



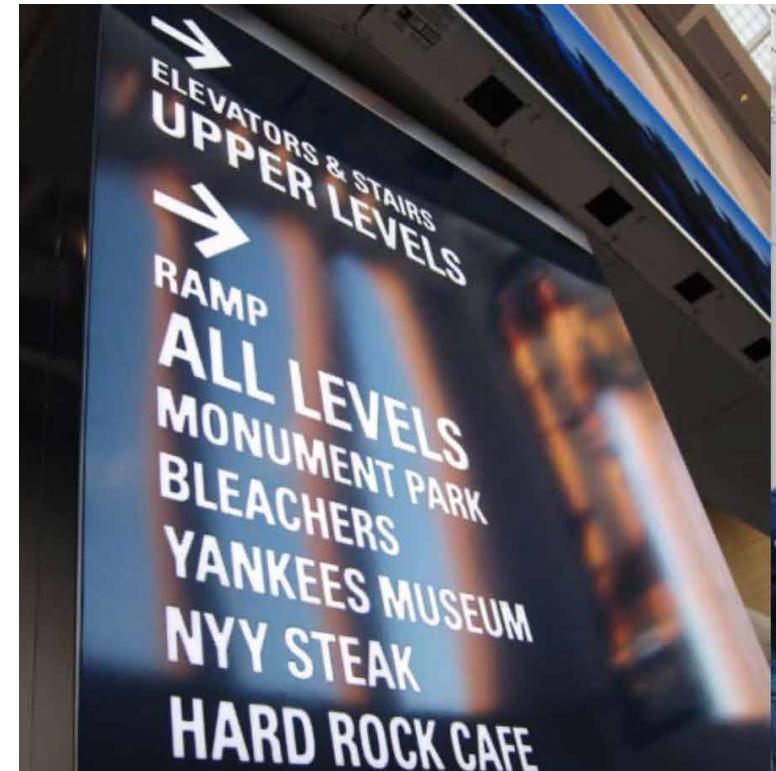
**Craig Gephart**

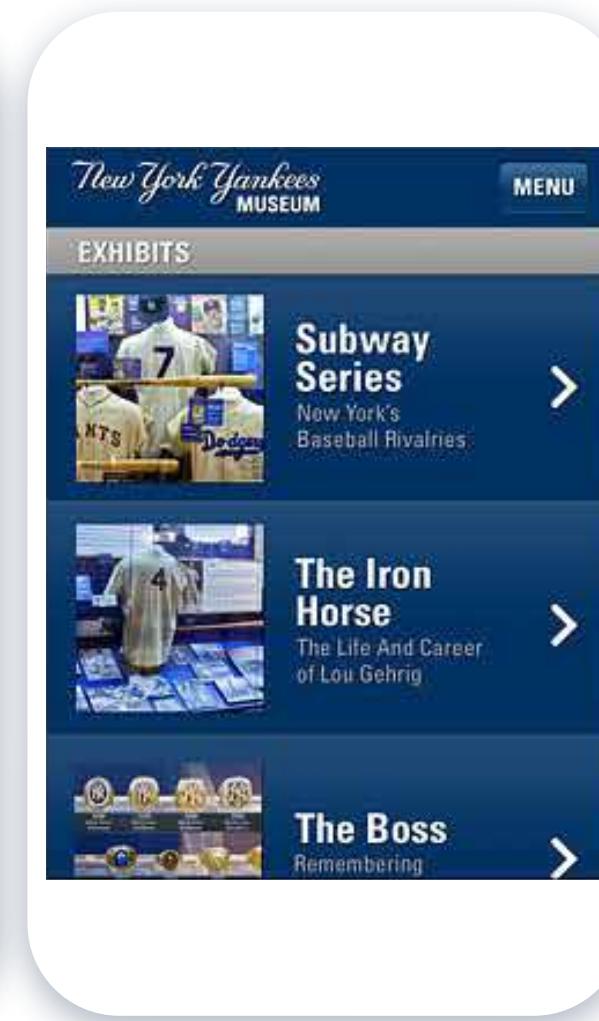
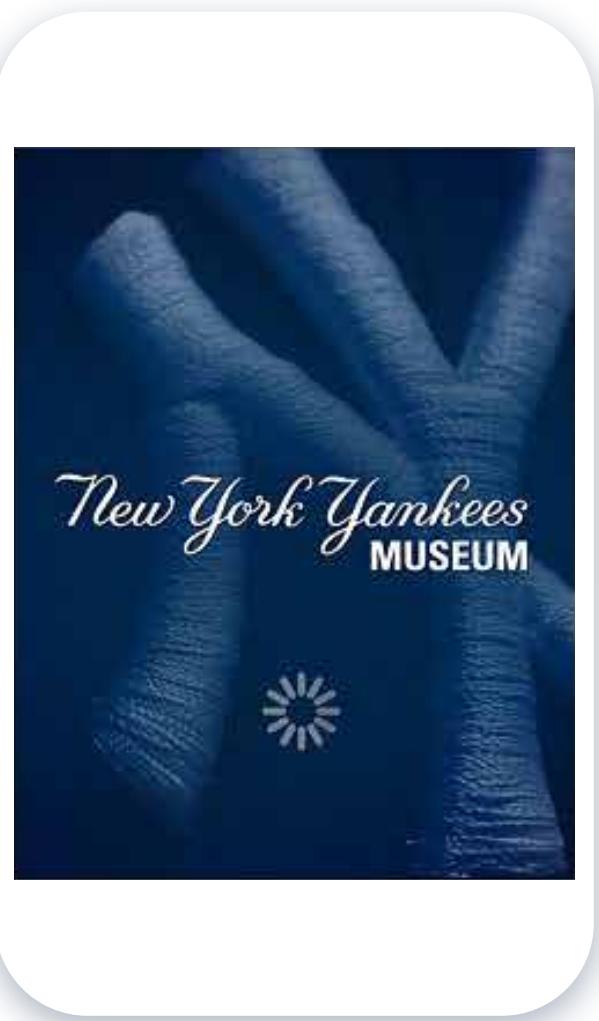
October 2020





