



## GP-LP Intelligence Platform Product Document

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# 1. Executive Summary

## Overview

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.

**Domain:** lpxgp.com

**Target Users:** Private equity, venture capital, and growth equity fund managers

## Problem Statement

Fund managers face significant challenges in the fundraising process:

- **Information Overload:** Thousands of institutional investors with varying mandates, preferences, and allocation strategies
- **Manual Research:** Hours spent researching LP mandates, recent commitments, and contact information
- **Poor Targeting:** Wasted meetings with misaligned investors who don't invest in the fund's strategy or size
- **Generic Outreach:** One-size-fits-all pitch materials that don't resonate with specific LP priorities

## Solution

LPxGP provides an intelligent matching and outreach platform:

Feature	Benefit
LP Database	5,000+ institutional investors with mandates, AUM, and contacts
AI Matching	Semantic search matches fund thesis to LP mandates
Match Scoring	Ranked list of LPs by fit score with explanation
Pitch Generation	AI-generated personalized outreach for each LP

Outreach Tracking

Pipeline management for fundraising campaigns

**Key Value Proposition:** Reduce time-to-first-close by helping GPs focus on the highest-probability LP targets with personalized, relevant outreach.

## 2. User Personas

### GP Fund Manager (Company Admin)

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

**Goals:**

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

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

### GP Associate (Company Member)

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**Role:** Associate or VP supporting fundraising efforts

**Goals:**

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

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

### Super Admin (LPxGP Team)

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**Role:** LPxGP platform administrator

**Goals:**

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

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

## 3. User Journeys

This section describes the key user experience flows through the LPxGP platform, connecting screens with user goals and tested behaviors.

### Journey 1: Platform Onboarding (Super Admin)

**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

**Story:** 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, and invites John (Partner) as the company admin via email invitation.

**Tested Behaviors:** F-AUTH-04 (Company creation, user invitation), duplicate company name rejection, invalid email format rejection.

### Journey 2: New User Onboarding (GP Admin)

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

**Goal:** Accept invitation and set up account

**Screen Flow:** Email Invitation → Accept Invitation → Login → Dashboard

**Story:** John receives an invitation email, clicks the link to accept, creates a secure password, and lands on his empty dashboard ready to create his first fund.

**Tested Behaviors:** F-AUTH-05 (Invitation acceptance), F-AUTH-01 (Login), expired invitation rejection, weak password rejection, account lockout after 5 failed attempts.

## Journey 3: 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

**Story:** John clicks "+ New Fund" on his dashboard, uploads a pitch deck PDF. The AI extracts fund information (strategy, size, thesis) with confidence scores. John reviews and confirms each field, especially low-confidence items, then views his completed fund profile.

**Tested Behaviors:** F-GP-01 (Fund creation), F-GP-02 (Deck upload), F-GP-03 (AI extraction), corrupt file rejection, API timeout graceful handling, missing required fields blocked.

## Journey 4: LP Research

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

**Goal:** Find LPs matching Growth Fund III criteria

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

**Story:** Maria navigates to Search, applies filters (Strategy: Growth Equity, Check Size > \$10M, Geography: North America), reviews 45 matching LPs with relevance scores, clicks on CalPERS to view full profile with mandate and contacts, then adds CalPERS to the shortlist.

**Tested Behaviors:** F-LP-02 (Filters), F-LP-03 (Semantic search), F-UI-03 (HTMX updates), performance < 500ms, empty query handling, special characters handling.

## Journey 5: AI Matching

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

**Goal:** Get AI-ranked LP matches for Growth Fund III

**Screen Flow:** Fund Detail → Matches → Match Detail → Review Insights

**Story:** Maria clicks "View Matches" for Growth Fund III, sees 45 LPs ranked by fit score (0-100). She clicks on CalPERS (score: 87) to see the breakdown: strategy alignment, size fit, geographic overlap, and semantic similarity. The AI provides talking points and identifies potential concerns.

**Tested Behaviors:** F-MATCH-01 (Hard filters), F-MATCH-02 (Soft scoring), F-MATCH-03 (Semantic matching), F-MATCH-04 (Explanations), no matches handling, API timeout fallback.

