



## GP-LP Intelligence Platform

AI-powered investor matching and outreach  
for fund managers

Product Document | December 2025

# Table of Contents

## 1. Product Overview

- What LPxGP Does
- The Problem We Solve
- Key Capabilities
- Who Uses LPxGP

## 2. Feature Specifications

- LP Database & Search
- AI-Powered Matching
- Pitch Generation
- Pipeline Management

## 3. User Journeys

- Platform Onboarding
- Fund Creation
- LP Research & Matching
- Pitch & Outreach

## 4. Screen Reference (35 screens)

- Public Screens (4)
- GP User Screens (13)
- Super Admin Screens (10)
- UI State Screens (3)

## 5. Data Model

- Entity Overview
- Key Relationships

## 6. Technical Architecture

- System Overview
- Technology Stack
- Security Model

## **7. Non-Functional Requirements**

Performance

Security

Scalability

## **8. Success Metrics**

## **9. Glossary**

# 1. Product Overview

## What LPxGP Does

LPxGP is an AI-powered intelligence platform that helps investment fund managers (General Partners, or GPs) find and engage the right institutional investors (Limited Partners, or LPs) for their funds.

**In one sentence:** LPxGP uses AI to match funds with compatible LPs and generate personalized outreach, reducing time-to-first-close for fundraising campaigns.

## Core Capabilities

Capability	What It Does	User Benefit
<b>LP Database</b>	Searchable database of 5,000+ institutional investors with mandates, AUM, allocation targets, and key contacts	Hours of research condensed into seconds
<b>Semantic Search</b>	Natural language search that understands investment concepts, not just keywords	Find relevant LPs even with imprecise queries
<b>AI Matching</b>	Automatically rank LPs by fit score based on strategy, size, geography, and thesis alignment	Focus on highest-probability targets first
<b>Match Explanations</b>	AI-generated insights explaining why an LP is a good fit and what concerns to address	Walk into meetings fully prepared
<b>Pitch Generation</b>	Create personalized outreach emails, executive summaries, and talking points for each LP	Personalization at scale without the time cost
<b>Pipeline Tracking</b>	Manage outreach status, log activities, and track commitments across the team	Coordinated fundraising with visibility

## The Problem We Solve

Fund managers face significant challenges in the fundraising process:

**Information Overload**

Thousands of institutional investors with varying mandates, preferences, and allocation strategies. Impossible to evaluate manually.

**Manual Research**

Hours spent researching LP mandates, recent commitments, and finding the right contact. Time that could be spent on relationships.

**Poor Targeting**

Wasted meetings with misaligned investors who don't invest in the fund's strategy, size, or geography. Opportunity cost is enormous.

**Generic Outreach**

One-size-fits-all pitch materials that don't resonate with specific LP priorities. Low response rates and missed opportunities.

## Who Uses LPxGP

---

### GP Fund Manager (Company Admin)

**Role:** Managing Partner or Partner at a PE/VC firm responsible for fundraising

**Platform Access:** Full access including fund creation, team management, and all LP features

**Primary Goals:**

- Raise capital for new funds efficiently
- Build relationships with the right institutional investors
- Track fundraising pipeline across the entire team

### GP Associate (Company Member)

**Role:** Associate or VP supporting fundraising efforts at a PE/VC firm

**Platform Access:** LP search, matching, and pitch generation (read-only for fund settings)

**Primary Goals:**

- Research and identify potential LP targets
- Prepare meeting materials and personalized pitches
- Support partners with data and analysis

## **Super Admin (LPxGP Team)**

**Role:** LPxGP platform administrator responsible for operations

**Platform Access:** Full administrative access across all companies

### **Primary Goals:**

- Onboard new GP firms to the platform
- Maintain and improve LP database quality
- Monitor platform health and support users

## 2. Feature Specifications

### LP Database & Search

---

#### Database Contents

The LP database contains comprehensive information on institutional investors:

- **Organization Profile:** Name, type (pension, endowment, family office, etc.), headquarters location, website
- **Financial Data:** Total AUM, PE/VC allocation percentage, typical check size range, target returns
- **Investment Mandate:** Strategy preferences, geographic focus, sector interests, stage preferences
- **Contact Information:** Key personnel with names, titles, and professional profiles
- **Activity Data:** Recent fund commitments (when available from public sources)

#### Search Capabilities

Search Type	Description	Example
Keyword Search	Traditional text matching on LP names and fields	"CalPERS" or "technology"
Semantic Search	Natural language queries using AI embeddings	"growth equity investors focused on enterprise software"
Filtered Search	Combine filters for precise targeting	Type: Pension, AUM: >\$10B, Geography: North America

### AI-Powered Matching

---

**Design Principle:** Quality above all else. Cost is not a constraint. Success is measured by actual investment commitments, not just high match scores.

## Quality-First Hybrid Pipeline

The matching system uses a 6-stage pipeline that combines hard filters, multiple scoring methods, LLM analysis, and continuous learning:

- Stage 1: HARD FILTERS (SQL)
  - └ Eliminate impossible matches (strategy, geography, size, track record)
  - └ Output: ~300-500 candidates from 10,000 LPs
- Stage 2: MULTI-SIGNAL SCORING (Python + Embeddings)
  - └ Attribute matching, semantic similarity, historical patterns
  - └ Output: Ranked list with preliminary scores
- Stage 3: LLM DEEP ANALYSIS (Claude via OpenRouter)
  - └ Analyze EVERY filtered candidate with LLM for nuanced judgment
  - └ Output: LLM-validated scores + detailed reasoning
- Stage 4: ENSEMBLE RANKING
  - └ Combine all scores, surface disagreements as "worth investigating"
  - └ Output: Final ranked matches with multi-perspective validation
- Stage 5: EXPLANATION GENERATION
  - └ Rich explanations, talking points, concerns, approach strategy
  - └ Output: Actionable intelligence for GP outreach
- Stage 6: LEARNING LOOP (Continuous)
  - └ Track outcomes, retrain models, A/B test changes

## Ensemble Scoring Weights

Component	Weight	Source	Purpose
Rule-Based Score	25%	SQL + Python	Hard constraints, business logic
Semantic Score	25%	Voyage AI embeddings	Thesis/mandate alignment
<b>LLM Score</b>	<b>35%</b>	Claude analysis	Nuanced judgment, non-obvious fit
Collaborative Score	15%	Historical patterns	"LPs like this invested in funds like this"



## LLM Scoring (Key Innovation)

Unlike systems that only use LLMs for explanations, we use Claude to actually score every match. The LLM analyzes fund profiles and LP mandates to identify:

- **Strategy Alignment:** How well does fund strategy match LP mandate?
- **Size Fit:** Is fund size in LP's sweet spot or at the edge?
- **Track Record:** Does team experience meet LP's requirements?
- **Timing:** Is LP likely allocating now based on known patterns?
- **Non-Obvious Insights:** Red flags, hidden opportunities, and nuanced factors

## Bidirectional Matching

The system supports matching in both directions:

- **GP → LP:** GP creates fund, system finds matching LPs ranked by fit quality
- **LP → GP:** LPs can see which funds match their mandate (optional feature)

## Learning From Slow Feedback

**Critical Reality:** Investment sector feedback takes 12-18 months (first meeting → commitment). The system uses proxy metrics for early learning.

Tier	Signal	Latency	Use For
1	Match shortlisted/dismissed	Immediate	Hard filter tuning
2	Response received	Days-Weeks	<b>Key early predictor</b>
2	Meeting scheduled	Weeks	<b>Strong quality signal</b>
3	Due diligence started	2-6 months	Deal progression
4	Commitment made	6-18 months	<b>Ground truth</b>

## Match Output

For each fund, the system generates:

- **Ranked LP List:** LPs ordered by fit score (0-100)
- **Score Breakdown:** How each component contributed to the score
- **Talking Points:** What to emphasize when approaching this LP
- **Risk Factors:** Potential concerns to address proactively

## Pitch Generation

---

### Output Types

Type	Length	Use Case
Executive Summary	1 page	One-pager tailored to LP's interests and mandate
Outreach Email	3-5 paragraphs	Initial introduction referencing LP's recent activity
Talking Points	Bullet list	Meeting preparation with key messages and responses

**Human-in-the-Loop Design:** All AI-generated content requires human review before use. There is no auto-send functionality - users must copy to clipboard and paste into their email client. This ensures quality control and compliance with professional communication standards.

## Pipeline Management

---

The platform tracks LPs through the fundraising pipeline:

- **Identified:** LP discovered through search or matching
- **Shortlisted:** Selected for potential outreach
- **Contacted:** Initial outreach sent
- **Meeting Scheduled:** Engagement confirmed
- **In Diligence:** Active evaluation underway
- **Committed:** Commitment received

## 3. User Journeys

This section describes the key user experience flows through the LPxGP platform.

### Journey 1: Platform Onboarding

---

**Actor:** Sarah, LPxGP Super Admin

**Goal:** Onboard a new GP firm to the platform

**Screen Flow:** Admin Dashboard → Companies → Create Company → Company Detail → Invite Admin

Sarah receives a request from Acme Capital to join LPxGP. She reviews platform health on the Admin Dashboard, navigates to Companies, creates the new company profile with billing information, and invites John (Managing Partner) as the company admin via email invitation. John receives a secure link to accept the invitation and set up his account.

### Journey 2: Fund Creation

---

**Actor:** John, Partner at Acme Capital

**Goal:** Create fund profile for Growth Fund III

**Screen Flow:** Dashboard → Create Fund → Upload Deck → AI Extraction → Fund Detail

John clicks "+ New Fund" on his dashboard. He can either manually enter fund details or upload a pitch deck PDF. Choosing to upload, the AI extracts fund information (name, strategy, target size, thesis, track record) with confidence scores for each field. John reviews and confirms high-confidence items, manually corrects a low-confidence field, and saves the fund profile. The fund is now ready for LP matching.

### Journey 3: LP Research & Matching

---

**Actor:** Maria, Associate at Acme Capital

**Goal:** Find and evaluate LPs for Growth Fund III

**Screen Flow:** Dashboard → LP Search → Apply Filters → LP Detail → Matches → Match Detail → Add to Shortlist

Maria uses two approaches: manual research and AI matching. For manual research, she navigates to LP Search, enters "growth equity technology investors" and applies filters (Check Size > \$10M, Geography: North America). She reviews 45 results, clicks on promising LPs to view full profiles with mandates and contacts.

For AI matching, she goes to Growth Fund III and clicks "View Matches." The system shows 87 LPs ranked by fit score. She clicks on CalPERS (score: 92) to see why it's a strong match: strategy alignment, appropriate size, and high semantic similarity to the fund thesis. The AI provides talking points about CalPERS's recent tech investments and flags a potential concern about their preference for established managers.

