



Claude for PowerPoint

From Analysis to Pitch Book

What We'll Cover Today

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Pitch books from prompts

2

Document-to-deck conversion

3

Transaction structure & process slides

4

Competitive landscape & market overviews

5

Investment thesis one-pagers

6

Deck editing & reformatting

7

Iterative refinement workflows

+

Plus an end-to-end IB workflow tying it all together

What is Claude for PowerPoint?

A Microsoft 365 add-in that puts Claude in the right-hand sidebar of PowerPoint. Claude reads your slide master, layouts, fonts, and color scheme – then builds and edits **native, on-brand slides** from natural-language prompts.



BUILD

Generate from prompts

Open a blank deck or a corporate template, describe the goal, and Claude builds a logical first draft using your master's layouts and styles.



EDIT

Pinpoint edits

Select a slide or object – Claude knows what you have selected. Simplify text, restructure storyline, or convert bullets into a chart while preserving formatting.



CONNECT

Cross-app context

Claude carries one conversation across PowerPoint, Excel and Word add-ins – pull a comps table from a workbook straight into a valuation slide.

Getting Set Up: Install, Plans, Models

INSTALL IN THREE STEPS

- 1. Get the add-in.** In PowerPoint desktop (Mac or Windows), Home → Add-ins → search “*Claude by Anthropic*”. Or admin-deploy from M365 Admin Center.
- 2. Sign in.** Click the Claude icon in the Home ribbon. Authenticate with your Claude account – or, in regulated set-ups, your firm’s LLM gateway via Bedrock, Vertex AI or Azure Foundry.
- 3. Start in Claude.ai desktop to build the full deck.** Then open in PowerPoint and use the add-in for pinpoint editing.

QUICK FACTS

Plans

Pro, Max, Team, Enterprise (no Free).

Models

Opus — full pitch-book builds, restructuring, multi-slide narrative.

Sonnet — fast targeted edits, rewrites, formatting passes.

Status

Beta research preview — review every output.

How To Prompt: Three Principles That Change Everything

01

Anchor on success

Tell Claude the audience, deliverable and outcome – not just “make a deck.”
A vague prompt = generic slides.

02

Outline before slides

Agree the storyline first, then ask Claude to build slides against it.
Restructuring later costs more time than getting the spine right.

03

Select to target

Click the slide or shape you want changed before you prompt. Claude scopes edits to your selection – far cleaner than describing it in words.

WEAK PROMPT

“Make a pitch book for our healthcare deal.”

Generic structure, no buyer perspective, every section the same length.

STRONG PROMPT

“Build a 12-slide buy-side pitch on Target Co. for a strategic acquirer. Use our template. Lead with strategic rationale, then synergies, then valuation. Aim for an MD review.”

01 Pitch Books From Prompts

USE THIS FOR

First-draft pitch book in your firm template — company overview, transaction rationale, market context. Used for live deals, MD reviews, internal pre-pitch.

SAMPLE PROMPT

“Build a 14-slide buy-side pitch book for our client (large-cap industrial) on Target Co. Use this template. Include: cover, executive summary, strategic rationale (3 angles), Target Co. profile, market context, comparable transactions, preliminary valuation, illustrative synergies, indicative offer, process & timing, next steps. MD review, formal tone.”

Build a draft, then sharpen it

MAKE IT REUSABLE

Save your firm’s standard pitch-book outline as a Skill — one click for every analyst.

SET THE AUDIENCE

“MD review” vs. “client kickoff” changes density and tone.

FEED CONTEXT

Drop in the latest CIM excerpt or deal memo before prompting — quality jumps.

Four more ways to use Claude in PowerPoint

BEYOND PITCH BOOKS

The same workflow extends across four other recurring deck tasks on the desk.

02 Document-to-deck conversion

CIMs, memos, transcripts → structured slides

03 Transaction structure & process

Step diagrams, timelines, sources & uses

04 Competitive landscape

Peer grids, positioning maps, market overviews

05 Investment thesis one-pagers

Key points, financial highlights, risk summary

When to reach for each

Source material in hand

Use 02 to ingest CIMs, memos, or filings directly.

Process & structure

Use 03 for timelines and transaction flow diagrams.

