



## GP-LP Intelligence Platform

AI-powered investor matching and outreach  
for fund managers

Product Document | December 2025

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

## The Problem We Solve

Fund managers face significant challenges in the fundraising process:

**Information Overload**

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

**Manual Research**

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

**Poor Targeting**

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

**Generic Outreach**

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

## Who Uses LPxGP

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### 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

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#### Database Contents

The LP database contains comprehensive information on institutional investors:

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

#### Search Capabilities

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

#### AI-Powered Matching

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

## Quality-First Hybrid Pipeline

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

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

## Ensemble Scoring Weights

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

## LLM Scoring (Key Innovation)

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

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

## Bidirectional Matching

The system supports matching in both directions:

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

## Learning From Slow Feedback

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

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

## Match Output

For each fund, the system generates:

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

# Pitch Generation

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## 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

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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



GP-LP Intelligence Platform

**Find the right LPs for your fund.**

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

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## Sign in

Enter your credentials to access your account

Email address

Password [Forgot password?](#)

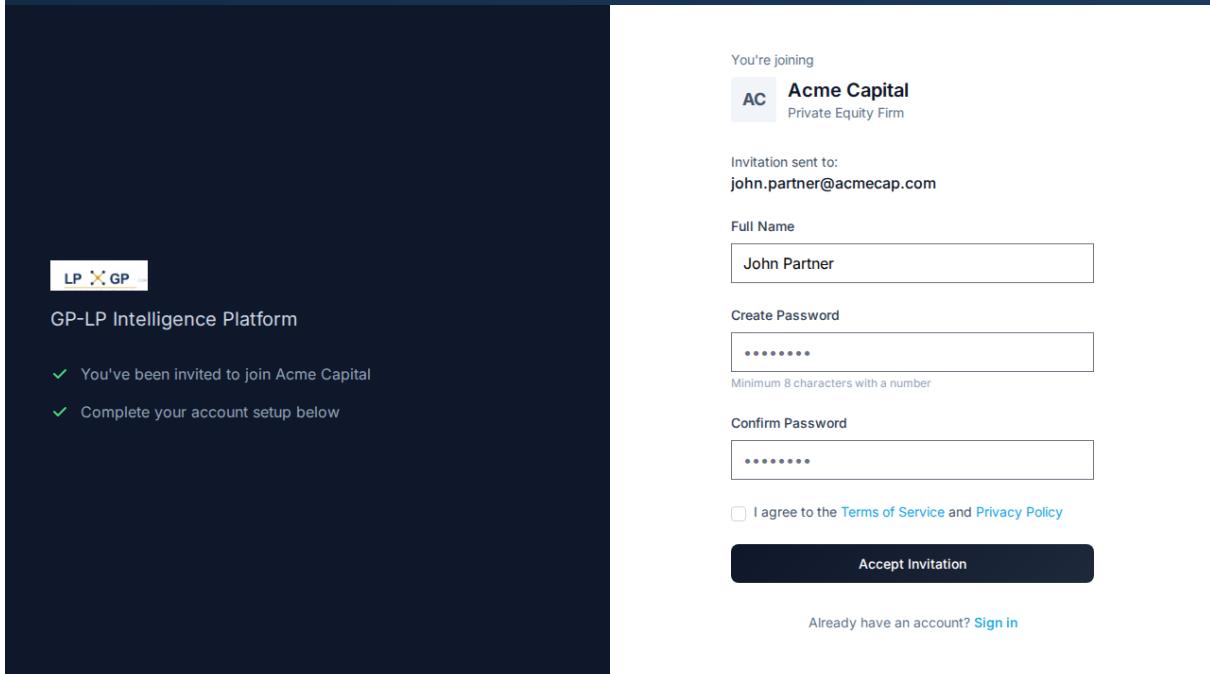
**Sign in**

Don't have an account? Contact us for access.

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.

## Accept Invitation

New user onboarding



The screenshot shows the 'Accept Invitation' page. On the left, there's a dark sidebar with the LPxGP logo and the text 'GP-LP Intelligence Platform'. Below that is a list of two items with checkmarks: 'You've been invited to join Acme Capital' and 'Complete your account setup below'. The main content area on the right starts with 'You're joining' followed by the organization's logo ('AC'), name ('Acme Capital'), and description ('Private Equity Firm'). It then displays the invitation details: 'Invitation sent to: john.partner@acmecap.com'. Below this are input fields for 'Full Name' (containing 'John Partner') and 'Create Password' (containing '\*\*\*\*\*'). A note says 'Minimum 8 characters with a number'. There's also a 'Confirm Password' field with '\*\*\*\*\*'. A checkbox labeled 'I agree to the Terms of Service and Privacy Policy' is present. At the bottom is a large 'Accept Invitation' button.

