



GP-LP Intelligence Platform

AI-powered investor matching and outreach
for fund managers

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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
LP Database	Searchable database of 5,000+ institutional investors with mandates, AUM, allocation targets, and key contacts	Hours of research condensed into seconds
Semantic Search	Natural language search that understands investment concepts, not just keywords	Find relevant LPs even with imprecise queries
AI Matching	Automatically rank LPs by fit score based on strategy, size, geography, and thesis alignment	Focus on highest-probability targets first
Match Explanations	AI-generated insights explaining why an LP is a good fit and what concerns to address	Walk into meetings fully prepared
Pitch Generation	Create personalized outreach emails, executive summaries, and talking points for each LP	Personalization at scale without the time cost
Pipeline Tracking	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
LLM Score	35%	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	Key early predictor
2	Meeting scheduled	Weeks	Strong quality signal
3	Due diligence started	2-6 months	Deal progression
4	Commitment made	6-18 months	Ground truth

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.

The screenshot shows the LPxGP login interface. On the left, there's a dark sidebar with the LPxGP logo and a tagline: "Find the right LPs for your fund." Below that, it says "AI-powered matching and outreach tools to help fund managers connect with institutional investors efficiently." At the bottom of the sidebar, it includes a copyright notice: "© 2024 LPxGP. All rights reserved."

The main content area has a header "Sign in" 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 large blue "Sign in" button is at the bottom of the form. Below the form, a link reads "Don't have an account? Contact us for access."

At the very bottom of the page, a navigation bar shows the UX flow: "Login" -> "Dashboard" | "Forgot Password" -> "Reset Password" -> "Login". There are also links for "All Screens" and "Logout".

Accept Invitation

New user onboarding

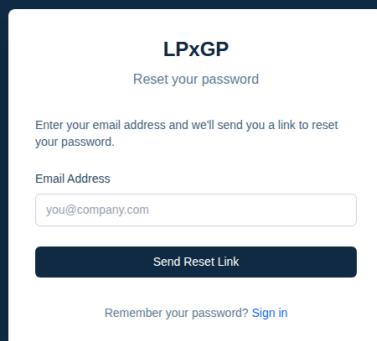
This screen appears when a user clicks an invitation link from their email. Since LPxGP is invite-only, this is the only way to create an account. Users set their password and confirm their details. The invitation token is validated server-side to ensure security. Expired or already-used tokens show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

The screenshot shows the 'Accept Invitation' page. On the left, there's a dark sidebar with the LPxGP logo, 'GP-LP Intelligence Platform', and two bullet points: '✓ You've been invited to join Acme Capital' and '✓ Complete your account setup below'. The main content area starts with 'You're joining' followed by the Acme Capital logo (AC) and name. It then displays the invitation details: 'Invitation sent to: john.partner@acmecap.com'. Below this are input fields for 'Full Name' (containing 'John Partner'), 'Create Password' (containing '*****'), and 'Confirm Password' (containing '*****'). A checkbox labeled 'I agree to the Terms of Service and Privacy Policy' is present, which is unchecked. At the bottom right is a large blue button labeled 'Accept Invitation'. Below the main form, there's a link 'Already have an account? Sign in' and a footer navigation bar with 'UX Flow', 'Email Invitation -> Accept Invitation -> Dashboard', and '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.



The screenshot shows a modal window titled "LPxGP" with the sub-header "Reset your password". The main instruction reads: "Enter your email address and we'll send you a link to reset your password." Below this is an "Email Address" input field containing "you@company.com". A "Send Reset Link" button is centered below the input field. At the bottom of the modal, there is a 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

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 screenshot shows a white rectangular form on a dark background. At the top center is the LPxGP logo. Below it is the text "Create new password". A green callout box contains the message "Email verified. Create your new password below." The form has two input fields: "New Password" and "Confirm New Password", both containing placeholder text "*****". Below these fields is a "Reset Password" button. At the bottom of the form is a blue "Back to sign in" link. At the very bottom of the page, centered, is the copyright notice "© 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.

The screenshot shows the LPxGP Dashboard interface. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search, Outreach, and a user profile for Acme Capital (JP). Below the navigation bar is a section titled "Dashboard" with a welcome message "Welcome back, John".

The main content area is divided into several sections:

- Key Metrics:** Four cards showing "ACTIVE FUNDS" (3, +1 this quarter), "TOTAL MATCHES" (127, across all funds), "SHORTLISTED" (34, LPs for outreach), and "MEETINGS" (8, +3 this month).
- Your Funds:** A grid of three fund cards:
 - Growth Fund III:** Raising, Private Equity - Growth, Target Size \$500M, Matches 45, Shortlisted 12. Action: View Details →
 - Growth Fund II:** Investing, Private Equity - Growth, Fund Size \$350M, Vintage 2021, Deployed 72%. Action: View Details →
 - Growth Fund I:** Harvesting, Private Equity - Growth, Fund Size \$200M, Vintage 2017, Net IRR 28.5%. Action: View Details →
- Recent Activity:** A list of recent events:
 - Generated pitch for CalPERS Growth Fund III (2 hours ago)
 - Added Harvard Endowment to shortlist Growth Fund III (Yesterday)
 - UX Flow: GP User (match scores updated for 12 LPs) (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.

