



GP-LP Intelligence Platform Product Document

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1. Executive Summary

Overview

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

Domain: lpxgp.com

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

Problem Statement

Fund managers face significant challenges in the fundraising process:

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

Solution

LPxGP provides an intelligent matching and outreach platform:

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

Outreach Tracking	Pipeline management for fundraising campaigns
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Key Value Proposition: Reduce time-to-first-close by helping GPs focus on the highest-probability LP targets with personalized, relevant outreach.

2. User Personas

GP Fund Manager (Company Admin)

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

Goals:

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

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

GP Associate (Company Member)

Role: Associate or VP supporting fundraising efforts

Goals:

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

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

Super Admin (LPxGP Team)

Role: LPxGP platform administrator

Goals:

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

Platform Access: Full administrative access across all companies

3. User Journeys

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

Journey 1: Platform Onboarding (Super Admin)

Actor: Sarah, LPxGP Super Admin

Goal: Onboard a new GP firm to the platform

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

Story: Sarah receives a request from Acme Capital to join LPxGP. She reviews platform health on the Admin Dashboard, navigates to Companies, creates the new company profile, and invites John (Partner) as the company admin via email invitation.

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

Journey 2: New User Onboarding (GP Admin)

Actor: John, Partner at Acme Capital

Goal: Accept invitation and set up account

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

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

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

Journey 3: Fund Creation

Actor: John, Partner at Acme Capital

Goal: Create fund profile for Growth Fund III

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

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

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

Journey 4: LP Research

Actor: Maria, Associate at Acme Capital

Goal: Find LPs matching Growth Fund III criteria

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

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

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

Journey 5: AI Matching

Actor: Maria, Associate at Acme Capital

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

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

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

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

Journey 6: Pitch Generation

Actor: Maria, Associate at Acme Capital

Goal: Create personalized outreach for CalPERS

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

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

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

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

4. Screen Mockups

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

Public Screens

4 screens - Authentication and onboarding flows

Login

User authentication page

LPxGP

GP-LP Intelligence Platform

Find the right LPs for your fund.

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

© 2024 LPxGP. All rights reserved.

Sign in

Enter your credentials to access your account

Email address

partner@acmecapital.com

Password

[Forgot password?](#)

Sign in

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

UX Flow:

[Login](#) -> [Dashboard](#) | [Forgot Password](#) -> [Reset Password](#) -> [Login](#)

[All Screens](#)

Accept Invitation

New user onboarding flow

LPxGP

GP-LP Intelligence Platform

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

You're joining

AC Acme Capital
Private Equity Firm

Invitation sent to:
john.partner@acmecap.com

Full Name

John Partner

Create Password

Minimum 8 characters with a number

Confirm Password

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

Accept Invitation

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

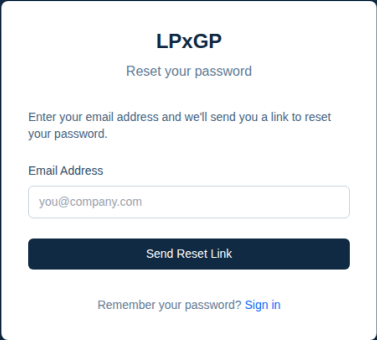
UX Flow:

Email Invitation -> **Accept Invitation** -> Dashboard

... All Screens

Forgot Password

Password reset request



The image shows a 'Forgot Password' form for LPxGP. The form is centered on a dark blue background. It includes a title 'LPxGP', a subtitle 'Reset your password', and an instruction 'Enter your email address and we'll send you a link to reset your password.' Below this is a label 'Email Address' and a text input field containing 'you@company.com'. A dark blue button labeled 'Send Reset Link' is positioned below the input field. At the bottom of the form, there is a link 'Remember your password? Sign in'. The footer of the page contains a 'UX Flow' section with a navigation path: 'Login -> Forgot Password -> Reset Password -> Login', where 'Forgot Password' is highlighted. To the right of this path is a link 'All Screens'. A copyright notice '© 2024 LPxGP. All rights reserved.' is located below the form.

