



## GP-LP Intelligence Platform

AI-powered investor matching and outreach  
for fund managers

Product Document | December 2025

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# 1. Product Overview

## What LPxGP Does

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

**In one sentence:** LPxGP uses AI to match funds with compatible LPs and generate personalized outreach, reducing time-to-first-close for fundraising campaigns.

## Core Capabilities

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

## The Problem We Solve

Fund managers face significant challenges in the fundraising process:

**Information Overload**

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

**Manual Research**

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

**Poor Targeting**

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

**Generic Outreach**

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

## Who Uses LPxGP

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### GP Fund Manager (Company Admin)

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

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

**Primary Goals:**

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

### GP Associate (Company Member)

**Role:** Associate or VP supporting fundraising efforts at a PE/VC firm

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

**Primary Goals:**

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

## **Super Admin (LPxGP Team)**

**Role:** LPxGP platform administrator responsible for operations

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

### **Primary Goals:**

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

## 2. Feature Specifications

### LP Database & Search

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#### Database Contents

The LP database contains comprehensive information on institutional investors:

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

#### Search Capabilities

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

### AI-Powered Matching

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#### How Matching Works

The matching algorithm evaluates LP-Fund compatibility using multiple signals:

Signal	Type	Weight	Description
Strategy Alignment	Hard Filter	Pass/Fail	LP must invest in fund's strategy (e.g., growth equity)

Geographic Fit	Hard Filter	Pass/ Fail	LP's geographic preferences must overlap with fund focus
Size Compatibility	Soft Score	20%	Fund target size within LP's typical commitment range
Semantic Similarity	Soft Score	40%	AI comparison of fund thesis to LP investment mandate
Activity Recency	Soft Score	20%	Recent LP activity suggests active deployment
Data Quality	Soft Score	20%	Higher quality LP data enables better matching

## Match Output

For each fund, the system generates:

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

## Pitch Generation

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### Output Types

Type	Length	Use Case
Executive Summary	1 page	One-pager tailored to LP's interests and mandate
Outreach Email	3-5 paragraphs	Initial introduction referencing LP's recent activity
Talking Points	Bullet list	Meeting preparation with key messages and responses

**Human-in-the-Loop Design:** All AI-generated content requires human review before use. There is no auto-send functionality - users must copy to clipboard

and paste into their email client. This ensures quality control and compliance with professional communication standards.

## Pipeline Management

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The platform tracks LPs through the fundraising pipeline:

- **Identified:** LP discovered through search or matching
- **Shortlisted:** Selected for potential outreach
- **Contacted:** Initial outreach sent
- **Meeting Scheduled:** Engagement confirmed
- **In Diligence:** Active evaluation underway
- **Committed:** Commitment received

# 3. User Journeys

This section describes the key user experience flows through the LPxGP platform.

## Journey 1: Platform Onboarding

**Actor:** Sarah, LPxGP Super Admin

**Goal:** Onboard a new GP firm to the platform

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

Sarah receives a request from Acme Capital to join LPxGP. She reviews platform health on the Admin Dashboard, navigates to Companies, creates the new company profile with billing information, and invites John (Managing Partner) as the company admin via email invitation. John receives a secure link to accept the invitation and set up his account.

## Journey 2: Fund Creation

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

**Goal:** Create fund profile for Growth Fund III

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

John clicks "+ New Fund" on his dashboard. He can either manually enter fund details or upload a pitch deck PDF. Choosing to upload, the AI extracts fund information (name, strategy, target size, thesis, track record) with confidence scores for each field. John reviews and confirms high-confidence items, manually corrects a low-confidence field, and saves the fund profile. The fund is now ready for LP matching.

## Journey 3: LP Research & Matching

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

**Goal:** Find and evaluate LPs for Growth Fund III

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

Maria uses two approaches: manual research and AI matching. For manual research, she navigates to LP Search, enters "growth equity technology investors" and applies filters (Check Size > \$10M, Geography: North America). She reviews 45 results, clicks on promising LPs to view full profiles with mandates and contacts.

For AI matching, she goes to Growth Fund III and clicks "View Matches." The system shows 87 LPs ranked by fit score. She clicks on CalPERS (score: 92) to see why it's a strong match: strategy alignment, appropriate size, and high semantic similarity to the fund thesis. The AI provides talking points about CalPERS's recent tech investments and flags a potential concern about their preference for established managers.

## Journey 4: Pitch & Outreach

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

**Goal:** Create personalized outreach for high-priority LPs

**Screen Flow:** Match Detail → Pitch Generator → Generate → Edit → Copy → Outreach Hub

From the CalPERS match detail, Maria clicks "Generate Pitch" and selects "Outreach Email." The AI generates a personalized email referencing CalPERS's recent allocations and how Growth Fund III aligns with their mandate. Maria edits the subject line to add a mutual connection reference, adjusts the call-to-action timing, and copies the final email to clipboard. She pastes it into her email client and sends. Back in LPxGP, she moves CalPERS to "Contacted" in the Outreach Hub and logs the activity.