## Journey 6: Pitch Generation

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

**Goal:** Create personalized outreach for CalPERS

**Screen Flow:** Match Detail → Pitch Generator → Generate → Review & Edit → Copy to Clipboard

**Story:** Maria clicks "Generate Pitch" from the match detail page, selects "Outreach Email" as the output type. The AI generates a personalized email referencing CalPERS's recent allocations. Maria edits the subject line and call-to-action, then copies to clipboard for use in her email client.

**Tested Behaviors:** F-PITCH-01 (Executive summary), F-PITCH-02 (Email draft), F-HITL-01 (No auto-send), API rate limiting handled, missing LP data graceful degradation, clipboard permission issues handled.

**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.

## 4. Screen Mockups

The following pages show all 27 screens in the LPxGP platform, organized by user type. Each screen includes context about its role in the user journeys above.

### Public Screens

4 screens - Authentication and onboarding flows

# Login

User authentication page

The screenshot shows the LPxGP user authentication page. On the left, there's a dark sidebar with the LPxGP logo and a tagline: "Find the right LPs for your fund. AI-powered matching and outreach tools to help fund managers connect with institutional investors efficiently." Below this is a copyright notice: "© 2024 LPxGP. All rights reserved." On the right, the main content area has a "Sign in" heading and a sub-instruction: "Enter your credentials to access your account". It features two input fields: "Email address" containing "partner@acmecapital.com" and "Password" containing "\*\*\*\*\*". To the right of the password field is a "Forgot password?" link. A "Sign in" button is at the bottom of the form. At the very bottom of the page, a navigation bar includes links for "Login", "Dashboard", "Forgot Password", "Reset Password", and "Logout", along with a "UX Flow" link and a "All Screens" link.

## Accept Invitation

New user onboarding flow

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

Password reset request

**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](#)

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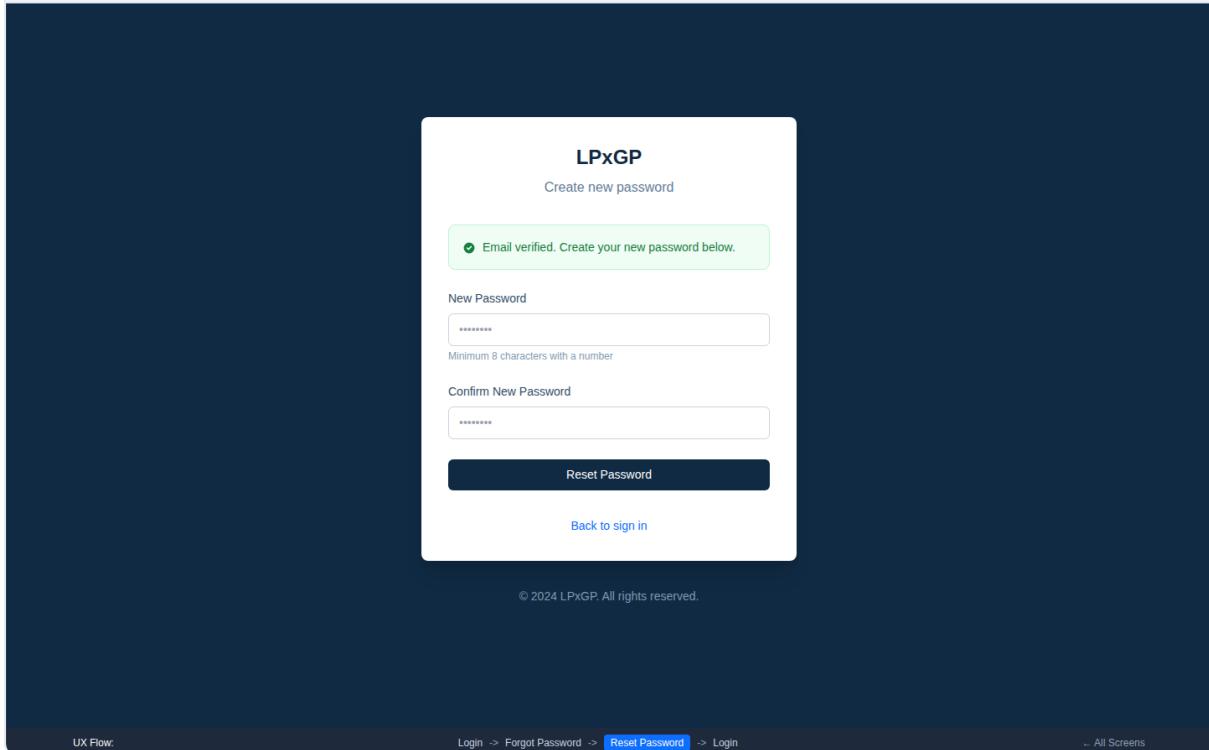
UX Flow:

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

-- All Screens

## Reset Password

Create new password



## GP User Screens

13 screens - Core platform functionality for fund managers

# Dashboard

Fund overview and recent activity

The screenshot shows the LPxGP dashboard interface. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search, and Outreach. On the right side of the navigation bar, it says "Acme Capital" and "JP". Below the navigation bar, there is a section titled "Dashboard" with a welcome message "Welcome back, John".