Market context

Use 04 for peer grids and positioning maps.

Single-page summary

Use 05 to compress a thesis into one slide.

06 Deck Editing & Reformatting

USE THIS FOR

Inheriting a deck for a new mandate, standardising formatting, applying brand updates, splitting one deck into client / internal versions, fixing inconsistencies in bulk.

SAMPLE PROMPT

“Review every slide in this deck for typos, inconsistent punctuation, and capitalisation drift. List each issue with slide number and proposed fix, then apply all corrections. Then standardise: titles in Ivar Text Bold 28pt navy, body in Open Sans 14pt, two-column layouts where lists exceed 5 items.”

Restructure, restyle, re-purpose

REVIEW BEFORE APPLY

Ask Claude to list changes first – then approve in one pass.

SCOPE BY SLIDE

“Simplify slides 4–8” works better than “simplify the deck.”

ACCEPT-ALL TOGGLE

In settings, enable accept-all-edits during heavy iteration.

07 Iterative Refinement & Skills

USE THIS FOR

Adapting a draft for different audiences (MD review, client kickoff, IC), producing variants, and codifying your team's best workflows as one-click Skills.

SAMPLE PROMPT

"Produce three versions of slide 7. (a) MD-review density – tight, every word earns its place. (b) Client-facing – warmer tone, more white space, one chart. (c) IC-ready – explicit risk callouts, downside case noted. Keep our template throughout."

Conversational edits + reusable Skills

CHAIN, DON'T RESTART

Stay in the same conversation – Claude keeps deck context across turns.

SAVE AS A SKILL

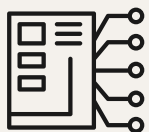
When a workflow works, save it. Whole team gets the click.

INSTRUCTIONS FIELD

Use the sidebar Instructions field for standing rules – brand, voice, length.

Project Helix – Live Demo

From MD thesis & industry report to first-draft pitch book



THE BRIEF

SaaS, sector consolidation

Salesforce evaluating a take-private of HubSpot. Lazard SaaS & AI deck plus firm template in hand, MD review on Monday.



WHAT YOU'LL SEE

The full workflow

Standing rules, source ingestion, outline-first, batched build, pinpoint edits, audience variant, and the closing reality check.



THE RESULT

10-slide draft

Two days of work compressed into one conversation — with one critical step at the end.

End-to-end: From Deal Memo to MD-ready Pitch Book

One conversation, one MD-ready deck. The order matters — treat Claude like a junior analyst with a strong template.

1

Set the brief

Open the firm template. Use the Instructions field for tone, brand, audience.

2

Feed sources

Attach the CIM, deal memo, comps workbook. Pull live data via Excel cross-app context.

3

Outline first

Ask Claude for the slide-by-slide outline before any slides are built. Approve the storyline.

4

Build & iterate in PPT

Generate in batches. Select-and-edit pinpoint changes. Save high-quality flows as Skills.

5

Human review

Numbers, claims, citations — you check everything before it leaves the desk.

Set up the project

INSTRUCTIONS

“Act as a senior TMT banker preparing an internal buy-side pitch for a SaaS coverage MD. Build a Salesforce–HubSpot acquisition case with precise, confident, board-ready output. Use action-oriented slide titles that state conclusions, not topics. Keep each slide to one idea, supported by 3–5 crisp bullets and one clear exhibit. Focus on strategic rationale, competitive urgency, valuation, premium cases, accretion/dilution, synergies, financing, risks, and integration. State assumptions explicitly and separate facts from judgment. Cite sources in 8pt Calibri at the bottom of each slide. Use only slide-master colours. Make charts native PowerPoint elements, never images.”

Add files

TEMPLATE

Your standard firm template. Note, you can't add PPT files to Claude projects. You can however use the add-in to PPT and you can also point a co-work project to a folder with PPTs.

CONTEXT

The Lazard industry presentation and any other relevant research.