**Ohio University**  
BFA Graphic Design  
Thesis: Interface Design





**Finance**

**Insurance**

**Supply Chain**

**Real Estate**

**Payments**

**HR Tech**

**Analytics**

**Social**

**Games**

**Education**

# My Process

**Discover**

- User Research
- Scoping
- Problem Definition
- Identify Key Objectives & Metrics
- Audit of similar products

**Exploration**

- Sketching
- Wireframe

**Refinement**

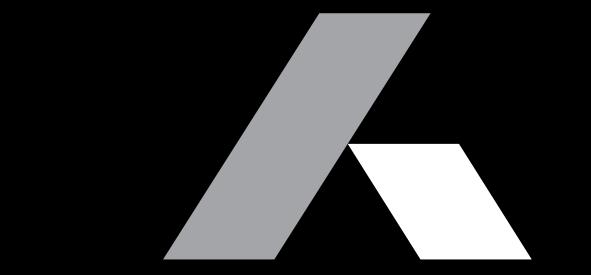
- Feedback from stakeholders
- User Testing
- Prototyping
- Refine Wireframes

**Production**

- Sprint Planning
- Collaborate w/ Eng to build in production
- Construction Docs
- Create Production Assets
- Coding

**Follow Up**

- Analyze Key Metrics
- User Testing
- Iterate



# ADDEPAR

The Operating System  
for the Financial World



**Monthly Report**

Last saved 14 mins ago. [Save now.](#) [Export](#)

File Edit View Object

T Univers 10 pt. B I U Insert Factor

DATE 4/13 – 4/31/13

PORTFOLIO Tony Star

Add Portfolio X

OUTLINE

star

Clients

- Star Jones
- Ned Stark
- John Starks
- Ringo Starr

Groups

- Stark Family

Entities

- Battlestar Gallactica
- Stark Industries

**Bank of Addepar**

**Mark Tex**  
Holdings Summary  
August 1, 2013

### Alternatives Overview

	Value	Commitments	Paid-in Capital	Unfunded Commitment	MOC	Gross IRR
High Yield	\$ 256,077	\$ 550,000	\$ 560,000	\$ 0	1.17	5.94 %
Dain Capital VI	\$ 144,010	\$ 300,000	\$ 310,000	\$ 0	0.09	(0.52) %
KKR Europe	\$ 111,158	\$ 250,000	\$ 250,000	\$ 0	1.39	10.00 %
Growth	\$ 626,464	\$ 900,000	\$ 687,000	\$ 213,000	1.80	27.18 %
Formation 8	\$ 94,000	\$ 300,000	\$ 87,000	\$ 213,000	1.08	5.23 %
Sequoia Global Growth Fund II	\$ 532,464	\$ 600,000	\$ 600,000	\$ 0	1.90	28.29 %
Buyout	\$ 442,406	\$ 1,100,000	\$ 1,100,000	\$ 0	1.21	6.93 %
Apxx Europe VI	\$ 270,120	\$ 600,000	\$ 600,000	\$ 0	1.14	5.92 %
Crosslink Capital Crossover Fund V	\$ 172,286	\$ 500,000	\$ 500,000	\$ 0	1.30	7.59 %
Venture	\$ 521,291	\$ 900,000	\$ 678,000	\$ 222,000	1.26	12.07 %
Accel Partners V	\$ 271,560	\$ 300,000	\$ 300,000	\$ 0	1.17	8.94 %
Bessemer Venture Partners V	\$ 124,866	\$ 300,000	\$ 189,000	\$ 111,000	1.33	13.99 %
Bessemer Venture Partners VIII	\$ 124,866	\$ 300,000	\$ 189,000	\$ 111,000	1.33	13.99 %
Total	\$ 1,846,238	\$ 3,450,000	\$ 3,025,000	\$ 435,000	1.35	11.91 %

### Alternatives Cashflow

Adjusted Value (USD) Total Distributions (USD) Paid-in Capital (USD)

### IRR

Buyout	8.33 %
Growth	28.17 %
High Yield	7.17 %
Venture	13.65 %

Bank of Addepar, Inc.  
1215 Terra Bella Ave.  
Mountain View, CA 94040

Disclaimer: If your account was opened during this calendar year, the Year to Date column will be blank for all but the index returns. "Account" refers to the total return of your entire account for the period. "Fixed Income" refers to the total return of the fixed income only in your account. "Equities" refers to the total return of the equities only in your account.