Below this, there are four cards providing summary statistics:

- ACTIVE FUNDS**: 3 (+1 this quarter)
- TOTAL MATCHES**: 127 (across all funds)
- SHORTLISTED**: 34 (LPs for outreach)
- MEETINGS**: 8 (+3 this month)

Under the "Your Funds" heading, there are three cards for different funds:

- Growth Fund III**: Private Equity - Growth (Status: Raising). Details: Target Size \$500M, Matches 45, Shortlisted 12. Action: View Matches →
- Growth Fund II**: Private Equity - Growth (Status: Investing). Details: Fund Size \$350M, Vintage 2021, Deployed 72%. Action: View Details →
- Growth Fund I**: Private Equity - Growth (Status: Harvesting). Details: Fund Size \$200M, Vintage 2017, Net IRR 28.5%. Action: View Details →

At the bottom, there is a section titled "Recent Activity" listing three recent events:

- 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 screenshot shows the LPxGP platform's 'Funds' section. At the top, there is a navigation bar with links: LPxGP, Dashboard, Funds (which is the active tab), Search, and Outreach. On the right side of the header, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the header, the title 'Your Funds' is displayed, followed by the sub-instruction 'Manage fund profiles and view LP matches'. A prominent 'New Fund' button with a plus sign is located in the top right corner.

**Growth Fund III**  
Private Equity - Growth  
Raising

Target Size	\$500M
Matches	45
Shortlisted	12

[View Fund →](#)      Matches

**Growth Fund II**  
Private Equity - Growth  
Investing

Fund Size	\$350M
Vintage	2021
Deployed	72%

[View Fund →](#)

**Growth Fund I**  
Private Equity - Growth  
Harvesting

Fund Size	\$200M
Vintage	2017
Net IRR	28.5%

[View Fund →](#)

**Create New Fund**  
Set up a fund profile to find matching LPs

A dashed box highlights the 'Create New Fund' button.

## Fund Detail

Fund profile with thesis and track record

The screenshot shows the LPxGP platform's Fund Detail view for 'Growth Fund III'. The top navigation bar includes 'LPxGP', 'Dashboard', 'Funds' (selected), 'Search', and 'Outreach'. On the right, there are user details 'Acme Capital' and a profile icon 'JP'. The main content area has a breadcrumb 'Funds / Growth Fund III'. The fund card for 'Growth Fund III' (Raising) shows its status as 'Private Equity - Growth Equity'. Below the card are two main sections: 'Fund Overview' and 'Matching Stats'.

Fund Overview		Matching Stats	
Target Size \$500M	Target Close Q2 2025	Total Matches <b>45</b>	
Geography Focus North America	Sector Focus Technology, Healthcare	High Score (80+) <b>12</b>	
Check Size \$25M - \$75M	Stage Growth / Expansion	Shortlisted <b>8</b>	
		Contacted <b>5</b>	
		<a href="#">View All Matches</a>	

**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 →

**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
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# Create Fund

New fund creation form

The screenshot shows the 'Create Fund Profile' section of the LPxGP platform. At the top, there's a navigation bar with 'LPxGP', 'Dashboard', 'Funds' (which is the active tab), 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a breadcrumb 'Funds / Create Fund'. The main form area has several sections: 'Basic Information' (Fund Name: 'e.g., Growth Fund III', 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', Sector Focus: 'e.g., Technology, Healthcare, Financial Services'), and 'Investment Thesis' (a large text area with placeholder text about investment strategy). At the bottom, there are 'Cancel' and 'Create Fund' buttons.

**Create Fund Profile**

Set up your fund to start finding matching LPs

**Basic Information**

Fund Name \*

e.g., Growth Fund III

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

Sector Focus

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

The screenshot shows the LPxGP LP Search interface. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search (which is the active tab), and Outreach. On the far right, there are user profile icons for "Acme Capital" and "JP".