You're joining

AC Acme Capital  
Private Equity Firm

Invitation sent to:  
[john.partner@acmecap.com](mailto: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](#)

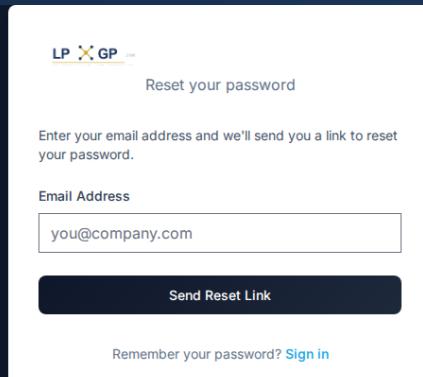
[Accept Invitation](#)

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

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.

## Forgot Password

Request reset link



The form is titled "Reset your password". It contains a placeholder text "Enter your email address and we'll send you a link to reset your password." Below this is a label "Email Address" followed by an input field containing "you@company.com". A "Send Reset Link" button is at the bottom. A link "Remember your password? Sign in" is also present.

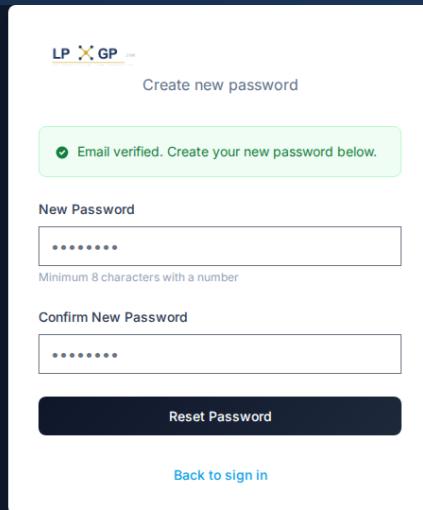
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All Screens

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.

## Reset Password

Create new password



The image shows a password reset form. At the top, there is a logo consisting of the letters 'LP' and 'GP' with a stylized orange 'X' between them. Below the logo is the text 'Create new password'. A green success message box contains the text 'Email verified. Create your new password below.' In the main form area, there are 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 link 'Back to sign in'.

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All Screens

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.

## GP User Screens

13 screens — Core platform functionality for fund managers and associates

# Dashboard

Fund overview and activity

The screenshot shows the LPxGP Dashboard interface. At the top, there's a navigation bar with 'Dashboard' selected, along with links for 'Funds', 'Search', 'Matches', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon labeled 'JP'.

**Dashboard Summary:**

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

**Your Funds:**

Fund Name	Status	Target Size	Matches	Shortlisted
Growth Fund III	Raising	\$500M	45	12
Growth Fund II	Investing	\$350M	2021	72%
Growth Fund I	Harvesting	\$200M	2017	28.5%

[View Matches →](#)    [View Details →](#)    [View Details →](#)

**Recent 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.

# Funds

List of all funds

**Your Funds**

Manage fund profiles and view LP matches

**+ New Fund**

Growth Fund III		Raising
Private Equity - Growth		
Target Size	\$500M	
Matches	45	
Shortlisted	12	
<a href="#">View Fund →</a>		Matches

Growth Fund II		Investing
Private Equity - Growth		
Fund Size	\$350M	
Vintage	2021	
Deployed	72%	
<a href="#">View Fund →</a>		

Growth Fund I		Harvesting
Private Equity - Growth		
Fund Size	\$200M	
Vintage	2017	
Net IRR	28.5%	
<a href="#">View Fund →</a>		

**Create New Fund**

Set up a fund profile to find matching LPs

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.

## Fund Detail

Fund profile with thesis and track record

The screenshot displays the Fund Detail screen for 'Growth Fund III'. At the top, there's a navigation bar with 'LP X GP' logo, 'Dashboard', 'Funds' (selected), 'Search', 'Matches', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a breadcrumb 'Funds / Growth Fund III'. The main content area has a header 'Growth Fund III' (Raising) and 'Private Equity - Growth Equity'. It features two main sections: 'Fund Overview' and 'Matching Stats'. The 'Fund Overview' section includes details like Target Size (\$500M), Target Close (Q2 2025), Geography Focus (North America), Sector Focus (Technology, Healthcare), Check Size (\$25M - \$75M), and Stage (Growth / Expansion). The 'Matching Stats' section shows 45 total matches, 12 high score (80+), 8 shortlisted, and 5 contacted, with a 'View All Matches' button. There are also 'Investment Thesis' and 'Quick Actions' sections. The 'Investment Thesis' section describes the fund's focus on technology-enabled businesses in the upper mid-market segment. The 'Quick Actions' section includes a 'Generate LP Pitch' button.