**PORTFOLIO** TRANSACTIONS REPORTS PORTAL

dev@addepar.com

Terrabella Capital

**Adam Smith** 2014-10-10 - 2014-11-10

Select a View Add Filter

**Asset Table**

Value (USD) grouped by Asset Class

Real Assets, 33%  
Equity, 32%  
Other, 6%  
Fixed Income, 17%  
Cash & Cash Equivalent, 12%

Value (USD) grouped by Sector

Unknown:	\$23,413,768.30
Investment Fund	\$8,771,548.76
Electronics	\$4,648,222.00
Investment trusts/funds ...	\$3,598,205.70
Licensor	\$3,198,956.35
Cash	\$3,135,002.07
Diversified	\$894,102.04
Software & Programming	\$745,396.40
Lodging & catering ind., le...	\$743,397.20
Chemicals	\$541,726.00
Retail	\$405,778.80
Investment trusts/funds ...	\$300,406.83
Internet, software & IT se...	\$241,884.44

Clients

- Adam Smith
- Addepar, GP
- Alex Rogers
- Amanda Newton
- Amelia Hooke
- Anna von Hayek
- Aris Friedman
- Blaise Pascal
- Capital Dynamics Venture 2002, L.P.
- Daniel Bernoulli
- David Ricardo
- Dell Company Pension Plan, L.P.
- Friedrich Von Hayek
- Galileo Galilei
- George Edison
- George Rogers
- Georgia Smith
- Henry Cavendish
- Irving Fisher
- Isaac Newton
- Funds
- Groups
- Legal Entities
- Contacts

Asset Table

Value (USD) grouped by Asset Class

Cash & Cash Equivalent, 12%  
USD, 12%  
Fixed Income, 17%  
Assets Billed On...  
Assets Billed On (USD)  
Automatic Data Processing  
Assets Billed On (YTD, USD)  
Assets Billed On (Since Inception, USD)  
Cost Basis...  
Net Cash Flow...  
Purchase Date  
Sub Asset Class  
Use Cash Accruals  
Super Asset Class  
Projected Cashflow

Value (USD) grouped by Sector

Unknown: \$23,413,768.30  
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Making Hiring a  
Delightful Experience

The collage illustrates the liveli platform's features:

- Candidate Profile:** Shows a detailed profile for Steve Holt, including his photo, resume, employment history (Bartender at Barney's Beanery, Yard House, and The 3Star Bar), education (Bay Area Technical College), and background checks (National Criminal Check and Sex Offender Check, both CLEAR).
- Background Checks:** A modal shows the results of the background checks for Steve Holt.
- Job Applications:** A list of all jobs, showing applicants like Steve Holt, Rita Leeds, Stan Sitwell, Michael Bluth, Lindsay Funke, Ann Veal, Marta Estrella, Maggie Lizer, Lucille Austerio, Larry Middleman, and Gene Parmesan, along with their application status (New Application, Invited to Interview, Not Interested, BG Check Pending, Hired).
- Calendar:** A daily calendar view for November 23, 24, 25, and 26, showing scheduled events like "STORE OPENING", "MANAGER MEETING", and "TRAINING".
- Payment Info:** A section for entering payment information to post a job, with steps: Create Account, Set Up Company, Create Job Post, and Enter your payment information to post your job.
- Account Creation:** A step-by-step guide for creating a liveli account.

**Choose a job template to customize.**

You can modify all the details of the job post. If you don't see the role you're looking for, choose the option that is most similar or [customize a blank template](#).

**FRONT OF HOUSE**

Barista	Waiter/Waitress
Bartender	Busser/Runner
Host/Hostess	Cashier

**BACK OF HOUSE**

Line Cook	Chef
Fry Cook	Dishwasher

**OTHER**

Manager	General Manager
Driver	Event Planner

[Customize a blank template](#)

**NEXT**

**What are the details of this Host/Hostess position?**

< Choose a different job type

**PAY TYPE**

Hourly    Salary

**PAY RATE (IN \$)**

12.25

**ADDITIONAL COMPENSATION**

Tips   Benefits   Bonus

**REQUIRED EXPERIENCE**

<6 mos   6+ mos   1+ yr   2+ yr   5+ yr

**WHAT SHIFTS ARE AVAILABLE FOR THIS POSITION?**

	MON	TUES	WED	THU	FRI	SAT	SUN
MORNING							
LUNCH	✓	✓	✓	✓	✓	✓	✓
DINNER	✓	✓	✓	✓	✓	✓	✓
EVENING							
OVERNIGHT							

**NEXT**

**Please review your job posting:**

To make changes, click on the section you wish to modify.

**Host/Hostess**  
Bud's Burger Shack

**Location** 282 2nd Street   **Employment Type** Part Time, Seasonal

**Compensation** 12.25 Hourly + Tips   **Required Experience** <6 mos

**Available Shifts**

	MON	TUES	WED	THU	FRI	SAT	SUN
MORNING							
LUNCH	✓	✓	✓	✓	✓	✓	✓
DINNER	✓	✓	✓	✓	✓	✓	✓
EVENING							
OVERNIGHT							

**Description**

We are a busy restaurant and have an open role for Hostess. You will greet guests as they enter and show them to their table or waiting area. You will also engage with guests to ensure their meal is as good as it should be. To do well in this role you should be comfortable standing for long periods and managing a very busy shift.

**Required Skills**

- Customer Service
- Fine Dining Experience
- Point of Sale System
- Good Communication
- Team-Oriented
- Fast-Paced
- Multi-Tasking
- Legal Working Status

**NEXT**

**Who should have access to view candidates and receive emails about this position?**

NAME	EMAIL	ACCESS
Adam Jones	ajones@budsburgers.com	<input checked="" type="checkbox"/>
Michael Kaplan	mkaplan@budsburgers.com	<input type="checkbox"/>

**NEXT**

**Please review your information and purchase:**

< Go back and make changes

**craigslist**

Standard 30-day job post to Craigslist. We'll automatically schedule your job post for the busiest times to maximize your job seekers.