The screenshot shows the LPxGP interface for managing funds. At the top, there is a navigation bar with tabs: Dashboard, Funds (which is selected), Search, and Outreach. On the right side of the header, it shows "Acme Capital" and a user icon labeled "JP".

The main content area is titled "Your Funds" and includes a subtitle "Manage fund profiles and view LP matches". There is a button labeled "+ New Fund" in the top right corner of this section.

Below this, there are three fund cards, each with a title, status, target size, and some metrics:

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

At the bottom left, there is a dashed box containing a plus sign (+) and the text "Create New Fund" followed by "Set up a fund profile to find matching LPs".

At the very bottom of the page, there is a footer with links: "UX Flow: GP User", "Dashboard", "Funds" (selected), "Search", "Matches", "Outreach", and "... 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.

The screenshot displays the LPxGP Fund Detail interface. At the top, there's a navigation bar with links for Dashboard, Funds, Search, and Outreach. On the right, it shows "Acme Capital" and a user icon. Below the navigation is a breadcrumb trail: Funds / Growth Fund III. The main content area is divided into several sections:

- Growth Fund III** (Raising): This section includes a "Edit Fund" button and a "View Matches" button.
- Fund Overview**: Shows Target Size (\$500M), Target Close (Q2 2025), Geography Focus (North America), Sector Focus (Technology, Healthcare), Check Size (\$25M - \$75M), and Stage (Growth / Expansion).
- Matching Stats**: Displays Total Matches (45), High Score (80+) (12), Shortlisted (8), Contacted (5), and a "View All Matches" button.
- Investment Thesis**: Describes the fund's focus on technology-enabled businesses in the upper mid-market segment, mentioning revenue ranges (\$50M-\$200M) and growth strategies like M&A and market expansion. It also highlights value-add operational support and access to a network of industry executives and potential customers.
- Quick Actions**: Includes links for "Generate LP Pitch", "Export Fund Summary", and "Refresh Matches".
- Track Record**: Shows key performance metrics: Gross MOIC (Fund II) at 2.3x, Net IRR (Fund I) at 28.5%, 18 Portfolio Companies, and \$550M 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.

The screenshot shows the LPxGP application interface for creating a new fund profile. The top navigation bar includes links for Dashboard, Funds, Search, and Outreach, along with a user profile for 'Acme Capital' and 'JP'. The main content area is titled 'Create Fund Profile' and contains several sections for inputting fund details:

- Basic Information:** Fields for 'Fund Name *' (e.g., Growth Fund III), 'Strategy *' (Private Equity - Growth), and 'Status *' (Raising).
- Fund Size & Timeline:** Fields for 'Target Size *' (\$ 500M) and 'Target Close' (Q2 2025). Below these are 'Min Check Size' (\$ 25M) and 'Max Check Size' (\$ 75M).
- Investment Focus:** Fields for 'Geography *' (North America) and 'Stage Focus' (Growth / Expansion).
- Investment Thesis:** A text area for describing the investment strategy, with a note: "What types of companies do you invest in? What is your value-add approach? What makes your fund unique?" Below this, a smaller note states: "This will be used for AI matching with LP mandates".

At the bottom right of the form are 'Cancel' and 'Create Fund' buttons. The bottom navigation bar includes links for Dashboard, Funds, Create Fund, Matches, and Outreach, along with a link to 'All Screens'.

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.

The screenshot shows the LPxGP interface with the 'Search' tab selected. The search bar contains 'technology growth equity'. The results table displays 247 LPs found, sorted by AUM (High to Low). The columns include NAME, TYPE, LOCATION, AUM, and ACTIONS (View + Shortlist). The results list includes CalPERS, Yale Endowment, Harvard Management, Ford Foundation, and Texas Teachers. The sidebar on the left contains filters for LP Type (Pension, Endowment, Foundation, Family Office, Sovereign Wealth), AUM Range (\$1B to Max), Geography (North America), and Invests In (Private Equity, Venture Capital, Real Estate). A 'Clear Filters' button is also present. The bottom navigation bar includes links for Dashboard, Funds, Matches, Outreach, and All Screens.

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

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.

