# LPxGP

# 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

**LP X GP**
GP-LP Intelligence Platform

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

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

© 2024 LPxGP. All rights reserved.

### Sign in

Enter your credentials to access your account

**Email address**

partner@acmecapital.com

**Password**          Forgot password?

••••••••••

**Sign in**

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

Authentication          Login          ☰ All Screens

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
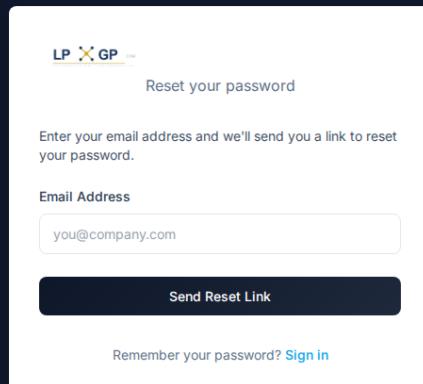


GP-LP Intelligence Platform

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

You're joining

**AC** **Acme Capital**
Private Equity Firm

Invitation sent to:
john.partner@acmecap.com

Full Name

John Partner

Create Password

••••••••

Minimum 8 characters with a number

Confirm Password

••••••••

☐ I agree to the Terms of Service and Privacy Policy

**Accept Invitation**

Already have an account? Sign in

Authentication | Accept Invitation | ☰ All Screens

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

**LP X GP**

Reset your password

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

**Email Address**

you@company.com

**Send Reset Link**

Remember your password? Sign in
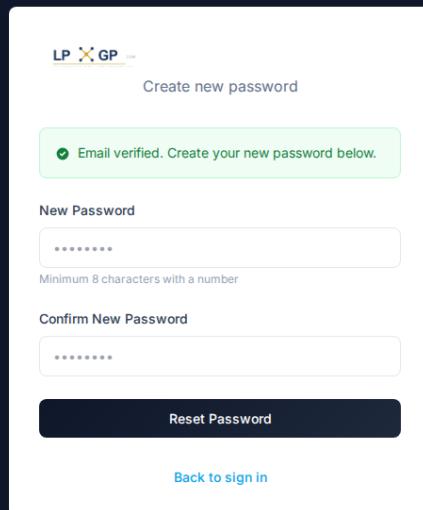
Authentication     Forgot Password     ☰ All Screens

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



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

LP X GP   **Dashboard**   Funds   Search   Matches   Outreach                        Acme Capital   JP

## Dashboard

Welcome back, John

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

### Your Funds

**+ New Fund**

| Growth Fund III | Raising | Growth Fund II | Investing | Growth Fund I | Harvesting |
|---|---|---|---|---|---|
| Private Equity - Growth | | Private Equity - Growth | | Private Equity - Growth | |
| Target Size | $500M | Fund Size | $350M | Fund Size | $200M |
| Matches | 45 | Vintage | 2021 | Vintage | 2017 |
| Shortlisted | 12 | Deployed | 72% | Net IRR | 28.5% |
| View Matches → | | View Details → | | View Details → | |

GP User                              Dashboard                              ☰ All Screens

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

LP ✕ GP    Dashboard    **Funds**    Search    Matches    Outreach                    Acme Capital    JP

## Your Funds
Manage fund profiles and view LP matches

**+ New Fund**

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

| Growth Fund II | Investing |
| Private Equity - Growth | |
| Fund Size | $350M |
| Vintage | 2021 |
| Deployed | 72% |
| View Fund → | |

| Growth Fund I | Harvesting |
| Private Equity - Growth | |
| Fund Size | $200M |
| Vintage | 2017 |
| Net IRR | 28.5% |
| View Fund → | |

+

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

GP User                    Fund List                    ☰ All Screens

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

LP X GP    Dashboard    **Funds**    Search    Matches    Outreach      Acme Capital   JP

Funds / Growth Fund III

## Growth Fund III   Raising
Private Equity - Growth Equity

[ Edit Fund ]   [ View Matches ]

### Fund Overview

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

### Matching Stats

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

[ View All Matches ]