**\$35**

**SELECT**

**glassdoor**

Post to the largest and most transparent career marketplace. Your job will show up when candidates search for similar positions.

**\$99**

**SELECT**

**Jobs2Careers**

Post to the #1 Pay-per-application job search engine, specializing in cutting-edge job search technology.

**\$99**

**SELECT**

**NEXT**

**Please review your information and purchase:**

**Host/Hostess**  
Bud's Burger Shack

**JOB BOARDS**

JOB BOARD	PRICE
Craigslist	\$35
Glassdoor	\$99

**TOTAL** **\$134**

**PURCHASE & POST**

**NEXT**

**Success!**

We've added your job to those boards. We'll automatically post it at peak job seeker traffic times.

**OK**

**Get More Candidates**

**STATUS** DATE CREATED  
Active January 20, 2016

**NAME** **EMAIL** **ACCESS**

Adam Jones	ajones@budsburgers.com	<input checked="" type="checkbox"/>
Michael Kaplan	mkaplan@budsburgers.com	<input type="checkbox"/>

**MANAGE JOB**



A screenshot of the Ripio website and its mobile application. The top part shows the website homepage with a banner featuring a couple and the text "La mejor forma de comprar Bitcoin! Fácil. Seguro. Rapido." Below the banner are fields for "Full Name", "Email", "Password", and a "Sign Up" button. The middle section of the website highlights three features: "Easy" (Create an order, make payment at a near store like and get your bitcoins.), "Secure" (SSL encrypted web application with encrypted secured wallet.), and "Nearby" (Pay at a near place to you with PagoFacil and many other local). The bottom section shows a "How to buy my bitcoins?" guide with four steps: "Create your account", "Verify your account", "Buy bitcoins", and "Start to use". To the right, a smartphone displays the Ripio app interface.