## Journey 4: Pitch & Outreach

**Actor:** Maria, Associate at Acme Capital

**Goal:** Create personalized outreach for high-priority LPs

**Screen Flow:** Match Detail → Pitch Generator → Generate → Edit → Copy → Outreach Hub

From the CalPERS match detail, Maria clicks "Generate Pitch" and selects "Outreach Email." The AI generates a personalized email referencing CalPERS's recent allocations and how Growth Fund III aligns with their mandate. Maria edits the subject line to add a mutual connection reference, adjusts the call-to-action timing, and copies the final email to clipboard. She pastes it into her email client and sends. Back in LPxGP, she moves CalPERS to "Contacted" in the Outreach Hub and logs the activity.

## 4. Screen Reference

This section documents all 35 screens in the LPxGP platform. Each screen includes a visual mockup and explanation of its purpose, user actions, and role in user journeys.

### Public Screens

4 screens — Authentication and onboarding flows for all users

# Login

## User authentication

The Login screen is the entry point for all authenticated users. Users enter their email and password to access the platform. The design emphasizes security and trust with a clean, professional interface. Failed login attempts are tracked and accounts are locked after 5 consecutive failures to prevent brute-force attacks. A "Forgot Password" link provides account recovery options.

**LPxGP**  
GP-LP Intelligence Platform

Find the right LPs  
for your fund.

AI-powered matching and outreach tools to help fund managers connect  
with institutional investors efficiently.

© 2024 LPxGP. All rights reserved.

**Sign in**  
Enter your credentials to access your account

Email address  
partner@acmecapital.com

Password [Forgot password?](#)

Sign in

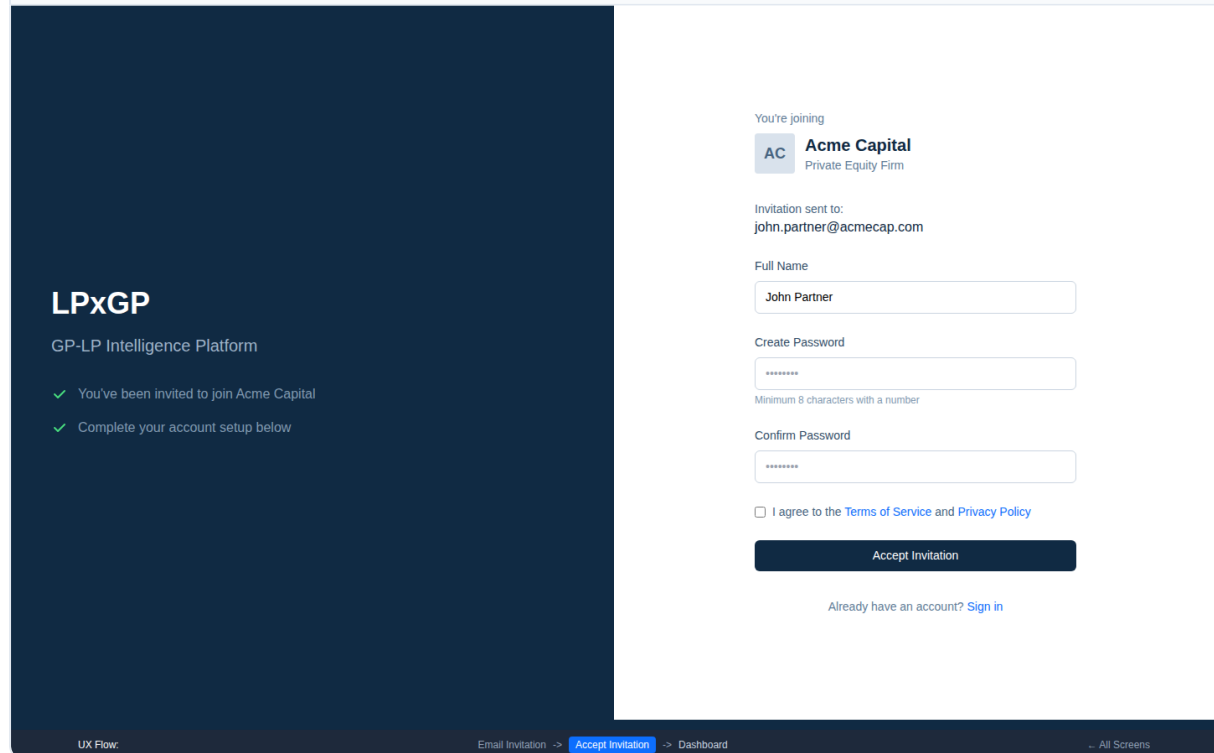
[Don't have an account? Contact us for access.](#)

UX Flow: [Login](#) -> Dashboard | [Forgot Password](#) -> [Reset Password](#) -> Login ... All Screens

# Accept Invitation

New user onboarding

This screen appears when a user clicks an invitation link from their email. Since LPxGP is invite-only, this is the only way to create an account. Users set their password and confirm their details. The invitation token is validated server-side to ensure security. Expired or already-used tokens show appropriate error messages.



The mockup shows a two-column layout. The left column has a dark blue background with the LPxGP logo and two green checkmarks indicating the user's status. The right column is white and contains the account setup form. The form includes a header with the company name 'Acme Capital', a section for invitation details, and three input fields for user information. A checkbox for terms and privacy policy is located below the password fields. A dark blue 'Accept Invitation' button is at the bottom of the form, with a 'Sign in' link for existing users.

**LPxGP**  
GP-LP Intelligence Platform

- ✓ You've been invited to join Acme Capital
- ✓ Complete your account setup below

You're joining  
**AC Acme Capital**  
Private Equity Firm

Invitation sent to:  
john.partner@acmecap.com

Full Name  
John Partner

Create Password  
Minimum 8 characters with a number

Confirm Password

☐ I agree to the [Terms of Service](#) and [Privacy Policy](#)

Accept Invitation

Already have an account? [Sign in](#)

UX Flow: Email Invitation -> **Accept Invitation** -> Dashboard ... All Screens

# Forgot Password

Request reset link

Users who cannot remember their password can request a reset link. They enter their email address and receive a secure, time-limited reset link. The form includes rate limiting to prevent abuse. For security, the same success message is shown whether or not the email exists in the system.

**LPxGP**

Reset your password

Enter your email address and we'll send you a link to reset your password.

Email Address

Send Reset Link

Remember your password? [Sign in](#)

© 2024 LPxGP. All rights reserved.

UX Flow:

Login -> **Forgot Password** -> Reset Password -> Login

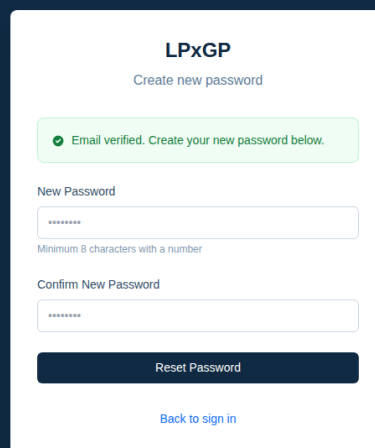
.. All Screens



## Reset Password

Create new password

After clicking the reset link from their email, users land on this screen to set a new password. Password strength requirements are enforced (minimum 8 characters, mix of letters and numbers). The reset token is validated and expires after use to ensure security.



The mockup shows a white card on a dark blue background. At the top, it says 'LPxGP' and 'Create new password'. Below that is a green success message: 'Email verified. Create your new password below.' There are two input fields: 'New Password' and 'Confirm New Password', both with masked text '\*\*\*\*\*'. A note below the first field states 'Minimum 8 characters with a number'. At the bottom of the card is a dark blue 'Reset Password' button and a blue link 'Back to sign in'.

© 2024 LPxGP. All rights reserved.

UX Flow:

Login -> Forgot Password -> **Reset Password** -> Login

... All Screens

## GP User Screens

13 screens — Core platform functionality for fund managers and associates

# Dashboard

## Fund overview and activity

The Dashboard is the command center for fund managers. It provides an at-a-glance view of all funds, recent matching activity, and quick access to key features. Users see fund cards showing name, status (Raising/Investing/Harvesting), target size, and match statistics. Recent activity includes new matches, shortlist additions, and outreach updates. The "+ New Fund" button provides quick access to fund creation.

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

### Dashboard

Welcome back, John

ACTIVE FUNDS  
**3**  
+1 this quarter

TOTAL MATCHES  
**127**  
across all funds

SHORTLISTED  
**34**  
LPs for outreach

MEETINGS  
**8**  
+3 this month

#### Your Funds

+ New Fund

**Growth Fund III**  
Private Equity - Growth  
Target Size \$500M  
Matches 45  
Shortlisted 12  
View Matches --  
Raising

**Growth Fund II**  
Private Equity - Growth  
Fund Size \$350M  
Vintage 2021  
Deployed 72%  
View Details --  
Investing

**Growth Fund I**  
Private Equity - Growth  
Fund Size \$200M  
Vintage 2017  
Net IRR 28.5%  
View Details --  
Harvesting

#### Recent Activity

Generated pitch for CalPERS  
Growth Fund III  
2 hours ago

Added Harvard Endowment to shortlist  
Growth Fund III  
Yesterday

Match scores updated for 12 LPs  
Growth Fund III  
2 days ago

# Funds

## List of all funds

The Funds screen shows all funds belonging to the user's company. Each fund card displays key metrics: fund name, status, target size, number of LP matches, and last activity date. Users can filter by status or search by name. Clicking a fund card navigates to the Fund Detail view. Company admins can see all company funds; members see funds they're assigned to.

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

Your Funds

Manage fund profiles and view LP matches

+ New Fund

Growth Fund III

Raising

Private Equity - Growth

Target Size\$500M

Matches45

Shortlisted12

View Fund --Matches

Growth Fund II

Investing

Private Equity - Growth

Fund Size\$350M

Vintage2021

Deployed72%

View Fund --

Growth Fund I

Harvesting

Private Equity - Growth

Fund Size\$200M

Vintage2017

Net IRR28.5%

View Fund --

+ Create New Fund

Set up a fund profile to find matching LPs

UX Flow: GP User

Dashboard

Funds

Search

Matches

Outreach

... All Screens

# Fund Detail

Fund profile with thesis and track record

The Fund Detail screen is the comprehensive profile for a single fund. It displays the fund thesis, investment strategy, geographic focus, target size, and track record of notable exits. A sidebar shows matching statistics and quick actions (View Matches, Generate Pitch). Company admins can edit fund details; members have read-only access. This is the primary context for LP matching and outreach activities.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

Funds / Growth Fund III

**Growth Fund III** Raising

Private Equity - Growth Equity

Edit FundView Matches

**Fund Overview**

Target Size	Target Close
\$500M	Q2 2025
Geography Focus	Sector Focus
North America	Technology, Healthcare
Check Size	Stage
\$25M - \$75M	Growth / Expansion

**Matching Stats**

Total Matches	45
High Score (80+)	12
Shortlisted	8
Contacted	5

View All Matches

**Investment Thesis**

Growth Fund III focuses on technology-enabled businesses in the upper mid-market segment (\$50M-\$200M revenue) with strong unit economics and paths to market leadership. We target companies with proven business models seeking capital to accelerate organic growth, pursue strategic M&A, or expand into new markets.

