



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

The Problem We Solve

Fund managers face significant challenges in the fundraising process:

Information Overload

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

Manual Research

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

Poor Targeting

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

Generic Outreach

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

Who Uses LPxGP

GP Fund Manager (Company Admin)

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

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

Primary Goals:

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

GP Associate (Company Member)

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

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

Primary Goals:

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

Super Admin (LPxGP Team)

Role: LPxGP platform administrator responsible for operations

Platform Access: Full administrative access across all companies

Primary Goals:

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

2. Feature Specifications

LP Database & Search

Database Contents

The LP database contains comprehensive information on institutional investors:

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

Search Capabilities

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

AI-Powered Matching

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

Quality-First Hybrid Pipeline

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

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

Ensemble Scoring Weights

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

LLM Scoring (Key Innovation)

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

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

Bidirectional Matching

The system supports matching in both directions:

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

Learning From Slow Feedback

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

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

Match Output

For each fund, the system generates:

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

Pitch Generation

Output Types

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

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

Pipeline Management

The platform tracks LPs through the fundraising pipeline:

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

3. User Journeys

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

Journey 1: Platform Onboarding

Actor: Sarah, LPxGP Super Admin

Goal: Onboard a new GP firm to the platform

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

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

Journey 2: Fund Creation

Actor: John, Partner at Acme Capital

Goal: Create fund profile for Growth Fund III

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

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

Journey 3: LP Research & Matching

Actor: Maria, Associate at Acme Capital

Goal: Find and evaluate LPs for Growth Fund III

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

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

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

Journey 4: Pitch & Outreach

Actor: Maria, Associate at Acme Capital

Goal: Create personalized outreach for high-priority LPs

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

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

4. Screen Reference

This section documents all 35 screens in the LPxGP platform. Each screen includes a visual mockup and explanation of its purpose, user actions, and role in user journeys.

Public Screens

4 screens — Authentication and onboarding flows for all users

Login

User authentication

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.

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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](#)

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

Accept Invitation

New user onboarding

The screenshot shows the 'Accept Invitation' page for a new user onboarding. The page has a dark blue header with the title 'Accept Invitation' and 'New user onboarding'. Below the header, there's a dark sidebar on the left containing the LPxGP logo, 'GP-LP Intelligence Platform', and two green checkmark icons with the text: 'You've been invited to join Acme Capital' and 'Complete your account setup below'. The main content area on the right starts with a message 'You're joining' followed by the invitation details: 'AC Acme Capital Private Equity Firm'. It shows the invitation was sent to 'john.partner@acmecap.com'. The user is prompted to enter their 'Full Name' (input field contains 'John Partner'), 'Create Password' (input field contains '*****'), and 'Confirm Password' (input field contains '*****'). A checkbox labeled 'I agree to the Terms of Service and Privacy Policy' is present. At the bottom right is a large blue button labeled 'Accept Invitation'. Below the main form, a link 'Already have an account? Sign in' is visible. At the very bottom, a navigation bar shows the 'UX Flow' from 'Email Invitation' to 'Accept Invitation' to 'Dashboard', and a link to 'All Screens'.

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](#)

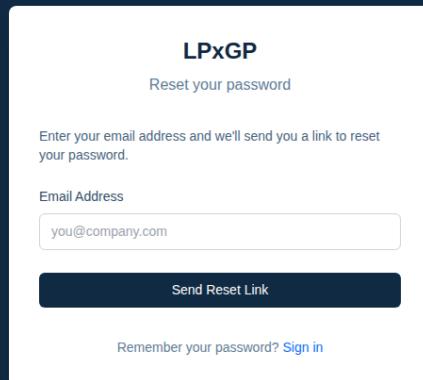
Already have an account? [Sign in](#)

UX Flow: Email Invitation -> [Accept Invitation](#) -> Dashboard [... All Screens](#)

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

Forgot Password

Request reset link



The form is titled "LPxGP" and "Reset your password". It contains a text input field for "Email Address" with the placeholder "you@company.com". Below the input is a "Send Reset Link" button. At the bottom, there is a link "Remember your password? [Sign in](#)".