The screenshot shows the LPxGP interface for the CalPERS LP profile. At the top, there is a navigation bar with links for Dashboard, Funds, Search, Outreach, and a user icon for Acme Capital (JP). Below the navigation is a search bar showing 'Search / CalPERS'. The main content area is divided into several sections:

- LP Profile:** Displays the CalPERS logo, name, and description ('California Public Employees' Retirement System'). It also shows 'Public Pension' and 'Sacramento, CA'. Buttons for '+ Add to Shortlist' and 'Generate Pitch' are present.
- Overview:** Shows Total AUM (\$450B), PE Allocation (13%), and Est. PE Commitment (\$58.5B).
- Investment Mandate:** Details TARGET RETURN (Net IRR 11%+), PREFERRED CHECK (\$100M - \$500M), GEOGRAPHY (North America, Europe), and SECTORS (Diversified).
- Match Score:** A large green circle indicates a score of 92, labeled 'Excellent Match'. Below it, a table compares Strategy Alignment (Strong), Size Fit (Good), Geography (Match), and ESG Focus (Aligned) against a baseline.
- Actions:** Buttons for 'Generate Email Draft' and 'Create LP Summary'.
- UX Flow:** A sidebar on the left shows the 'UX Flow: GP User' path: UX Flow → GP User → Michael Smith → Jennifer Chen. On the right, there are buttons for 'Flag Data Issue' and 'All Screens'.
- Data Quality:** Shows a 'High' quality rating with a note: 'Last updated: 2 weeks ago'.

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.

The screenshot displays the LPxGP product interface, specifically the 'Matches' section for a fund. At the top, there's a navigation bar with links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right side of the header, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the header, the breadcrumb navigation shows 'Funds / Growth Fund III / Matches'. The main title 'LP Matches' is centered above a summary row containing four boxes: 'Total Matches 45', 'Avg Score 72', 'Shortlisted 12', and 'Contacted 8'. There are four match cards listed below:

- CalPERS** (Excellent Match): Score 92. Public Pension | \$450B AUM | Sacramento, CA. Alignment: ✓ Strategy aligned, ✓ ESG aligned, ✓ Size fit. Buttons: 'Why this match?' and '+ Shortlist'.
- Yale Endowment** (Strong Match): Score 88. Endowment | \$41B AUM | New Haven, CT. Alignment: ✓ Strong PE allocation, ✓ Thesis aligned. Buttons: 'Why this match?' and '+ Shortlist'.
- Texas Teachers** (Good Match): Score 76. Public Pension | \$180B AUM | Austin, TX. Alignment: ✓ Strategy aligned, ⚡ Usually requires Fund III+. Buttons: 'Why this match?' and '+ Shortlist'.
- Ford Foundation** (Moderate Match): Score 65. Foundation | \$1.6B AUM | New York, NY. Alignment: ✓ ESG aligned, ⚡ Lower PE allocation. Buttons: 'Why this match?' and '+ Shortlist'.

At the bottom of the page, there are footer links for 'Dashboard', 'Fund', 'Matches', 'Match Detail', and 'Shortlist'. It also includes a 'UX Flow: GP User' note, a 'Load More (41 remaining)' button, and a 'All Screens' link.

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.

The screenshot displays the LPxGP Match Analysis interface. At the top, there's a navigation bar with 'LPxGP' and links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a breadcrumb trail: 'Funds / Growth Fund III / Matches / CalPERS Analysis'. The main content area starts with 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 a '+ Add to Shortlist' link. Below this is a 'Score Breakdown' section with four cards: 'Strategy Fit' (95), 'Size Match' (90), 'Geography' (92), and 'Thesis Alignment' (88). The next section is 'AI Match Analysis' with a heading 'Why This Is a Strong Match'. It lists several key factors: Strategy alignment, Fund size fit, Track record, and ESG commitment. The final section is 'Suggested Talking Points' with three items: 'Track Record Highlight', 'Value Creation Story', and 'ESG Commitment', each with a 'Copy' link.

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 shows the LPxGP Pitch Generator interface. 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; ESG commitment, Co-investment capacity unchecked). A "Generate Pitch" button is at the bottom. On the right, the main area displays the "Generated Outreach Email" with a yellow warning box: "⚠️ Human review required: AI-generated content should be reviewed and personalized before sending." The email content is addressed to Michael Smith, Managing Investment Director, with the subject "Acme Capital Growth Fund III - Investment Opportunity". The body of the email discusses Acme Capital's growth equity vehicle focused on technology-enabled businesses in North America, highlights its track record, team experience, and strategy, and concludes with a request for a call. Below the email is a footer note: "Generated by Claude via OpenRouter • Based on CalPERS mandate analysis". The top navigation bar shows tabs for Dashboard, Funds, Search, Outreach (selected), and a user profile for Acme Capital (JP).

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.

The screenshot shows the LPxGP platform's Shortlist feature. At the top, there is a navigation bar with links for Dashboard, Funds, Search, and Outreach. A user profile for "Acme Capital" is shown on the right. Below the navigation, a breadcrumb trail indicates the current location: Funds / Growth Fund III / Shortlist. The main title "Shortlist" is displayed, followed by the subtitle "Growth Fund III - 12 LPs ready for outreach". There are two buttons at the top right: "Export List" and "Batch Generate Pitches". Below this, a filter bar allows users to view "All (12)", "To Contact (7)", "Contacted (3)", or "Meeting Set (2)". The main content area is a table listing 12 LPs. Each row includes a checkbox, the LP name, its type, a score, its status, a notes column, and a "View" link. The LPs listed are CalPERS, Yale Endowment, Harvard Management, Ontario Teachers, and Texas Teachers, each with their respective details and status.

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

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.

