

# How to Automate Analyst Work as a GP Who's Never Done It Before

For people who've never used GCP, scraped a website, or touched an AI agent.

## Note:

1. If you have questions on this document, feel free to reach out to us [here](#).
2. If your team needs assistance building an AI agent setup for your investment firm, [click here](#). We have a certified team that can speak with you.

## TL;DR: What Are We Doing?

We're giving you **a way to replace 100+ hours of LP research, firm profiling, or CRM prep** with AI—**without hiring** or using expensive databases.

You'll learn:

1. What this setup does (and doesn't) do
2. What tools you need (and how to set them up)
3. How to actually run a research agent (overnight or faster)

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4. When to use our prebuilt LP tools instead

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## Part 1: What Is “Automated LP Research” and Why Should I Care?

Think of it like this:

Instead of hiring an analyst to manually research 500 LPs, we teach a robot to do it overnight—for \$2–3.

### Example Use Cases

- Pull every LP that invests in cybersecurity, writes \$1–5M checks, and is active in 2024.
- Enrich a spreadsheet of 300 LP names with AUM, HQ, past investments, and website.
- Create bio summaries or talking points for investor meetings.

### What This Isn’t

- It’s **not** magic. You need to ask good questions (prompts), test, and sometimes tweak the outputs.

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- It **won't** find contact info for tiny FOs buried behind gated sites. You may need a paid database or manual lookup for that.

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## Part 2: Tools You'll Use (No Engineering Degree Required)

| Tool             | What It Does                                      | Why It Matters                   |
|------------------|---------------------------------------------------|----------------------------------|
| ChatGPT          | Helps you write prompts (instructions for the AI) | Like writing a memo to an intern |
| Gemini (via GCP) | The robot that actually does the research         | Handles big jobs at low cost     |
| Claude           | Writes scripts (code) to make everything run      | It's your free engineer          |

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|                                  |                                                  |                            |
|----------------------------------|--------------------------------------------------|----------------------------|
| <b>BeautifulSoup</b>             | Scrapes websites when Gemini can't find the data | Like a browser bot         |
| <b>Terminal</b>                  | Where you "run" the agent (like pressing play)   | One command, done          |
| <b>Capital OS LP Directories</b> | Prebuilt LP data from our own database           | Often faster than scraping |

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## **Part 3: Setup for Absolute Beginners (Bart-Mode)**

Let's walk you through the full setup like it's your first time. Because it probably is.

### **STEP 1: Get a Free GCP Account**

Go to [console.cloud.google.com](https://console.cloud.google.com)

Create a new project. You'll get \$300 in free credits.

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### **STEP 2: Enable the Gemini API**

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This is the tool that does your research.

1. Go to **APIs & Services > Library**
  2. Search for **Generative Language API (Gemini)**
  3. Click “Enable”
- 

### **STEP 3: Create a Secure API Key**

You need this so your computer can “talk” to Gemini.

1. Go to **APIs & Services > Credentials**
2. Click “**Create credentials > API Key**”
3. Name it something like gemini-agent-key
4. Restrict it to:
  - Only the Gemini API
  - Your home IP address (for safety)

Copy it somewhere safe.

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## STEP 4: Test a Prompt in Gemini (Before You Build an Agent)

Use Gemini's chat interface to test if your question works:

Example Prompt:

Find 25 LPs that invest in software or cybersecurity funds, led by emerging managers, writing \$1–5M checks between 2022–2025.

**Why This Matters:** If Gemini gives garbage results here, don't bother building an agent.

Use: <https://aistudio.google.com/app/prompts>

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## STEP 5: Ask Claude to Write the Script

Once your prompt works, Claude helps you build the actual script (code).

Prompt for Claude:

Write a Python script that takes a CSV of LP names, scrapes websites using BeautifulSoup, and queries the Gemini API using this key: INSERT\_YOUR\_KEY\_HERE.

Claude will give you the script. Save it as `research_agent.py`.

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## STEP 6: Run the Script in Terminal

Open your terminal (Mac or PC):

```
python3 research_agent.py
```

And you're off.

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## Part 4: Use This Instead (Faster Than Running an Agent)

Before you build anything, check if we already have it.

| Tool                    | What It Has                                             | How to Use It                          |
|-------------------------|---------------------------------------------------------|----------------------------------------|
| Capital OS LP Directory | 700–800 LPs, segmented by check size, sector, geography | Ask Adam to export a list or expand it |
| FO Directory            | Family offices, max check size, wealth source           | Great for <\$5M check strategies       |

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### Apollo + CRM

Integrates your outreach (email sequences)

Can use the enriched data directly

If we don't have what you need, **ping us** and we'll build it or find a fast workaround.

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## When to Use What

### If you need...

### Use this

5–50 large LPs by sector

Gemini via GCP

<50 LPs under \$500M AUM

Internal DB or Dakota/Preqin

Fast enrichment of CRM contacts

Claude + script

Email outreach tools

Apollo (cheap, effective)



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Help running any of this

Ask Adam or Armin (we'll connect you to a junior engineer)



## Bonus: What It Costs

| Tool          | Cost               | Notes                                 |
|---------------|--------------------|---------------------------------------|
| GCP           | Free \$300 credits | Covers most usage for 6–12 months     |
| Claude        | Free to start      | Paid if you use Claude Pro            |
| BeautifulSoup | Free (Python lib)  | Might need help installing            |
| Apollo        | ~\$79/mo           | Use free credits from our masterclass |

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## **Final Thought: You're Building a Research Machine**

This isn't about tech—it's about speed and edge.

If you want to raise faster, close bigger checks, or walk into meetings knowing more than the next GP—this is your edge.

You don't have to be technical. You just have to get addicted to **asking good questions** and letting the machine do the digging.

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