### Investment Thesis

Growth Fund III focuses on technology-enabled businesses in the upper mid-market segment

### Quick Actions

GP User      Fund Detail      ☰ All Screens

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

LP X GP

Dashboard    **Funds**    Search    Matches    Outreach

Acme Capital    JP

## 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

Max Check Size

GP User

Fund Create

All Screens

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

LP ✕ GP      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

247 LPs found          Sort by: AUM (High to Low)

| 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 |

GP User                          Lp Search                          ☰ All Screens

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

LP ✕ GP    Dashboard    Funds    **Search**    Matches    Outreach                    Acme Capital    JP

Search / CalPERS

**CP**    **CalPERS**                    + Add to Shortlist    **Generate Pitch**
California Public Employees' Retirement System
Public Pension    Sacramento, CA

**Overview**

| Total AUM | PE Allocation | Est. PE Commitment |
|---|---|---|
| **$450B** | **13%** | **$58.5B** |

**Match Score**

**92**

Excellent Match

| | |
|---|---|
| Strategy Alignment | Strong |
| Size Fit | Good |
| Geography | Match |
| ESG Focus | Aligned |

Why This Score?

**Investment Mandate**

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

TARGET RETURN
Net IRR 11%+

PREFERRED CHECK
$100M – $500M

GP User                    Lp Detail                    ☰ All Screens

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

LP ✕ GP ─    Dashboard    Funds    Search    **Matches**    Outreach                    Acme Capital    JP

Funds / Growth Fund III / Matches

## LP Matches
Growth Fund III - 45 matched LPs ranked by fit score                    ⟳ Refresh Matches

| Total Matches | Avg Score | Shortlisted | Contacted |
|---|---|---|---|
| **45** | **72** | **12** | **8** |

**92**  **CalPERS**  Excellent Match
Public Pension | $450B AUM | Sacramento, CA
✓ Strategy aligned    ✓ ESG aligned    ✓ Size fit
                                        Why this match?    + Shortlist

**88**  **Yale Endowment**  Strong Match
Endowment | $41B AUM | New Haven, CT
✓ Strong PE allocation    ✓ Thesis aligned
                                        Why this match?    + Shortlist

**76**  **Texas Teachers**  Good Match
Public Pension | $180B AUM | Austin, TX
                                        Why this match?    + Shortlist

GP User                    Matches                    ☰ All Screens

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

Funds / Growth Fund III / Matches / CalPERS Analysis

**92**   **CalPERS × Growth Fund III**               + Add to Shortlist      **Generate Pitch**
        Match Analysis & AI Insights

**Score Breakdown**

| 95 | 90 | 92 | 88 |
|----|----|----|----|
| Strategy Fit | Size Match | Geography | 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

GP User                    Match Detail                    ☰ All Screens

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

LP X GP —    Dashboard    Funds    Search    Matches    **Outreach**        Acme Capital   JP

Outreach / Generate Pitch

### Pitch Settings      ← Back

**Target LP**

CP   **CalPERS**
Score: 92

**Fund**

Growth Fund III   ▾

**Content Type**

● Outreach Email

○ Executive Summary

○ Meeting Brief

**Tone**

Professional & Formal   ▾

---

✓ **Generated Outreach Email**    ⟳ Regenerate    ⧉ Copy to Clipboard

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

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

Dear Mr. Smith,
I hope this message finds you well. I am reaching out regarding Acme Capital's Growth Fund III, a $500 million growth equity vehicle focused on technology-enabled businesses in North America.
Given CalPERS' strategic interest in growth equity managers with demonstrated operational value creation capabilities, I believe there may be strong alignment with our investment approach.
**Key highlights:**
**Track Record:** Fund I has achieved a 28.5% net IRR, ranking in the top quartile among growth equity peers
**Team:** Our partners average 20+ years of PE experience across

GP User          Pitch Generator          ☰ All Screens

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

LP X GP    Dashboard    Funds    Search    Matches    **Outreach**      Acme Capital   JP