Our value-add approach includes operational support through our portfolio services team, board-level governance expertise, and access to our extensive network of industry executives and potential customers.

**Quick Actions**

Generate LP Pitch →

Export Fund Summary →

Refresh Matches →

UX Flow: GP User

DashboardFundsFund DetailMatchesOutreach

... All Screens

**Track Record**

<b>2.3x</b> Gross MOIC (Fund II)	<b>28.5%</b> Net IRR (Fund I)	<b>18</b> Portfolio Companies	<b>\$550M</b> Capital Deployed
-------------------------------------	----------------------------------	----------------------------------	-----------------------------------

# Create Fund

## New fund creation form

The Create Fund screen enables users to set up a new fund profile. Users can either manually enter fund details or upload a pitch deck (PDF/PPTX) for AI-assisted extraction. When a deck is uploaded, the system uses Claude to extract fund name, strategy, thesis, target size, and other details. Extracted fields show confidence scores, allowing users to review and correct low-confidence items before saving.

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

Funds / Create Fund

### Create Fund Profile

Set up your fund to start finding matching LPs

#### Basic Information

Fund Name \*

Strategy \*

Private Equity - Growth

Status \*

Raising

#### Fund Size & Timeline

Target Size \*

\$ 500M

Target Close

Q2 2025

Min Check Size

\$ 25M

Max Check Size

\$ 75M

#### Investment Focus

Geography \*

North America

Stage Focus

Growth / Expansion

e.g., Technology, Healthcare, Financial Services

### Investment Thesis

Describe your investment strategy

What types of companies do you invest in? What is your value-add approach? What makes your fund unique?

This will be used for AI matching with LP mandates

Cancel

Create Fund

# LP Search

## Search and filter institutional investors

LP Search is the primary research tool for finding potential investors. Users can search by keyword or use natural language queries like "technology growth equity investors in North America." Advanced filters allow narrowing by LP type (pension, endowment, family office), AUM range, typical check size, geographic focus, and strategy preferences. Results show relevance scores and key LP attributes. Users can add promising LPs to their shortlist or view full profiles.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

### Search LPs

Find institutional investors for your funds

Search

**Filters**

LP Type

☒ Pension (245)☒ Endowment (89)☐ Foundation (67)☒ Family Office (312)☐ Sovereign Wealth (23)

AUM Range

\$1B

to

Max

Geography

North America

Invests In

☒ Private Equity☐ Venture Capital☐ Real Estate

Clear Filters

247 LPs found

Sort by: AUM (High to Low)

NAME	TYPE	LOCATION	AUM	ACTIONS
<b>CalPERS</b> California Public Employees' Retirement System	Pension	Sacramento, CA	\$450B	<a href="#">View</a> + <a href="#">Shortlist</a>
<b>Yale Endowment</b> Yale University Investments Office	Endowment	New Haven, CT	\$41B	<a href="#">View</a> + <a href="#">Shortlist</a>
<b>Harvard Management</b> Harvard Management Company	Endowment	Boston, MA	\$53B	<a href="#">View</a> + <a href="#">Shortlist</a>
<b>Ford Foundation</b> Ford Foundation Endowment	Foundation	New York, NY	\$16B	<a href="#">View</a> + <a href="#">Shortlist</a>
<b>Texas Teachers</b> Teacher Retirement System of Texas	Pension	Austin, TX	\$180B	<a href="#">View</a> + <a href="#">Shortlist</a>

Showing 1-5 of 247

Previous

1

2

3

Next

UX Flow: GP User

DashboardFundsSearchMatchesOutreach

... All Screens

# LP Detail

LP profile with mandate and contacts

The LP Detail screen provides comprehensive information about an institutional investor. It displays the LP's investment mandate, AUM, allocation targets, geographic preferences, and recent fund commitments. The Contacts section shows key personnel with titles and roles. Users can add the LP to their shortlist, generate a personalized pitch, or view matching scores against their funds. This screen is essential for research before outreach.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

Search / CalPERS

CP

**CalPERS**  
California Public Employees' Retirement System  
[Public Pension](#) Sacramento, CA

[+ Add to Shortlist](#)[Generate Pitch](#)

**Overview**

Total AUM  
**\$450B**

PE Allocation  
**13%**

Est. PE Commitment  
**\$58.5B**

**Investment Mandate**

CalPERS maintains a diversified private equity portfolio with allocations across buyout, growth equity, and venture capital strategies. The system prioritizes partnerships with established managers demonstrating strong track records and operational value creation capabilities.

TARGET RETURN  
Net IRR 11%+

PREFERRED CHECK  
\$100M - \$500M

GEOGRAPHY  
North America, Europe

SECTORS  
Diversified

**Match Score**

92

Excellent Match

Strategy Alignment

Strong

Size Fit

Good

Geography

Match

ESG Focus

Aligned

[Why This Score?](#)

**Actions**

[Generate Email Draft](#)

[Create LP Summary](#)

[Flag Data Issue](#)

**Data Quality**

High

Last updated: 2 weeks ago

UX Flow: GP User

DashboardSearchLP DetailPitchOutreach

All Screens

MS

**Michael Smith**  
Managing Investment Director, Private Equity  
[View Profile](#)

JC

**Jennifer Chen**  
Investment Director, Growth Equity  
[View Profile](#)

# Matches

## AI-ranked LP matches for fund

The Matches screen shows AI-generated LP recommendations for a specific fund. LPs are ranked by a fit score (0-100) calculated from strategy alignment, size fit, geographic overlap, and semantic similarity between fund thesis and LP mandate. Each match card shows the score, LP name, type, AUM, and key alignment indicators (checkmarks for strong fits, warnings for concerns). Users can filter by score range, sort by different criteria, and bulk-add matches to their shortlist.

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital JP

Funds / Growth Fund III / Matches

LP Matches

Refresh Matches

Growth Fund III - 45 matched LPs ranked by fit score

Total Matches  
45

Avg Score  
72

Shortlisted  
12

Contacted  
8

92

**CalPERS** Excellent Match  
Public Pension | \$450B AUM | Sacramento, CA  
✓ Strategy aligned ✓ ESG aligned ✓ Size fit

Why this match? + Shortlist

88

**Yale Endowment** Strong Match  
Endowment | \$41B AUM | New Haven, CT  
✓ Strong PE allocation ✓ Thesis aligned

Why this match? + Shortlist

76

**Texas Teachers** Good Match  
Public Pension | \$180B AUM | Austin, TX  
✓ Strategy aligned ⚠ Usually requires Fund III+

Why this match? + Shortlist

65

**Ford Foundation** Moderate Match  
Foundation | \$16B AUM | New York, NY  
✓ ESG aligned ⚠ Lower PE allocation

Why this match? + Shortlist

UX Flow: GP User Dashboard Fund Matches Match Detail Shortlist ... All Screens

Load More (41 remaining)



# Match Analysis

AI insights and talking points

The Match Detail screen explains why a specific LP is recommended for a fund. It breaks down the match score into components: strategy alignment, size compatibility, geographic fit, and semantic similarity. The AI generates talking points highlighting what to emphasize in outreach and identifies potential concerns to address proactively. Recent LP activity (if available) helps users time their outreach. A "Generate Pitch" button launches personalized content creation.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

Funds / Growth Fund III / Matches / CalPERS Analysis

92

**CalPERS × Growth Fund III**  
Match Analysis & AI Insights

+ Add to Shortlist

Generate Pitch

Score Breakdown

95  
Strategy Fit

90  
Size Match

92  
Geography

88  
Thesis Alignment

AI Match Analysis

Why This Is a Strong Match

CalPERS presents an excellent fit for Growth Fund III based on several key factors:

✓ **Strategy alignment:** CalPERS actively invests in growth equity managers targeting technology-enabled businesses, matching your fund's focus.

✓ **Fund size fit:** Your \$500M target is within CalPERS' preferred commitment range for emerging managers (\$100M-\$500M).

✓ **Track record:** Your Fund I/II performance (28.5% net IRR) exceeds their 11% target hurdle rate.

✓ **ESG commitment:** Both organizations prioritize responsible investment practices and governance.

UX Flow: GP User

DashboardMatchesMatch DetailPitchShortlist

... All Screens

Points to Consider

⚠ **Competition:** CalPERS receives 200+ manager proposals annually; differentiation is critical.

⚠ **Due diligence timeline:** Their process typically takes 9-12 months from first meeting to commitment.

⚠ **Co-investment:** They often expect co-investment opportunities; be prepared to discuss capacity.

Suggested Talking Points

Track Record Highlight

"Our Fund I has achieved a 28.5% net IRR through disciplined growth investing in technology-enabled businesses, significantly exceeding the median PE benchmark."

Copy

Value Creation Story

"Our portfolio company [X] grew revenue 3x over 4 years through our operational support in sales optimization and strategic M&A, aligning with CalPERS' focus on value creation over financial engineering."

Copy

ESG Commitment

"We integrate ESG considerations across our investment process, with 100% of portfolio companies implementing governance best practices within 12 months of investment."

Copy

# Pitch Generator

AI-powered outreach content

The Pitch Generator uses Claude to create personalized outreach content for specific LP-fund combinations. Users select the output type: Executive Summary (1-page overview), Outreach Email (introduction message), or Talking Points (meeting preparation). The AI references the LP's mandate, recent activity, and the fund's thesis to create relevant, personalized content. All generated content is editable before copying to clipboard. There is no auto-send - this ensures human review of all outreach.

The screenshot displays the LPxGP Pitch Generator interface. The top navigation bar includes 'LPxGP', 'Dashboard', 'Funds', 'Search', and 'Outreach' (which is underlined). On the right, it shows 'Acme Capital' and a 'JP' profile icon. Below the navigation bar, the breadcrumb 'Outreach / Generate Pitch' is visible.

The main content area is divided into two columns. The left column, titled 'Pitch Settings', contains a 'Back' link and the following options:

- Target LP:** A selection box showing 'CP CalPERS' with a 'Score: 92'.
- Fund:** A dropdown menu currently set to 'Growth Fund III'.
- Content Type:** Three radio buttons: 'Outreach Email' (selected), 'Executive Summary', and 'Meeting Brief'.
- Tone:** A dropdown menu set to 'Professional & Formal'.
- Key Points to Emphasize:** A list of checkboxes: 'Track record' (checked), 'Team experience' (checked), 'ESG commitment' (unchecked), and 'Co-investment capacity' (unchecked).
- A 'Generate Pitch' button at the bottom.