The main area is titled "Search LPs" and includes a search bar with the query "technology growth equity" and a "Search" button. Below the search bar is a "Filters" sidebar containing the following sections:

- LP Type:** Includes checkboxes for Pension (245), Endowment (89), Foundation (67), Family Office (312), and Sovereign Wealth (23).
- AUM Range:** A range input from "\$1B" to "Max".
- Geography:** A dropdown menu set to "North America".
- Invests In:** Includes checkboxes for Private Equity (selected), Venture Capital, and Real Estate.

Below the filters, there is a "Clear Filters" button.

The main content area displays a table of search results with 247 entries found. The table has columns for NAME, TYPE, LOCATION, AUM, and ACTIONS. The results include:

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

At the bottom of the results table, it says "Showing 1-5 of 247" and features a pagination control with buttons for "Previous", page numbers 1, 2, 3, and "Next".

## LP Detail

LP profile with mandate and contacts

The screenshot displays the LP Detail page for CalPERS (California Public Employees' Retirement System) on the LPxGP platform. The top navigation bar includes links for Dashboard, Funds, Search, Outreach, and a user icon for Acme Capital (JP). The main header shows the CalPERS logo and name, with a Public Pension classification and location in Sacramento, CA. A search bar indicates the current search term is 'CalPERS'. To the right are buttons for '+ Add to Shortlist' and 'Generate Pitch'.

**Overview**

Total AUM <b>\$450B</b>	PE Allocation <b>13%</b>	Est. PE Commitment <b>\$58.5B</b>
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**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

**Key Contacts**

MS Michael Smith Managing Investment Director, Private Equity	<a href="#">View Profile →</a>
JC Jennifer Chen Investment Director, Growth Equity	<a href="#">View Profile →</a>

**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

# Matches

AI-ranked LP matches for fund

The screenshot shows the LPxGP platform's 'Matches' section for a specific fund. At the top, there are navigation links: LPxGP, Dashboard, Funds, Search, Outreach, Acme Capital, and a user icon (JP). Below the navigation is a breadcrumb trail: Funds / Growth Fund III / Matches.

**LP Matches**

Growth Fund III - 45 matched LPs ranked by fit score

Key statistics displayed:

- Total Matches: 45
- Avg Score: 72
- Shortlisted: 12
- Contacted: 8

The main content area lists four LP matches with their scores and match types:

- CalPERS** (Excellent Match): Score 92. Public Pension | \$450B AUM | Sacramento, CA. Status: Shortlisted. Buttons: Why this match? and + Shortlist.
- Yale Endowment** (Strong Match): Score 88. Endowment | \$41B AUM | New Haven, CT. Status: Not yet shortlisted. Buttons: Why this match? and + Shortlist.
- Texas Teachers** (Good Match): Score 76. Public Pension | \$180B AUM | Austin, TX. Status: Not yet shortlisted. Buttons: Why this match? and + Shortlist.
- Ford Foundation** (Moderate Match): Score 65. Foundation | \$16B AUM | New York, NY. Status: Not yet shortlisted. Buttons: Why this match? and + Shortlist.

At the bottom of the list is a button labeled "Load More (41 remaining)".

# Match Analysis

AI insights and talking points

The screenshot displays the LPxGP Match Analysis interface. At the top, there's a navigation bar with 'LPxGP' and links to 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the navigation is a breadcrumb trail: 'Funds / Growth Fund III / Matches / CalPERS Analysis'. The main content area features a summary card for 'CalPERS x Growth Fund III' with a score of 92, labeled 'Match Analysis & AI Insights'. It includes a 'Generate Pitch' button and an 'Add to Shortlist' button. Below this is a 'Score Breakdown' section with four categories: 'Strategy Fit' (95), 'Size Match' (90), 'Geography' (92), and 'Thesis Alignment' (88). A detailed 'AI Match Analysis' section follows, listing reasons why CalPERS is a strong match, such as strategy alignment, fund size fit, track record, and ESG commitment. Another section, 'Points to Consider', lists competition, diligence timeline, and co-investment. Finally, a 'Suggested Talking Points' section provides three pre-written scripts for pitch decks.