# 4. Screen Reference

This section documents all 30 screens in the LPxGP platform. Each screen includes a visual mockup and explanation of its purpose, user actions, and role in user journeys.

## Public Screens

4 screens — Authentication and onboarding flows for all users

# Login

User authentication

The Login screen is the entry point for all authenticated users. Users enter their email and password to access the platform. The design emphasizes security and trust with a clean, professional interface. Failed login attempts are tracked and accounts are locked after 5 consecutive failures to prevent brute-force attacks. A "Forgot Password" link provides account recovery options.

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

The main content area has a "Sign in" heading and a sub-instruction: "Enter your credentials to access your account". It features two input fields: "Email address" containing "partner@acmecapital.com" and "Password" containing "\*\*\*\*\*". To the right of the password field is a "Forgot password?" link. A large blue "Sign in" button is at the bottom of the form. Below the form, a small note reads: "Don't have an account? Contact us for access."

At the very bottom of the page, there's a navigation bar with "UX Flow" on the left, a breadcrumb trail ("Login -> Dashboard | Forgot Password -> Reset Password -> Login"), and "All Screens" on the right.

# Accept Invitation

New user onboarding

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

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

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**

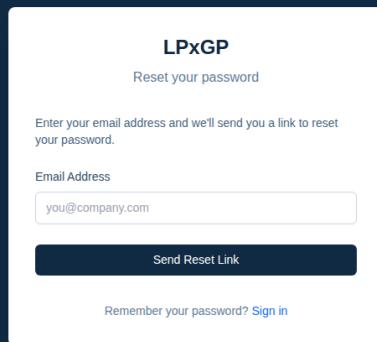
Already have an account? [Sign in](#)

UX Flow: Email Invitation -> **Accept Invitation** -> Dashboard .. All Screens

# Forgot Password

Request reset link

Users who cannot remember their password can request a reset link. They enter their email address and receive a secure, time-limited reset link. The form includes rate limiting to prevent abuse. For security, the same success message is shown whether or not the email exists in the system.



The screenshot shows a modal window titled "LPxGP" with the sub-header "Reset your password". Below this, a descriptive text reads: "Enter your email address and we'll send you a link to reset your password." A text input field is labeled "Email Address" and contains the placeholder "you@company.com". Below the input field is a dark blue button labeled "Send Reset Link". At the bottom of the modal, there is a link "Remember your password? [Sign in](#)".

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UX Flow:

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

.. All Screens

## Reset Password

Create new password

After clicking the reset link from their email, users land on this screen to set a new password. Password strength requirements are enforced (minimum 8 characters, mix of letters and numbers). The reset token is validated and expires after use to ensure security.

The screenshot shows a white rectangular form on a dark background. At the top center is the LPxGP logo. Below it is the text "Create new password". A green callout box contains the message "Email verified. Create your new password below." The form has two input fields: "New Password" and "Confirm New Password", both containing placeholder text "\*\*\*\*\*". Below these fields is a "Reset Password" button. At the bottom of the form is a blue "Back to sign in" link. At the very bottom of the page, centered, is the copyright notice "© 2024 LPxGP. All rights reserved."

UX Flow:

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

.. All Screens

## GP User Screens

13 screens — Core platform functionality for fund managers and associates

# Dashboard

Fund overview and activity

The Dashboard is the command center for fund managers. It provides an at-a-glance view of all funds, recent matching activity, and quick access to key features. Users see fund cards showing name, status (Raising/Investing/Harvesting), target size, and match statistics. Recent activity includes new matches, shortlist additions, and outreach updates. The "+ New Fund" button provides quick access to fund creation.

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

The main content area is divided into several sections:

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

# Funds

List of all funds

The Funds screen shows all funds belonging to the user's company. Each fund card displays key metrics: fund name, status, target size, number of LP matches, and last activity date. Users can filter by status or search by name. Clicking a fund card navigates to the Fund Detail view. Company admins can see all company funds; members see funds they're assigned to.

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

The main content area is titled "Your Funds" and includes a subtitle "Manage fund profiles and view LP matches". On the right side of this title, there is a button labeled "+ New Fund".

Below the title, there are three fund cards, each with a summary of its status, target size, and current progress:

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

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

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

# Fund Detail

Fund profile with thesis and track record

The Fund Detail screen is the comprehensive profile for a single fund. It displays the fund thesis, investment strategy, geographic focus, target size, and track record of notable exits. A sidebar shows matching statistics and quick actions (View Matches, Generate Pitch). Company admins can edit fund details; members have read-only access. This is the primary context for LP matching and outreach activities.

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

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

# Create Fund

New fund creation form

The Create Fund screen enables users to set up a new fund profile. Users can either manually enter fund details or upload a pitch deck (PDF/PPTX) for AI-assisted extraction. When a deck is uploaded, the system uses Claude to extract fund name, strategy, thesis, target size, and other details. Extracted fields show confidence scores, allowing users to review and correct low-confidence items before saving.