Funds / Growth Fund III / Shortlist

## Shortlist
Growth Fund III · 12 LPs ready for outreach

⬇ Export List    ✉ Batch Generate Pitches

**All (12)**    To Contact (7)    Contacted (3)    Meeting Set (2)

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

GP User      Shortlist      ☰ All Screens

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

LP X GP —   Dashboard   Funds   Search   Matches   **Outreach**                    Acme Capital   JP

### Outreach Hub
Manage LP communications across all funds

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

**Recent Activity**      All Funds

📅 Meeting scheduled with **Yale Endowment**                              2 hours ago
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**                              2 days ago
Growth Fund III

**Quick Actions**

Generate Batch Pitches

Export Shortlist to CSV

View All Meetings

**Upcoming Meetings**

GP User                         Outreach Hub                         ☰ All Screens

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

LP ✕ GP —    Dashboard    Funds    Search    Matches    Outreach        Acme Capital   JP

**Settings**

Profile

Team

Company

Notifications

Security

**Profile Settings**

JP    Change Photo

JPG, PNG. Max 5MB.

**First Name**

John

**Last Name**

Partner

**Email**

john@acmecapital.com

Contact support to change your email address

**Title**

Managing Partner

**Phone**

+1 (555) 123-4567

GP User        Settings Profile        ☰ All Screens

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

LP ✕ GP ·  Dashboard   Funds   Search   Matches   Outreach                    Acme Capital   JP

## Settings

Profile

Team

Company

Notifications

Security

### Team Members
Manage who has access to Acme Capital

[+ Invite Member]

| JP | **John Partner**<br>john@acmecapital.com | Admin   You |
| SJ | **Sarah Johnson**<br>sarah@acmecapital.com | Member   Edit |
| MC | **Mike Chen**<br>mike@acmecapital.com | Member   Edit |

### Pending Invitations

| ✉ | **emily@acmecapital.com**<br>Invited 2 days ago | Pending   Resend   Cancel |

Role Permissions

GP User                    Settings Team                    ☰ All Screens

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

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

## Platform Dashboard
Overview of LPxGP platform activity

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

### Pending Actions

**3 companies awaiting activation**
Admin invitations pending acceptance                                    View →

**12 LPs flagged for review**
Data corrections submitted by users                                     Review →

**Import job in progress**
500 LPs processing - 78% complete                                       Monitor →

### System Health

| | |
|---|---|
| Database | ● Healthy |
| Supabase Auth | ● Healthy |
| OpenRouter API | ● Healthy |
| Voyage AI | ● Healthy |

Last checked: 30 seconds ago

Super Admin          Admin Dashboard          ☰ All Screens

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 ✕ 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 | 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 → |

Showing 1-4 of 25　　　　　　　　　　　　Previous   **1**   2   3   Next

Super Admin　　　　　　　Admin Companies　　　　　　　☰ All Screens

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

---

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

Companies / Acme Capital

**AC**  **Acme Capital** Active                                    Edit Company    Deactivate
Private Equity | San Francisco, CA

| Users | Funds | Matches | Company Details |
| --- | --- | --- | --- |
| **4** | **3** | **127** | |

**Users**                                        + Invite User

| | | |
| --- | --- | --- |
| JP | **John Partner** john@acmecapital.com | Admin  Active |
| SJ | **Sarah Johnson** sarah@acmecapital.com | Member  Active |
| MC | **Mike Chen** mike@acmecapital.com | Member  Active |

**Company Details**

Created
December 1, 2024

Strategy
Private Equity - Growth

Location
San Francisco, CA

Website
acmecapital.com

**Activity**

Last login                    2 hours ago

---

Super Admin                    Admin Company Detail                    ☰ All Screens

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

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

## Users

All platform users across companies

| Search by name or email... | | All Companies ▾ | All Roles ▾ | Filter |

| 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 |

Showing 1-4 of 156 users                    Previous   **1**   2   3   Next

Super Admin                    Admin Users                    ☰ All Screens

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.

# People

LP contacts database

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

## People

LP contacts and investment professionals in the database

⬆ Import        + Add Person

Search by name, title, or organization...        All Organizations ▾    Filter

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

Showing 1-4 of 8,234 people        Previous  **1**  2  3  Next

Super Admin              Admin People                              ☰ All Screens

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.