The right column, titled 'Generated Outreach Email', features a green checkmark icon, a 'Regenerate' button, and a 'Copy to Clipboard' button. Below these is a yellow warning box stating: 'Human review required: AI-generated content should be reviewed and personalized before sending.' The email content is as follows:

**To:** Michael Smith, Managing Investment Director  
**Subject:** Acme Capital Growth Fund III - Investment Opportunity

Dear Mr. Smith,

I hope this message finds you well. I am reaching out regarding Acme Capital's Growth Fund III, a \$500 million growth equity vehicle focused on technology-enabled businesses in North America. Given CalPERS' strategic interest in growth equity managers with demonstrated operational value creation capabilities, I believe there may be strong alignment with our investment approach.

**Key highlights:**

- Track Record:** Fund I has achieved a 28.5% net IRR, ranking in the top quartile among growth equity peers
- Team:** Our partners average 20+ years of PE experience across technology, healthcare, and financial services
- Strategy:** We target \$50-200M revenue companies with proven unit economics, focusing on organic growth acceleration and strategic M&A

We are currently meeting with prospective limited partners for Fund III and would welcome the opportunity to discuss how our strategy may complement CalPERS' private equity portfolio. Would you be available for a brief introductory call in the coming weeks?

Best regards,

Managing Partner, Acme Capital  
 john@acmecapital.com

At the bottom of the interface, a dark navigation bar shows 'UX Flow: GP User' on the left and a series of tabs: 'Dashboard', 'Match Detail', 'Pitch Generator' (which is active), and 'Outreach'. On the far right of this bar is a link to 'All Screens'. A small footer note at the bottom right of the email content reads: 'Generated by Claude via OpenRouter • Based on CalPERS mandate analysis'.

# Shortlist

## LPs ready for outreach

The Shortlist is a curated collection of LPs the user has identified for potential outreach. It serves as a working list for fundraising campaigns. Users can organize LPs, add notes, track outreach status, and generate pitches in bulk. The shortlist persists across sessions and can be shared with team members. Quick actions allow moving LPs through the pipeline: Not Started → Contacted → Meeting Scheduled → In Diligence → Committed.

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital JP

Funds / Growth Fund III / Shortlist

### Shortlist

Growth Fund III - 12 LPs ready for outreach

[Export List](#)[Batch Generate Pitches](#)

All (12)

To Contact (7)

Contacted (3)

Meeting Set (2)

<input type="checkbox"/>	LP	TYPE	SCORE	STATUS	NOTES	ACTIONS
<input type="checkbox"/>	<b>CalPERS</b> \$450B AUM	Pension	92	Contacted	Sent intro email 2 days ago	<a href="#">View</a> →
<input type="checkbox"/>	<b>Yale Endowment</b> \$41B AUM	Endowment	88	Meeting Set	Call scheduled Jan 15	<a href="#">View</a> →
<input type="checkbox"/>	<b>Harvard Management</b> \$53B AUM	Endowment	85	To Contact	—	<a href="#">View</a> →
<input type="checkbox"/>	<b>Ontario Teachers</b> \$250B AUM	Pension	79	Contacted	Follow-up needed	<a href="#">View</a> →
<input type="checkbox"/>	<b>Texas Teachers</b> \$180B AUM	Pension	76	To Contact	—	<a href="#">View</a> →

Showing 1-5 of 12

[Previous](#)[1](#)[2](#)[3](#)[Next](#)

UX Flow: GP User

Dashboard | Fund | Matches | Shortlist | Outreach

... All Screens

# Outreach Hub

Activity tracking and pipeline

The Outreach Hub provides a kanban-style view of the fundraising pipeline. LPs are organized by status: Identified, Contacted, Meeting Scheduled, In Diligence, and Committed. Users can drag-and-drop LPs between stages, log activities (calls, emails, meetings), and track commitment amounts. Summary metrics show pipeline progress and conversion rates. This screen helps teams coordinate outreach and measure fundraising progress.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

Outreach Hub

Manage LP communications across all funds

SHORTLISTED

34

across 3 funds

CONTACTED

18

+5 this week

MEETINGS

8

+3 scheduled

RESPONSE RATE

44%

8 of 18 replied

Recent Activity

All Funds

Meeting scheduled with Yale Endowment

January 15, 2025 at 2:00 PM EST

Growth Fund III

2 hours ago

Email sent to CalPERS (Michael Smith)

Yesterday

Growth Fund III

Yesterday

Pitch generated for Ontario Teachers

2 days ago

Growth Fund III

2 days ago

Added 3 LPs to shortlist

3 days ago

Growth Fund III

3 days ago

[View All Activity →](#)

Quick Actions

[Generate Batch Pitches](#)

[Export Shortlist to CSV](#)

[View All Meetings](#)

Upcoming Meetings

Yale Endowment

Jan 15, 2:00 PM

Stanford Endowment

Jan 18, 10:00 AM

UX Flow: GP User

DashboardFundsSearchOutreachShortlist

... All Screens

Needs Follow-up

Ontario Teachers

5 days

CalPERS

3 days

CPPIB

7 days

28

# Settings - Profile

## User profile settings

The Profile Settings screen allows users to manage their personal information: name, email, title, and notification preferences. Users can change their password and manage two-factor authentication. The screen also shows account activity and login history for security awareness. All changes require current password confirmation for security.

LPxGP

DashboardFundsSearchOutreach

Acme CapitalJP

Settings

Profile

Team

Company

Notifications

Security

Profile Settings

JP

Change Photo

JPG, PNG, Max 5MB.

First Name

John

Last Name

Partner

Email

john@acmecapital.com

Contact support to change your email address

Title

Managing Partner

Phone

+1 (555) 123-4567

Bio

20+ years of private equity experience focused on growth investments in technology and healthcare sectors.

Brief description for your profile

UX Flow: GP User

DashboardSettings: ProfileTeam

... All Screens

Danger Zone

Delete Account

Permanently remove your account and all data

Delete Account

## Settings - Team

### Team member management

The Team Settings screen is available to Company Admins and allows them to manage team access. Admins can invite new team members by email, assign roles (Admin or Member), and deactivate accounts. The member list shows names, emails, roles, and last activity. Admins can also manage fund assignments, controlling which team members can access which funds.

The screenshot displays the LPxGP Settings - Team interface. At the top, a dark blue header contains the title "Settings - Team" and the subtitle "Team member management". Below this, a light blue banner provides an overview of the screen's functionality. The main content area is divided into three sections: "Team Members", "Pending Invitations", and "Role Permissions".

**Team Members**

Team Members		+ Invite Member	
Manage who has access to Acme Capital			
JP	John Partner john@acmecapital.com	Admin	You
SJ	Sarah Johnson sarah@acmecapital.com	Member	Edit
MC	Mike Chen mike@acmecapital.com	Member	Edit

**Pending Invitations**

emily@acmecapital.com	Pending	Resend	Cancel
Invited 2 days ago			

**Role Permissions**

Admin	Member
<ul style="list-style-type: none"><li>• Manage team members</li><li>• Create and edit funds</li><li>• Access all features</li><li>• View billing</li></ul>	<ul style="list-style-type: none"><li>• View funds</li><li>• Search LPs</li><li>• Generate pitches</li><li>• Manage shortlists</li></ul>

The interface includes a sidebar with navigation links: Profile, Team (selected), Company, Notifications, and Security. The top navigation bar shows "LPxGP" and links to Dashboard, Funds, Search, and Outreach. The bottom navigation bar displays the user's role "UX Flow: GP User" and the current page "Settings: Team".

## Super Admin Screens

10 screens — Platform administration and data management

# Admin Dashboard

## Platform overview and health

The Admin Dashboard provides Super Admins with a bird's-eye view of the entire LPxGP platform. Key metrics include total companies, users, funds, and LPs in the database. System health indicators show API status, database performance, and external service connectivity. Recent activity logs show new company signups, user invitations, and data imports. Quick actions provide access to common admin tasks.

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

### Platform Dashboard

Overview of LPxGP platform activity

COMPANIES

25

+3 this month

TOTAL USERS

156

+12 this month

LP DATABASE

5,247


+50 this week

MATCHES GENERATED


12,450

all time


#### Pending Actions

 3 companies awaiting activation  
Admin invitations pending acceptance

[View →](#)

 12 LPs flagged for review  
Data corrections submitted by users

[Review →](#)

 Import job in progress  
500 LPs processing - 78% complete

[Monitor →](#)

#### System Health

Database

● Healthy

Supabase Auth

● Healthy

OpenRouter API

● Healthy

Voyage AI

● Healthy

Last checked: 30 seconds ago

#### Recent Platform Activity

2 hours ago

New company Beta Ventures created

5 hours ago

User jane@acme.com joined Acme Capital

Yesterday

LP import completed: 500 records added

[View All](#)

UX Flow: Super Admin

Dashboard

Companies

Users

People

LPs

Data Quality

Health

... All Screens

# Companies

Manage GP firms on platform

The Companies screen lists all GP firms registered on LPxGP. Admins can view company details, user counts, fund counts, and subscription status. Search and filter options help find specific companies. Actions include creating new companies, viewing company details, and managing billing. This is the primary customer management interface for platform administrators.

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

Companies

Manage GP firms on the platform

+ Add Company

Search companies...

All Status

Filter

COMPANY	ADMIN	USERS	FUNDS	STATUS	CREATED	ACTIONS
<div>AC</div> <div>Acme Capital</div> <div>Private Equity</div>	john@acmecapital.com	4	3	Active	Dec 1, 2024	<a href="#">View</a> --
<div>BV</div> <div>Beta Ventures</div> <div>Venture Capital</div>	—	0	0	Pending	Dec 18, 2024	<a href="#">View</a> --
<div>GP</div> <div>Gamma Partners</div> <div>Growth Equity</div>	alex@gammapartners.com	2	1	Inactive	Oct 15, 2024	<a href="#">View</a> --
<div>DC</div> <div>Delta Capital</div> <div>Private Equity</div>	sarah@deltacap.com	6	4	Active	Sep 20, 2024	<a href="#">View</a> --

Showing 1-4 of 25

Previous

1

2

3

Next

UX Flow: Super Admin

Dashboard

Companies

Users

People

LPs

Data Quality

Health

... All Screens



# Company Detail

## Company users and funds

The Company Detail screen shows comprehensive information about a single GP firm. It displays company profile, subscription tier, billing status, and usage metrics. Lists of users and funds associated with the company are shown with quick access to details. Admins can edit company information, manage subscriptions, and impersonate users for support purposes (with audit logging).

LPxGPADMINDashboardCompaniesUsersPeopleLPsData QualitySuper AdminSA

Companies / Acme Capital

AC

**Acme Capital** Active

Private Equity | San Francisco, CA

Edit CompanyDeactivate

Users  
4

Funds  
3

Matches  
127

Users

+ Invite User

JP

John Partner

john@acmecapital.com

AdminActive

SJ

Sarah Johnson

sarah@acmecapital.com

MemberActive

MC

Mike Chen

mike@acmecapital.com

MemberActive

Funds

Growth Fund III

\$500M target • Raising

45 matches

Growth Fund II

\$350M • Investing

52 matches

Growth Fund I

\$200M • Harvesting

30 matches

Company Details

Created  
December 1, 2024

Strategy  
Private Equity - Growth

Location  
San Francisco, CA

Website  
acmecapital.com

Activity

Last login  
2 hours ago

Searches (30d)  
127

Pitches (30d)  
23

Admin Actions

View Audit Log

Reset Company Data

UX Flow: Super AdminDashboardCompaniesUsersPeopleLPsData QualityHealthAll Screens

# Users

## All platform users

The Users screen provides a global view of all registered users across all companies. Admins can search by name, email, or company. User cards show name, company, role, last login, and account status. Actions include resetting passwords, deactivating accounts, and viewing activity logs. This helps with user support and security monitoring.