LPxGP

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

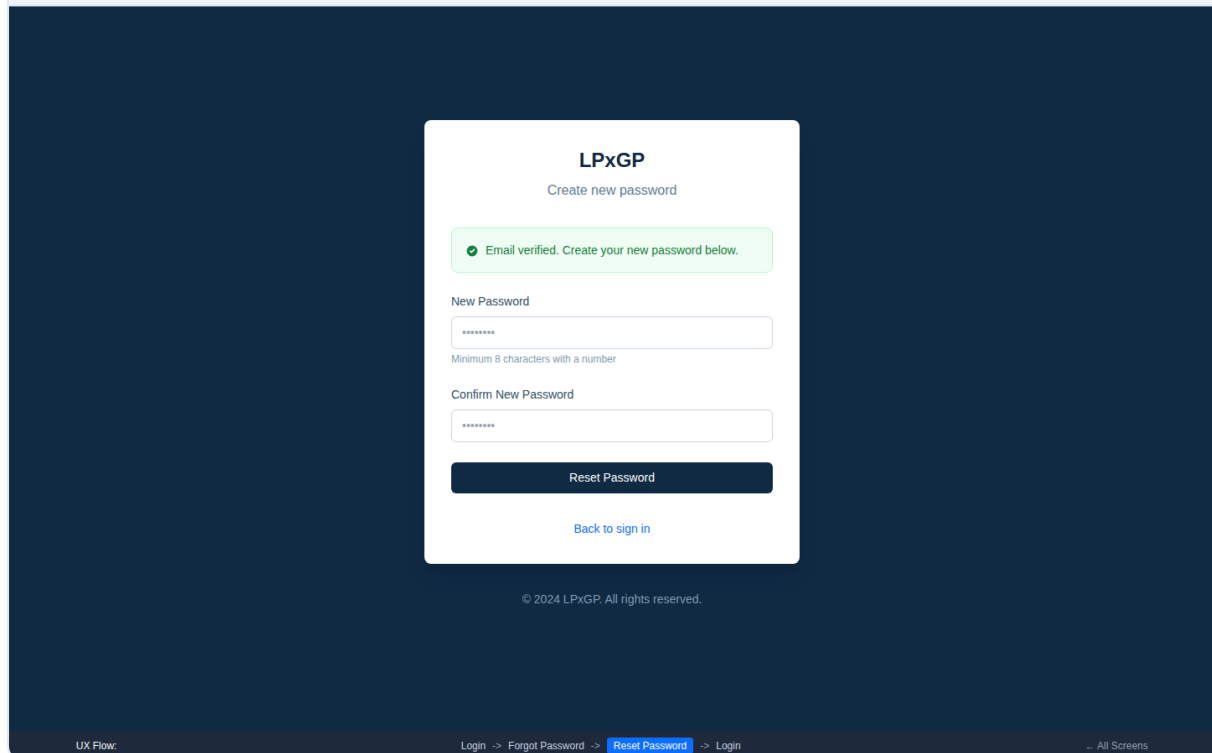
Remember your password? [Sign in](#)

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UX Flow: Login -> **Forgot Password** -> Reset Password -> Login ... All Screens

Reset Password

Create new password



The image shows a 'Reset Password' screen for the LPxGP application. The screen has a dark blue background. At the top, there is a light blue header with the title 'Reset Password' and the subtitle 'Create new password'. In the center, there is a white card with the LPxGP logo and the text 'Create new password'. Below the logo, there is a green success message: 'Email verified. Create your new password below.' followed by two input fields: 'New Password' and 'Confirm New Password'. The 'New Password' field has a hint: 'Minimum 8 characters with a number'. Below the input fields is a dark blue 'Reset Password' button and a blue link 'Back to sign in'. At the bottom of the card, there is a copyright notice: '© 2024 LPxGP. All rights reserved.' At the very bottom of the screen, there is a dark blue footer with the text 'UX Flow: Login -> Forgot Password -> Reset Password -> Login' and a link 'All Screens'.

