aligned across teams
* Deliver clean prep for internal and client use
* Avoid confusion caused by multiple input sources

### 🔧 Tools

* PowerPoint, Slack, SharePoint, internal trackers

### 😣 Frustrations

* Lack of coordination across geographies
* Client decks duplicating pitch work
* Constant chasing of stakeholders

### 💡 Motivators

* Being indispensable to execution flow
* Mastering process complexity
* Making meetings run smoothly

### 🧩 Personality Traits

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| Client-first ↔ Banker-first | ●●●●◉ |
| Control-seeking ↔ Delegator | ●●◉○○ |

## 🟢 4. Autonomous Analysts

**(Clayton B., Davis English)**

### 🧩 Persona Canvas: *“The Independent Synthesizer”*

| **🧑 Profile** | **📍 Context** |
| --- | --- |
| **Role:** Associate / VP | **Sector:** Tech, Energy |
| **Experience:** 2–6 years | **Focus:** Deep research, solo work, owning content blocks |

### 🧠 Description

These individuals prefer to work alone and own their outputs. They’re comfortable with ambiguity and take initiative without being told. They use GenAI and tools to speed up work but demand control and source transparency. They’re not process-driven — they care about quality.

### 🎯 Primary Goals

* Deliver thoughtful, accurate work independently
* Use tech to save time, not add complexity
* Avoid excessive meetings and micro-management

### 🔧 Tools

* Investor calls, transcripts, FactSet, GPT-based tools

### 😣 Frustrations

* Blind AI outputs with no sourcing
* “Process for process’s sake”
* Collaboration that adds more noise than value

### 💡 Motivators

* Owning high-impact content
* Uncovering unique insights
* Autonomy to decide workflow

### 🧩 Personality Traits

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