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UX Flow:

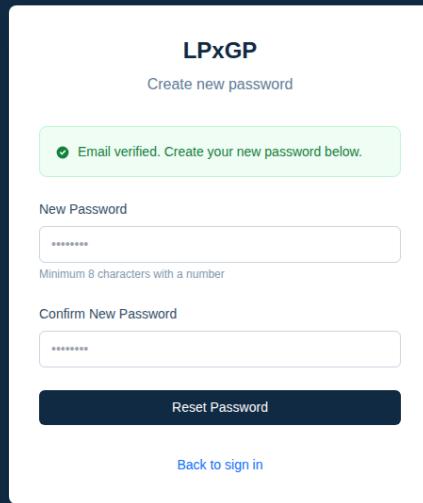
Login > **Forgot Password** > Reset Password > Login

.. All Screens

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

Reset Password

Create new password



The image shows a password reset form titled "LPxGP Create new password". It includes a success message "Email verified. Create your new password below.", fields for "New Password" and "Confirm New Password" (both containing placeholder "*****"), and a "Reset Password" button. A "Back to sign in" link is at the bottom.

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

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UX Flow:

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

... All Screens

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

GP User Screens

13 screens — Core platform functionality for fund managers and associates

Dashboard

Fund overview and activity

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

UX Flow: GP User Dashboard | Funds Search Matches Outreach ... All Screens

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

Funds

List of all funds

Growth Fund III
Private Equity - Growth
Raising

- Target Size: \$500M
- Matches: 45
- Shortlisted: 12

Growth Fund II
Private Equity - Growth
Investing

- Fund Size: \$350M
- Vintage: 2021
- Deployed: 72%

Growth Fund I
Private Equity - Growth
Harvesting

- Fund Size: \$200M
- Vintage: 2017
- Net IRR: 28.5%

[View Fund →](#)

[View Fund →](#)

[View Fund →](#)

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

UX Flow: GP User

Dashboard | **Funds** | Search | Matches | Outreach | ... All Screens

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

Fund Detail

Fund profile with thesis and track record

The screenshot shows the LPxGP interface for a fund profile. At the top, there's a navigation bar with 'LPxGP' and links for 'Dashboard', 'Funds', 'Search', and 'Outreach'. A user icon for 'Acme Capital' with initials 'JP' is also present. Below the navigation is a breadcrumb trail: 'Funds / Growth Fund III'. The main content area features a card for 'Growth Fund III' which is currently 'Raising' and categorized as 'Private Equity - Growth Equity'. The card includes sections for 'Fund Overview' (Target Size: \$500M, Target Close: Q2 2025, Geography Focus: North America, Check Size: \$25M - \$75M) and 'Matching Stats' (Total Matches: 45, High Score (80+): 12, Shortlisted: 8, Contacted: 5). There are buttons for 'Edit Fund' and 'View Matches'. Below this is an 'Investment Thesis' section stating: 'Growth Fund III focuses on technology-enabled businesses in the upper mid-market segment'. A 'Quick Actions' sidebar on the right offers options like 'View All Matches'. The bottom navigation bar includes 'UX Flow: GP User' and tabs for 'Dashboard', 'Funds', 'Fund Detail' (which is active), 'Matches', and 'Outreach', along with a link to 'All Screens'.

Fund Overview

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

Matching Stats

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

Investment Thesis

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

Quick Actions

UX Flow: GP User Dashboard | Funds | **Fund Detail** | Matches | Outreach ... All Screens

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

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

LP Search

Search and filter institutional investors

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Search LPs

Find institutional investors for your funds

technology growth equity Search

Filters

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

AUM Range
\$1B to Max

Geography
North America

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

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

UX Flow: GP User Dashboard | Funds Search Matches Outreach ... All Screens

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

LP Detail

LP profile with mandate and contacts

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 11.0% | PREFERRED CHECK
\$100M - \$500M

Match Score

92
Excellent Match

Strategy Alignment	Strong
Size Fit	Good
Geography	Match
ESG Focus	Aligned

Why This Score?