**Fund Overview**

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

**Matching Stats**

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

**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

**Quick Actions**

Generate LP Pitch →

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.

# Create Fund

New fund creation form

Funds / Create Fund

**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

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.

# LP Search

Search and filter institutional investors



Dashboard Funds

Search

Matches Outreach

Acme Capital JP

## Search LPs

Find institutional investors for your funds

technology growth equity

Search

### Filters

#### LP Type

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

#### AUM Range

\$1B to Max

#### Geography

North America

#### Invests In

247 LPs found

Sort by: AUM (High to Low)

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

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.

## LP Detail

LP profile with mandate and contacts

The screenshot shows the LP Detail interface for CalPERS. At the top, there's a navigation bar with 'LP X GP' logo, 'Dashboard', 'Funds', 'Search' (which is active), 'Matches', and 'Outreach'. On the right, it shows 'Acme Capital' and a user icon. Below the navigation is a search bar with 'CalPERS' entered. The main content area has two main sections: 'Overview' and 'Match Score'.

**Overview:**

Total AUM	PE Allocation	Est. PE Commitment
\$450B	13%	\$58.5B

**Investment Mandate:**

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

TARGET RETURN	PREFERRED CHECK
Net IRR 11%+	\$100M - \$500M

**Match Score:**

A large green circle displays a '92' score, labeled 'Excellent Match'. Below it, a table shows the breakdown of the match score across four categories:

Category	Score
Strategy Alignment	Strong
Size Fit	Good
Geography	Match
ESG Focus	Aligned

A button 'Why This Score?' is located at the bottom right of the score card.

**Description:**

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.

# Matches

AI-ranked LP matches for fund

The screenshot shows the LPxGP interface with the 'Matches' tab selected. At the top, there are navigation links: Dashboard, Funds, Search, Matches (which is highlighted in orange), and Outreach. On the right, there are user profile icons for 'Acme Capital' and 'JP'. Below the navigation, the path 'Funds / Growth Fund III / Matches' is shown. A 'LP Matches' section header is followed by a sub-header 'Growth Fund III - 45 matched LPs ranked by fit score'. Below this, four summary boxes provide key statistics: Total Matches (45), Avg Score (72), Shortlisted (12), and Contacted (8). The main content area displays three match cards for CalPERS, Yale Endowment, and Texas Teachers, each with a score, name, type, description, alignment indicators, and 'Why this match?' and '+ Shortlist' buttons.

Total Matches	Avg Score	Shortlisted	Contacted
45	72	12	8

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

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

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

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.

# Match Analysis

AI insights and talking points

The screenshot shows the LPxGP platform's Match Analysis feature. At the top, there's a navigation bar with tabs for Dashboard, Funds, Search, **Matches**, and Outreach. A user profile for "Acme Capital" is visible on the right. The main content area displays a match summary for "CalPERS x Growth Fund III" with a total score of 92. Below the score, there are four green boxes representing a "Score Breakdown": Strategy Fit (95), Size Match (90), Geography (92), and Thesis Alignment (88). To the right of the score summary are two buttons: "+ Add to Shortlist" and "Generate Pitch". Below the score breakdown, there's a section titled "AI Match Analysis" with a sub-section "Why This Is a Strong Match". It lists two key factors: "Strategy alignment" (CalPERS actively invests in growth equity managers targeting technology-enabled businesses) and "Fund size fit" (the fund's \$500M target is within CalPERS' preferred commitment range for emerging managers). A large callout box at the bottom explains the purpose of the Match Detail screen.

**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

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.

# Pitch Generator

AI-powered outreach content

**Pitch Settings**

Target LP: CP CalPERS Score: 92

Fund: Growth Fund III

Content Type:  Outreach Email  Executive Summary  Meeting Brief

Tone: Professional & Formal

Key Points to Emphasize:  Track record

**Generated Outreach Email**

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

⚠️ Human review required: AI-generated content should be reviewed and personalized before sending.

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

**Key highlights:**

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

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.

# Shortlist

LPs ready for outreach

The screenshot shows the LPxGP platform's "Shortlist" feature. At the top, there is a navigation bar with links: LP GP, Dashboard, Funds, Search, Matches, and Outreach (which is underlined). On the right side of the header, there is a user profile for "Acme Capital" and a user icon with initials "JP". Below the header, the URL "Funds / Growth Fund III / Shortlist" is displayed. To the right of the URL are two buttons: "Export List" and "Batch Generate Pitches". A sub-header "Shortlist" is followed by the text "Growth Fund III - 12 LPs ready for outreach". Below this, there is a table with the following columns: All (12), To Contact (7), Contacted (3), Meeting Set (2). The table lists 12 LP entries:

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

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".

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.