LPxGP
Create new password

✔ Email verified. Create your new password below.

New Password

Minimum 8 characters with a number

Confirm New Password

Reset Password

[Back to sign in](#)

© 2024 LPxGP. All rights reserved.

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

GP User Screens

13 screens - Core platform functionality for fund managers

Dashboard

Fund overview and recent activity

LPxGP **Dashboard** Funds Search Outreach Acme Capital JP

Dashboard

Welcome back, John

ACTIVE FUNDS
3
+1 this quarter

TOTAL MATCHES
127
across all funds

SHORTLISTED
34
LPs for outreach

MEETINGS
8
+3 this month

Your Funds


Growth Fund III Raising
Private Equity - Growth
Target Size **\$500M**
Matches **45**
Shortlisted **12**
[View Matches →](#)


Growth Fund II Investing
Private Equity - Growth
Fund Size **\$350M**
Vintage **2021**
Deployed **72%**
[View Details →](#)


Growth Fund I Harvesting
Private Equity - Growth
Fund Size **\$200M**
Vintage **2017**
Net IRR **28.5%**
[View Details →](#)

[+ New Fund](#)

Recent Activity

 **Generated pitch for CalPERS**
Growth Fund III 2 hours ago

 **Added Harvard Endowment to shortlist**
Growth Fund III Yesterday

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

14

Funds

List of all funds

LPxGP [Dashboard](#) [Funds](#) [Search](#) [Outreach](#) Acme Capital JP

Your Funds

Manage fund profiles and view LP matches

+ New Fund

Growth Fund III Raising

Private Equity - Growth

Target Size	\$500M
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

Fund Detail

Fund profile with thesis and track record

LPxGP

Dashboard

Funds

Search

Outreach

Acme CapitalJP

Funds / Growth Fund III

Growth Fund III

Raising

Private Equity - Growth Equity

Edit FundView Matches

Fund Overview

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

Matching Stats

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

View All Matches

Investment Thesis

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

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

Quick Actions

Generate LP Pitch →

Export Fund Summary →

Refresh Matches →

Track Record

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

Create Fund

New fund creation form

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

Funds / Create Fund

Create Fund Profile

Set up your fund to start finding matching LPs

Basic Information

Fund Name *

e.g., Growth Fund III

Strategy *

Private Equity - Growth

Status *

Raising

Fund Size & Timeline

Target Size *

\$ 500M

Target Close

Q2 2025

Min Check Size

\$ 25M

Max Check Size

\$ 75M

Investment Focus

Geography *

North America

Stage Focus

Growth / Expansion

Sector Focus

e.g., Technology, Healthcare, Financial Services

Investment Thesis

Describe your investment strategy

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

This will be used for AI matching with LP mandates

Cancel

Create Fund

LP Search

Search and filter institutional investors

LPxGP [Dashboard](#) [Funds](#) [Search](#) [Outreach](#) Acme Capital JP

Search LPs

Find institutional investors for your funds

Search

Filters

LP Type

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

AUM Range

to

Geography

▼

Invests In

- ☒ Private Equity
- ☐ Venture Capital
- ☐ Real Estate

Clear Filters

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
Texas Teachers Teacher Retirement System of Texas	Pension	Austin, TX	\$180B	View + Shortlist

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LP Detail

LP profile with mandate and contacts

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital JP

Search / CalPERS

CP

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

+ Add to Shortlist

Generate Pitch

Overview

Total AUM
\$450B

PE Allocation
13%

Est. PE Commitment
\$58.5B

Investment Mandate

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

TARGET RETURN
Net IRR 11%+

PREFERRED CHECK
\$100M - \$500M

GEOGRAPHY
North America, Europe

SECTORS
Diversified

Key Contacts

MS

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

JC

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

Match Score

92

Excellent Match

Strategy Alignment

Strong

Size Fit

Good

Geography

Match

ESG Focus

Aligned

Why This Score?