The screenshot displays the LPxGP Outreach Hub interface. At the top, there's a navigation bar with tabs: LPxGP, Dashboard, Funds, Search, Outreach (which is currently selected), and a user profile section for Acme Capital (JP). Below the navigation is a section titled "Outreach Hub" with the sub-instruction "Manage LP communications across all funds".

Key statistics are displayed in four boxes:

- SHORTLISTED:** 34 across 3 funds
- CONTACTED:** 18 +5 this week
- MEETINGS:** 8 +3 scheduled
- RESPONSE RATE:** 44% 8 of 18 replied

The main content area is divided into two main sections: "Recent Activity" and "Quick Actions".

Recent Activity: A list of recent interactions:

- Meeting scheduled with Yale Endowment (January 15, 2025 at 2:00 PM EST, Growth Fund III)
- Email sent to CalPERS (Michael Smith) (Yesterday, Growth Fund III)
- Pitch generated for Ontario Teachers (Growth Fund III)
- Added 3 LPs to shortlist (Growth Fund III)

 A "View All Activity" link is also present.

Quick Actions: A panel containing links to generate batch pitches, export the shortlist to CSV, and view all meetings.

Upcoming Meetings: A list of meetings:

- Yale Endowment Jan 15, 2:00 PM
- Stanford Endowment Jan 18, 10:00 AM

At the bottom, there's a "Needs Follow-up" section with three items:

- Ontario Teachers (5 days)
- CalPERS (3 days)
- CPPIB (7 days)

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 Dashboard Funds Search Outreach Acme Capital JP

Settings

- Profile
- Team
- Company
- Notifications
- Security

Profile Settings

First Name: John

Last Name: Partner

Email: john@acmecapital.com

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

Danger Zone

Delete Account
Permanently remove your account and all data

UX Flow: GP User Dashboard | Settings: Profile Team ... All Screens

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 Team Settings interface. At the top, there's a navigation bar with 'LPxGP' and links for 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 options: Profile, Team (selected), Company, Notifications, and Security. The 'Team' section contains a 'Team Members' table with three rows:

	Name	Email	Role	Action
	John Partner	john@acmecapital.com	Admin	You
	Sarah Johnson	sarah@acmecapital.com	Member	Edit
	Mike Chen	mike@acmecapital.com	Member	Edit

Below this is a 'Pending Invitations' section with one entry:

	Email	Last Action	Actions
	emily@acmecapital.com	Invited 2 days ago	Pending Resend Cancel

The final section is 'Role Permissions' comparing Admin and Member roles:

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

At the bottom, a footer bar includes 'UX Flow: GP User', 'Dashboard | Profile | Settings: Team', and '... All Screens'.

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.

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 <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> Database ● Healthy Supabase Auth ● Healthy OpenRouter API ● Healthy Voyage AI ● Healthy <p>Last checked: 30 seconds ago</p>										
Recent Platform Activity <table border="1"> <tbody> <tr> <td>2 hours ago</td> <td>New company Beta Ventures created</td> <td>View All</td> </tr> <tr> <td>5 hours ago</td> <td>User jane@acme.com joined Acme Capital</td> <td></td> </tr> <tr> <td>Yesterday</td> <td>LP import completed: 500 records added</td> <td></td> </tr> </tbody> </table>				2 hours ago	New company Beta Ventures created	View All	5 hours ago	User jane@acme.com joined Acme Capital		Yesterday	LP import completed: 500 records added	
2 hours ago	New company Beta Ventures created	View All										
5 hours ago	User jane@acme.com joined Acme Capital											
Yesterday	LP import completed: 500 records added											

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.

The screenshot shows the LPxGP Companies page. At the top, there's a navigation bar with tabs: Dashboard, Companies (which is active), Users, People, LPs, and Data Quality. On the far right of the bar, it says "Super Admin" and has a "SA" icon. Below the navigation is a header with the title "Companies" and a subtitle "Manage GP firms on the platform". To the right of the subtitle is a button labeled "+ Add Company". Underneath is a search bar with placeholder text "Search companies..." and a dropdown menu set to "All Status". There's also a "Filter" button. The main content area is a table with the following columns: COMPANY, ADMIN, USERS, FUNDS, STATUS, CREATED, and ACTIONS. The table contains four rows of data:

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

At the bottom left of the table area, it says "Showing 1-4 of 25". To the right, there are navigation buttons for "Previous", "1" (which is highlighted in dark blue), "2", "3", and "Next".

At the very bottom of the page, there's a footer with links: "UX Flow: Super Admin", "Dashboard", "Companies", "Users", "People", "LPs", "Data Quality", "Health", and "... 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).

The screenshot shows the LPxGP interface for managing a company named "Acme Capital". The top navigation bar includes links 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 company's profile: "Acme Capital" (Active), "Private Equity | San Francisco, CA". It shows key metrics: 4 Users, 3 Funds, and 127 Matches. Below this, there are sections for "Users", "Funds", and "Activity".