# LPs

Institutional investor database

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

## LP Database
5,247 institutional investors

⬆ Import LPs   + Add LP

| Total LPs | Pensions | Endowments | Family Offices | Other |
|---|---|---|---|---|
| **5,247** | **1,245** | **892** | **2,156** | **954** |

Search LPs...   All Types ▾   All Regions ▾   Data Quality ▾   Filter

| 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** | Pension | — | Unknown | 0 | Low | Edit → |

Super Admin    Admin Lps    ☰ All Screens

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



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

LPs / CalPERS

### Edit LP: CalPERS                                                    High Quality
Last updated: 2 weeks ago

**Basic Information**

LP Name *

CalPERS

Full Name

California Public Employees' Retirement System

Type *                                    Location

Public Pension                            Sacramento, CA, USA

**Financial Information**

Total AUM                                 PE Allocation %

$ 450B                                    12%

Super Admin                  Admin Lp Detail                         ☰ All Screens

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 | HIGH QUALITY | MEDIUM QUALITY | LOW QUALITY |
|---|---|---|---|
| **78%** ✓ | **3,124** 60% of LPs | **1,523** 29% of LPs | **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

| Name | 100% |
|---|---|
| Type | 98% |
| AUM | 72% |
| Mandate | 65% |
| Contacts | 45% |

Super Admin                    Admin Data Quality                    ☰ All Screens

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

LPs / Import Wizard

✓ Upload ——— ② Map Fields ——— ③ Preview ——— ④ Import

## Map CSV Fields

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

**File:** lp_database_export_2024.csv   500 rows × 12 columns

| CSV Column | LPxGP Field |
|---|---|
| organization_name | LP Name * ⌄ |
| investor_type | Type * ⌄ |
| hq_location | |

Super Admin        Admin Import        ☰ All Screens

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

## System Health
Monitor platform status and integrations                                                      ● All systems operational

### Supabase PostgreSQL
Primary database                                                               Healthy

| Response | Connections | Storage |
|---|---|---|
| 12ms | 8/100 | 2.4GB |

### Supabase Auth
Authentication service                                                          Healthy

| Response | Active Sessions | Logins (24h) |
|---|---|---|
| 45ms | 24 | 156 |

### OpenRouter API
LLM inference (Claude)                                                          Healthy

| Response | Requests (24h) | Cost (24h) |
|---|---|---|
| 1.2s avg | 89 | $2.34 |

### Voyage AI
Embedding service                                                              Healthy

| Response | Embeddings (24h) | Vectors |
|---|---|---|
| 180ms | 450 | 5,247 |

### Recent System Events                                                       View All

✓ LP import completed successfully
500 records processed, 498 imported, 2 duplicates skipped                      2 hours ago

Super Admin                              Admin Health                          ☰ All Screens

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

LP ✕ GP    Dashboard    Funds    Search    Matches    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**

GP User                    Dashboard Empty                    ☰ All Screens

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

# Loading Matches
Match generation progress



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

# API Error

Error state handling

LP ✕ GP    Dashboard    Funds    Search    Matches    Outreach                                    Acme Capital    JP

⚠

**Something went wrong**

We encountered an error while processing your request.
This might be a temporary issue with our service.

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

🔄 Try Again          ← Go Back

Need help?

GP User                              Error Api                                              ☰ All Screens

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 | REVIEWED | INTERESTED | ALLOCATION |
|---|---|---|---|
| **24** | **156** | **12** | **$850M** |
| +8 this week | funds this quarter | marked for follow-up | available FY24 |

**Top Fund Matches**                                                                View All Matches →

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

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    Preferences    Profile      CalPERS   CP

## 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 | Fund Number |
| $2.5B | Fund VI |

| Closing | Min Commitment |
| 30 days | $50M |

**Interested**   Pass      View Details →

### Acme Growth Fund III
Acme Capital      **91** / 100

Growth Equity   North America   ESG

| Target Size | Fund Number |
| $500M | Fund III |

| Closing | Min Commitment |
| Q2 2024 | $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