Actions

Generate Email Draft

Create LP Summary

Flag Data Issue

Data Quality

High

Last updated: 2 weeks ago

Matches

AI-ranked LP matches for fund

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Funds / Growth Fund III / Matches

LP Matches Refresh Matches

Growth Fund III - 45 matched LPs ranked by fit score

Total Matches
45

Avg Score
72

Shortlisted
12

Contacted
8

92

CalPERS Excellent Match

Public Pension | \$450B AUM | Sacramento, CA

✓ Strategy aligned ✓ ESG aligned ✓ Size fit

Why this match? + Shortlist

88

Yale Endowment Strong Match

Endowment | \$41B AUM | New Haven, CT

✓ Strong PE allocation ✓ Thesis aligned

Why this match? + Shortlist

76

Texas Teachers Good Match

Public Pension | \$180B AUM | Austin, TX

✓ Strategy aligned ⚠ Usually requires Fund III+

Why this match? + Shortlist

65

Ford Foundation Moderate Match

Foundation | \$16B AUM | New York, NY

✓ ESG aligned ⚠ Lower PE allocation

Why this match? + Shortlist

Load More (41 remaining)

Match Analysis

AI insights and talking points

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Funds / Growth Fund III / Matches / CalPERS Analysis

92

CalPERS × Growth Fund III
Match Analysis & AI Insights

+ Add to Shortlist

Generate Pitch

Score Breakdown

95
Strategy Fit

90
Size Match

92
Geography

88
Thesis Alignment

AI Match Analysis

Why This Is a Strong Match

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

- ✓ **Strategy alignment:** CalPERS actively invests in growth equity managers targeting technology-enabled businesses, matching your fund's focus.
- ✓ **Fund size fit:** Your \$500M target is within CalPERS' preferred commitment range for emerging managers (\$100M-\$500M).
- ✓ **Track record:** Your Fund I/II performance (28.5% net IRR) exceeds their 11% target hurdle rate.
- ✓ **ESG commitment:** Both organizations prioritize responsible investment practices and governance.

Points to Consider

- ⚠ **Competition:** CalPERS receives 200+ manager proposals annually; differentiation is critical.
- ⚠ **Due diligence timeline:** Their process typically takes 9-12 months from first meeting to commitment.
- ⚠ **Co-investment:** They often expect co-investment opportunities; be prepared to discuss capacity.

Suggested Talking Points

Track Record Highlight [Copy](#)

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

Value Creation Story [Copy](#)

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

ESG Commitment [Copy](#)

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

Pitch Generator

AI-powered outreach content

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

Outreach / Generate Pitch

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

☒ Team experience

☐ ESG commitment

☐ Co-investment capacity

Generate Pitch

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 technology, healthcare, and financial services

Strategy: We target \$50-200M revenue companies with proven unit economics, focusing on organic growth acceleration and strategic M&A

We are currently meeting with prospective limited partners for Fund III and would welcome the opportunity to discuss how our strategy may complement CalPERS' private equity portfolio.

Would you be available for a brief introductory call in the coming weeks?

Best regards,

John Partner
Managing Partner, Acme Capital
john@acmecapital.com

Generated by Claude via OpenRouter • Based on CalPERS mandate analysis

Shortlist

LPs ready for outreach

LPxGP

Dashboard

Funds

Search

Outreach

Acme Capital

JP

Funds / Growth Fund III / Shortlist

Shortlist

Growth Fund III - 12 LPs ready for outreach

↓ Export List

✉ Batch Generate Pitches

All (12)

To Contact (7)

Contacted (3)

Meeting Set (2)

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

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Outreach Hub

Activity tracking and pipeline

LPxGP [Dashboard](#) [Funds](#) [Search](#) **[Outreach](#)** Acme Capital JP

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
Growth Fund III
3 days ago

[View All Activity](#) →

Quick Actions

[Generate Batch Pitches](#)

[Export Shortlist to CSV](#)

[View All Meetings](#)

Upcoming Meetings

Yale Endowment
Jan 15, 2:00 PM

Stanford Endowment
Jan 18, 10:00 AM

Needs Follow-up

Ontario Teachers5 days

CalPERS3 days

CPPIB7 days

24

Settings - Profile

User profile settings

LPxGP

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

Acme Capital

JP

Settings

[Profile](#)[Team](#)[Company](#)[Notifications](#)[Security](#)

Profile Settings

[Change Photo](#)

JPG, PNG. Max 5MB.