# Advisor, Lecturer, & Mentor

Ripio, Cal Berkeley, WhiteSpace Design Accelerator



Visualizing the  
Supply Chain Network

Palantir

government

ADDEPAR

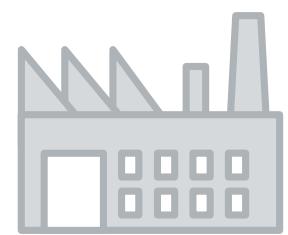
finance

Alloy

supply chain

## REACT WEB APPLICATION

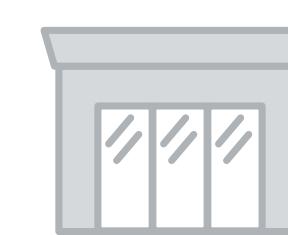
## DATA PLATFORM



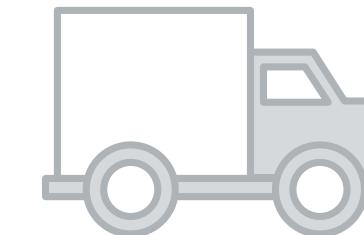
FACTORIES



DC'S



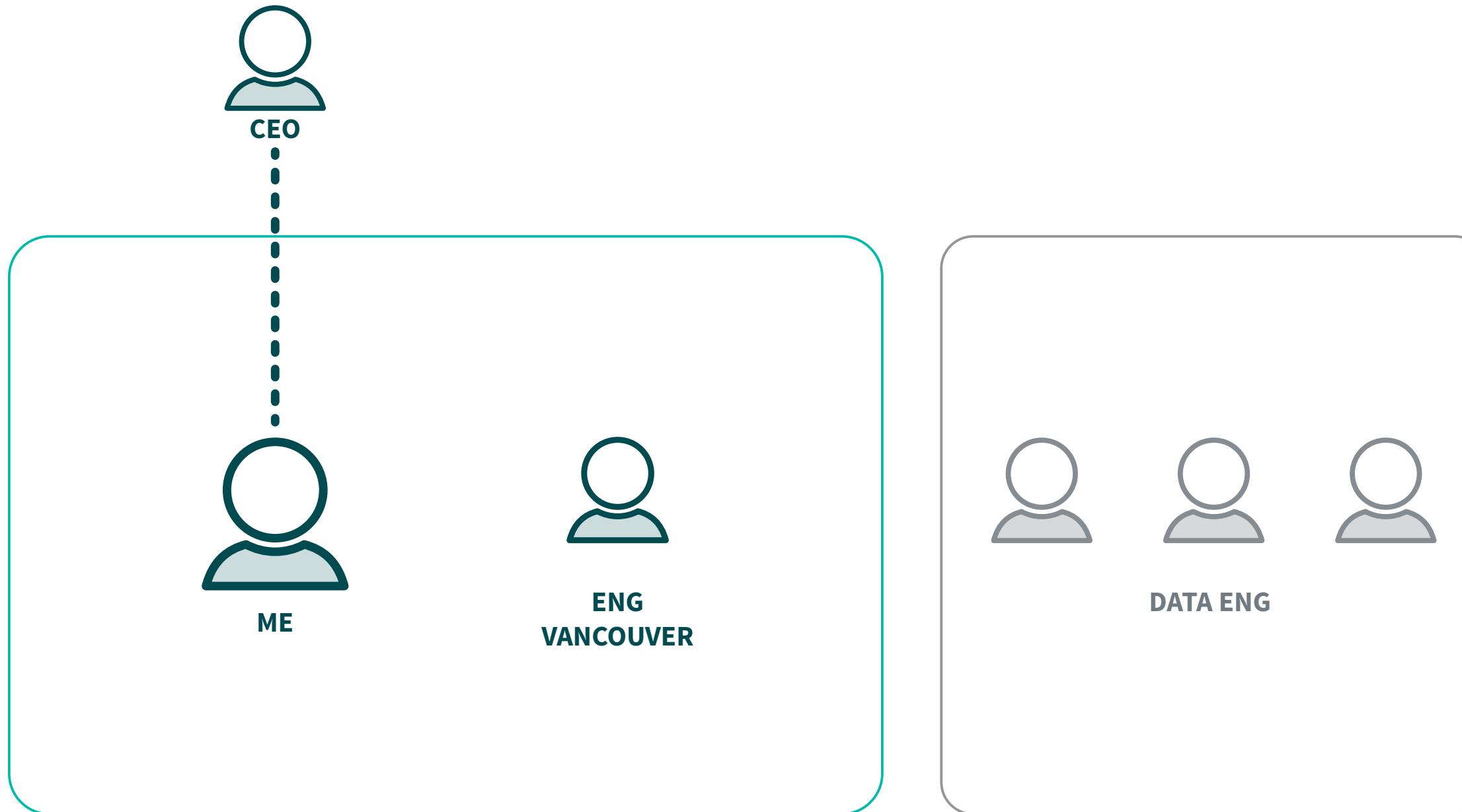
RETAILERS



SHIPMENTS



E-COMM



First Hire outside of Founders

Pre-revenue

Beta Product

# Design Principles

## Earn the Users' Trust.

Users should have confidence in the data. Alloy surfaces major errors or missing data in an obvious way. Minor issues are easy to find and understand. Confidence is emotional as much as it is logical.

## Bias towards the Casual User.

Users should feel empowered to dive in and customize dashboards without training or support from Alloy. They should be able to understand what the different controls and settings mean. Confusing and complicated topics and ideas should have documentation in a help center.

## Be a good buddy.

Prevent users from getting into states where the data doesn't work or the configurations are incompatible.

## Have a soul.

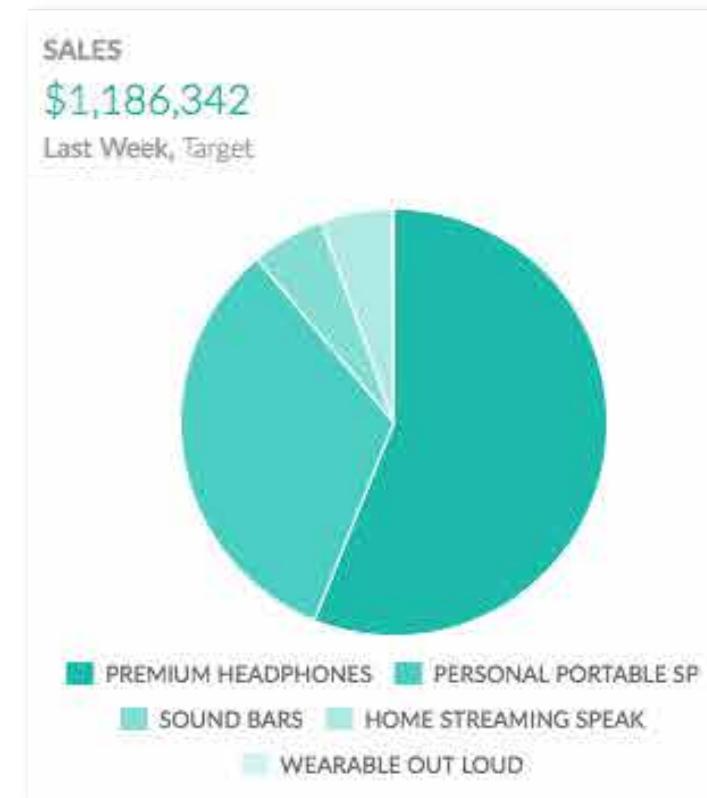
Small things that delight are like a park in a data-dense city—they break up the monotony and give your brain a break, while also signaling to the user where they are in the app. AI - needs to sound and feel human. Can communicate in human ways.

# Responsive Elements

Distribution Center	Product Description	Scent	Total Inventory (Units) Yesterday	Units On Order Yesterday	Safety Stock Yesterday	Reorder Point Yesterday
Rialto CA DC	Shampoo & Conditioner	Lime + Sea Salt	10,380	3,628	6,334	19,004
Woodland CA DC	Shampoo & Conditioner	Lime + Sea Salt	13,468	1,428	6,463	19,105
Shafter CA DC	Shampoo & Conditioner	Lime + Sea Salt	6,672	1,969	3,954	11,400
Wilton NY DC	Shampoo & Conditioner	Lime + Sea Salt	7,589	2,863	4,339	12,098
Cedar Falls IA DC	Shampoo & Conditioner	Lime + Sea Salt	7,864	1,005	3,421	10,105
Fontana CA DC	Shampoo & Conditioner	Lime + Sea Salt	4,160	691	2,131	6,722
Indianapolis IN DC	Shampoo & Conditioner	Lime + Sea Salt	2,799	750	1,942	5,615
Phoenix AZ DC	Shampoo & Conditioner	Lime + Sea Salt	2,892	908	2,030	5,654
Amsterdam NY DC	Shampoo & Conditioner	Lime + Sea Salt	3,839	700	2,104	6,131
Woodland CA DC	Antibacterial All-Purpose Cleaner	Bamboo	9,604	560	3,973	10,839
Rialto CA DC	Antibacterial All-Purpose Cleaner	Bamboo	9,542	506	3,702	10,347
Oconomowoc WI DC	Shampoo & Conditioner	Lime + Sea Salt	3,149	720	1,673	5,101
<b>TOTAL</b>			<b>1,130,812</b>	<b>302,613</b>	<b>217,729</b>	<b>669,150</b>