# Outreach Hub

Activity tracking and pipeline

[Dashboard](#)
[Funds](#)
[Search](#)
[Matches](#)
[Outreach](#)

Acme Capital

## Outreach Hub

Manage LP communications across all funds

**SHORTLISTED**
**34**

across 3 funds

**CONTACTED**
**18**

+5 this week

**MEETINGS**
**8**

+3 scheduled

**RESPONSE RATE**
**44%**

8 of 18 replied

**Recent Activity**
[All Funds](#)

 Meeting scheduled with Yale Endowment  
January 15, 2025 at 2:00 PM EST  
Growth Fund III

2 hours ago

 Email sent to CalPERS (Michael Smith)  
Growth Fund III

Yesterday

 Pitch generated for Ontario Teachers  
Growth Fund III

2 days ago

Added 3 LPs to shortlist

3 days ago

### Quick Actions

[Generate Batch Pitches](#)
[Export Shortlist to CSV](#)
[View All Meetings](#)

### Upcoming Meetings

[Yale Endowment](#)

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.

## Settings - Profile

### User profile settings

The screenshot shows the 'Profile Settings' page. On the left, a sidebar lists 'Settings' with 'Profile' selected, and other options like 'Team', 'Company', 'Notifications', and 'Security'. The main content area is titled 'Profile Settings' and contains the following fields:

- First Name:** John
- Last Name:** Partner
- Email:** john@acmecapital.com
- Title:** Managing Partner
- Phone:** +1 (555) 123-4567

A 'Change Photo' button is available next to a placeholder photo of 'JP'. Below the email field is a note: 'Contact support to change your email address'.

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.

## Settings - Team

Team member management

The screenshot shows the 'Team' section of the LPxGP Settings. On the left, a sidebar lists 'Profile', 'Team' (which is selected), 'Company', 'Notifications', and 'Security'. The main area is titled 'Team Members' and contains a sub-header 'Manage who has access to Acme Capital'. It shows three members: 'John Partner' (Admin, You), 'Sarah Johnson' (Member, Edit), and 'Mike Chen' (Member, Edit). A button '+ Invite Member' is at the top right. Below this is a 'Pending Invitations' section with one entry for 'emily@acmecapital.com' (Invited 2 days ago) with buttons for 'Pending', 'Resend', and 'Cancel'. At the bottom is a 'Role Permissions' section.

Member	Name	Role	Action
JP	John Partner	Admin	You
SJ	Sarah Johnson	Member	Edit
MC	Mike Chen	Member	Edit

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.

## Super Admin Screens

10 screens — Platform administration and data management

# Admin Dashboard

Platform overview and health

The screenshot displays the LPxGP Admin Dashboard. At the top, there's a navigation bar with tabs: Overview (selected), Companies, Users, LPs, People, Quality, Import, and Health. To the right, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the navigation is a section titled 'Platform Dashboard' with a subtitle 'Overview of LPxGP platform activity'. It features four cards: 'COMPANIES' (25, +3 this month), 'TOTAL USERS' (156, +12 this month), 'LP DATABASE' (5,247, +50 this week), and 'MATCHES GENERATED' (12,450, all time). Under 'Pending Actions', there are three items: '3 companies awaiting activation' (Admin invitations pending acceptance), '12 LPs flagged for review' (Data corrections submitted by users), and 'Import job in progress' (500 LPs processing - 78% complete). A 'System Health' section lists 'Database', 'Supabase Auth', 'OpenRouter API', and 'Voyage AI' as healthy. A 'Recent Platform Activity' section at the bottom right has a 'View All' link.

**Platform Dashboard**

Overview of LPxGP platform activity

COMPANIES	156	TOTAL USERS	5,247	LP DATABASE	MATCHES GENERATED
25	+3 this month	156	+12 this month	5,247	+50 this week
					12,450
					all time

**Pending Actions**

- 3 companies awaiting activation  
Admin invitations pending acceptance [View →](#)
- 12 LPs flagged for review  
Data corrections submitted by users [Review →](#)
- Import job in progress  
500 LPs processing - 78% complete [Monitor →](#)

**System Health**

Service	Status
Database	Healthy
Supabase Auth	Healthy
OpenRouter API	Healthy
Voyage AI	Healthy

Last checked: 30 seconds ago

**Recent Platform Activity**

[View All](#)

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.

# Companies

Manage GP firms on platform

LP X GP Admin Overview Companies Users LPs People Quality Import Health Acme Capital JP

**Companies**

Manage GP firms on the platform

+ Add Company

Search companies...

All Status Filter

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

Showing 1-4 of 25

Previous 1 2 3 Next

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.