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

Matches

AI-ranked LP matches for fund

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Funds / Growth Fund III / Matches

LP Matches

Growth Fund III - 45 matched LPs ranked by fit score

Total Matches 45	Avg Score 72	Shortlisted 12	Contacted 8
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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 | \$130B AUM | Austin, TX
Why this match? + Shortlist

UX Flow: GP User Dashboard Fund **Matches** Match Detail Shortlist ... All Screens

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

Match Analysis

AI insights and talking points

The screenshot shows the LPxGP Match Analysis interface. At the top, there's a navigation bar with 'LPxGP' and links to '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'. A main card displays a score of '92' for 'CalPERS x Growth Fund III' with a 'Match Analysis & AI Insights' subtitle. It includes a 'Generate Pitch' button and a '+ Add to Shortlist' button. Below this is a 'Score Breakdown' section with four cards: 'Strategy Fit' (95), 'Size Match' (90), 'Geography' (92), and 'Thesis Alignment' (88). Underneath is an 'AI Match Analysis' section with a heading 'Why This Is a Strong Match' and a list of factors: 'Strategy alignment: CalPERS actively invests in growth equity managers targeting technology-enabled businesses, matching your fund's focus...'. At the bottom, there's a footer with 'UX Flow: GP User' and navigation links for 'Dashboard', 'Matches', 'Match Detail', 'Pitch', and 'Shortlist', along with a link to 'All Screens'.

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...

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

Pitch Generator

AI-powered outreach content

The screenshot shows the LPxGP Pitch Generator interface. On the left, a sidebar titled "Pitch Settings" includes fields for "Target LP" (set to CalPERS with a score of 92), "Fund" (set to Growth Fund III), "Content Type" (set to Outreach Email), and "Tone" (set to Professional & Formal). Below these are sections for "Key Points to Emphasize" and "Generated Outreach Email". The "Generated Outreach Email" section displays a message to Michael Smith, Managing Investment Director of Acme Capital Growth Fund III, regarding an investment opportunity. The message highlights Acme Capital's focus on technology-enabled businesses and its strategic interest in growth equity managers. It also mentions CalPERS' operational value creation capabilities and a strong alignment with their investment approach. A note at the bottom of the email area states: "Human review required: AI-generated content should be reviewed and personalized before sending." Buttons for "Regenerate" and "Copy to Clipboard" are available above the email 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.

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

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

LP	TYPE	SCORE	STATUS	NOTES	ACTIONS
CalPERS \$450B AUM	Pension	92	Contacted	Sent intro email 2 days ago	View →
Yale Endowment \$418 AUM	Endowment	88	Meeting Set	Call scheduled Jan 15	View →
Harvard Management \$538 AUM	Endowment	85	To Contact	—	View →
Ontario Teachers \$250B AUM	Pension	79	Contacted	Follow-up needed	View →
Texas Teachers \$180B AUM	Pension	76	To Contact	—	View →

UX Flow: GP User Dashboard Fund Matches Shortlist Outreach ... All Screens

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

Outreach Hub

Activity tracking and pipeline

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
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Recent Activity

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

All Funds

Quick Actions

- Generate Batch Pitches
- Export Shortlist to CSV
- View All Meetings

Upcoming Meetings

UX Flow: GP User

Dashboard | Funds | Search | Outreach | Shortlist | ... All Screens

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

Settings - Profile

User profile settings

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

Settings - Team

Team member management

The screenshot shows the LPxGP Settings - Team interface. On the left, a sidebar titled "Settings" has "Team" selected. The main area is titled "Team Members" and shows three team members: John Partner (Admin, You), Sarah Johnson (Member), and Mike Chen (Member). A button "+ Invite Member" is at the top right. Below this is a section for "Pending Invitations" with one entry for emily@acmecapital.com (Pending, Resend, Cancel buttons).

Team Members

- John Partner (Admin, You)
- Sarah Johnson (Member)
- Mike Chen (Member)

Pending Invitations

- emily@acmecapital.com (Pending, Resend, Cancel)

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

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

Super Admin Screens

10 screens — Platform administration and data management

Admin Dashboard

Platform overview and health

LPxGP ADMIN Dashboard Companies Users People LPs Data Quality Super Admin SA

Platform Dashboard

Overview of LPxGP platform activity

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

Pending Actions

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

System Health

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

Last checked: 30 seconds ago

UX Flow: Super Admin Dashboard Companies Users People LPs Data Quality Health ... All Screens

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

Companies

Manage GP firms on platform

LPxGP

ADMIN

Dashboard

Companies

Users

People

LPs

Data Quality

Super Admin

SA

Companies

Manage GP firms on the platform

+ Add Company

Search companies...