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

**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.

**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** Copy  
"Our Fund I has achieved a 28.5% net IRR through disciplined growth investing in technology-enabled businesses, significantly exceeding the median PE benchmark."
- Value Creation Story** Copy  
"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."
- ESG Commitment** Copy  
"We integrate ESG considerations across our investment process, with 100% of portfolio companies implementing governance best practices within 12 months of investment."

# Pitch Generator

AI-powered outreach content

The screenshot shows the LPxGP platform's Outreach section, specifically the 'Generate Pitch' feature. On the left, the 'Pitch Settings' sidebar includes fields for 'Target LP' (CalPERS, Score: 92), 'Fund' (Growth Fund III), 'Content Type' (Outreach Email selected), 'Tone' (Professional & Formal), and 'Key Points to Emphasize' (Track record, Team experience checked). A large blue button at the bottom says 'Generate Pitch'. On the right, the generated outreach email is displayed. It has a green checkmark icon and the text 'Generated Outreach Email'. Below it are 'Regenerate' and 'Copy to Clipboard' buttons. A yellow warning box states: 'Human review required: AI-generated content should be reviewed and personalized before sending.' The email itself is addressed to Michael Smith, Managing Investment Director at Acme Capital Growth Fund III - Investment Opportunity. The body of the email discusses the fund's performance, strategic interest in growth equity managers, and a request for a meeting. At the bottom, it shows the source: 'Generated by Claude via OpenRouter • Based on CalPERS mandate analysis'.

# Shortlist

LPs ready for outreach

The screenshot shows the LPxGP software interface for managing LPs. At the top, there's a navigation bar with links for LPxGP, Dashboard, Funds, Search, and Outreach. On the far right, it shows "Acme Capital" and a user icon labeled "JP". Below the navigation is a breadcrumb trail: Funds / Growth Fund III / Shortlist. To the right of the trail are two buttons: "Export List" and "Batch Generate Pitches".

The main area is titled "Shortlist" and subtitle "Growth Fund III - 12 LPs ready for outreach". Below this, there are four filter buttons: "All (12)", "To Contact (7)", "Contacted (3)", and "Meeting Set (2)".

The main content is a table with the following columns: LP, TYPE, SCORE, STATUS, NOTES, and ACTIONS. The table lists six LPs:

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

At the bottom left, it says "Showing 1-5 of 12". At the bottom right, there are navigation buttons for "Previous", "1", "2", "3", and "Next".

# Outreach Hub

## Activity tracking and pipeline

The screenshot displays the LPxGP Outreach Hub interface. At the top, there is a navigation bar with tabs: LPxGP, Dashboard, Funds, Search, and Outreach (which is currently selected). To the right of the navigation bar are user details: Acme Capital and a profile icon labeled JP.

**Outreach Hub**

Manage LP communications across all funds

**Recent Activity**

	Action	Time Ago
<span style="color: green;">🕒</span>	Meeting scheduled with Yale Endowment January 15, 2025 at 2:00 PM EST Growth Fund III	2 hours ago
<span style="color: blue;">✉️</span>	Email sent to CalPERS (Michael Smith) Growth Fund III	Yesterday
<span style="color: purple;">📅</span>	Pitch generated for Ontario Teachers Growth Fund III	2 days ago
<span style="color: orange;">➕</span>	Added 3 LPs to shortlist 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

**Needs Follow-up**

Entity	Days
Ontario Teachers	5 days
CalPERS	3 days
CPPIB	7 days

## Settings - Profile

### User profile settings

The screenshot shows the LPxGP Settings - Profile page. At the top, there is a navigation bar with links for Dashboard, Funds, Search, Outreach, and a user icon for Acme Capital (JP). On the left, a sidebar titled "Settings" has a "Profile" tab selected, along with Team, Company, Notifications, and Security tabs.

The main content area is titled "Profile Settings". It includes a circular profile picture placeholder with "JP" and a "Change Photo" button. Below it are fields for First Name ("John") and Last Name ("Partner"). There is also an Email field containing "john@acmecapital.com" with a note below it: "Contact support to change your email address". A Title field contains "Managing Partner". A Phone field contains "+1 (555) 123-4567". A Bio field contains "20+ years of private equity experience focused on growth investments in technology and healthcare sectors." Below the bio is a "Brief description for your profile" input field, which is currently empty.

At the bottom right of the main form are "Cancel" and "Save Changes" buttons. Below the main form is a red-bordered "Danger Zone" section with a "Delete Account" link and a note: "Permanently remove your account and all data".