The screenshot shows the LPxGP application interface for creating a new fund profile. The top navigation bar includes links for Dashboard, Funds, Search, and Outreach, along with a user profile for 'Acme Capital' and 'JP'. The main page title is 'Funds / Create Fund'. The central form is titled 'Create Fund Profile' and contains the following sections:

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

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

# LP Search

Search and filter institutional investors

LP Search is the primary research tool for finding potential investors. Users can search by keyword or use natural language queries like "technology growth equity investors in North America." Advanced filters allow narrowing by LP type (pension, endowment, family office), AUM range, typical check size, geographic focus, and strategy preferences. Results show relevance scores and key LP attributes. Users can add promising LPs to their shortlist or view full profiles.

The screenshot shows the LPxGP platform's LP Search feature. At the top, there is a navigation bar with links for Dashboard, Funds, Search, and Outreach. A user profile for 'Acme Capital' is visible on the right. Below the navigation is a search bar containing the query 'technology growth equity'. To the left of the search results is a sidebar titled 'Filters' with sections for LP Type, AUM Range, Geography, and Invests In. The main area displays a table of 247 found LPs, sorted by AUM (High to Low). The table columns include NAME, TYPE, LOCATION, AUM, and ACTIONS (View and + Shortlist). Some rows are highlighted in blue. At the bottom of the results table are pagination controls for 'Previous', page numbers '1', '2', '3', and 'Next'.

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

# LP Detail

LP profile with mandate and contacts

The LP Detail screen provides comprehensive information about an institutional investor. It displays the LP's investment mandate, AUM, allocation targets, geographic preferences, and recent fund commitments. The Contacts section shows key personnel with titles and roles. Users can add the LP to their shortlist, generate a personalized pitch, or view matching scores against their funds. This screen is essential for research before outreach.

The screenshot shows the LP Detail page for CalPERS. At the top, there is a navigation bar with links for LPxGP, Dashboard, Funds, Search (which is selected), and Outreach. To the right, it shows "Acme Capital" and a user icon. Below the navigation is a search bar with the text "Search / CalPERS".

The main content area starts with a header for "CalPERS" (California Public Employees' Retirement System) with a "CP" icon, followed by its address "Public Pension, Sacramento, CA". There are two buttons: "+ Add to Shortlist" and "Generate Pitch".

Below this is a "Match Score" section with a large green circle containing the number "92" and the text "Excellent Match". It includes a breakdown of the score across four categories: Strategy Alignment (Strong), Size Fit (Good), Geography (Match), and ESG Focus (Aligned). A "Why This Score?" button is also present.

The next section is "Overview", which displays key financial metrics: Total AUM (\$450B), PE Allocation (13%), and Est. PE Commitment (\$58.5B).

The "Investment Mandate" section details the portfolio's diversification, including Target Return (Net IRR 11%+), Preferred Check (\$100M - \$500M), Geography (North America, Europe), and Sectors (Diversified).

The "Actions" section contains buttons for "Generate Email Draft" and "Create LP Summary".

At the bottom, there is a "Data Quality" section showing "High" quality with a note that it was last updated 2 weeks ago. The footer includes a "UX Flow: GP User" link and a "Dashboard | Search | LP Detail | Pitch | Outreach" navigation bar.

# Matches

AI-ranked LP matches for fund

The Matches screen shows AI-generated LP recommendations for a specific fund. LPs are ranked by a fit score (0-100) calculated from strategy alignment, size fit, geographic overlap, and semantic similarity between fund thesis and LP mandate. Each match card shows the score, LP name, type, AUM, and key alignment indicators (checkmarks for strong fits, warnings for concerns). Users can filter by score range, sort by different criteria, and bulk-add matches to their shortlist.

The screenshot displays the LPxGP product interface, specifically the 'Matches' section for a fund. At the top, there's a navigation bar with links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. On the right side of the header, it shows 'Acme Capital' and a user icon labeled 'JP'. Below the header, the breadcrumb navigation shows 'Funds / Growth Fund III / Matches'. The main title 'LP Matches' is centered above a summary section. This summary includes four boxes: 'Total Matches 45', 'Avg Score 72', 'Shortlisted 12', and 'Contacted 8'. Below this, four match cards are listed, each with a green circular icon containing a score (92, 88, 76, 65), the LP's name, a color-coded match level (Excellent Match, Strong Match, Good Match, Moderate Match), and a brief description. Each card also includes a 'Why this match?' button and a '+ Shortlist' button. At the bottom of the page, there's a footer with links for 'Dashboard', 'Fund', 'Matches', 'Match Detail', 'Shortlist', and 'UX Flow: GP User'. A 'Load More (41 remaining)' button is located at the bottom center.

# Match Analysis

AI insights and talking points

The Match Detail screen explains why a specific LP is recommended for a fund. It breaks down the match score into components: strategy alignment, size compatibility, geographic fit, and semantic similarity. The AI generates talking points highlighting what to emphasize in outreach and identifies potential concerns to address proactively. Recent LP activity (if available) helps users time their outreach. A "Generate Pitch" button launches personalized content creation.