All Status

Filter

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

Showing 1-4 of 25

[Previous](#)

1

2

3

[Next](#)

UX Flow: Super Admin

Dashboard Companies

Users People

LPs

Data Quality

Health

[All Screens](#)

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

Company Detail

Company users and funds

LPxGP ADMIN Dashboard Companies Users People LPs Data Quality Super Admin SA

Companies / Acme Capital


Acme Capital Active
 Private Equity | San Francisco, CA

[Edit Company](#)
[Deactivate](#)

Users 4	Funds 3	Matches 127
-------------------	-------------------	-----------------------

Users + Invite User

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

Company Details

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

Activity

Last login 2 hours ago
 ... All Screens

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

Users

All platform users

LPxGP ADMIN Dashboard Companies **Users** People LPs Data Quality Super Admin SA

Users

All platform users across companies

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

Showing 1-4 of 156 users

UX Flow: Super Admin Dashboard Companies **Users** People LPs Data Quality Health ... All Screens

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

People

LP contacts database

LPxGP ADMIN Dashboard Companies Users People LPs Data Quality Super Admin SA

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

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

UX Flow: Super Admin Dashboard Companies Users People LPs Data Quality Health ... All Screens

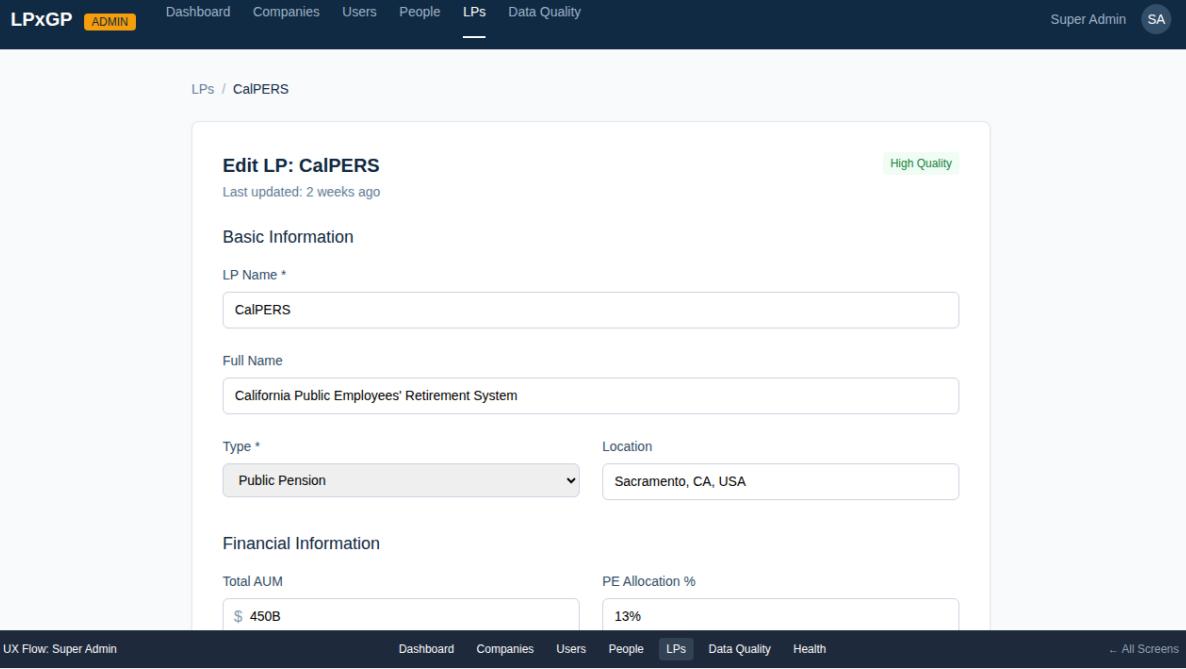
The People screen manages the global database of LP contacts (individuals who work at institutional investors). Unlike LPs (organizations), People tracks individuals with their employment history. Admins can search contacts, view profiles, and track career movements between organizations. This data enriches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