## Settings - Team

Team member management

The screenshot shows the LPxGP Settings - Team interface. At the top, there's a navigation bar with 'LPxGP' and links to 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon 'JP'. The main area has a sidebar titled 'Settings' with 'Profile', 'Team', 'Company', 'Notifications', and 'Security' options.

**Team Members**

Manage who has access to Acme Capital

+ Invite Member

Avatar	Name	Role	Action
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 Invited 2 days ago	Pending	Resend	Cancel
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**Role Permissions**

<b>Admin</b>	<b>Member</b>
<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>

## Super Admin Screens

10 screens - Platform administration and data management

# Admin Dashboard

Platform overview and health

The screenshot displays the LPxGP Admin Dashboard with the following key components:

- Top Navigation Bar:** LPxGP ADMIN, Dashboard, Companies, Users, People, LPs, Data Quality, Super Admin SA.
- Platform Dashboard Section:** Overview of LPxGP platform activity. It includes four cards:
  - 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 Section:** Lists three items:
  - 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 Section:** Monitors system status across various services:
  - Database, Supabase Auth, OpenRouter API, Voyage AI: All marked as Healthy.
  - Last checked: 30 seconds ago.
- Recent Platform Activity Section:** Lists recent events:
  - 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

Bottom navigation bar: UX Flow: Super Admin, Dashboard, Companies, Users, People, LPs, Data Quality, Health, ... All Screens.

# Companies

Manage GP firms on platform

The screenshot shows the LPxGP product interface for managing GP firms. The top navigation bar includes links for LPxGP (ADMIN), Dashboard, Companies (which is the active tab), Users, People, LPs, and Data Quality. On the far right, it shows "Super Admin" and a "SA" icon. Below the navigation is a search bar with placeholder text "Search companies..." and a dropdown filter for "All Status". A prominent blue button on the right says "+ Add Company". The main content area displays a table of company data:

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

Below the table, a message says "Showing 1-4 of 25". To the right are navigation buttons for "Previous", page numbers 1, 2, 3, and "Next". At the bottom of the page, there's a footer with links for UX Flow, Super Admin, and All Screens.

# Company Detail

## Company users and funds

The screenshot shows the LPxGP product interface for managing company details. At the top, there's a navigation bar with tabs for Dashboard, Companies (which is active), Users, People, LPs, and Data Quality. A Super Admin user is logged in.

The main content area displays the following information:

- Company Overview:** Shows the company logo (AC), name (Acme Capital - Active), and location (Private Equity | San Francisco, CA). It includes buttons for "Edit Company" and "Deactivate".
- Users:** Shows 4 users listed under the "Users" section. Each user has a profile picture, name, email, role (Admin or Member), and status (Active).
- Funds:** Shows two funds: "Growth Fund III" and "Growth Fund II". Each fund has a brief description and the number of matches (45 and 52 respectively).
- Company Details:** Includes sections for Created (December 1, 2024), Strategy (Private Equity - Growth), Location (San Francisco, CA), and Website (acmecapital.com).
- Activity:** Shows recent activity: Last login (2 hours ago), Searches (30d) (127), and Pitches (30d) (23).
- Admin Actions:** Includes links for View Audit Log and Reset Company Data.

At the bottom, there's a footer with UX Flow: Super Admin, a navigation bar with links to Dashboard, Companies, Users, People, LPs, Data Quality, Health, and All Screens, and a link to View Audit Log.

# Users

All platform users

**Users**  
All platform users across companies

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

Showing 1-4 of 156 users

Previous 1 2 3 Next

UX Flow: Super Admin

Dashboard Companies **Users** People LPs Data Quality Health

.. All Screens

# People

LP contacts database

LPxGP ADMIN

Dashboard Companies Users People LPs Data Quality

Super Admin SA

## People

LP contacts and investment professionals in the database

Search by name, title, or organization...