# Company Detail

Company users and funds

The screenshot shows the Company Detail screen for 'Acme Capital'. At the top, there's a navigation bar with tabs for 'Companies' (which is active), 'Users', 'LPs', 'People', 'Quality', 'Import', and 'Health'. Below the navigation is a breadcrumb trail: 'Companies / Acme Capital'. The main content area has a header with the company logo ('AC'), name ('Acme Capital'), status ('Active'), and location ('Private Equity | San Francisco, CA'). To the right are 'Edit Company' and 'Deactivate' buttons. Below this, there are three summary boxes: 'Users' (4), 'Funds' (3), and 'Matches' (127). The 'Users' section lists three individuals: John Partner (Admin, Active), Sarah Johnson (Member, Active), and Mike Chen (Member, Active). The 'Funds' section is partially visible. To the right, there are two panels: 'Company Details' (Created: December 1, 2024, Strategy: Private Equity - Growth, Location: San Francisco, CA, Website: acmecapital.com) and 'Activity' (Last login: 2 hours ago, Searches (30d): 127).

**Company Details**

- Created **December 1, 2024**
- Strategy **Private Equity - Growth**
- Location **San Francisco, CA**
- Website **acmecapital.com**

**Activity**

- Last login **2 hours ago**
- Searches (30d) **127**

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).

# Users

All platform users

The screenshot shows the 'Users' section of the LPxGP interface. At the top, there's a navigation bar with tabs: Admin (highlighted), Overview, Companies, Users (selected), LPs, People, Quality, Import, and Health. To the right, it shows 'Acme Capital' and a user icon 'JP'. Below the navigation is a search bar with placeholder 'Search by name or email...' and dropdown filters for 'All Companies' and 'All Roles', along with a 'Filter' button. The main area is a table titled 'Users' with columns: USER, COMPANY, ROLE, STATUS, LAST ACTIVE, and ACTIONS. It lists four users: John Partner (Admin, Active, 2 hours ago), Sarah Johnson (Member, Active, Yesterday), Sarah Davis (Admin, Active, 3 days ago), and emily@acmecapital.com (Member, Pending). The table includes pagination at the bottom showing 'Showing 1-4 of 156 users' and buttons for 'Previous', '1', '2', '3', and 'Next'.

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@deltacap.com	Delta Capital	Admin	● Active	3 days ago	Impersonate Edit
emily@acmecapital.com Invitation pending	Acme Capital	Member	● Pending	—	Resend Cancel

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.

The screenshot shows the LPxGP People page. At the top, there's a navigation bar with tabs: Overview, Companies, Users, LPs, People (which is active and underlined), Quality, Import, and Health. To the right of the navigation is a user profile for "Acme Capital" with initials "JP". Below the navigation is a search bar with placeholder text "Search by name, title, or organization..." and a dropdown menu set to "All Organizations". There are also "Import" and "Add Person" buttons. The main content area displays a table of contacts with columns: NAME, TITLE, ORGANIZATION, EMAIL, DATA QUALITY, and ACTIONS. The table contains four rows of data:

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

At the bottom of the table, it says "Showing 1-4 of 8,234 people" and has navigation buttons for "Previous", "1", "2", "3", and "Next".

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 LP Database interface. At the top, there's a navigation bar with links for Overview, Companies, Users, LPs (which is the active tab), People, Quality, Import, and Health. On the far right, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the navigation 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'. Below these are search and filter controls: a search bar, dropdowns for 'All Types', 'All Regions', 'Data Quality', and a 'Filter' button. The main content area is a table with columns: LP NAME, TYPE, LOCATION, AUM, CONTACTS, QUALITY, and ACTIONS. It lists four entries: CalPERS (Pension, Sacramento, CA, \$450B, 12 contacts, High quality, Edit link), Yale Endowment (Endowment, New Haven, CT, \$41B, 5 contacts, High quality, Edit link), Smith Family Office (Family Office, New York, NY, \$2B, 2 contacts, Medium quality, Edit link), and Unknown Pension Fund (Pension, —, Unknown AUM, 0 contacts, Low quality, Edit link).

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

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.

## Edit LP

LP data management form

The screenshot shows the 'Edit LP' interface for 'CalPERS'. At the top, there's a navigation bar with tabs: Overview, Companies, Users, LPs (which is active), People, Quality, Import, and Health. On the far right, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the navigation is a breadcrumb trail: LPs / CalPERS. The main content area has a title 'Edit LP: CalPERS' and a note 'Last updated: 2 weeks ago'. A green 'High Quality' badge is in the top right corner. The 'Basic Information' section contains fields for 'LP Name \*' (CalPERS), 'Full Name' (California Public Employees' Retirement System), 'Type \*' (Public Pension), and 'Location' (Sacramento, CA, USA). The 'Financial Information' section shows 'Total AUM' (\$ 450B) and 'PE Allocation %' (13%).

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.