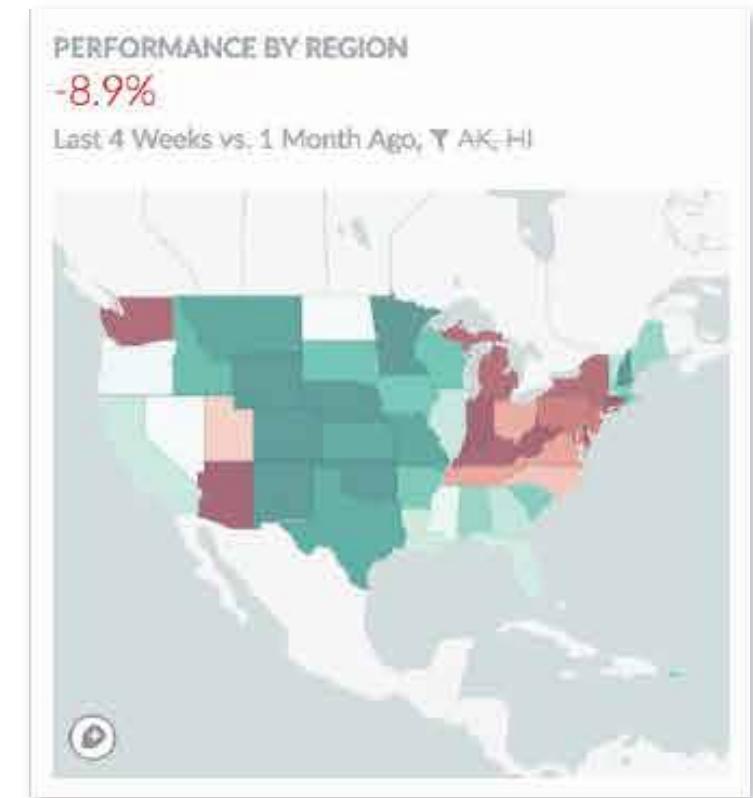
TOP LOCATIONS		
\$157,389,106		
Last 52 Weeks, <small>▼ Unknown Location Name</small>		
Retailer	Location Name	Sales
Meijer	GRAND RAPIDS	\$222,403
Target	Springfield Store	\$206,586
Target	Alexandria Store	\$202,472
Target	Boulder Store	\$199,007
Meijer	MUSKEGON	\$189,053
Target	Watertown Store	\$186,194
Target	Edina SuperTarget...	\$186,150
Target	Walnut Creek Store	\$184,675