First Name

John

Last Name

Partner

Email

john@acmecapital.com

[Contact support to change your email address](#)

Title

Managing Partner

Phone

+1 (555) 123-4567

Bio

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

[Brief description for your profile](#)[Cancel](#)[Save Changes](#)

Danger Zone

Delete Account

Permanently remove your account and all data

[Delete Account](#)

Settings - Team

Team member management

LPxGP Dashboard Funds Search Outreach Acme Capital JP


Settings
Profile
Team
Company
Notifications
Security

Team Members
Manage who has access to Acme Capital

+ Invite Member

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

Pending Invitations

 emily@acmecapital.com
Invited 2 days ago

Pending Resend Cancel

Role Permissions

Admin

- Manage team members
- Create and edit funds
- Access all features
- View billing

Member

- View funds
- Search LPs
- Generate pitches
- Manage shortlists

Super Admin Screens

10 screens - Platform administration and data management

Admin Dashboard

Platform overview and health

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

Platform Dashboard

Overview of LPxGP platform activity

COMPANIES

25

+3 this month

TOTAL USERS

156

+12 this month

LP DATABASE

5,247

+50 this week

MATCHES GENERATED

12,450

all time

Pending Actions

3 companies awaiting activation

Admin invitations pending acceptance

View →

12 LPs flagged for review

Data corrections submitted by users

Review →

Import job in progress

500 LPs processing - 78% complete

Monitor →

System Health

Database

● Healthy

Supabase Auth

● Healthy

OpenRouter API

● Healthy

Voyage AI

● Healthy

Last checked: 30 seconds ago

Recent Platform Activity

View All

2 hours ago

New company Beta Ventures created

5 hours ago

User jane@acme.com joined Acme Capital

Yesterday

LP import completed: 500 records added

UX Flow: Super Admin

Dashboard

Companies

Users

People

LPs

Data Quality

Health

... All Screens

Companies

Manage GP firms on platform

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

Companies

Manage GP firms on the platform

+ Add Company

All Status

Filter

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

Showing 1-4 of 25

Previous

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UX Flow: Super Admin

Dashboard

Companies

Users

People

LPs

Data Quality

Health

... All Screens

Company Detail

Company users and funds

LPxGPADMIN

DashboardCompaniesUsersPeopleLPsData Quality

Super AdminSA

Companies / Acme Capital

AC

Acme Capital

Private Equity | San Francisco, CA

Active

Edit CompanyDeactivate

Users

4

Funds

3

Matches

127

Company Details

Created
December 1, 2024

Strategy
Private Equity - Growth

Location
San Francisco, CA

Website
acmecapital.com

Users

+ Invite User

JP

John Partner
john@acmecapital.com

AdminActive

SJ

Sarah Johnson
sarah@acmecapital.com

MemberActive

MC

Mike Chen
mike@acmecapital.com

MemberActive

Funds

Growth Fund III
\$500M target • Raising45 matches

Growth Fund II
\$350M • Investing52 matches

Growth Fund I
\$200M • Harvesting30 matches

Activity

Last login2 hours ago

Searches (30d)127

Pitches (30d)23

Admin Actions

View Audit Log

Reset Company Data

UX Flow: Super AdminDashboardCompaniesUsersPeopleLPsData QualityHealth... All Screens

Users

All platform users

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

Users

All platform users across companies

All Companies

All Roles

Filter

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

Showing 1-4 of 156 users

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People

LP contacts database

LPxGP

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People

LP contacts and investment professionals in the database

Search by name, title, or organization...

All Organizations

Filter

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

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LPs

Institutional investor database

LPxGP

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LP Database

5,247 institutional investors

Import LPs

Add LP

Total LPs

5,247

Pensions

1,245

Endowments

892

Family Offices

2,156

Other

954

Search LPs...