# Data Quality

Quality monitoring and issues

LP GP Admin Overview Companies Users LPs People Quality Import Health Acme Capital JP

**Data Quality**  
Monitor and improve LP database quality

**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** 12 pending

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

**Quality by Field**

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

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

# Import Wizard

CSV import tool

The screenshot shows the LPxGP Admin interface with the 'Import' tab selected. The main title is 'Import Wizard' with the subtitle 'CSV import tool'. Below the title, there's a breadcrumb navigation: LPs / Import Wizard. A progress bar indicates the current step is '2 Map Fields'.

The main content area is titled 'Map CSV Fields' and displays the message 'Match your CSV columns to LPxGP fields. 500 rows detected.' It shows a table mapping CSV columns to LPxGP fields:

CSV Column	LPxGP Field
organization_name	LP Name *
investor_type	Type *
hq_location	Location

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.

# System Health

Services and integrations status

LP X GP Admin Overview Companies Users LPs People Quality Import Health Acme Capital JP

## System Health

Monitor platform status and integrations

All systems operational

 <b>Supabase PostgreSQL</b> Primary database	 <b>Supabase Auth</b> Authentication service
Response 12ms	Connections 8/100
Storage 2.4GB	
	Healthy
 <b>OpenRouter API</b> LLM inference (Claude)	 <b>Voyage AI</b> Embedding service
Response 1.2s avg	Requests (24h) 89
Cost (24h) \$2.34	
	Healthy

### Recent System Events

[View All](#)

 LP import completed successfully 500 records processed, 498 imported, 2 duplicates skipped	2 hours ago
 Embedding regeneration completed 5,247 LP embeddings updated for semantic search	Yesterday

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.

## UI State Screens

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

# Empty Dashboard

First-time user experience

The screenshot shows the LPxGP dashboard interface. At the top, there's a navigation bar with the LPxGP logo, a dropdown menu, and links for Dashboard, Funds, Search, Matches, and Outreach. On the right, it shows "Acme Capital" and a profile icon. The main area has a title "Dashboard" and a welcome message "Welcome back, John". Below this is a large empty space with a placeholder icon. A central call-to-action button says "+ Create Your First Fund". Underneath, a section titled "What you can do with LPxGP" contains three cards: "Find Matching LPs" (AI analyzes 10,000+ institutional investors), "Generate Personalized Pitches" (Create tailored executive summaries and outreach), and "Track Your Pipeline" (Manage your shortlist, track outreach progress, and). A descriptive text box at the bottom explains the purpose of the empty dashboard.

**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

**Generate Personalized Pitches**  
Create tailored executive summaries and outreach

**Track Your Pipeline**  
Manage your shortlist, track outreach progress, and

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

## Loading Matches

Match generation progress

The screenshot shows the LPxGP software interface. At the top, there is a dark header bar with the title "Loading Matches" and a subtitle "Match generation progress". Below the header is a navigation bar with tabs: "Dashboard", "Funds", "Search", "Matches" (which is highlighted in orange), and "Outreach". On the right side of the header, there is a user profile for "Acme Capital" with initials "JP". The main content area has a light gray background. It displays the title "LP Matches" and the subtitle "Growth Fund III". In the center, there is a large circular icon with a magnifying glass symbol. Below it, the text "Analyzing 10,000 LPs for Growth Fund III..." is displayed, followed by a descriptive sentence: "We're finding the best institutional investors that match your fund strategy, geography, and size requirements." A progress bar is shown at the bottom, indicating "68%" completion. Below the progress bar, a note says "Estimated time remaining: ~45 seconds". A list of steps is shown in a box: "Applying strategy filters (PE Growth)" (checkmark), "Filtering by geography (North America)" (checkmark), "Computing semantic similarity scores..." (dot), and "Ranking and finalizing matches" (number 4). The entire interface is set against a white background.

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

# API Error

Error state handling

The screenshot shows a user interface for handling API errors. At the top, there's a navigation bar with the LPxGP logo, Dashboard, Funds, Search, Matches, Outreach, Acme Capital, and a user icon (JP). The main area has a large red warning icon with an exclamation mark. Below it, the heading "Something went wrong" is displayed in bold. A message follows: "We encountered an error while processing your request. This might be a temporary issue with our service." To the right of the message is a "Copy" button. Below the message is a "ERROR DETAILS" section containing the following information:

Error Code:	API_503
Timestamp:	2024-01-15 14:32:18 UTC
Request ID:	req_7f3a8b2c9d4e

At the bottom of the error details section are two buttons: "Try Again" and "Go Back". Below these buttons is a "Need help?" section with links to "Go to Dashboard" and "Contact Support".