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

# Pitch Generator

AI-powered outreach content

The Pitch Generator uses Claude to create personalized outreach content for specific LP-fund combinations. Users select the output type: Executive Summary (1-page overview), Outreach Email (introduction message), or Talking Points (meeting preparation). The AI references the LP's mandate, recent activity, and the fund's thesis to create relevant, personalized content. All generated content is editable before copying to clipboard. There is no auto-send - this ensures human review of all outreach.

The screenshot shows the LPxGP Pitch Generator interface. On the left, the "Pitch Settings" sidebar includes fields for "Target LP" (CalPERS, Score: 92), "Fund" (Growth Fund III), "Content Type" (Outreach Email selected), "Tone" (Professional & Formal), and "Key Points to Emphasize" (Track record, Team experience checked; ESG commitment, Co-investment capacity unchecked). A large "Generate Pitch" button is at the bottom. On the right, the main area displays the "Generated Outreach Email" with a green checkmark icon. It includes a "Regenerate" button and a "Copy to Clipboard" button. A yellow warning box states: "⚠️ Human review required: AI-generated content should be reviewed and personalized before sending." Below this, the email details are shown: To: Michael Smith, Managing Investment Director; Subject: Acme Capital Growth Fund III - Investment Opportunity. The email body starts with "Dear Mr. Smith," followed by a paragraph about the fund's focus on technology-enabled businesses in North America, its strategic interest in growth equity managers, and alignment with their investment approach. It highlights track record, team experience, and strategy. It ends with a call for a introductory call. At the bottom of the email view, it says "Generated by Claude via OpenRouter • Based on CalPERS mandate analysis". The top navigation bar shows "LPxGP", "Dashboard", "Funds", "Search", "Outreach" (selected), and user "Acme Capital" with initials "JP". The bottom navigation bar shows "Dashboard", "Match Detail", "Pitch Generator", "Outreach", "All Screens", and "Generated by Claude via OpenRouter • Based on CalPERS mandate analysis".

## Shortlist

## LPs ready for outreach

The Shortlist is a curated collection of LPs the user has identified for potential outreach. It serves as a working list for fundraising campaigns. Users can organize LPs, add notes, track outreach status, and generate pitches in bulk. The shortlist persists across sessions and can be shared with team members. Quick actions allow moving LPs through the pipeline: Not Started → Contacted → Meeting Scheduled → In Diligence → Committed.

LPxGP		Dashboard	Funds	Search	Outreach	Acme Capital		JP		
Funds / Growth Fund III / Shortlist										
Shortlist						<a href="#">Export List</a>		<a href="#">Batch Generate Pitches</a>		
Growth Fund III - 12 LPs ready for outreach										
<a href="#">All (12)</a>	<a href="#">To Contact (7)</a>	<a href="#">Contacted (3)</a>	<a href="#">Meeting Set (2)</a>							
□	LP	Type	Score	Status	Notes	Actions				
<input type="checkbox"/>	CalPERS \$450B AUM	Pension	92	Contacted	Sent intro email 2 days ago	<a href="#">View →</a>				
<input type="checkbox"/>	Yale Endowment \$41B AUM	Endowment	88	Meeting Set	Call scheduled Jan 15	<a href="#">View →</a>				
<input type="checkbox"/>	Harvard Management \$35B AUM	Endowment	85	To Contact	—	<a href="#">View →</a>				
<input type="checkbox"/>	Ontario Teachers \$250B AUM	Pension	79	Contacted	Follow-up needed	<a href="#">View →</a>				
<input type="checkbox"/>	Texas Teachers \$180B AUM	Pension	76	To Contact	—	<a href="#">View →</a>				
Showing 1-5 of 12						<a href="#">Previous</a>	<a href="#">1</a>	<a href="#">2</a>	<a href="#">3</a>	<a href="#">Next</a>
UX Flow: GP User									<a href="#">All Screens</a>	

# Outreach Hub

Activity tracking and pipeline

The Outreach Hub provides a kanban-style view of the fundraising pipeline. LPs are organized by status: Identified, Contacted, Meeting Scheduled, In Diligence, and Committed. Users can drag-and-drop LPs between stages, log activities (calls, emails, meetings), and track commitment amounts. Summary metrics show pipeline progress and conversion rates. This screen helps teams coordinate outreach and measure fundraising progress.

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

Key statistics are displayed in four boxes:

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

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

**Recent Activity:** A list of recent interactions:
 

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

 A "View All Activity" link is also present.

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

**Upcoming Meetings:** A list of meetings:
 

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

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

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

# Settings - Profile

## User profile settings

The Profile Settings screen allows users to manage their personal information: name, email, title, and notification preferences. Users can change their password and manage two-factor authentication. The screen also shows account activity and login history for security awareness. All changes require current password confirmation for security.