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

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

Edit LP

LP data management form



The screenshot shows the 'Edit LP' interface for the CalPERS entry. At the top, there's a navigation bar with 'LPxGP ADMIN' on the left, followed by 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (which is the active tab), and 'Data Quality'. On the right, it shows 'Super Admin' and a 'SA' badge. Below the navigation is a breadcrumb trail: 'LPs / CalPERS'. The main content area has a title 'Edit LP: CalPERS' and a note 'Last updated: 2 weeks ago'. A green 'High Quality' badge is in the top right corner. The 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%), and 'Investment Mandate' (Investment Mandate: Investment Grade Bonds). The bottom of the screen shows a footer with 'UX Flow: Super Admin' and navigation links for 'Dashboard', 'Companies', 'Users', 'People', 'LPs' (selected), 'Data Quality', and 'Health'. There's also a link to 'All Screens'.

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

Data Quality

Quality monitoring and issues

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality

Super Admin SA

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

- ⚠ Duplicate LP detected
 "CalPERS" and "California PERS" may be the same entity
 Flagged by system • 2 hours ago

[Ignore](#) [Merge](#)
- ⌚ Missing AUM data
 15 LPs have no AUM information
 Detected during import • Yesterday

[Review](#)
- ✉️ User-submitted correction
 Yale Endowment AUM outdated - should be \$42B not \$41B
 Submitted by john@acmecapital.com • 3 days ago

[Reject](#) [Accept](#)

Quality by Field

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

UX Flow: Super Admin

Dashboard Companies Users People LPs Data Quality Health

... All Screens

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

The screenshot shows the LPxGP Import Wizard interface. At the top, a dark header bar displays the title "Import Wizard" and "CSV import tool". Below this, a navigation bar includes links for "Dashboard", "Companies", "Users", "People", "LPs" (which is the active tab), and "Data Quality". On the far right, it shows the user "Super Admin" and a "SA" badge.

The main content area is titled "Map CSV Fields" and displays the message "Match your CSV columns to LPxGP fields. 500 rows detected." It shows a file upload section with "File: lp_database_export_2024.csv" and "500 rows x 12 columns". Below this is a mapping grid:

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

At the bottom of the main area, there's a footer with "UX Flow: Super Admin" and navigation links for "Dashboard", "Companies", "Users", "People", "LPs" (active), "Data Quality", and "Health". To the right, there's a link "← All Screens".

The overall interface is clean with a white background and light gray accents. The "LPs" tab is highlighted in blue, indicating the current step in the wizard.

Text Summary:

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

System Health

Services and integrations status

LPxGP ADMIN Dashboard Companies Users People LPs Data Quality System Super Admin SA

System Health
Monitor platform status and integrations All systems operational

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

Recent System Events View All

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

UX Flow: Super Admin Dashboard Companies Users People LPs Data Quality Health .. All Screens

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

UI State Screens

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

Empty Dashboard

First-time user experience

The screenshot shows the LPxGP dashboard for a first-time user. 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 profile icon. Below the navigation is a section titled 'Dashboard' with a 'Welcome back, John' message. A large central area features a house icon and the text 'Welcome to LPxGP! Create your first fund to get started with LP matching and outreach.' Below this is a dark button with '+ Create Your First Fund'. At the bottom, there's a section titled 'What you can do with LPxGP' with three icons: a green circle with a checkmark, a blue speech bubble, and a purple document. The footer includes a 'UX Flow: GP User (Empty State)' label, navigation links for 'Dashboard (Empty)', 'Dashboard (Active)', 'Create Fund', and 'All Screens'.

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

Loading Matches

Match generation progress

LPxGP Dashboard Funds Search Outreach Acme Capital JP

Funds / Growth Fund III / Matches

LP Matches

Growth Fund III

Analyzing 10,000 LPs for Growth Fund III...

We're finding the best institutional investors that match your fund strategy, geography, and size requirements.