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

## LP User Screens

5 screens — Bidirectional matching - funds ranked for institutional investors

# LP Dashboard

Fund overview for institutional investors

LPxGP LP Portal    Dashboard    Fund Matches    Preferences    Profile

CalPERS    CP

## LP Dashboard

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

NEW MATCHES

**24**

+8 this week

REVIEWED

**156**

funds this quarter

INTERESTED

**12**

marked for follow-up

ALLOCATION

**\$850M**

available FY24

### Top Fund Matches

[View All Matches →](#)

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

UX Flow: LP User

LP Dashboard

| Fund Matches

| Match Detail

| Preferences

... All Screens

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.

# Fund Matches

Ranked funds matching LP mandate

LPxGP LP Portal   Dashboard   Fund Matches **Fund Matches**   Preferences   Profile

CalPERS 

## Fund Matches

Funds ranked by compatibility with your mandate

 Filters  Export

Search funds or GP firms...

All Strategies

All Sizes

Score: High to Low

Showing 156 matching funds

Score range: 70+

### Sequoia Growth Fund VI

Sequoia Capital

94 / 100

Growth Equity   North America   Technology

Target Size  
\$2.5B

Fund Number  
Fund VI

Closing  
30 days

Min Commitment  
\$50M

Interested   Pass

[View Details →](#)

### Acme Growth Fund III

Acme Capital

91 / 100

Growth Equity   North America   ESG

Target Size  
\$500M

Fund Number  
Fund III

Closing  
Q2 2024

Min Commitment  
\$25M

Interested   Pass

[View Details →](#)

UX Flow: LP User

LP Dashboard

Fund Matches

Match Detail

Preferences

[All Screens](#)

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.

# Fund Match Detail

Detailed fund analysis for LPs

The screenshot shows the Fund Match Detail page for Sequoia Growth Fund VI. At the top right, the CalPERS logo is displayed with a green circular badge containing the letters 'CP'. Below the logo, the fund's name 'Sequoia Growth Fund VI' is shown, along with its target size '\$2.5B' and fund number 'Fund VI'. A large green button labeled 'Mark Interested' is visible.

**Why This Match**

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

- Strategy alignment:** Growth equity focus matches your core allocation strategy with emphasis on established technology companies.
- Track record:** Fund V delivered 2.8x net MOIC and 28% net IRR, exceeding your minimum return thresholds.
- Check size fit:** \$100M minimum commitment aligns with your typical allocation of \$50-200M per fund.
- ESG commitment:** Sequoia has a formal ESG policy and dedicated sustainability team, meeting your responsible investment requirements.

**Fund Details**

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

**Score Breakdown**

Strategy Alignment: 96/100

UX Flow: LP User      LP Dashboard      Fund Matches      Match Detail      Preferences      Jim Lucks      ... All Screens

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.

# LP Preferences

Matching preferences and alerts

LPxGP LP Portal

Dashboard Fund Matches Preferences Profile

CalPERS CP

## Matching Preferences

Configure how funds are matched to your mandate

### Investment Criteria

#### Strategies

- Growth Equity
- Buyout
- Climate / ESG
- Venture Capital
- Real Assets

#### Geography

- North America
- Europe
- Asia Pacific
- Latin America
- Global

#### Fund Size Range

Minimum

\$250M

Maximum

\$3B

#### Check Size Range

Minimum

\$50M

Maximum

\$200M

#### Track Record Minimum

Fund II+

#### ESG Requirement

Preferred

UX Flow: LP User

LP Dashboard Fund Matches Preferences LP Profile

.. All Screens

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.

# LP Profile

Organization profile management

LPxGP LP Portal

Dashboard Fund Matches Preferences Profile

CalPERS CP

## Organization Profile

Manage your LP profile information

### Organization Information

Organization Name

California Public Employees' Retirement System

Short Name

CalPERS

LP Type

Public Pension

Headquarters

Sacramento, California, USA

Total AUM

\$450 Billion

PE Allocation

8% (~\$36B)