- Users:** Shows three users: John Partner (Admin, Active), Sarah Johnson (Member, Active), and Mike Chen (Member, Active). There is a "+ Invite User" button.
- Funds:** Shows two funds: "Growth Fund III" (\$500M target + Raising) with 45 matches, and "Growth Fund II" (\$350M + Investing) with 52 matches.
- Activity:** Shows recent activity: Last login 2 hours ago, Searches (30d) 127, and Pitches (30d) 23.
- Company Details:** Includes fields for Created (December 1, 2024), Strategy (Private Equity - Growth), Location (San Francisco, CA), and Website (acmecapital.com).
- Admin Actions:** Includes links for View Audit Log and Reset Company Data.

At the bottom, a footer bar shows UX Flow: Super Admin, with links for Dashboard, Companies, Users, People, LPs, Data Quality, and Health. It also includes a "... All Screens" link.

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.

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 Edit
SJ Sarah Johnson sarah@acmecapital.com	Acme Capital	Member	● Active	Yesterday	Impersonate Edit
SD Sarah Davis sarah@delitacap.com	Delta Capital	Admin	● Active	3 days ago	Impersonate Edit
emily@acmecapital.com Invitation pending	Acme Capital	Member	● Pending	—	Resend Cancel

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

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.

The screenshot shows the LPxGP People screen. At the top, there is a navigation bar with links for Dashboard, Companies, Users, People (which is highlighted in blue), LPs, and Data Quality. On the far right of the navigation bar, it says "Super Admin" and has a "SA" badge. Below the navigation bar, the title "People" is displayed, followed by the subtitle "LP contacts and investment professionals in the database". There are two buttons: "Import" and "+ Add Person". A search bar contains the placeholder "Search by name, title, or organization...". To the right of the search bar are buttons for "All Organizations" (with a dropdown arrow) and "Filter". The main area is a table listing four contacts:

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

At the bottom left, it says "Showing 1-4 of 8,234 people". At the bottom right, there are navigation buttons for "Previous", page numbers "1", "2", "3", and "Next".

At the very bottom of the screenshot, there is a footer with links for "UX Flow: Super Admin", "Dashboard", "Companies", "Users", "People" (highlighted in blue), "LPs", "Data Quality", "Health", and "... 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.

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

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.

The screenshot shows the LPxGP Admin interface with the 'Edit LP' page open. The top navigation bar includes 'LPxGP' (with an ADMIN badge), 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (selected), 'Data Quality', and 'Super Admin SA'. The page title is 'Edit LP: CalPERS' with a 'Last updated: 2 weeks ago' timestamp. A green 'High Quality' badge is visible in the top right corner. The main 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); and '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). At the bottom, there are buttons for 'Delete LP', 'Cancel', and '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.

Overall Score: 78% (Green)

High Quality: 3,124 (60% of LPs)

Medium Quality: 1,523 (29% of LPs)

Low Quality: 600 (11% of LPs)

Data Issues to Review:

- Duplicate LP detected: "CalPERS" and "California PERS" may be the same entity. Flagged by system • 2 hours ago. Actions: Ignore, Merge.
- Missing AUM data: 15 LPs have no AUM information. Detected during import • Yesterday. Action: Review.
- User-submitted correction: Yale Endowment AUM outdated - should be \$42B not \$41B. Submitted by john@acme-capital.com • 3 days ago. Actions: Reject, Accept.

View All Issues →

Quality by Field:

Field	Percentage
Name	100%
Type	98%
AUM	72%
Mandate	65%
Contacts	45%

Actions:

- Run Duplicate Detection
- Export Quality Report

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.

The screenshot shows the 'Map Fields' step of the Import Wizard. At the top, a navigation bar includes 'LPxGP' and 'ADMIN' buttons, followed by links for Dashboard, Companies, Users, People, LPs (which is the active tab), and Data Quality. On the far right, it shows 'Super Admin' and a 'SA' badge. Below the navigation is a breadcrumb trail: 'LPs / Import Wizard'. The main area has a progress bar with four steps: 'Upload' (green checkmark), 'Map Fields' (blue circle with '2'), 'Preview' (grey circle with '3'), and 'Import' (grey circle with '4').

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 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.

The screenshot shows the LPxGP System Health dashboard. At the top, there's a navigation bar with links for Dashboard, Companies, Users, People, LPs, Data Quality, and Health. On the far right, it shows 'System' (highlighted), Super Admin, and a user icon labeled 'SA'. Below the navigation is a section titled 'System Health' with the subtitle 'Monitor platform status and integrations'. A green circular icon indicates 'All systems operational'. The main area contains four cards: 'Supabase PostgreSQL' (Primary database, healthy, response 12ms, connections 8/100, storage 2.4GB), 'Supabase Auth' (Authentication service, healthy, response 45ms, active sessions 24, logins 156), 'OpenRouter API' (LLM inference (Claude), healthy, response 1.2s avg, requests 89, cost \$2.34), and 'Voyage AI' (Embedding service, healthy, response 180ms, embeddings 450, vectors 5,247). Below these is a section for 'Recent System Events' with three entries: 'LP import completed successfully' (green checkmark, 500 records processed, 498 imported, 2 duplicates skipped, 2 hours ago), 'Embedding regeneration completed' (blue info icon, 5,247 LP embeddings updated for semantic search, Yesterday), and 'OpenRouter rate limit approached' (orange warning icon, 80% of daily limit reached, consider upgrading, 2 days ago). At the bottom, there's a footer with 'UX Flow: Super Admin' and links for Dashboard, Companies, Users, People, LPs, Data Quality, and Health, along with a 'All Screens' link.