Progress 68%

⌚ Estimated time remaining: ~45 seconds

- ✓ Applying strategy filters (PE Growth)
- ✓ Filtering by geography (North America)
- ⌚ Computing semantic similarity scores

UX Flow: Match Generation Fund Loading Matches Matches (Complete) ← All Screens

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

API Error

Error state handling

The screenshot shows a user interface for an application named LPxGP. At the top, there is a dark header bar with the LPxGP logo and navigation links for Dashboard, Funds, Search, and Outreach. On the right side of the header, there is a user profile section for "Acme Capital" with initials "JP". Below the header is a large white content area. In the center, there is a red circular icon with a white exclamation mark. Below this icon, the text "Something went wrong" is displayed in bold. A smaller text below it says, "We encountered an error while processing your request. This might be a temporary issue with our service." To the left of this text is a "ERROR DETAILS" section enclosed in a light gray box. It contains three entries: "Error Code:" followed by "API_503" (in red), "Timestamp:" followed by "2024-01-15 14:32:18 UTC", and "Request ID:" followed by "req_7f3a8b2c9d4e". To the right of the "ERROR DETAILS" box is a "Copy" button. Below the error details are two buttons: "Try Again" (dark blue with white text) and "Go Back" (light gray with black text). At the very bottom of the page, there is a dark footer bar with the text "UX Flow: Error State" on the left, "API Error" in a larger font in the center, and "Need help?", "Dashboard", and "Loading State" on the right. There is also a "All Screens" link at the far right.

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

LP User Screens

5 screens — Bidirectional matching - funds ranked for institutional investors

LP Dashboard

Fund overview for institutional investors

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS CP

LP Dashboard

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

NEW MATCHES

24

+8 this week

REVIEWED

156

funds this quarter

INTERESTED

12

marked for follow-up

ALLOCATION

\$850M

available FY24

Top Fund Matches

[View All Matches →](#)

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

UX Flow: LP User

LP Dashboard

| Fund Matches

| Match Detail

| Preferences

← All Screens

The LP Dashboard is the command center for institutional investors using LPxGP. It provides an at-a-glance view of matching funds, allocation availability, and recent activity. LPs see statistics including new fund matches, funds reviewed, and current allocation capacity. The top matches table shows funds ranked by compatibility score with quick actions to mark interest or pass. This bidirectional matching enables LPs to proactively discover funds rather than waiting for GP outreach.

Fund Matches

Ranked funds matching LP mandate

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS CP

Fund Matches

Funds ranked by compatibility with your mandate

Filters

Export

Search funds or GP firms...

All Strategies

All Sizes

Score: High to Low

Showing 156 matching funds

Score range: 70+

Sequoia Growth Fund VI

Sequoia Capital

94 / 100

Growth Equity North America Technology

Target Size
\$2.5B

Fund Number
Fund VI

Closing
30 days

Min Commitment
\$50M

Interested Pass

[View Details →](#)

Acme Growth Fund III

Acme Capital

91 / 100

Growth Equity North America ESG

Target Size
\$500M

Fund Number
Fund III

Closing
Q2 2024

Min Commitment
\$25M

Interested Pass

[View Details →](#)

UX Flow: LP User

LP Dashboard

Fund Matches

Match Detail

Preferences

← All Screens

The Fund Matches screen shows all funds ranked by compatibility with the LP's investment mandate. LPs can filter by strategy, fund size, and geography. Each fund card displays the GP firm, strategy tags, target size, fund number, closing timeline, and match score. Quick actions allow LPs to mark interest, pass, or view detailed analysis. The scoring algorithm considers strategy alignment, size fit, track record, geographic overlap, and ESG requirements.

Fund Match Detail

Detailed fund analysis for LPs

The screenshot shows the Fund Match Detail page for the Sequoia Growth Fund VI. At the top, there's a navigation bar with 'LPxGP LP Portal' and links for Dashboard, Fund Matches (which is underlined), Preferences, and Profile. On the right, it shows 'CalPERS CP' and a green 'Mark Interested' button. The main content area has a header 'Fund Matches / Sequoia Growth Fund VI' and 'Sequoia Capital'. To the right, a large green box displays a 'Match Score' of '94'. Below this are two columns: 'Why This Match' (with points about strategy alignment, track record, size fit, and ESG commitment) and 'Fund Details' (including target size, fund number, strategy, geography, and financial terms). Further down are sections for 'Score Breakdown' (with a progress bar at 96/100) and 'GP Team' (listing Jim Lucks). The bottom navigation bar includes 'UX Flow: LP User', 'LP Dashboard', 'Fund Matches', 'Match Detail' (which is active), and 'Preferences'. There's also a link to 'All Screens'.