All Organizations

Filter

NAME	TITLE	ORGANIZATION	EMAIL	DATA QUALITY	ACTIONS
MS Michael Smith	Managing Investment Director, PE	CalPERS	m.smith@calpers.ca.gov	High	Edit →
JC Jennifer Chen	Investment Director, Growth Equity	CalPERS	j.chen@calpers.ca.gov	High	Edit →
DS David Swensen	Chief Investment Officer	Yale Endowment	Not available	Medium	Edit →
RW Robert Wilson	Sr. Portfolio Manager	Harvard Management	rwilson@hmc.harvard.edu	High	Edit →

Showing 1-4 of 8,234 people

Previous 1 2 3 Next

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality Health

.. All Screens

# LPs

Institutional investor database

The screenshot shows the LPxGP LP Database interface. At the top, there is a navigation bar with links for Dashboard, Companies, Users, People, LPs (which is the active tab), and Data Quality. On the far right of the navigation bar, it says "Super Admin" and has a "SA" icon. Below the navigation bar, there is a section titled "LP Database" with a sub-section "5,247 institutional investors". This section includes five summary boxes: "Total LPs 5,247", "Pensions 1,245", "Endowments 892", "Family Offices 2,156", and "Other 954". There are also buttons for "Import LPs" and "+ Add LP". Below these summary boxes is a search bar with placeholder text "Search LPs..." and several filter dropdowns for "All Types", "All Regions", "Data Quality", and a "Filter" button. The main content area is a table listing four LP entries:

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

At the bottom of the table, it says "Showing 1-4 of 5,247 LPs" and has a page navigation with buttons for "Previous", "1", "2", "3", and "Next".

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality Health

.. All Screens

# Edit LP

LP data management form

The screenshot shows the LPxGP application interface for editing a Limited Partner (LP) record. The top navigation bar includes links for LPxGP (ADMIN), Dashboard, Companies, Users, People, LPs (selected), Data Quality, and Super Admin (SA). The current page is 'LPs / CalPERS'. The main content area is titled 'Edit LP: CalPERS' and indicates it was last updated 2 weeks ago. A green 'High Quality' badge is present. The form is divided into sections: '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); and 'Data Quality' (Quality Score: High, Source: Public filings, website). At the bottom are buttons for 'Delete LP', 'Cancel', and a prominent 'Save Changes' button.

# Data Quality

Quality monitoring and issues

The screenshot shows the LPxGP Data Quality dashboard. At the top, there's a navigation bar with 'LPxGP' and 'ADMIN' on the left, and 'Super Admin SA' on the right. Below the navigation is a section titled 'Data Quality' with the subtitle 'Monitor and improve LP database quality'. This section includes four cards: 'OVERALL SCORE' (78%, green), 'HIGH QUALITY' (3,124, 60% of LPs), 'MEDIUM QUALITY' (1,523, 29% of LPs), and 'LOW QUALITY' (600, 11% of LPs). Below these cards is a 'Data Issues to Review' section containing three items: 'Duplicate LP detected' (CalPERS and California PERS may be the same entity, flagged by system 2 hours ago), 'Missing AUM data' (15 LPs have no AUM information, detected during import yesterday), and 'User-submitted correction' (Yale Endowment AUM outdated - should be \$42B not \$41B, submitted by john@acmecapital.com 3 days ago). Each item has 'Ignore' and 'Merge' buttons. A 'View All Issues →' link is at the bottom. To the right is a 'Quality by Field' section with five bars: Name (100%), Type (98%), AUM (72%), Mandate (65%), and Contacts (45%). Below this is an 'Actions' section with 'Run Duplicate Detection' and 'Export Quality Report' buttons. At the very bottom is a footer with links for UX Flow, Super Admin, Dashboard, Companies, Users, People, LPs, Data Quality, Health, and a 'All Screens' link.

# Import Wizard

## CSV import tool

The screenshot shows the 'Map CSV Fields' step of the Import Wizard. The top navigation bar includes 'LPxGP ADMIN', 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (which is the active tab), and 'Data Quality'. On the far right, it shows 'Super Admin SA'. The breadcrumb path 'LPs / Import Wizard' is at the top left. A progress bar at the top indicates steps 1 through 4: 'Upload' (green checkmark), 'Map Fields' (blue circle, currently active), 'Preview' (grey circle), and 'Import' (grey circle).

**Map CSV Fields**

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

File: lp\_database\_export\_2024.csv 500 rows x 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 %

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality Health .. All Screens

internal\_notes — Skip —

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

.. Back Preview Import ..

# System Health

Services and integrations status

The screenshot shows the LPxGP System Health dashboard. At the top, there's a navigation bar with 'LPxGP ADMIN' and links for Dashboard, Companies, Users, People, LPs, Data Quality, System (selected), Super Admin, and SA.