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

Fund Matches / Sequoia Growth Fund VI

## Sequoia Growth Fund VI
Sequoia Capital

**94** Match Score   [Mark Interested]   [Pass]

### Why This Match

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

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

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

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

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

### Fund Details

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

### Score Breakdown

Strategy Alignment    96/100

### GP Team

Jim Loucks

UX Flow: LP User      LP Dashboard    Fund Matches    Match Detail | Preferences      ← 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 | Maximum |
|---------|---------|
| $250M | $3B |

**Check Size Range**

| Minimum | Maximum |
|---------|---------|
| $50M | $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.
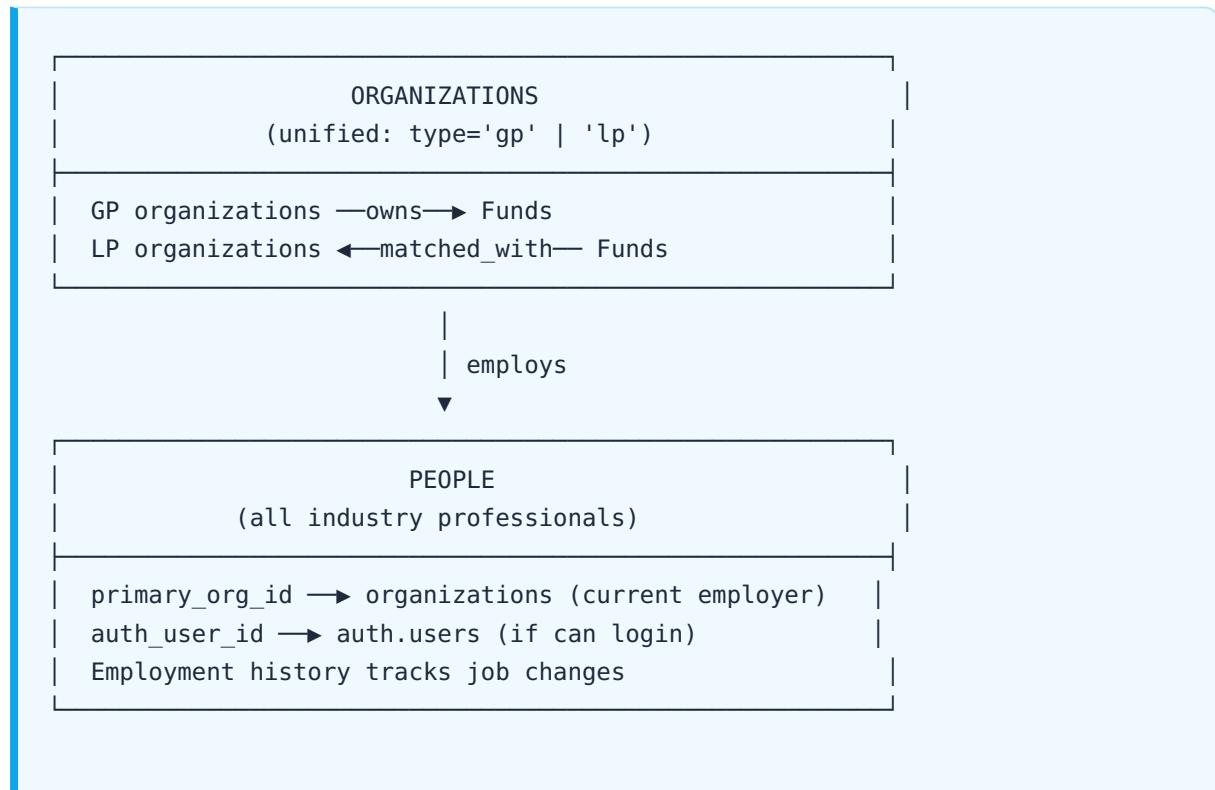
UX Flow: LP User          LP Dashboard   Fund Matches   Preferences   **LP Profile**          ← All Screens