**Profile Settings**

First Name: John

Last Name: Partner

Email: john@acmecapital.com

Title: Managing Partner

Phone: +1 (555) 123-4567

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

**Danger Zone**

Delete Account

## Settings - Team

Team member management

The Team Settings screen is available to Company Admins and allows them to manage team access. Admins can invite new team members by email, assign roles (Admin or Member), and deactivate accounts. The member list shows names, emails, roles, and last activity. Admins can also manage fund assignments, controlling which team members can access which funds.

The screenshot displays the LPxGP Team Settings interface. At the top, there's a navigation bar with 'LPxGP' and links for Dashboard, Funds, Search, and Outreach. On the right, it shows 'Acme Capital' and a user icon 'JP'. The main area has a sidebar titled 'Settings' with options: Profile, Team (selected), Company, Notifications, and Security. The 'Team' section contains a 'Team Members' card showing three users: John Partner (Admin, You), Sarah Johnson (Member, Edit), and Mike Chen (Member, Edit). There's a '+ Invite Member' button. Below this is a 'Pending Invitations' card for 'emily@acmecapital.com' (Invited 2 days ago) with buttons for Pending, Resend, and Cancel. The final section is 'Role Permissions' comparing Admin and Member roles. Admin permissions include: Manage team members, Create and edit funds, Access all features, and View billing. Member permissions include: View funds, Search LPs, Generate pitches, and Manage shortlists. At the bottom, a footer bar includes 'UX Flow: GP User', 'Dashboard | Profile | Settings: Team', and a link to 'All Screens'.

## Super Admin Screens

10 screens — Platform administration and data management

# Admin Dashboard

Platform overview and health

The Admin Dashboard provides Super Admins with a bird's-eye view of the entire LPxGP platform. Key metrics include total companies, users, funds, and LPs in the database. System health indicators show API status, database performance, and external service connectivity. Recent activity logs show new company signups, user invitations, and data imports. Quick actions provide access to common admin tasks.

**Platform Dashboard**  
Overview of LPxGP platform activity

COMPANIES <b>25</b> +3 this month	TOTAL USERS <b>156</b> +12 this month	LP DATABASE <b>5,247</b> +50 this week	MATCHES GENERATED <b>12,450</b> all time									
<b>Pending Actions</b> <ul style="list-style-type: none"> <li>3 companies awaiting activation Admin invitations pending acceptance <a href="#">View →</a></li> <li>12 LPs flagged for review Data corrections submitted by users <a href="#">Review →</a></li> <li>Import job in progress 500 LPs processing - 78% complete <a href="#">Monitor →</a></li> </ul>		<b>System Health</b> <ul style="list-style-type: none"> <li>Database <span style="color: green;">● Healthy</span></li> <li>Supabase Auth <span style="color: green;">● Healthy</span></li> <li>OpenRouter API <span style="color: green;">● Healthy</span></li> <li>Voyage AI <span style="color: green;">● Healthy</span></li> </ul> <p>Last checked: 30 seconds ago</p>										
<b>Recent Platform Activity</b> <table border="1"> <tbody> <tr> <td>2 hours ago</td> <td>New company Beta Ventures created</td> <td><a href="#">View All</a></td> </tr> <tr> <td>5 hours ago</td> <td>User jane@acme.com joined Acme Capital</td> <td></td> </tr> <tr> <td>Yesterday</td> <td>LP import completed: 500 records added</td> <td></td> </tr> </tbody> </table>				2 hours ago	New company Beta Ventures created	<a href="#">View All</a>	5 hours ago	User jane@acme.com joined Acme Capital		Yesterday	LP import completed: 500 records added	
2 hours ago	New company Beta Ventures created	<a href="#">View All</a>										
5 hours ago	User jane@acme.com joined Acme Capital											
Yesterday	LP import completed: 500 records added											

UX Flow: Super Admin [Dashboard](#) [Companies](#) [Users](#) [People](#) [LPs](#) [Data Quality](#) [Health](#) [... All Screens](#)

# Companies

Manage GP firms on platform

The Companies screen lists all GP firms registered on LPxGP. Admins can view company details, user counts, fund counts, and subscription status. Search and filter options help find specific companies. Actions include creating new companies, viewing company details, and managing billing. This is the primary customer management interface for platform administrators.

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

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

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

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

# Company Detail

Company users and funds

The Company Detail screen shows comprehensive information about a single GP firm. It displays company profile, subscription tier, billing status, and usage metrics. Lists of users and funds associated with the company are shown with quick access to details. Admins can edit company information, manage subscriptions, and impersonate users for support purposes (with audit logging).

The screenshot shows the LPxGP interface for managing a company named "Acme Capital". The top navigation bar includes links for Dashboard, Companies (which is active), Users, People, LPs, and Data Quality. A Super Admin user is logged in.

The main content area displays the company's profile: "Acme Capital" (Active), Private Equity | San Francisco, CA. It shows key metrics: 4 Users, 3 Funds, and 127 Matches. Below this, there are sections for "Users", "Funds", and "Activity".