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.

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Dashboard
Welcome back, John

Welcome to LPxGP!
Create your first fund to get started with LP matching and outreach.

+ Create Your First Fund

What you can do with LPxGP

- Find Matching LPs**
Our AI analyzes 10,000+ institutional investors to find the best matches for your fund strategy.
- Generate Personalized Pitches**
Create tailored executive summaries and outreach emails for each LP prospect.
- Track Your Pipeline**
Manage your shortlist, track outreach progress, and measure engagement metrics.

UX Flow: GP User (Empty State) Dashboard (Empty) | Dashboard (Active) Create Fund ... All Screens

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.

The screenshot shows the LPxGP interface with a dark header bar. The title 'Loading Matches' is prominently displayed. Below it, the sub-header 'Match generation progress' is shown. The main content area contains descriptive text about the process, a progress bar indicating completion at 68%, and a list of steps with status indicators (green checkmarks for completed steps, a grey dot for the current step, and a number for the remaining step). A 'Cancel' button is located at the bottom of the progress section. The footer includes navigation links like 'Fund', 'Loading Matches', and 'Matches (Complete)'.

API Error

Error state handling

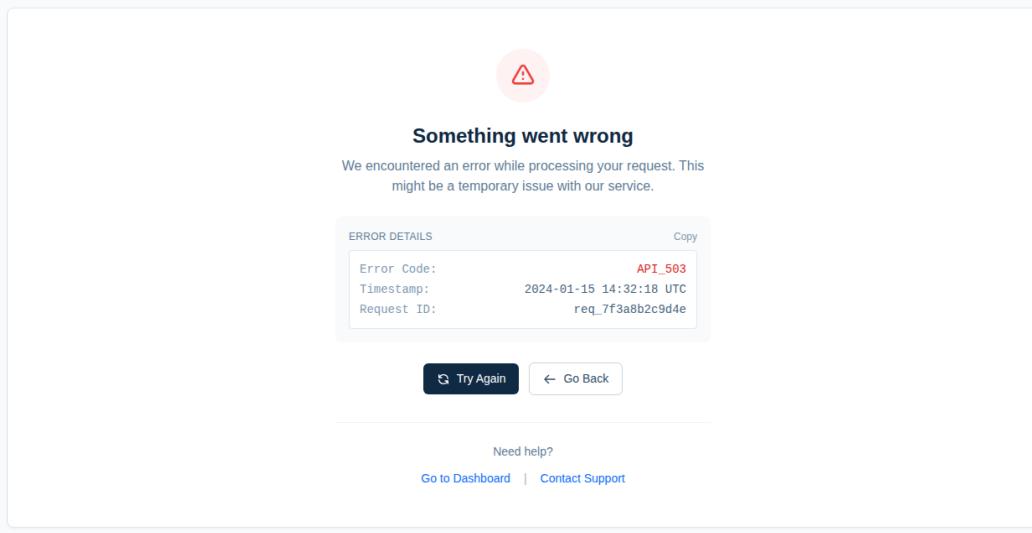
The API Error screen provides graceful error handling when something goes wrong. Instead of cryptic error messages, it shows a friendly explanation and clear next steps. A "Try Again" button attempts to retry the operation. Error details are available for technical users and support. Contact information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

LPxGP

Dashboard Funds Search Outreach

Acme Capital

JP



UX Flow: Error State

API Error | Dashboard Loading State

.. All Screens

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.

The screenshot displays the LP Dashboard interface. At the top, there's a navigation bar with 'LPxGP LP Portal' and links for 'Dashboard', 'Fund Matches', 'Preferences', and 'Profile'. A CalPERS logo with a green 'CP' monogram is also present. Below the navigation is a section titled 'LP Dashboard' with a welcome message: 'Welcome back, Sarah. Here are funds matching your mandate.' Four summary boxes are shown: 'NEW MATCHES 24 +8 this week', 'REVIEWED 156 funds this quarter', 'INTERESTED 12 marked for follow-up', and 'ALLOCATION \$850M available FY24'. Underneath is a table titled 'Top Fund Matches' with columns for Fund, GP Firm, Strategy, Target Size, Match Score, and Action. The table lists four funds: Sequoia Growth Fund VI, Acme Growth Fund III, Climate Partners Fund II, and TechVentures Fund IV. Further down are sections for 'Your Investment Mandate' (listing Strategies, Geography, and Check Size) and 'Matching Alerts' (showing a new high-match fund and a fund update). A footer navigation bar includes 'UX Flow: LP User', 'LP Dashboard' (which is highlighted in green), 'Fund Matches', 'Match Detail', 'Preferences', and 'All Screens'.

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.