# Card Widgets

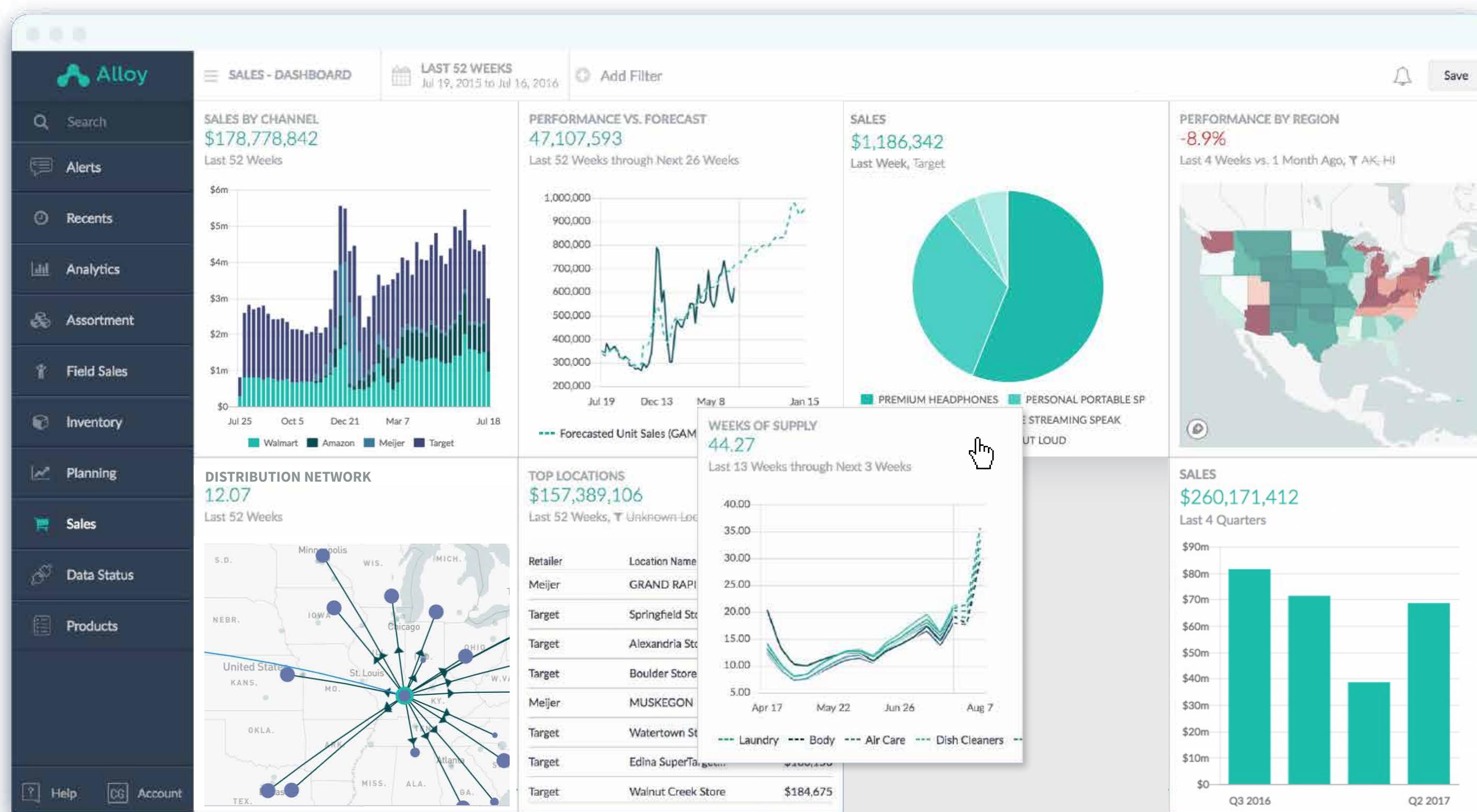


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Last 52 Weeks, T Unknown Location Name

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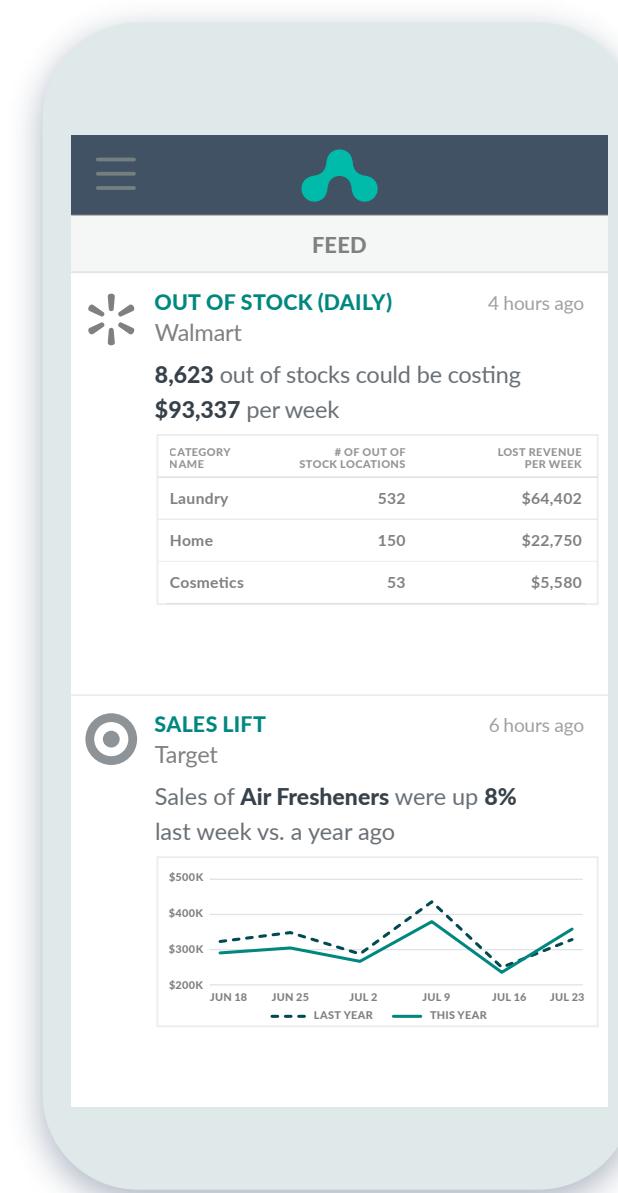


# Dashboards





# Outside the Dashboard



**DESKTOP**

**MOBILE**

Category Report Daily  
05/22/2017

POWERED BY Alloy

[View Dashboard in Alloy](#)

UNIT SALES LAST WEEK (MAY 15, 2017–MAY 16, 2017) <b>\$2,358</b>	UNIT SALES 1 YEAR AGO (MAY 16, 2016–MAY 22, 2016) <b>\$2,917</b>	COMPS % LAST WEEK, VS. 1 YEAR AGO <b>-19.2%</b>
---	--	---

RETAILER	SALES, LAST WEEK (MAY 15, 2017–MAY 16, 2017)
Walmart	\$1,221,101
Amazon	\$51,202
Autozone	\$397,203
Bass Pro Shop	\$4,201
Cabela's	\$71,129
Dick's Sporting Goods	\$3,318
Gander Mountain	\$58,821
Meijer	\$42,220
Shopko	\$5,677
Academy Sports	\$55,458
Field and Stream	\$3,111
Hibbett Sports	\$4,505
Sportsman's Warehouse	\$22,202
O'Reilly Automotive	\$320,101
Tractor Supply	\$91,300
Pep Boys	\$61,424

[VIEW THIS DASHBOARD IN ALLOY](#)

Unclassified Products: Unknown  
Unclassified and/or misclassified products can be assigned via the Product Master.  
For assistance, please contact [support](#).

You received this email because you subscribed to this dashboard in Alloy.  
[Click here](#) to view this dashboard, or to modify your email subscription settings.