LPxGPADMINDashboardCompaniesUsersPeopleLPsData Quality

Super AdminSA

### Users

All platform users across companies

All CompaniesAll RolesFilter

USER	COMPANY	ROLE	STATUS	LAST ACTIVE	ACTIONS
 <b>John Partner</b> john@acmecapital.com	Acme Capital	Admin	Active	2 hours ago	Impersonate Edit
 <b>Sarah Johnson</b> sarah@acmecapital.com	Acme Capital	Member	Active	Yesterday	Impersonate Edit
 <b>Sarah Davis</b> sarah@deltacap.com	Delta Capital	Admin	Active	3 days ago	Impersonate Edit
 <b>emily@acmecapital.com</b> Invitation pending	Acme Capital	Member	Pending	—	Resend Cancel

Showing 1-4 of 156 users

Previous123Next

UX Flow: Super Admin

DashboardCompaniesUsersPeopleLPsData QualityHealth

... All Screens

# People

## LP contacts database

The People screen manages the global database of LP contacts (individuals who work at institutional investors). Unlike LPs (organizations), People tracks individuals with their employment history. Admins can search contacts, view profiles, and track career movements between organizations. This data enriches LP profiles with specific relationship targets for outreach.





LPxGPADMINDashboardCompaniesUsersPeopleLPsData Quality

Super AdminSA

### People

LP contacts and investment professionals in the database

All OrganizationsFilter

NAME	TITLE	ORGANIZATION	EMAIL	DATA QUALITY	ACTIONS
 Michael Smith	Managing Investment Director, PE	CalPERS	m.smith@calpers.ca.gov	High	<a href="#">Edit</a>
 Jennifer Chen	Investment Director, Growth Equity	CalPERS	j.chen@calpers.ca.gov	High	<a href="#">Edit</a>
 David Swensen	Chief Investment Officer	Yale Endowment	Not available	Medium	<a href="#">Edit</a>
 Robert Wilson	Sr. Portfolio Manager	Harvard Management	rwilson@hmc.harvard.edu	High	<a href="#">Edit</a>

Showing 1-4 of 8,234 people

Previous123Next

UX Flow: Super Admin

DashboardCompaniesUsersPeopleLPsData QualityHealth

... All Screens

# LPs

## Institutional investor database

The LPs screen is the master database of institutional investors. Admins can browse, search, filter, and edit LP records. Each LP entry shows name, type, AUM, location, and data quality score. Bulk actions allow updating multiple records. The Import Wizard button provides access to CSV import for adding new LPs. Data quality indicators highlight records needing attention.

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

LP Database

5,247 institutional investors

Import LPs

Add LP

Total LPs

5,247

Pensions

1,245

Endowments

892

Family Offices

2,156

Other

954

Search LPs...

All Types

All Regions

Data Quality

Filter

LP NAME	TYPE	LOCATION	AUM	CONTACTS	QUALITY	ACTIONS
<b>CalPERS</b> California Public Employees' Retirement	Pension	Sacramento, CA	\$450B	12	High	<a href="#">Edit</a>
<b>Yale Endowment</b> Yale University Investments Office	Endowment	New Haven, CT	\$41B	5	High	<a href="#">Edit</a>
<b>Smith Family Office</b> Multi-family office	Family Office	New York, NY	\$2B	2	Medium	<a href="#">Edit</a>
<b>Unknown Pension Fund</b> State pension	Pension	—	Unknown	0	Low	<a href="#">Edit</a>

Showing 1-4 of 5,247 LPs

Previous

1

2

3

Next

UX Flow: Super Admin

Dashboard

Companies

Users

People

LPs

Data Quality

Health

All Screens

## Edit LP

## LP data management form

The Edit LP screen allows admins to maintain LP data quality. All fields are editable: name, type, location, AUM, allocation targets, investment mandate, and geographic preferences. The investment mandate text field is particularly important as it's used for semantic matching. Data source and quality score help track provenance. Changes are logged for audit purposes.

LPxGPADMIN

DashboardCompaniesUsersPeopleLPsData Quality

Super AdminSA

LPs / CalPERS

Edit LP: CalPERS

High Quality

Last updated: 2 weeks ago

Basic Information

LP Name \*  
CalPERS

Full Name  
California Public Employees' Retirement System

Type \*  
Public Pension

Location  
Sacramento, CA, USA

Financial Information

Total AUM  
\$ 450B

PE Allocation %  
13%

Target PE Return  
11% Net IRR

Typical Commitment  
\$100M - \$500M

Investment Mandate

Geographic Focus  
North America, Europe

Investment Mandate (for AI matching)  
CalPERS maintains a diversified private equity portfolio with allocations across buyout, growth equity, and venture capital strategies. The system prioritizes partnerships with established managers demonstrating strong track records and operational value creation capabilities. ESG integration is a key priority, with all investments assessed against sustainability criteria.

Used for semantic matching with fund profiles

Data Quality

Quality Score  
High

Source  
Public filings, website

Delete LP

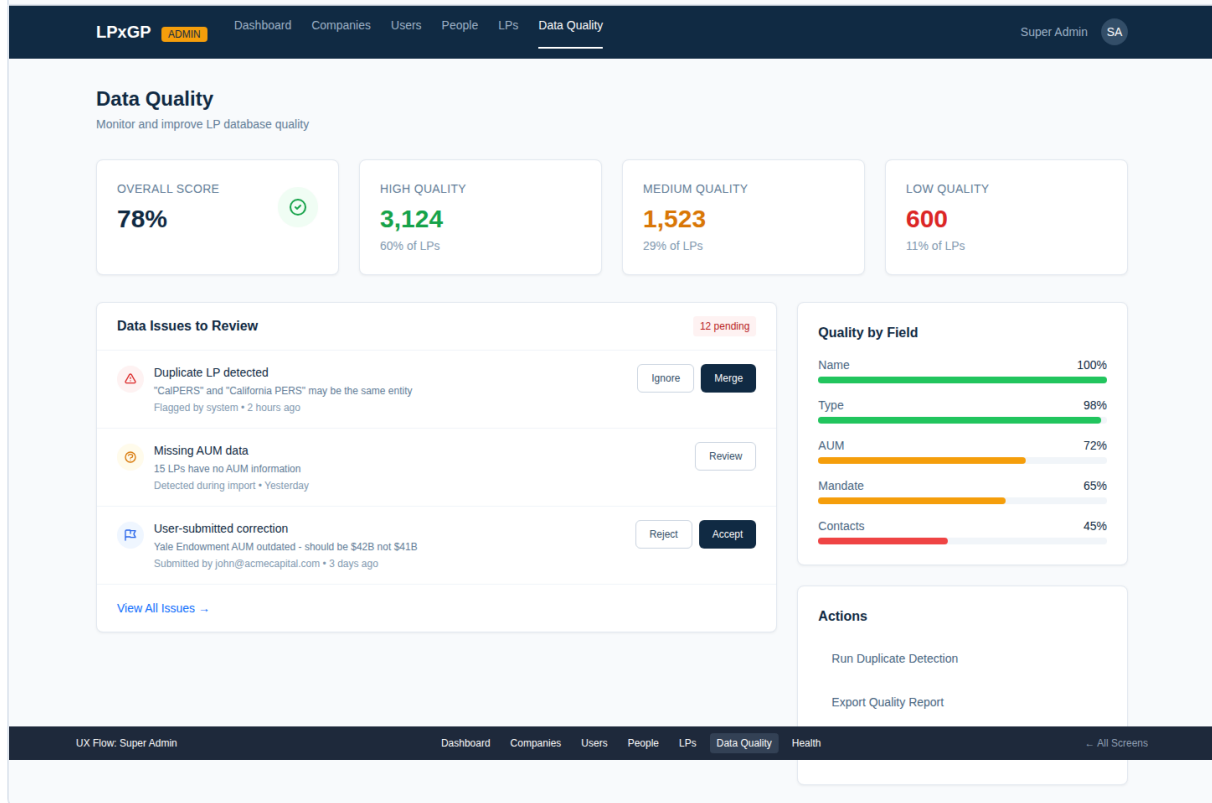
Cancel

Save Changes

# Data Quality

## Quality monitoring and issues

The Data Quality screen helps admins maintain high-quality LP data. It shows data completeness metrics, identifies records with missing fields, flags potential duplicates, and highlights stale data. Quality scores are calculated based on field completeness, recency, and source reliability. Admins can drill down into specific issues and take corrective actions.



# Import Wizard

## CSV import tool

The Import Wizard guides admins through bulk LP data import. It's a multi-step process: upload CSV, map columns to fields, preview changes, and execute import. The system validates data, detects duplicates, and shows potential issues before committing. Import jobs can be paused, resumed, or rolled back. Progress is tracked with detailed logging for troubleshooting.

LPxGPADMINDashboardCompaniesUsersPeopleLPsData QualitySuper AdminSA

LPs / Import Wizard

1 Upload

2 Map Fields

3 Preview

4 Import

**Map CSV Fields**

Match your CSV columns to LPxGP fields. 500 rows detected.

File: lp\_database\_export\_2024.csv 500 rows × 12 columns

CSV Column	LPxGP Field
organization_name	LP Name *
investor_type	Type *
hq_location	Location
aum_usd	Total AUM
pe_allocation_pct	PE Allocation %
internal_notes	— Skip —

1 column will be skipped

The "internal\_notes" column is not mapped and won't be imported.

← Back

Preview Import →

UX Flow: Super AdminDashboardCompaniesUsersPeopleLPsData QualityHealth... All Screens

# System Health

## Services and integrations status

The System Health screen monitors platform infrastructure and external services. It shows status for the database, API server, authentication service, OpenRouter (LLM), Voyage AI (embeddings), and email delivery. Response times and error rates are tracked. Alerts notify admins of issues. This is the first place to check when users report problems.