The screenshot displays the LPxGP Fund Matches interface. At the top, there is a navigation bar with links for LPxGP LP Portal, Dashboard, Fund Matches (which is underlined), Preferences, and Profile. A CalPERS logo with the letters 'CP' is also present. Below the navigation is a section titled 'Fund Matches' with a subtitle 'Funds ranked by compatibility with your mandate'. It includes 'Filters' and 'Export' buttons. A search bar and dropdown filters for 'All Strategies', 'All Sizes', and 'Score: High to Low' are shown. The main content area shows four fund cards:

- Sequoia Growth Fund VI** (94 / 100) - Sequoia Capital. Strategy: Growth Equity, North America, Technology. Target Size: \$2.5B. Fund Number: Fund VI. Closing: 30 days. Buttons: Interested, Pass, View Details →.
- Acme Growth Fund III** (91 / 100) - Acme Capital. Strategy: Growth Equity, North America, ESG. Target Size: \$500M. Fund Number: Fund III. Closing: Q2 2024. Buttons: Interested, Pass, View Details →.
- Climate Partners Fund II** (89 / 100) - Climate Partners. Strategy: Climate / ESG, Global, Sustainability. Target Size: \$800M. Fund Number: Fund II. Closing: Min Commitment. Buttons: Interested, Pass, View Details →.
- TechVentures Fund IV** (78 / 100) - TechVentures Partners. Strategy: Venture Capital, North America, Enterprise SaaS. Target Size: \$300M. Fund Number: Fund IV. Closing: Min Commitment. Buttons: Interested, Pass, View Details →.

At the bottom, there is a footer with links for UX Flow: LP User, LP Dashboard, Fund Matches (underlined), Match Detail, Preferences, and All Screens. There are also buttons for Interested, Pass, and View Details, along with a page navigation bar showing 'Previous', page 1, '2', '3', '...', '39', and '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.

The screenshot displays the LPxGP Fund Match Detail interface. At the top, there is a navigation bar with links for LPxGP LP Portal, Dashboard, Fund Matches (which is underlined), Preferences, and Profile. A CalPERS logo with a green 'CP' icon is also present. Below the navigation, the page title is "Fund Matches / Sequoia Growth Fund VI".

Sequoia Growth Fund VI (Sequoia Capital) has a **Match Score** of **94**. There are buttons for **Mark Interested**, **Pass**, and **Request Deck**.

Why This Match: Sequoia Growth Fund VI is a strong match for CalPERS based on multiple alignment factors. Key points include Strategy alignment, Track record, Check size fit, and ESG commitment.

Score Breakdown: The fund scores 96/100 for Strategy Alignment, 92/100 for Size Fit, 98/100 for Track Record, 90/100 for Geographic Overlap, and 88/100 for ESG Alignment.

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

GP Team: The team consists of Jim Loucks (Managing Partner), Sarah Chen (Partner), and Michael Rodriguez (Partner).

Actions: Buttons for **Mark Interested**, **Request Meeting**, and **Request Deck**.

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.

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 Dashboard Fund Matches **Preferences** Profile CalPERS CP

Matching Preferences
Configure how funds are matched to your mandate

Investment Criteria

Strategies	Geography
<input checked="" type="checkbox"/> Growth Equity	<input checked="" type="checkbox"/> North America
<input checked="" type="checkbox"/> Buyout	<input checked="" type="checkbox"/> Europe
<input checked="" type="checkbox"/> Climate / ESG	<input type="checkbox"/> Asia Pacific
<input type="checkbox"/> Venture Capital	<input type="checkbox"/> Latin America
<input type="checkbox"/> Real Assets	<input type="checkbox"/> Global

Fund Size Range	Check Size Range
Minimum \$250M	Minimum \$50M
Maximum \$3B	Maximum \$200M

Track Record Minimum	ESG Requirement
Fund II+	Preferred

Current Allocation

Available Allocation (FY24)	Actively Looking
\$ 850 M	<input checked="" type="checkbox"/> Yes, show me matching funds

Target Close Date: _____ Minimum Match Score: _____

UX Flow: LP User LP Dashboard Fund Matches **Preferences** LP 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	<input checked="" type="checkbox"/>
Fund updates Notify me when funds I've marked "Interested" post updates	<input checked="" type="checkbox"/>
Closing reminders Remind me 30 days before final close of interesting funds	<input checked="" type="checkbox"/>
Weekly digest Receive a weekly summary of new matches	<input type="checkbox"/>

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.