Why This Match

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

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

Fund Details

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

Score Breakdown

Strategy Alignment 96/100

GP Team

Jim Lucks

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

The Fund Match Detail screen explains why a specific fund is recommended for the LP. It provides a narrative explanation of alignment factors, a detailed score breakdown across multiple dimensions (strategy, size, track record, geography, ESG), the fund's investment thesis, historical performance data, and key considerations or concerns. LPs can mark interest, request a meeting, or request the fund deck. Private notes allow LPs to track their evaluation.

LP Preferences

Matching preferences and alerts

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS CP

Matching Preferences

Configure how funds are matched to your mandate

Investment Criteria

Strategies

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

Geography

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

Fund Size Range

Minimum

\$250M

Maximum

\$3B

Check Size Range

Minimum

\$50M

Maximum

\$200M

Track Record Minimum

Fund II+

ESG Requirement

Preferred

UX Flow: LP User

LP Dashboard

Fund Matches

Preferences

LP Profile

.. All Screens

The LP Preferences screen allows institutional investors to configure their matching criteria. LPs can set strategy preferences, geographic focus, fund size range, check size range, track record requirements, and ESG requirements. Current allocation availability helps the system prioritize actively deploying LPs. Notification preferences control alerts for new high-score matches, fund updates, closing reminders, and weekly digests.

LP Profile

Organization profile management

LPxGP LP Portal

Dashboard

Fund Matches

Preferences

Profile

CalPERS

CP

Organization Profile

Manage your LP profile information

Organization Information

Organization Name

California Public Employees' Retirement System

Short Name

CalPERS

LP Type

Public Pension

Headquarters

Sacramento, California, USA

Total AUM

\$450 Billion

PE Allocation

8% (~\$36B)