**LPxGP** ADMIN Dashboard Companies Users People LPs Data Quality System Super Admin SA

### System Health

Monitor platform status and integrations All systems operational

Service	Status	Response	Connections	Storage	Active Sessions	Logins (24h)
<b>Supabase PostgreSQL</b> Primary database	Healthy	12ms	8/100	2.4GB		
<b>Supabase Auth</b> Authentication service	Healthy	45ms			24	156
<b>OpenRouter API</b> LLM inference (Claude)	Healthy	1.2s avg	Requests (24h) 89	Cost (24h) \$2.34		
<b>Voyage AI</b> Embedding service	Healthy	180ms	Embeddings (24h) 450	Vectors 5,247		

#### Recent System Events

[View All](#)

- LP import completed successfully**  
500 records processed, 498 imported, 2 duplicates skipped  
2 hours ago
- Embedding regeneration completed**  
5,247 LP embeddings updated for semantic search  
Yesterday
- OpenRouter rate limit approached**  
80% of daily limit reached, consider upgrading  
2 days ago

UX Flow: Super Admin Dashboard Companies Users People LPs Data Quality **Health** All Screens

# UI State Screens

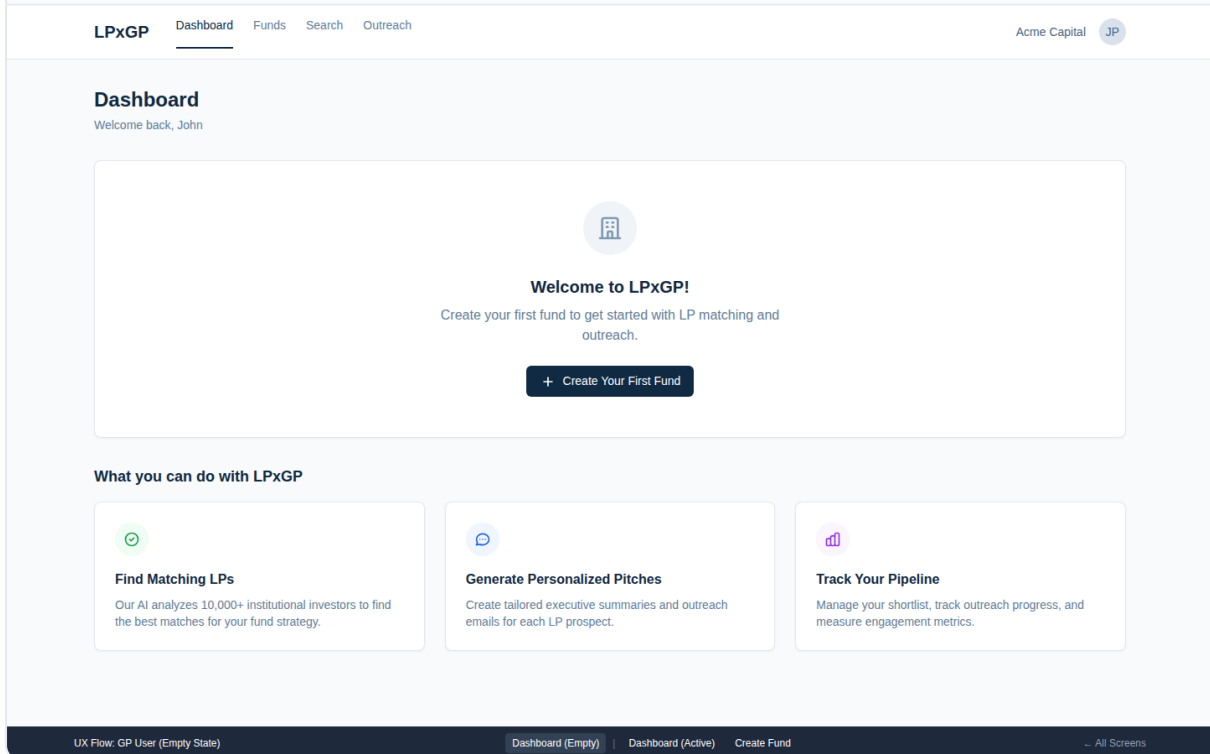
3 screens — Loading, empty, and error states for better user experience



# Empty Dashboard

## First-time user experience

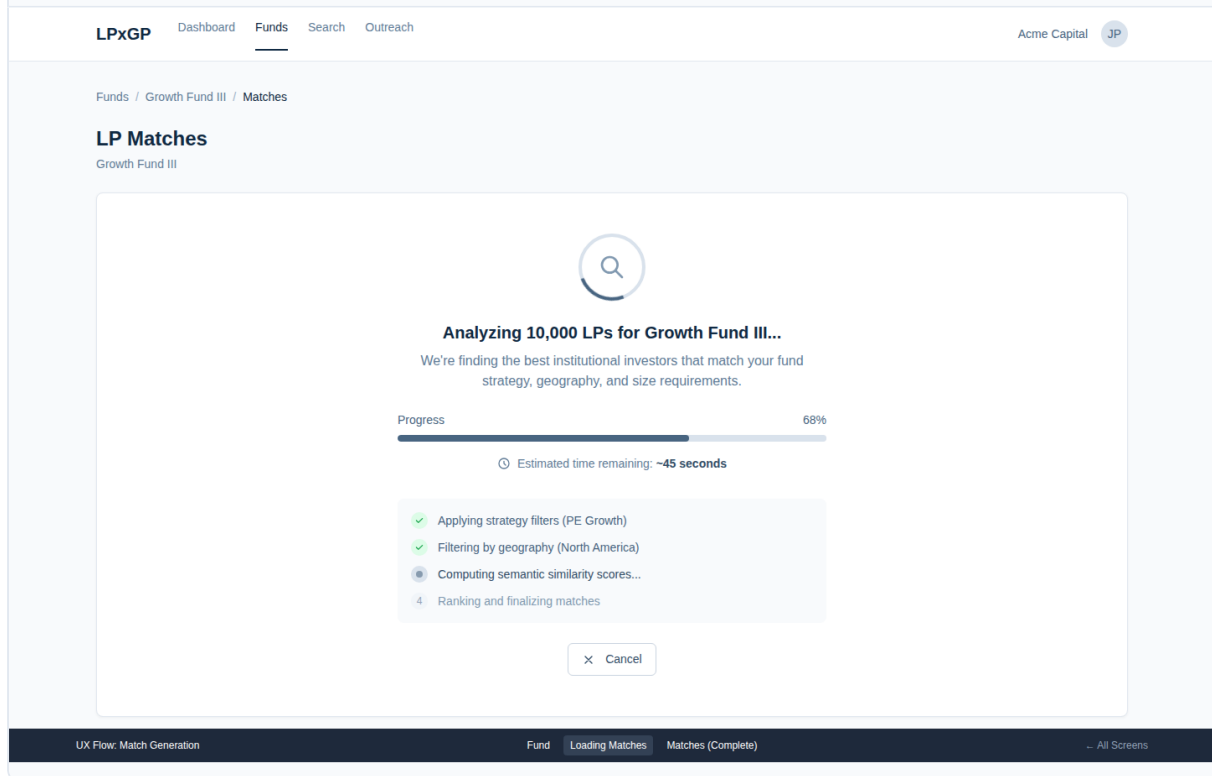
The Empty Dashboard appears when a user has no funds yet. Instead of empty space, it provides a welcoming onboarding experience. A prominent call-to-action encourages users to create their first fund. Brief feature descriptions explain what they'll be able to do: find matching LPs, generate pitches, and track outreach. This reduces friction for new users and increases activation rates.



# Loading Matches

## Match generation progress

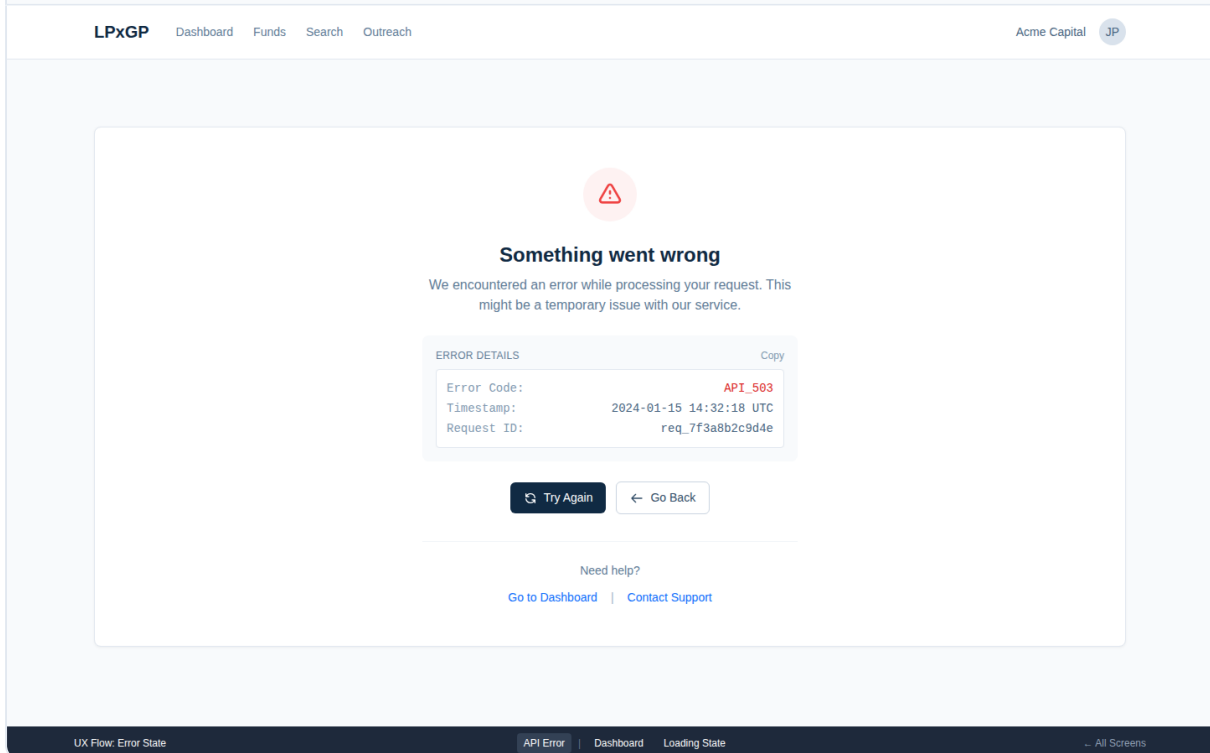
The Loading Matches screen appears during AI match generation, which can take 30+ seconds for large LP databases. It shows a progress bar, current step (applying filters, computing similarity scores), and estimated time remaining. A cancel button allows users to abort if needed. This transparent feedback prevents users from thinking the system is frozen and reduces support requests.



# API Error

## Error state handling

The API Error screen provides graceful error handling when something goes wrong. Instead of cryptic error messages, it shows a friendly explanation and clear next steps. A "Try Again" button attempts to retry the operation. Error details are available for technical users and support. Contact information helps users get assistance if the problem persists.



# LP User Screens

5 screens — Bidirectional matching - funds ranked for institutional investors

# LP Dashboard

Fund overview for institutional investors

The LP Dashboard is the command center for institutional investors using LPxGP. It provides an at-a-glance view of matching funds, allocation availability, and recent activity. LPs see statistics including new fund matches, funds reviewed, and current allocation capacity. The top matches table shows funds ranked by compatibility score with quick actions to mark interest or pass. This bidirectional matching enables LPs to proactively discover funds rather than waiting for GP outreach.