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

Your Profile

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

Security

Password	Change Password
Last changed 45 days ago	
Two-Factor Authentication	Manage 2FA
Enabled	
Login History	View History
Last login: Today at 9:15 AM from Sacramento, CA	

UX Flow: LP User

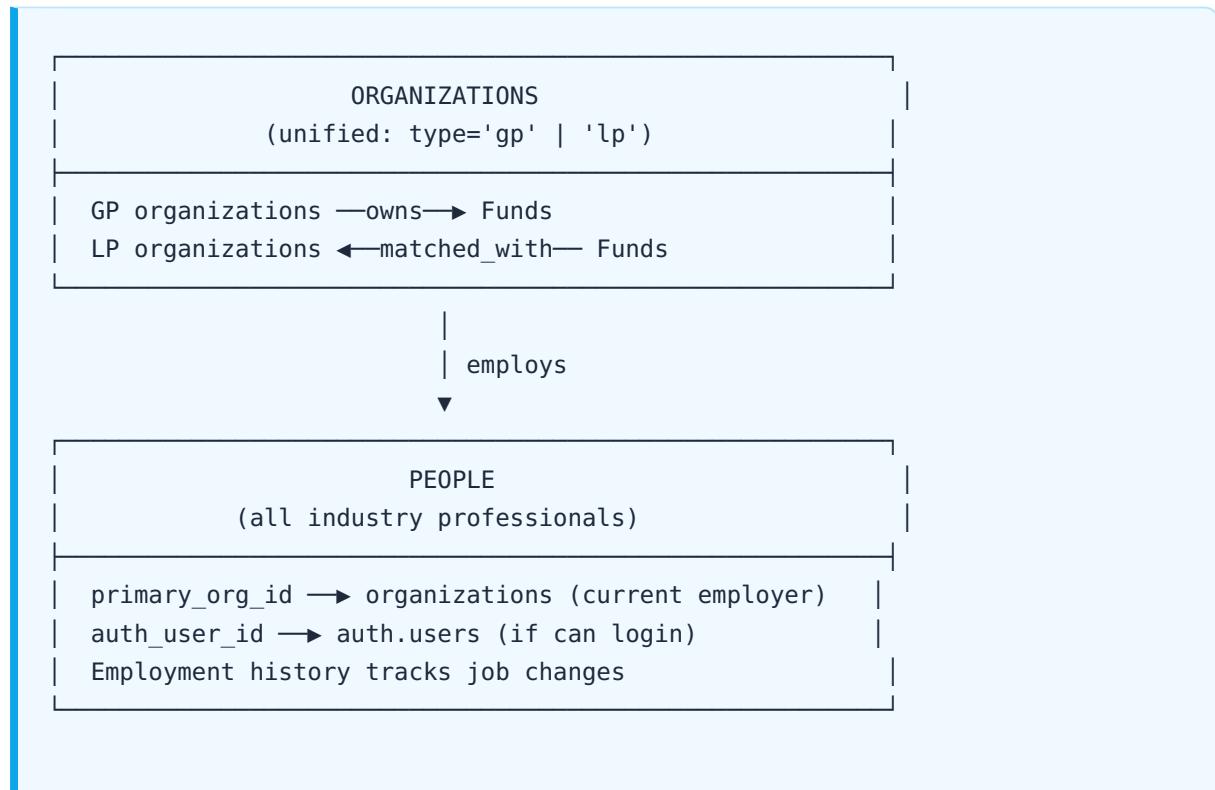
LP Dashboard Fund Matches Preferences LP Profile All Screens

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

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

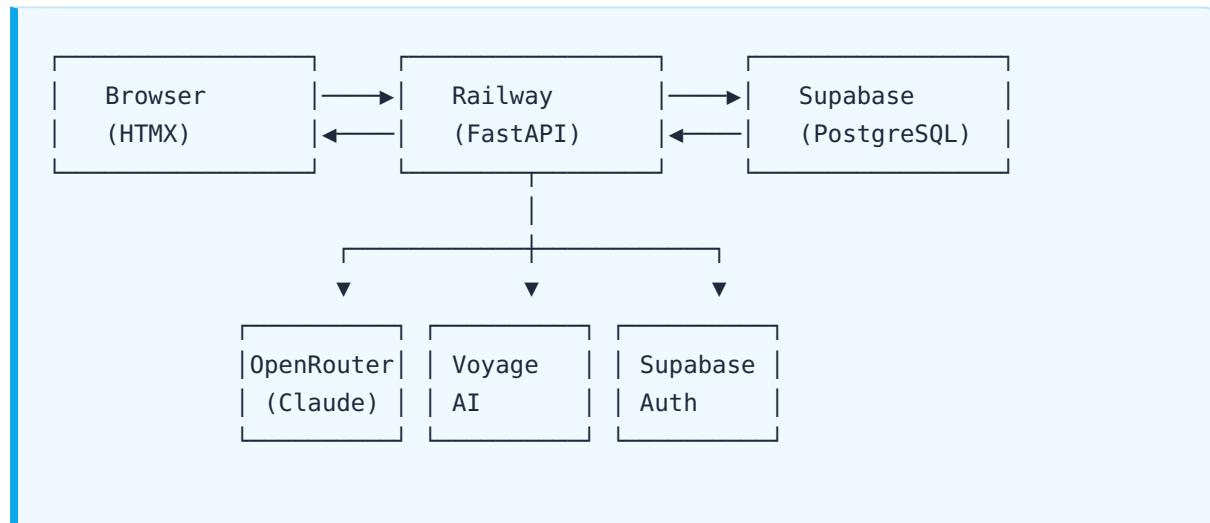
- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)

- **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
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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.