Website

<https://www.calpers.ca.gov>

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

UX Flow: LP User

LP Dashboard Fund Matches Preferences LP Profile

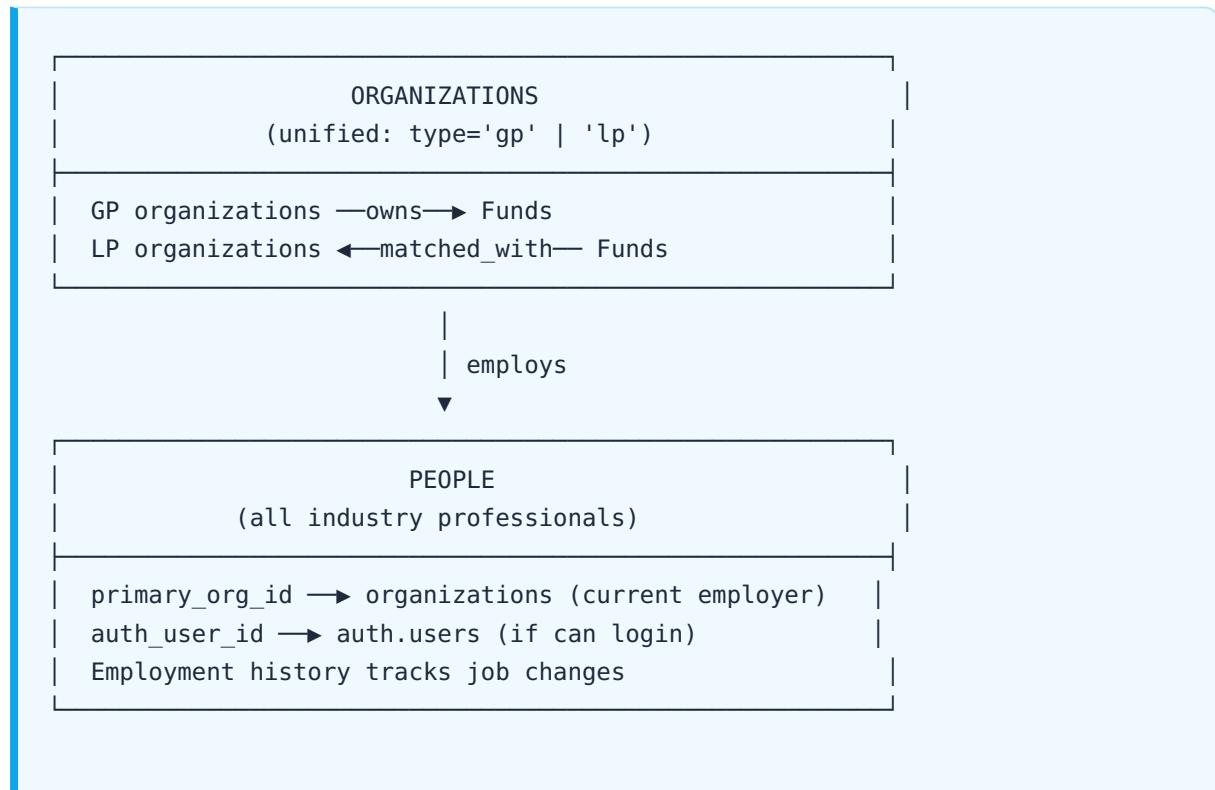
← All Screens

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.

# 5. Data Model

## Entity Overview

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



## Key Entities

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

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

## Key Design Decisions

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- **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

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

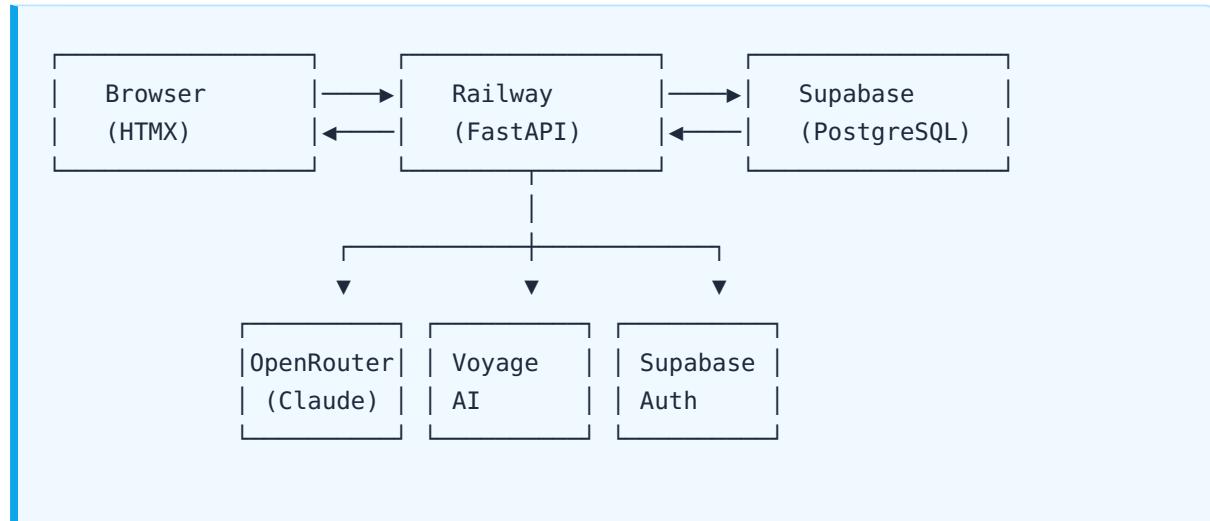
- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)

- **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

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- **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.