Prompt 1: Set the Scene

PROMPT

"I've attached two documents: a Lazard presentation on SaaS and AI, and our standard firm PowerPoint template in PDF. Read both carefully, and review them together with any relevant company information available via the Felix connector. Then assess this thesis: Salesforce must consolidate the front office before Microsoft strengthens its position through Dynamics and Copilot, and HubSpot is the only public target offering scaled SMB customer access and valuable first-party CRM data at a still-reasonable valuation. Do not draft slides yet. First, confirm in 4–5 sentences your understanding of the deal, the target, and the strategic rationale, in the voice of a SaaS coverage analyst preparing an internal MD review."

Review carefully

CHECK

Does Claude get the deal and understand the acquirer and target.

CONNECTORS

Are they working?

Prompt 2: Outline the Slides

PROMPT

“Now propose a 10-slide outline for the pitch book. Format: slide number, slide title (action-oriented – conclusion not topic), one-sentence summary of what the slide will say. Order the slides for an MD review reading them top-to-bottom. Don’t generate the slides yet – I want to approve the spine first.”

Review carefully

CHECK

Does Claude get the deal and understand the acquirer and target.

Does the order and emphasis of the slides work?

CONNECTORS

Are they working?

Prompt 3: Iterate the Spine

PROMPT

"Combine slides 2, 3, and 4 into 2 slides. Slide 5 should include a brief company profile on HubSpot with pie charts on geographical breakdown and product breakdown. Slide 6 should include a sector share price chart for the last 3 years rebased to 100 and highlighting HubSpot and Salesforce. Ensure slide 9 includes a numerical grid showing EPS accretion dilution and total debt / LTM EBITDA post deal based on the different leverage structures. Add a slide at the end on trading comps with a clear table of the sector including growth rates and margins and EV/EBITDA CY2. Now redo the spine.."

Review carefully

SLIDES

Reduce slides to tighten story. Always better to make changes now than when the PPT is created.

EXHIBITS

Mention exhibits/graphs you need.

Further Prompts: Step by Step

PROMPT

“Now build slides 1–4 in our template: cover, executive summary, strategic rationale, and target profile. Use the financial figures and ownership structure from the Felix. For the cover, use “Project Helix” as the codename, not the target name. For the executive summary, lead with the strategic rationale then the financial impact. Footnote sources and include speaker notes.”

Now build slides 5–10: Hubspot valuation with graphs, combined entity overview with a section on potential synergies (use deal comparables to estimate this), football field: ensure valuation methods are properly described including relevant multiples LTM EBITDA or CY2 EBITDA, include key assumptions in the DCF labelling, include a DCF range with suggested synergies, and a take out value from a private equity firm, and indicative valuation bid range. Put the Trading comps as the last slide as an appendix.

Review carefully

SLIDES

Review each section as you build.

FORMATTING

Ensure Claude is using your corporate formatting.

Open in PowerPoint and Open the Claude Add-In

PINPOINT PROMPTS

Slide 5: Click on the Chart and then "Make HubSpot and Salesforce lines clearer."

"Now I can't see the tech software and Nasdaq lines."

Often Claude can create garbage charts – particularly with Football Fields for example. The first time you will need to reformat the chart with a lot of prompting. Once you have done the hard work, select the completed chart and ask Claude to create a skill called "Football Field". Then when you ask Claude to create a Football Field again it will automatically reference that skill.

Click and Prompt

SELECT

Click on the area of the slide you want Claude to change then prompt.

SKILLS

If you know you will want the chart again and you have done a lot of prompting to get it right save it as a skill.

Limitations & Guardrails For IB Use

The tool is in beta. For client-facing pitch material, these matter.



QUALITY

Review every number

Template accuracy is ~85–90% on first pass. Custom layouts (chevrons, Harvey Balls, football fields) often need to be named explicitly. Claude can fabricate figures and citations — verify every metric, multiple, and source before anything leaves the desk.



SECURITY

Trusted files only


Hidden instructions in third-party CIMs, vendor templates, or downloaded documents can hijack Claude (prompt injection). Treat anything from outside your firm as untrusted. For regulated workflows, deploy via Bedrock, Vertex or Azure Foundry through your firm's gateway.



COMPLIANCE

Know the audit gaps

Audit telemetry to OTEL is Enterprise-only. Free, Pro, Max and Team don't inherit your firm's data-retention settings. Chat history is stored client-side in your browser — clear it after sensitive sessions.



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