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

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

# Users

All platform users

The Users screen provides a global view of all registered users across all companies. Admins can search by name, email, or company. User cards show name, company, role, last login, and account status. Actions include resetting passwords, deactivating accounts, and viewing activity logs. This helps with user support and security monitoring.

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

Showing 1-4 of 156 users

Previous 1 2 3 Next

UX Flow: Super Admin

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

... All Screens

# People

LP contacts database

The People screen manages the global database of LP contacts (individuals who work at institutional investors). Unlike LPs (organizations), People tracks individuals with their employment history. Admins can search contacts, view profiles, and track career movements between organizations. This data enriches LP profiles with specific relationship targets for outreach.

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

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

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

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

# LPs

Institutional investor database

The LPs screen is the master database of institutional investors. Admins can browse, search, filter, and edit LP records. Each LP entry shows name, type, AUM, location, and data quality score. Bulk actions allow updating multiple records. The Import Wizard button provides access to CSV import for adding new LPs. Data quality indicators highlight records needing attention.

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

Showing 1-4 of 5,247 LPs

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality Health

... All Screens

# Edit LP

## LP data management form

The Edit LP screen allows admins to maintain LP data quality. All fields are editable: name, type, location, AUM, allocation targets, investment mandate, and geographic preferences. The investment mandate text field is particularly important as it's used for semantic matching. Data source and quality score help track provenance. Changes are logged for audit purposes.

The screenshot shows the LPxGP Admin interface with the 'Edit LP' page open. The top navigation bar includes 'LPxGP' (with an ADMIN badge), 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (selected), 'Data Quality', and 'Super Admin SA'. The page title is 'Edit LP: CalPERS' with a 'Last updated: 2 weeks ago' timestamp. A green 'High Quality' badge is visible in the top right corner. The main form is divided into sections: 'Basic Information' (LP Name: CalPERS, Full Name: California Public Employees' Retirement System, Type: Public Pension, Location: Sacramento, CA, USA); 'Financial Information' (Total AUM: \$ 450B, PE Allocation %: 13%, Target PE Return: 11% Net IRR, Typical Commitment: \$100M - \$500M); and 'Investment Mandate' (Geographic Focus: North America, Europe, Investment Mandate (for AI matching): CalPERS maintains a diversified private equity portfolio with allocations across buyout, growth equity, and venture capital strategies. The system prioritizes partnerships with established managers demonstrating strong track records and operational value creation capabilities. ESG integration is a key priority, with all investments assessed against sustainability criteria). At the bottom, there are buttons for 'Delete LP', 'Cancel', and 'Save Changes'.

# Data Quality

Quality monitoring and issues

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

**Overall Score:** 78% (Green)

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

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

**Low Quality:** 600 (11% of LPs)

**Data Issues to Review:**

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

**View All Issues →**

**Quality by Field:**

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

**Actions:**

- Run Duplicate Detection
- Export Quality Report

# Import Wizard

## CSV import tool

The Import Wizard guides admins through bulk LP data import. It's a multi-step process: upload CSV, map columns to fields, preview changes, and execute import. The system validates data, detects duplicates, and shows potential issues before committing. Import jobs can be paused, resumed, or rolled back. Progress is tracked with detailed logging for troubleshooting.

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

**Map CSV Fields**

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

File: lp\_database\_export\_2024.csv 500 rows x 12 columns

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

**UX Flow: Super Admin**

All Screens

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

← Back Preview Import →

# System Health

Services and integrations status

The System Health screen monitors platform infrastructure and external services. It shows status for the database, API server, authentication service, OpenRouter (LLM), Voyage AI (embeddings), and email delivery. Response times and error rates are tracked. Alerts notify admins of issues. This is the first place to check when users report problems.

The screenshot shows the LPxGP System Health dashboard. At the top, there's a navigation bar with links for Dashboard, Companies, Users, People, LPs, Data Quality, and Health (which is highlighted). On the far right of the bar are buttons for System, Super Admin, and SA. Below the bar, the title "System Health" is displayed, along with a subtitle "Monitor platform status and integrations". A green circular icon indicates "All systems operational".

The main area contains four service status cards:

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

Below these cards is a section titled "Recent System Events" with three entries:

- 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)

At the bottom of the dashboard, there's a footer with links for UX Flow: Super Admin, Dashboard, Companies, Users, People, LPs, Data Quality, and Health. To the right of the footer is a link to "All Screens".