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:

```
┌─────────────────────────────────────────────────────────────┐
│                      ORGANIZATIONS                           │
│                (unified: type='gp' | 'lp')                   │
├─────────────────────────────────────────────────────────────┤
│   GP organizations ──owns──▶ Funds                           │
│   LP organizations ◀──matched_with── Funds                   │
└─────────────────────────────────────────────────────────────┘
                              │
                              │ employs
                              ▼
┌─────────────────────────────────────────────────────────────┐
│                        PEOPLE                                │
│              (all industry professionals)                    │
├─────────────────────────────────────────────────────────────┤
│   primary_org_id ──▶ organizations (current employer)        │
│   auth_user_id ──▶ auth.users (if can login)                 │
│   Employment history tracks job changes                      │
└─────────────────────────────────────────────────────────────┘
```

## Key Entities

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

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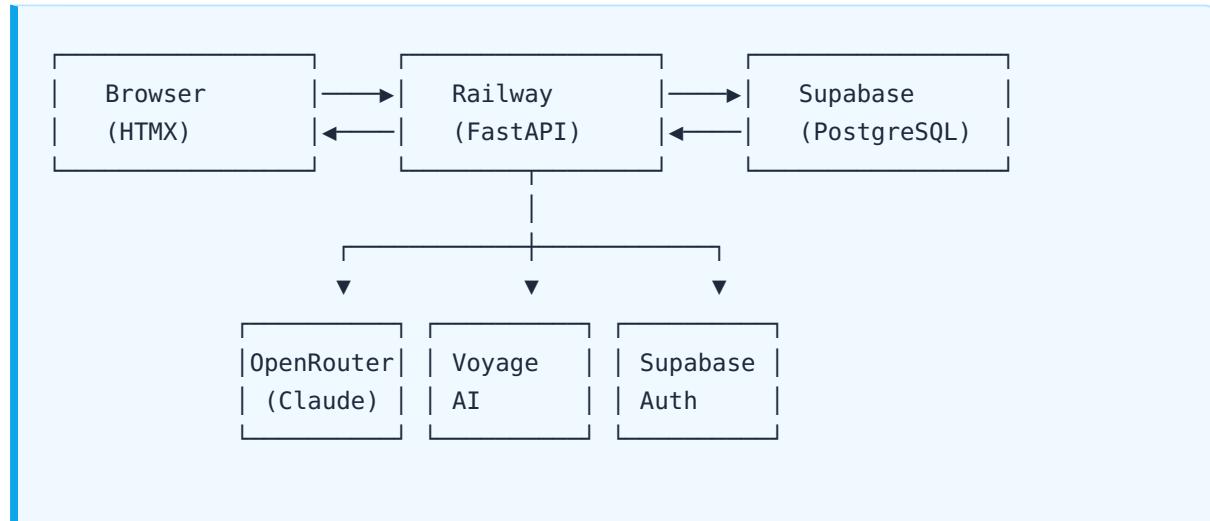
- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)

- **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:

```
| Browser   |  ---->  | Railway    |  ---->  | Supabase     |
| (HTMX)    |  <----  | (FastAPI)  |  <----  | (PostgreSQL) |

                           |
            +--------------+--------------+
            ▼              ▼              ▼
       |OpenRouter|   | Voyage |   | Supabase |
       | (Claude) |   | AI     |   | Auth     |
```

## Technology Stack

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

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

## Security Model

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

# 7. Non-Functional Requirements

## Performance

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

## Security

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

## Scalability

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

## Availability

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

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

# 8. Success Metrics

## User Engagement

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

## Feature Adoption

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

## Quality Indicators

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

# 9. Glossary

**AUM (Assets Under Management)**

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

**Dry Powder**

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

**Embedding**

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

**Endowment**

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

**Family Office**

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

**GP (General Partner)**

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

**Hard Filter**

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

**HTMX**

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

**LP (Limited Partner)**

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

**Mandate**

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

**Pension Fund**

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

**pgvector**

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

**RLS (Row-Level Security)**

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

**Semantic Search**

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

**Soft Score**

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

**Sovereign Wealth Fund**

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

**Thesis**

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

**Voyage AI**

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