Website

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

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

UX Flow: LP User

LP Dashboard Fund Matches Preferences LP Profile

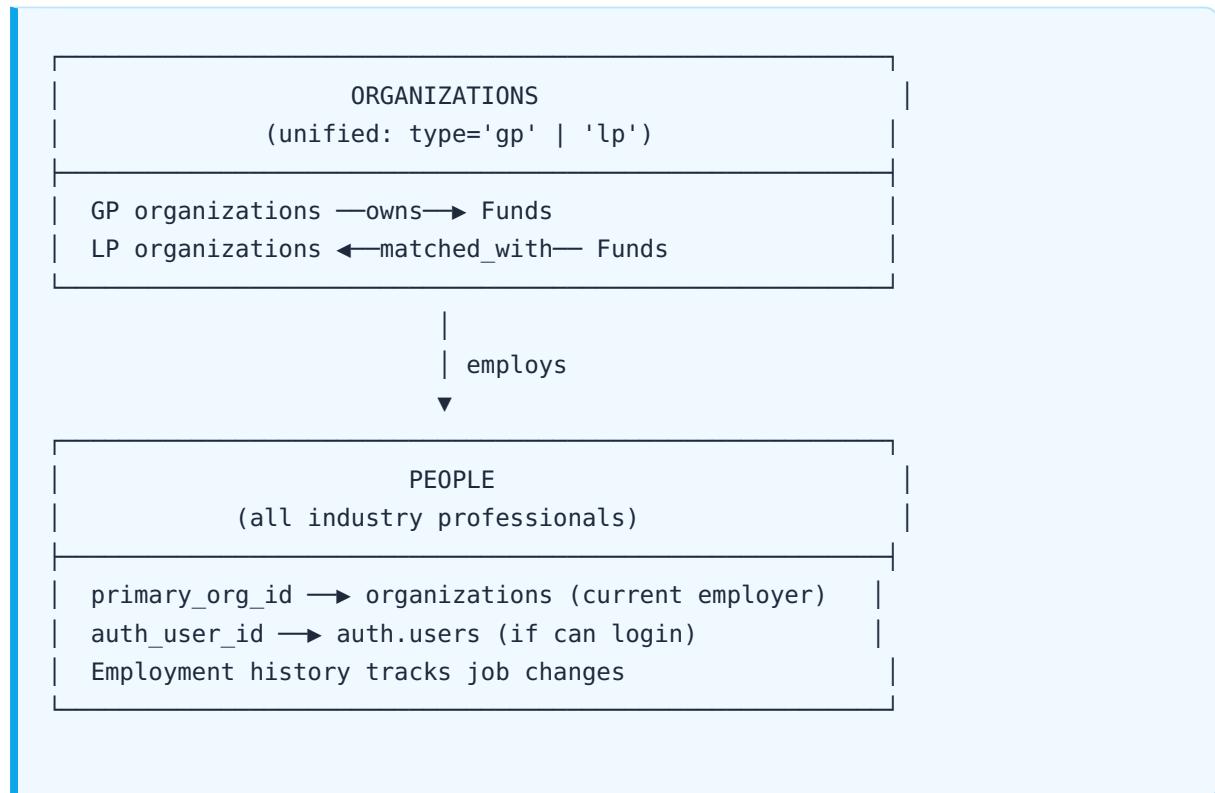
.. All Screens

The LP Profile screen displays the LP's organization information and investment mandate. Organization details (name, type, AUM, headquarters) are managed by LPxGP administrators to ensure data quality. The investment mandate section shows the LP's strategies, geographic focus, check size, and track record requirements. User profile settings allow LPs to manage their personal information and security settings including password and two-factor authentication.

5. Data Model

Entity Overview

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



Key Entities

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

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

Key Design Decisions

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

Vector Embeddings

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

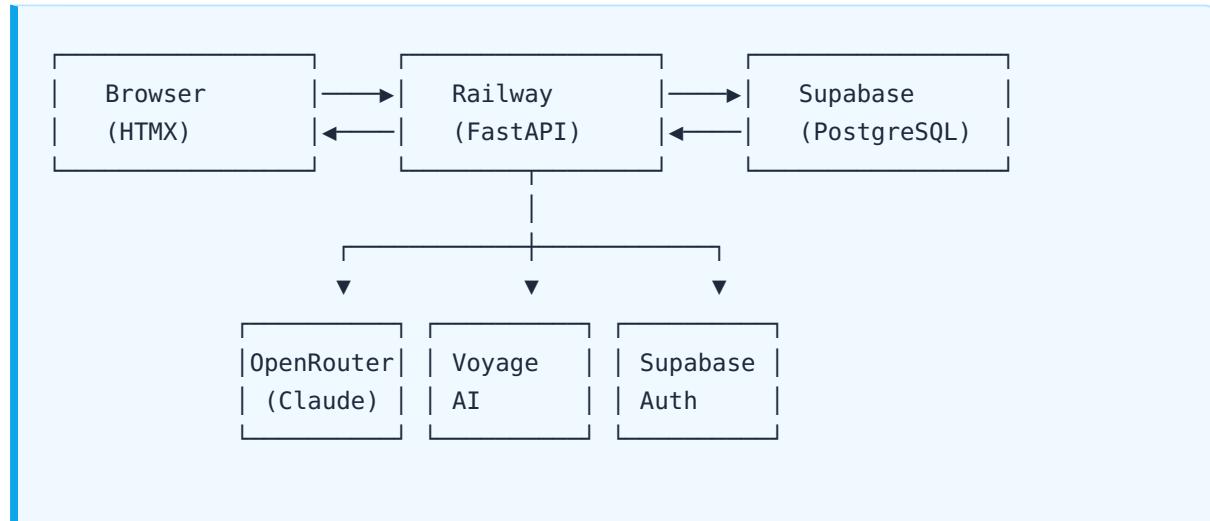
- **Fund Thesis Embedding:** Vector representation of fund strategy and thesis text
- **LP Mandate Embedding:** Vector representation of LP investment mandate (on organizations table)

- **Similarity Calculation:** Cosine similarity between embeddings determines semantic fit

6. Technical Architecture

System Overview

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



Technology Stack

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

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

Security Model

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

7. Non-Functional Requirements

Performance

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

Security

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

Scalability

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

Availability

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

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

8. Success Metrics

User Engagement

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

Feature Adoption

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

Quality Indicators

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

9. Glossary

AUM (Assets Under Management)

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

Dry Powder

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

Embedding

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

Endowment

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

Family Office

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

GP (General Partner)

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

Hard Filter

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

HTMX

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

LP (Limited Partner)

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

Mandate

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

Pension Fund

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

pgvector

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

RLS (Row-Level Security)

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

Semantic Search

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

Soft Score

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

Sovereign Wealth Fund

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

Thesis

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

Voyage AI

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