# UI State Screens

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

# Empty Dashboard

First-time user experience

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

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

**Dashboard**  
Welcome back, John

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

+ Create Your First Fund

**What you can do with LPxGP**

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

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

# Loading Matches

Match generation progress

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

The screenshot shows the LPxGP interface with a dark header bar. The header includes the LPxGP logo, navigation links for Dashboard, Funds, Search, and Outreach, and a user profile for Acme Capital (JP). Below the header, a breadcrumb trail shows 'Funds / Growth Fund III / Matches'. The main content area is titled 'LP Matches' under 'Growth Fund III'. A large circular loading icon with a magnifying glass is centered. Below it, the text reads 'Analyzing 10,000 LPs for Growth Fund III...' followed by a descriptive sentence about finding matching investors based on strategy, geography, and size. A progress bar indicates the process is at 68%. An estimated time remaining of '~45 seconds' is shown. A list of steps shows the current task as 'Computing semantic similarity scores...', preceded by completed tasks like 'Applying strategy filters (PE Growth)' and 'Filtering by geography (North America)'. At the bottom is a 'Cancel' button. A footer bar at the bottom of the screen shows the 'UX Flow: Match Generation' and includes tabs for 'Fund', 'Loading Matches' (which is active), and 'Matches (Complete)'. There is also a link to 'All Screens'.