**System Health** section: A summary message 'All systems operational' with a green dot icon. Below it are four cards for different services:

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

**Recent System Events** section: A table of recent events with columns for icon, event name, details, and timestamp.

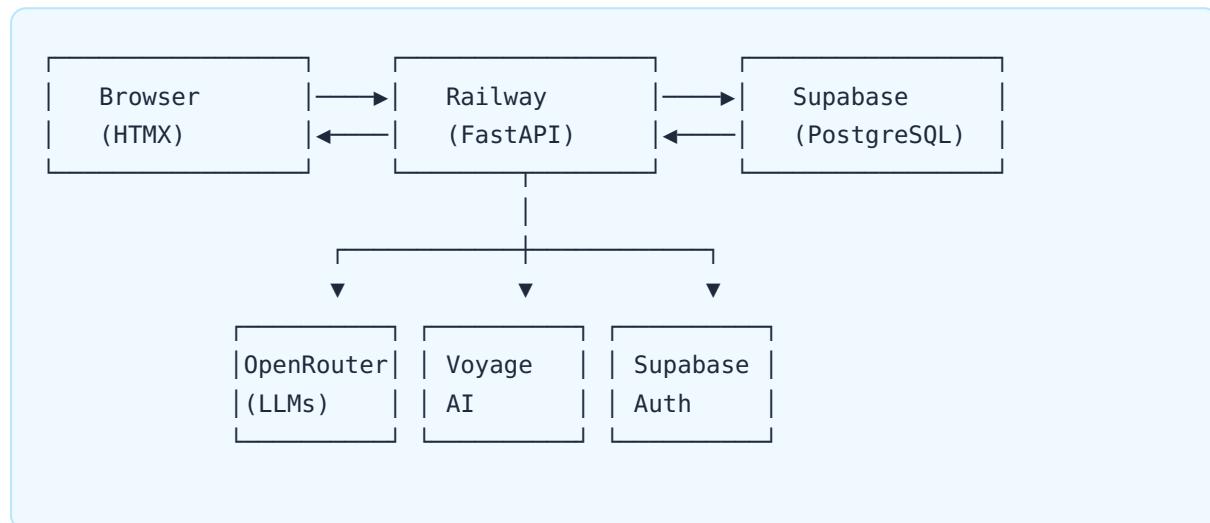
<span>green checkmark</span>	LP import completed successfully	500 records processed, 498 imported, 2 duplicates skipped	2 hours ago
<span>blue circular arrow</span>	Embedding regeneration completed	5,247 LP embeddings updated for semantic search	Yesterday
<span>orange triangle</span>	OpenRouter rate limit approached	80% of daily limit reached, consider upgrading	2 days ago

At the bottom, there's another navigation bar with 'UX Flow: Super Admin' and links for Dashboard, Companies, Users, People, LPs, Data Quality, and Health (selected).

# 5. Technical Architecture

## System Overview

LPxGP is built as a modern web application with the following architecture:



## Technology Stack

Layer	Technology	Purpose
Backend	Python + FastAPI	API server and business logic
Frontend	Jinja2 + HTMX + Tailwind	Server-rendered UI with dynamic updates
Database	Supabase (PostgreSQL)	Data storage with pgvector for embeddings
Auth	Supabase Auth	Invite-only authentication with RLS
LLM	OpenRouter (Claude)	Pitch generation and analysis
Embeddings	Voyage AI	Semantic search for LP matching
Hosting	Railway	Auto-deploy from GitHub

## Security Model

- **Invite-Only Access:** Users can only join via company admin invitation

- **Row-Level Security:** Database policies ensure users only see their company's data
- **Role-Based Access:** Company Admins vs Members vs Super Admins
- **Human-in-the-Loop:** All AI-generated content requires review before use

## 6. Milestones

LPxGP is developed in six milestones, each delivering independently demoable functionality:

Milestone	Focus	Key Deliverables
<b>M0</b>	Foundation	Project setup, data model, LP import pipeline
<b>M1</b>	Auth + Search	Supabase Auth, basic LP search, Railway deployment
<b>M2</b>	Semantic Search	Voyage AI embeddings, pgvector similarity search
<b>M3</b>	Matching	Fund profiles, LP matching algorithm, score explanations
<b>M4</b>	Pitch Generation	OpenRouter integration, AI summaries, email drafts
<b>M5</b>	Production	Admin panel, data quality, monitoring, polish

**Current Status:** Ready for Milestone 0 implementation