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS CP

## LP Dashboard

Welcome back, Sarah. Here are funds matching your mandate.

NEW MATCHES  
**24**  
+8 this week

REVIEWED  
**156**  
funds this quarter

INTERESTED  
**12**  
marked for follow-up

ALLOCATION  
**\$850M**  
available FY24

### Top Fund Matches

View All Matches --

FUND	GP FIRM	STRATEGY	TARGET SIZE	MATCH SCORE	ACTION
Sequoia Growth Fund VI	Sequoia Capital	Growth Equity	\$2.5B	94	View --
Acme Growth Fund III	Acme Capital	Growth Equity	\$500M	91	View --
Climate Partners Fund II	Climate Partners	Climate / ESG	\$800M	89	View --
TechVentures Fund IV	TechVentures Partners	Venture Capital	\$300M	78	View --

### Your Investment Mandate

Strategies

Geography

Check Size

Growth Equity, Buyout, Climate

North America, Europe

\$50M - \$200M

### Matching Alerts

New high-match fund  
Climate Partners Fund II (score: 89) was added  
2 hours ago

Fund update

Closing soon  
Sequoia Growth Fund VI final close in 30 days  
3 days ago

Manage Alerts --

UX Flow: LP User

LP Dashboard

Fund Matches

Match Detail

Preferences

-- All Screens

Track Record

Fund II+

Edit Preferences --

# Fund Matches

## Ranked funds matching LP mandate

The Fund Matches screen shows all funds ranked by compatibility with the LP's investment mandate. LPs can filter by strategy, fund size, and geography. Each fund card displays the GP firm, strategy tags, target size, fund number, closing timeline, and match score. Quick actions allow LPs to mark interest, pass, or view detailed analysis. The scoring algorithm considers strategy alignment, size fit, track record, geographic overlap, and ESG requirements.

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS CP

### Fund Matches

Funds ranked by compatibility with your mandate

Search funds or GP firms...

All Strategies

All Sizes

Score: High to Low

Showing 156 matching funds

Score range: 70+

**Sequoia Growth Fund VI**

Sequoia Capital

Growth Equity North America Technology

Target Size \$2.5B

Fund Number Fund VI

Closing 30 days

Min Commitment \$50M

Interested Pass

View Details

**Acme Growth Fund III**

Acme Capital

Growth Equity North America ESG

Target Size \$500M

Fund Number Fund III

Closing Q2 2024

Min Commitment \$25M

Interested Pass

View Details

**Climate Partners Fund II**

Climate Partners

Climate / ESG Global Sustainability

Target Size \$800M

Fund Number Fund II

Closing

Min Commitment

Interested Pass

View Details

**TechVentures Fund IV**

TechVentures Partners

Venture Capital North America Enterprise SaaS

Target Size \$300M

Fund Number Fund IV

Closing

Min Commitment

Interested Pass

View Details

UX Flow: LP User

LP Dashboard

Fund Matches

Match Detail

Preferences

All Screens

Previous

1

2

3

...

39

Next

# Fund Match Detail

Detailed fund analysis for LPs

The Fund Match Detail screen explains why a specific fund is recommended for the LP. It provides a narrative explanation of alignment factors, a detailed score breakdown across multiple dimensions (strategy, size, track record, geography, ESG), the fund's investment thesis, historical performance data, and key considerations or concerns. LPs can mark interest, request a meeting, or request the fund deck. Private notes allow LPs to track their evaluation.

LPxGP LP Portal
Dashboard
Fund Matches
Preferences
Profile
CalPERS CP

Fund Matches / Sequoia Growth Fund VI

Sequoia Growth Fund VI

Sequoia Capital

94

Match Score

Mark Interested

Pass

Why This Match

Sequoia Growth Fund VI is a strong match for CalPERS based on multiple alignment factors:

**Strategy alignment:** Growth equity focus matches your core allocation strategy with emphasis on established technology companies.

**Track record:** Fund V delivered 2.8x net MOIC and 28% net IRR, exceeding your minimum return thresholds.

**Check size fit:** \$100M minimum commitment aligns with your typical allocation of \$50-200M per fund.

**ESG commitment:** Sequoia has a formal ESG policy and dedicated sustainability team, meeting your responsible investment requirements.

Fund Details

Target Size	\$2.5B
Fund Number	Fund VI
Strategy	Growth Equity
Geography	North America
Min Commitment	\$50M
Management Fee	1.75%
Carry	20%
Final Close	30 days

Score Breakdown

Strategy Alignment	96/100
Size Fit	92/100
Track Record	98/100
Geographic Overlap	90/100
ESG Alignment	88/100

GP Team

- JL Jim Loucks  
Managing Partner
- SC Sarah Chen  
Partner
- MR Michael Rodriguez  
Partner

UX Flow: LP User

LP Dashboard Fund Matches Match Detail Preferences

... All Screens

Fund Thesis

Sequoia Growth Fund VI targets growth-stage technology companies with proven business models and clear paths to market leadership. The fund focuses on enterprise software, fintech, and healthcare technology sectors where Sequoia has deep operational expertise and extensive network relationships. Target investments range from \$50M to \$250M in companies with \$20M+ ARR and 40%+ YoY growth. The fund aims to build a concentrated portfolio of 15-20 companies with active board involvement and operational support.

Track Record

Fund	Vintage	Size	Net IRR	Net MOIC
Growth Fund V	2020	\$2.0B	28%	2.8x
Growth Fund IV	2017	\$1.5B	32%	3.2x
Growth Fund III	2014	\$1.0B	35%	3.8x

Considerations

- Fund size increase  
Fund VI is 25% larger than Fund V. Consider whether deployment pace can be maintained.
- Closing timeline  
Final close in 30 days. Early commitment may secure co-investment rights.

Actions

✓ Mark Interested

📅 Request Meeting

📄 Request Deck

Your Notes

Add private notes about this fund...

Save Notes

# LP Preferences

## Matching preferences and alerts

The LP Preferences screen allows institutional investors to configure their matching criteria. LPs can set strategy preferences, geographic focus, fund size range, check size range, track record requirements, and ESG requirements. Current allocation availability helps the system prioritize actively deploying LPs. Notification preferences control alerts for new high-score matches, fund updates, closing reminders, and weekly digests.

LPxGP LP Portal

DashboardFund MatchesPreferencesProfile

CalPERSCP

### Matching Preferences

Configure how funds are matched to your mandate

#### Investment Criteria

Strategies

☒ Growth Equity  
☒ Buyout  
☒ Climate / ESG  
☐ Venture Capital  
☐ Real Assets

Geography

☒ North America  
☒ Europe  
☐ Asia Pacific  
☐ Latin America  
☐ Global

Fund Size Range

Minimum

Maximum

\$250M

\$3B

Check Size Range

Minimum

Maximum

\$50M

\$200M

Track Record Minimum

Fund II+

ESG Requirement

Preferred

#### Current Allocation

Available Allocation (FY24)

\$850M

Actively Looking

☒ Yes, show me matching funds

Target Close Date

Minimum Match Score

UX Flow: LP User

LP DashboardFund MatchesPreferencesLP Profile

... All Screens

Only show funds scoring above this threshold

#### Notification Preferences

New high-score matches

Get notified when a new fund scores 85+ on your criteria

☒

Fund updates

Notify me when funds I've marked "Interested" post updates

☒

Closing reminders

Remind me 30 days before final close of interesting funds

☒

Weekly digest

Receive a weekly summary of new matches

☐

Cancel

Save Preferences

## LP Profile

### Organization profile management

The LP Profile screen displays the LP's organization information and investment mandate. Organization details (name, type, AUM, headquarters) are managed by LPxGP administrators to ensure data quality. The investment mandate section shows the LP's strategies, geographic focus, check size, and track record requirements. User profile settings allow LPs to manage their personal information and security settings including password and two-factor authentication.



LPxGP LP Portal

DashboardFund MatchesPreferencesProfile

CalPERS CP

## Organization Profile

Manage your LP profile information

### Organization Information

Organization Name	Short Name
California Public Employees' Retirement System	CalPERS
LP Type	Headquarters
Public Pension	Sacramento, California, USA
Total AUM	PE Allocation
\$450 Billion	8% (~\$36B)
Website	
https://www.calpers.ca.gov	

Organization details are managed by LPxGP administrators. Contact support to request changes.

### Investment Mandate

Mandate Description

CalPERS Private Equity program targets risk-adjusted returns exceeding public market equivalents over the long term. The program focuses on diversified exposure across buyout, growth equity, and credit strategies with emphasis on established

Primary Strategies

Geographic Focus

Buyout

Growth Equity

Climate

North America

Europe

Typical Check Size

Fund Size Preference

Track Record Requirement

\$50M - \$200M

\$500M - \$5B

Fund II+

### Your Profile

Full Name	Title
Sarah Johnson	Senior Investment Officer
Email	Phone
sarah.johnson@calpers.ca.gov	+1 (916) 555-0123

### Security

Password

Last changed 45 days ago

Change Password

Two-Factor Authentication

Enabled

Manage 2FA

Login History

Last login: Today at 9:15 AM from Sacramento, CA

View History

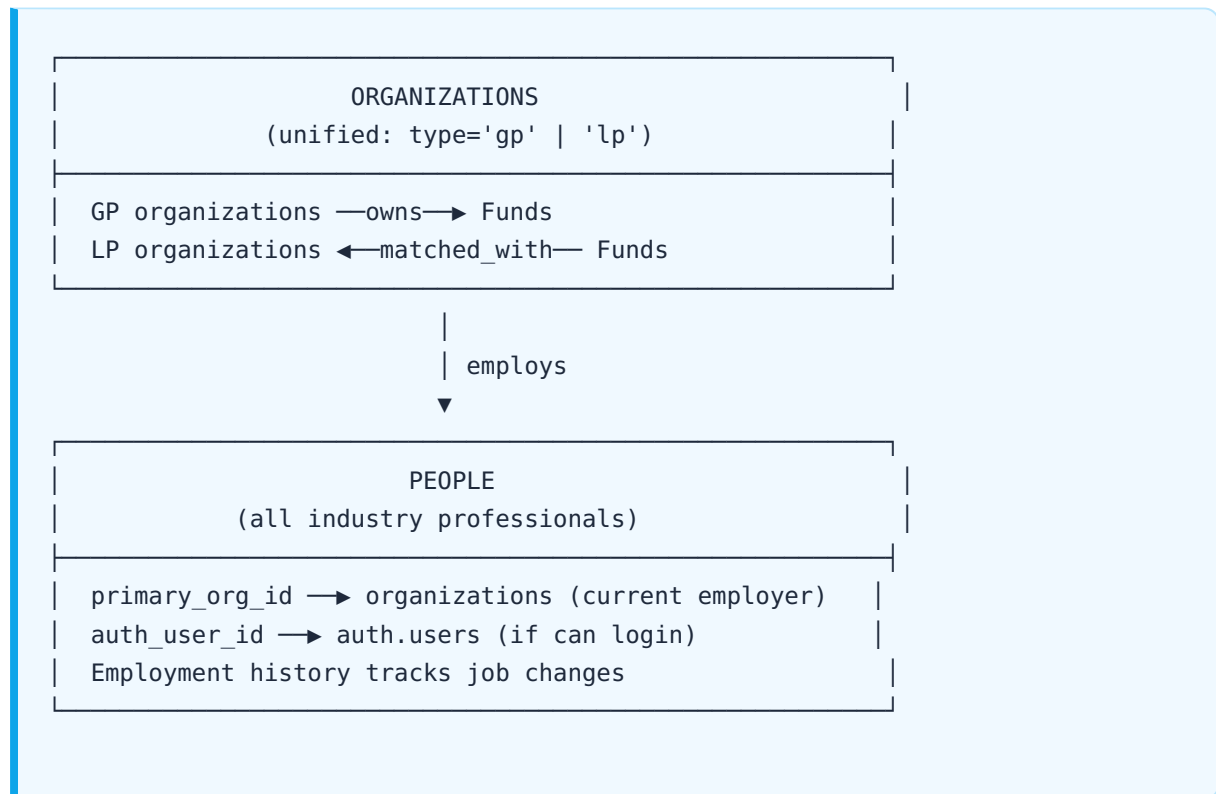
Cancel

Save Changes

## 5. Data Model

### Entity Overview

LPxGP uses a unified relational data model where GPs and LPs are both organizations, and platform users are people with login access:



### Key Entities

Entity	Description	Key Fields
<b>Organizations</b>	Unified table for both GP firms and LP investors	type (gp/lp), name, aum, lp_type, mandate_embedding
<b>People</b>	All industry professionals (can work at any org)	name, email, primary_org_id, auth_user_id, role
<b>Employment</b>	Career history linking people to organizations	person_id, org_id, title, start_date, end_date
<b>Funds</b>	Investment funds owned by GP organizations	org_id, name, strategy, target_size, thesis_embedding

<b>Matches</b>	Fund-LP compatibility scores	fund_id, lp_org_id, total_score, score_breakdown
<b>Pitches</b>	AI-generated outreach content	match_id, type, content, created_by
<b>Outreach Events</b>	Track journey from match to commitment	match_id, event_type, event_date, meeting_type
<b>Match Outcomes</b>	Final outcomes for model training	match_id, outcome, commitment_amount, features_at_match_time
<b>Relationships</b>	GP-LP relationship intelligence	gp_org_id, lp_org_id, relationship_type, prior_commitments
<b>LP Capacity</b>	Timing intelligence for allocation windows	lp_org_id, fiscal_year, remaining_capacity, next_allocation_window

## Key Design Decisions

- **Unified Organizations:** GPs and LPs are both organizations with a type discriminator. No separate tables.
- **People Work at Organizations:** Clean FK to organizations.id - no polymorphic relationships.
- **People Can Move:** Employment history tracks job changes. Someone can move from LP to GP.
- **Platform Users = People + Auth:** People with auth\_user\_id set can log in. No separate users table.
- **Full Referential Integrity:** All foreign keys are real database constraints.

## Vector Embeddings

Semantic matching uses 1024-dimensional vector embeddings stored in PostgreSQL with pgvector:

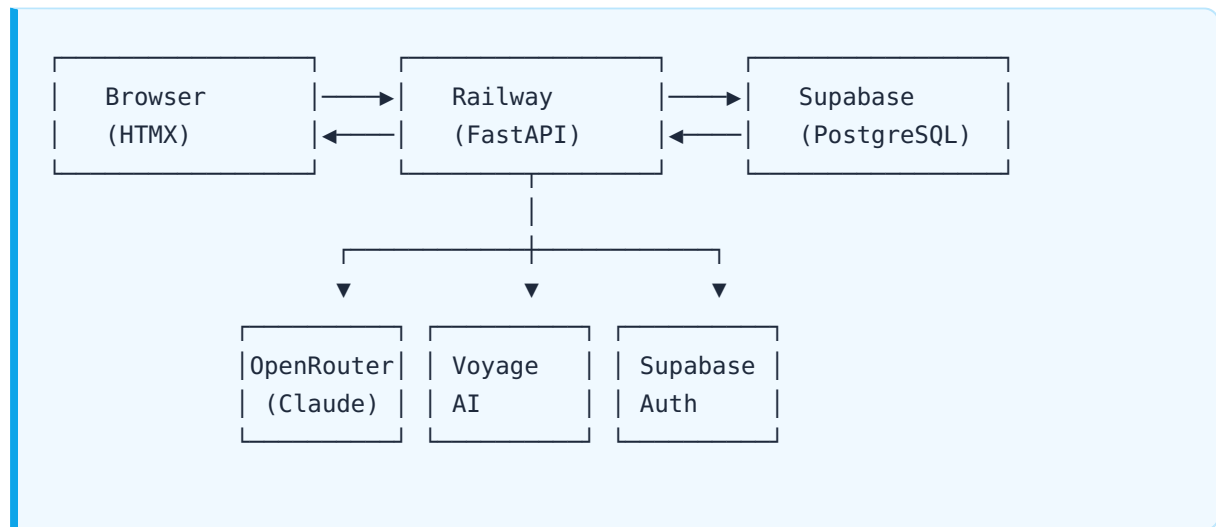
- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)

- **Similarity Calculation:** Cosine similarity between embeddings determines semantic fit

## 6. Technical Architecture

### System Overview

LPxGP is built as a modern web application with server-rendered UI and AI integrations:



### Technology Stack

Layer	Technology	Purpose
Backend	Python + FastAPI	API server, business logic, async operations
Frontend	Jinja2 + HTMX + Tailwind	Server-rendered UI with dynamic updates, no build step
Database	Supabase (PostgreSQL + pgvector)	Data storage, vector similarity search, row-level security
Authentication	Supabase Auth	Invite-only signup, session management, password reset
LLM	OpenRouter (Claude)	Pitch generation, fund extraction, match explanations
Embeddings	Voyage AI	Finance-optimized vectors for semantic matching

Hosting	Railway	Auto-deploy from GitHub, managed infrastructure
---------	---------	---

## Security Model

---

- **Invite-Only Access:** Users can only join via company admin invitation - no self-signup
- **Row-Level Security:** Database policies ensure users only see their company's data
- **Role-Based Access:** Company Admins vs Members vs Super Admins with different permissions
- **Human-in-the-Loop:** All AI-generated content requires human review before external use
- **Secure Sessions:** JWT tokens with refresh, automatic expiration, and secure cookie handling

# 7. Non-Functional Requirements

## Performance

Metric	Target	Measurement
Page Load (LCP)	< 2 seconds	Largest Contentful Paint for all pages
Search Response	< 500ms	Time from query to results display
Semantic Search	< 2 seconds	Including embedding generation and vector search
Match Generation	< 30 seconds	For 100 matches against full LP database
Pitch Generation	< 10 seconds	LLM response for single pitch

## Security

- **Authentication:** Secure password hashing, rate-limited login, account lockout after 5 failures
- **Authorization:** Row-level security policies, role-based access control
- **Data Protection:** Encryption at rest and in transit, no PII in logs
- **Input Validation:** Server-side validation, SQL injection prevention, XSS protection
- **Audit Logging:** Track who accessed what and when for compliance

## Scalability

- **Database:** Designed to handle 100,000+ LPs with efficient indexing
- **Concurrent Users:** Stateless backend supports horizontal scaling
- **API Rate Limiting:** Protect external services from overuse
- **Background Jobs:** Long-running tasks processed asynchronously

## Availability

- **Uptime Target:** 99.9% availability (excludes planned maintenance)
- **Disaster Recovery:** Daily database backups with point-in-time recovery

- **Graceful Degradation:** Core features work even if AI services are temporarily unavailable



## 8. Success Metrics

### User Engagement

Metric	Target	Why It Matters
Daily Active Users / Monthly Active Users	> 30%	Indicates habitual usage, not just occasional visits
Average Session Length	> 5 minutes	Users are doing meaningful work, not just checking in
Matches Reviewed per Session	> 10	Users are actively evaluating AI recommendations

### Feature Adoption

Metric	Target	Why It Matters
Fund Created within 7 Days of Signup	> 60%	Users are activating and seeing value quickly
Matches Shortlisted per Fund	> 20	AI matching is producing actionable recommendations
Pitches Generated per User (monthly)	> 5	Pitch generation is useful enough to use repeatedly

### Quality Indicators

Metric	Target	Why It Matters
Match Feedback: "Useful"	> 70%	AI recommendations are relevant and actionable
Pitch Copied to Clipboard	> 50%	Generated content is good enough to use
LP Contacted from Platform	> 20%	Platform enables actual outreach, not just research

## 9. Glossary

### **AUM (Assets Under Management)**

The total market value of assets that an investment firm manages on behalf of clients. For LPs, this indicates their overall investment capacity.

### **Dry Powder**

Capital that has been committed to a fund but not yet invested. Indicates available capital for new investments.

### **Embedding**

A vector (array of numbers) that represents text in a way that captures semantic meaning. Used for similarity matching between fund thesis and LP mandate.

### **Endowment**

A type of LP, typically a fund established by a university, hospital, or non-profit organization for long-term investment.

### **Family Office**

A private wealth management firm that handles investments for a wealthy family. Often more flexible than institutional LPs.

### **GP (General Partner)**

The fund manager who makes investment decisions and manages fund operations. GPs are LPxGP's primary users.

### **Hard Filter**

A matching criterion that must be satisfied for an LP to be considered. If failed, the LP is excluded regardless of other scores.

### **HTMX**

A JavaScript library that allows HTML elements to make AJAX requests directly, enabling dynamic updates without full page reloads.

### **LP (Limited Partner)**

An institutional investor who provides capital to investment funds. LPs include pension funds, endowments, family offices, and sovereign wealth funds.

### **Mandate**

An LP's investment guidelines, including acceptable strategies, geographic regions, check sizes, and return expectations.

**Pension Fund**

A type of LP that manages retirement assets for employees of governments, corporations, or unions. Often large and long-term focused.

**pgvector**

A PostgreSQL extension for storing and querying vector embeddings, enabling semantic similarity search in the database.

**RLS (Row-Level Security)**

Database security feature that restricts which rows users can access based on their identity. Ensures data isolation between companies.

**Semantic Search**

Search that understands meaning rather than just matching keywords. Uses embeddings to find conceptually similar content.

**Soft Score**

A matching criterion that contributes to the overall fit score but doesn't exclude the LP if not perfectly matched.

**Sovereign Wealth Fund**

A state-owned investment fund that invests global reserves. Among the largest LPs with diverse mandates.

**Thesis**

A fund's investment philosophy and strategy, describing what types of companies they invest in and why.

**Voyage AI**

An AI company providing embedding models optimized for specific domains like finance and legal.