

# Template: Proprietary Trading Technology Optimization Checklist

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Based on Article: "The Role of Technology in Proprietary Trading Success"

Website: <https://thetraderinyou.com>

A practical checklist to optimize technology use in proprietary trading for enhanced performance and risk management.

## Checklist Items:

- ☐ **1. Audit Your Workflow**  
Identify one manual step in your trading process (such as data collection, execution, or monitoring) that can be automated this month to improve efficiency.  
Reference Section: Conclusion
- ☐ **2. Define Strategy Parameters**  
Clearly outline your trading strategy, including timeframe, edge, and risk management rules, ensuring you have a backtesting framework in place to validate your approach.  
Reference Section: Core Content
- ☐ **3. Select Appropriate Tools**  
Choose charting and execution platforms that offer features necessary for your trading, such as API access for algorithmic trading.  
Reference Section: Core Content
- ☐ **4. Implement Execution Algorithms**  
Utilize execution algorithms suitable for your order size and market impact to optimize your trading performance and minimize slippage.  
Reference Section: Core Content
- ☐ **5. Monitor Trade Execution**  
Regularly monitor fills, latency spikes, and deviations in your trading strategy's performance to maintain effective oversight.  
Reference Section: Core Content
- ☐ **6. Prototype Risk Control Tools**  
Develop or test a small software tool or script that automates at least one risk rule from start to finish to enforce discipline in trading.  
Reference Section: Conclusion
- ☐ **7. Measure Performance Before and After Changes**  
Collect and analyze data on latency, hit-rate, and profit/loss outcomes both before and after implementing changes to objectively assess their impact.  
Reference Section: Conclusion
- ☐ **8. Integrate Real-Time Data Feeds**  
Incorporate real-time market data and alternative data feeds into your trading system to enhance decision-making and response speed.  
Reference Section: Core Content

- **9. Stay Updated on Trading Technology Innovations**  
Regularly review articles and publications, such as those from Roland Berger, to remain informed about emerging technologies and competitive advantages in trading.

Reference Section: Core Content