



LP BLUEPRINT

**WHY YOUR LP FUNNEL IS BROKEN
(AND HOW TO FIX IT FAST)**

Join Capital OS Premium – June Cohort



Capital OS Premium

A high-trust cohort with the tools, structure, and clarity GPs need to stop winging it and start closing.

UNLOCK QUARTERLY

UNLOCK ANNUAL

Whats Included

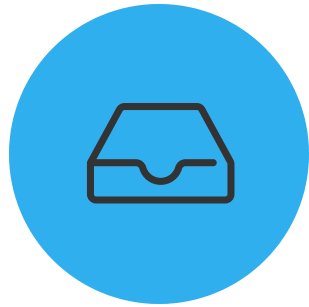
- Full Narrative Overhaul – From first word to closing call
- Deck + Data Room Refinement – Clarity, structure, and strategic polish
- LP Pipeline Design – Tiered, prioritized, frictionless
- Fundraising OS Buildout – From pipeline dashboards to workflows
- Live Cohort – Weekly sessions and async reviews
- Capital OS Access – All AI tools + lifetime updates

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The Real Problem



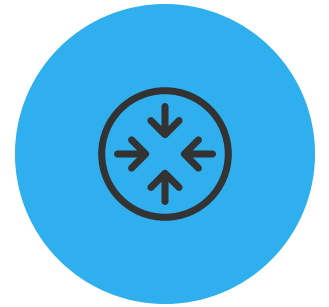
Ghosted LPs



Endless Follow-Ups

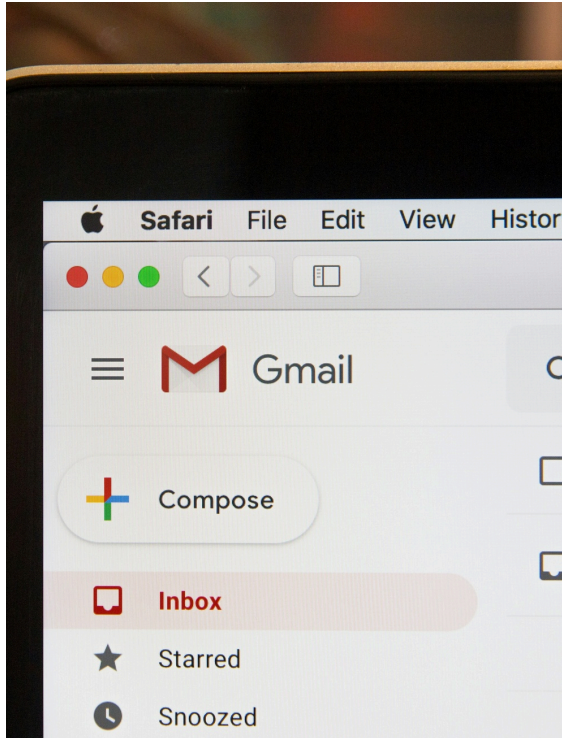


No Momentum



**Lack of LP
Segmentation**

What Failing Funnels Have In Common



No system to qualify interest



Reactive vs proactive follow-up



Pipeline bloat: LPs sitting idle for months



Emotional exhaustion

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What Winning Funnels Do Differently

Segment By LP Type (7 Types):

The 7 types are on the next slide.

Stage Every Deal In Hubspot Or CRM (not expensive spreadsheets)

Why? CRMs forecast and tell you ***when*** the fund will close and *what the fund will cost you to close - 2 or 2.5%*. If it costs more than that, this probably is not the time to move forward, and that is okay, too.

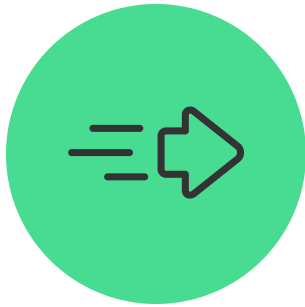
Drive Clear Yes/No Motion (Out or Through):

We use very real first and final close dates for our funds in order to help LPs and their legal teams "get real" about whether we need to work together right now, or "not really".

The 7 LP Types

- **Family Offices**
“Everyone wants our money, but no one understands us.”
- **Ultra High Net Worth Individuals**
“I don’t trust most GPs to protect my downside.”
- **Foundations**
“If your fund doesn’t align with our mission, we’re out.”
- **Endowments**
“We don’t have time for managers who aren’t ready.”
- **Pension Funds**
“We can’t take reputational risk on small managers.”
- **Institutions / Sovereign Wealth / Insurance**
“You don’t have the infrastructure to work with us.”
- **Funds Of Funds**
“We need a story we can sell to our LPs.”

"Out Or Through" - The Funnel Discipline



**If They're Not In Motion,
They're Out**



30 Day Cycle Of Clarity



**Service > Chasing, No Pitching In
First Meeting, Pain Funnel Only,
No Pain, No Pitch In Second
Meeting, LP's Pain Must Be
Deeply Profiled Prior To First
Meeting**

The Capital OS Funnel Philosophy

- **25:1 Pipeline Ratio**

\$200M raise = \$5B in pipeline = \$9.13M per day for 18 months

- **We believe in FOMO-driven fundraising, because LPs are driven by making pain go away and the fear of missing out on something great**

- **We guide fund managers to first validate their investment thesis by finding an anchor investor that's 25-33% of their fund**

If they cannot then the thesis just isn't that great, and that's okay

The Capital OS Funnel

- **Your Anchor Research + Anchor Packs**

AI-Powered Anchor Investors that Are Best-Fit who have anchored funds just like yours

- **Hubspot CRM, Affinity or similar**

Stages/Pain for all anchor investors

- **Hubspot or Smartlead**

Outreach Automation for all hyper-personalized email sequences for the 6-7 people at each anchor to determine pain level

- **IR Calendar**

Tracked, qualified meetings

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What To Do This Week

Figure Out The Exact Size of the Raise Including The 15% Buffer

\$100M = \$115M

Many investment firms under-budget because they fail to account for ops, cost of data warehouse, AI budget and LP and dealflow origination costs. **\$500K–\$1.2M/year**—just to play at an institutional level.

Do "Fund To Fund" LPs

We have a document that shows you exactly how to get your LPs from Fund 1 and Fund 2 into your newest fund. First you need to know their AUM and their exact problems. If you're talking to people with AUM under \$200M you're talking to the wrong people.

Have The Right Landing Pages

If the landing pages on your website are about you, founders or stuff other than LPs and LP problems LPs are going to think you're out of touch or full of shit. LPs care how you make them feel and what you know about their problems. That's it.

Clean The Funnel

Figure out exactly what type of biz pain each LP has. If you cannot determine 2-3 reasons that they want to meet with you and then set the agenda for the next meeting, kill the deal.