All Types

All Regions

Data Quality

Filter

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

Showing 1-4 of 5,247 LPs

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[Edit LP](#)

LP data management form

LPxGPADMIN

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LPs / CalPERS

Edit LP: CalPERS

High Quality

Last updated: 2 weeks ago

Basic Information

LP Name *

CalPERS

Full Name

California Public Employees' Retirement System

Type *

Public Pension

Location

Sacramento, CA, USA

Financial Information

Total AUM

\$ 450B

PE Allocation %

13%

Target PE Return

11% Net IRR

Typical Commitment

\$100M - \$500M

Investment Mandate

Geographic Focus

North America, Europe

Investment Mandate (for AI matching)

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

Used for semantic matching with fund profiles

Data Quality

Quality Score

High

Source

Public filings, website

Delete LP

CancelSave Changes

Data Quality

Quality monitoring and issues

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Data Quality

Monitor and improve LP database quality

OVERALL SCORE

78%

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

[View All Issues →](#)

Quality by Field

Name

100%

Type

98%

AUM

72%

Mandate

65%

Contacts

45%

Actions

Run Duplicate Detection

Export Quality Report

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Import Wizard

CSV import tool

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LPs / Import Wizard

Upload

2Map Fields

3Preview

4Import

Map CSV Fields

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

File: lp_database_export_2024.csv500 rows × 12 columns

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

1 column will be skipped

The "internal_notes" column is not mapped and won't be imported.

Back

Preview Import

System Health

Services and integrations status

LPxGP

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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

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

 Embedding regeneration completed
5,247 LP embeddings updated for semantic search
Yesterday

 OpenRouter rate limit approached
80% of daily limit reached, consider upgrading
2 days ago

View All

UX Flow: Super Admin

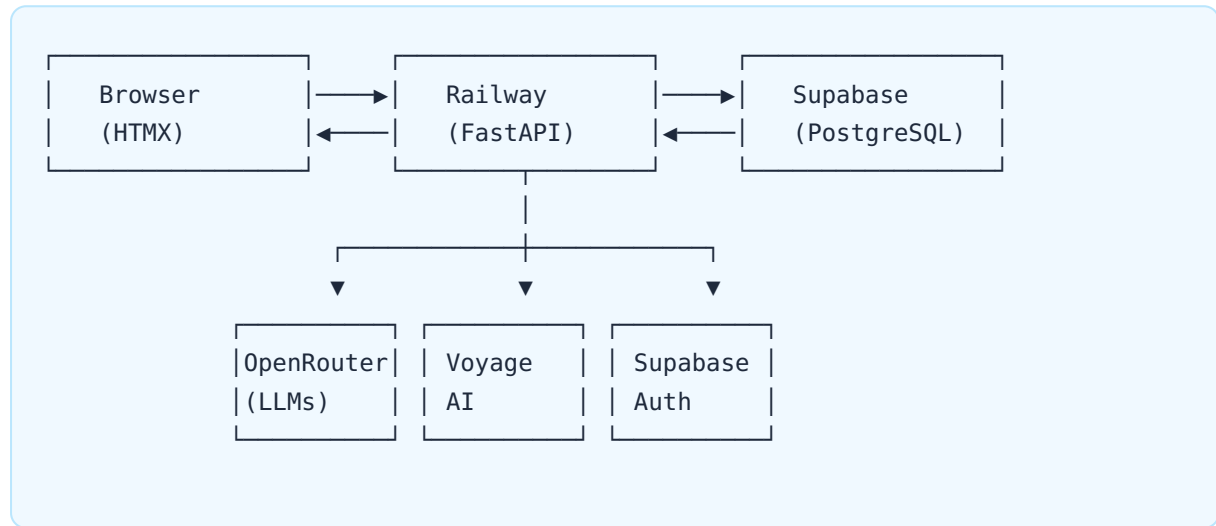
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5. Technical Architecture

System Overview

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



Technology Stack

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

Security Model

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

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

6. Milestones

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

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

Current Status: Ready for Milestone 0 implementation