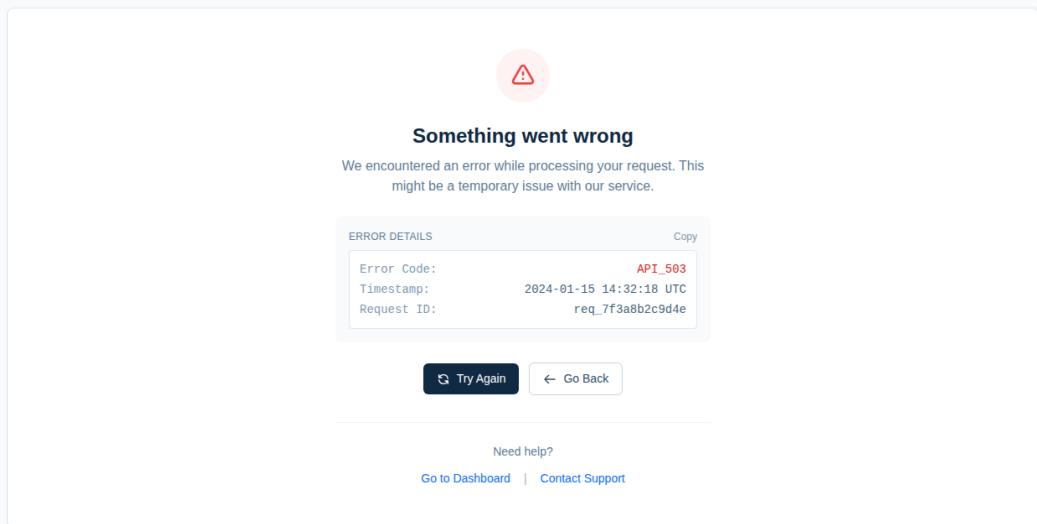
# API Error

## Error state handling

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

LPxGP   Dashboard   Funds   Search   Outreach

Acme Capital   JP



UX Flow: Error State

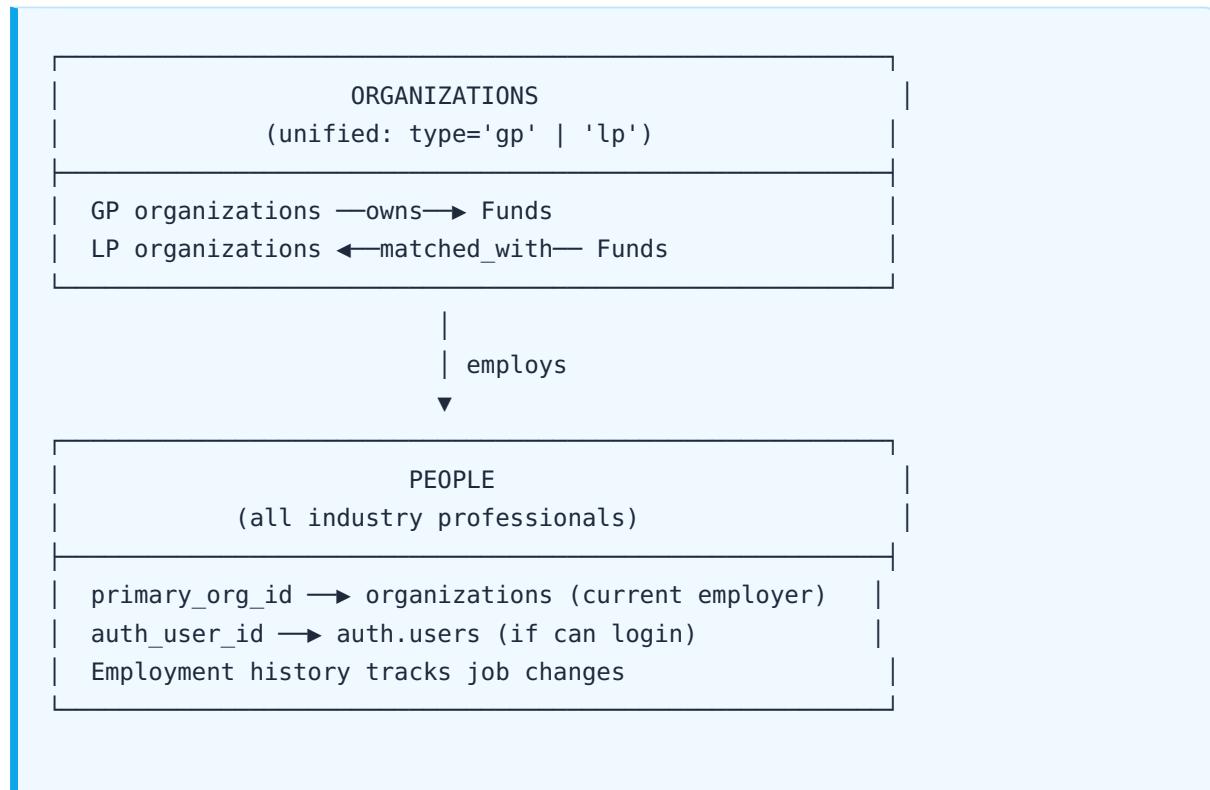
API Error | Dashboard | Loading State

.. All Screens

# 5. Data Model

## Entity Overview

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



## Key Entities

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

<b>Matches</b>	Fund-LP compatibility scores	fund_id, lp_org_id, total_score, score_breakdown
<b>Pitches</b>	AI-generated outreach content	match_id, type, content, created_by

## Key Design Decisions

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- **Unified Organizations:** GPs and LPs are both organizations with a type discriminator. No separate tables.
- **People Work at Organizations:** Clean FK to organizations.id - no polymorphic relationships.
- **People Can Move:** Employment history tracks job changes. Someone can move from LP to GP.
- **Platform Users = People + Auth:** People with auth\_user\_id set can log in. No separate users table.
- **Full Referential Integrity:** All foreign keys are real database constraints.

## Vector Embeddings

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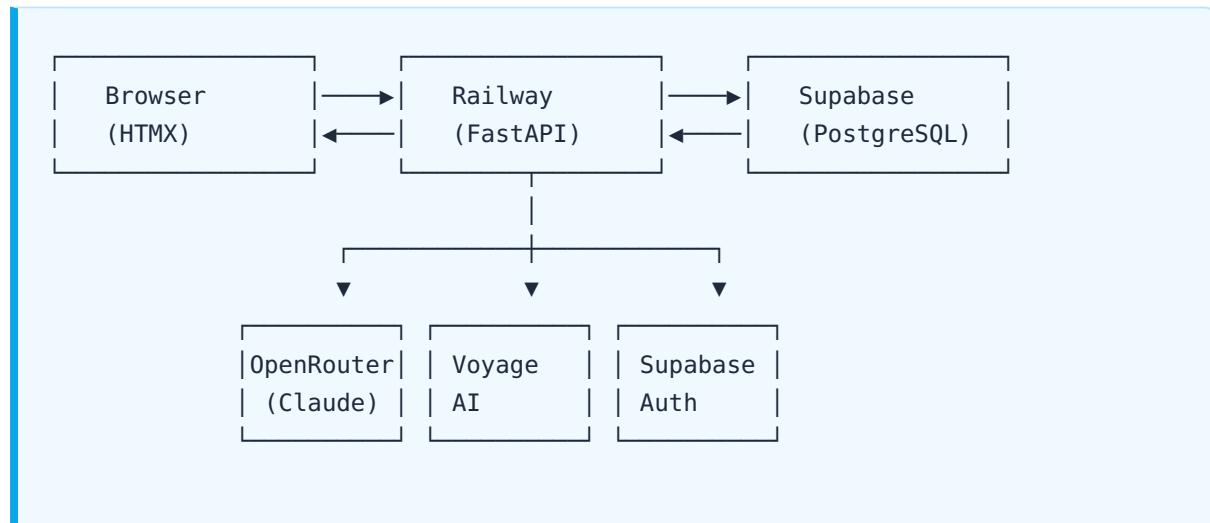
Semantic matching uses 1024-dimensional vector embeddings stored in PostgreSQL with pgvector:

- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)
- **Similarity Calculation:** Cosine similarity between embeddings determines semantic fit

# 6. Technical Architecture

## System Overview

LPxGP is built as a modern web application with server-rendered UI and AI integrations:



## Technology Stack

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

Hosting	Railway	Auto-deploy from GitHub, managed infrastructure
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## Security Model

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

# 7. Non-Functional Requirements

## Performance

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

## Security

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

## Scalability

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

## Availability

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

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

# 8. Success Metrics

## User Engagement

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

## Feature Adoption

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

## Quality Indicators

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

# 9. Glossary

## AUM (Assets Under Management)

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

## Dry Powder

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

## Embedding

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

## Endowment

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

## Family Office

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

## GP (General Partner)

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

## Hard Filter

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

## HTMX

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

## LP (Limited Partner)

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

## Mandate

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

### **Pension Fund**

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

### **pgvector**

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

### **RLS (Row-Level Security)**

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

### **Semantic Search**

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

### **Soft Score**

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

### **Sovereign Wealth Fund**

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

### **Thesis**

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

### **Voyage AI**

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