Category Report Daily  
05/22/2017

POWERED BY Alloy

[View Dashboard in Alloy](#)

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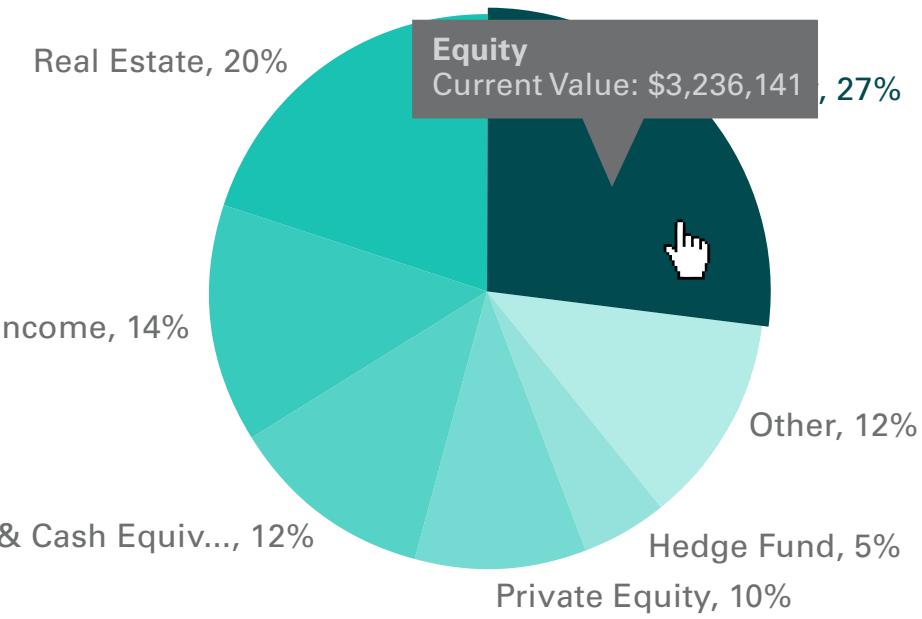
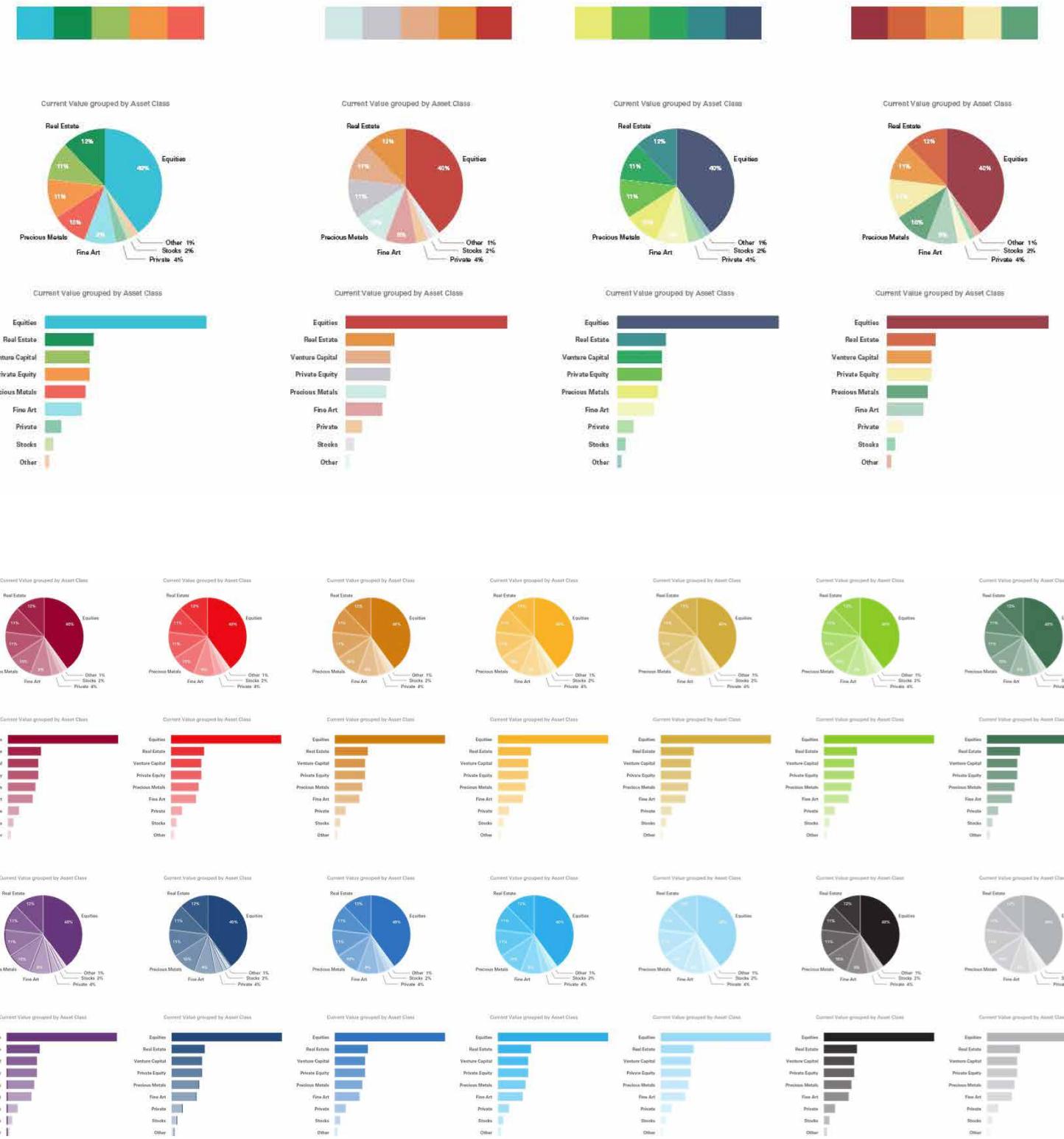
# Ask Alloy

“Show me **unit sales for all products at walmart for last week.**”

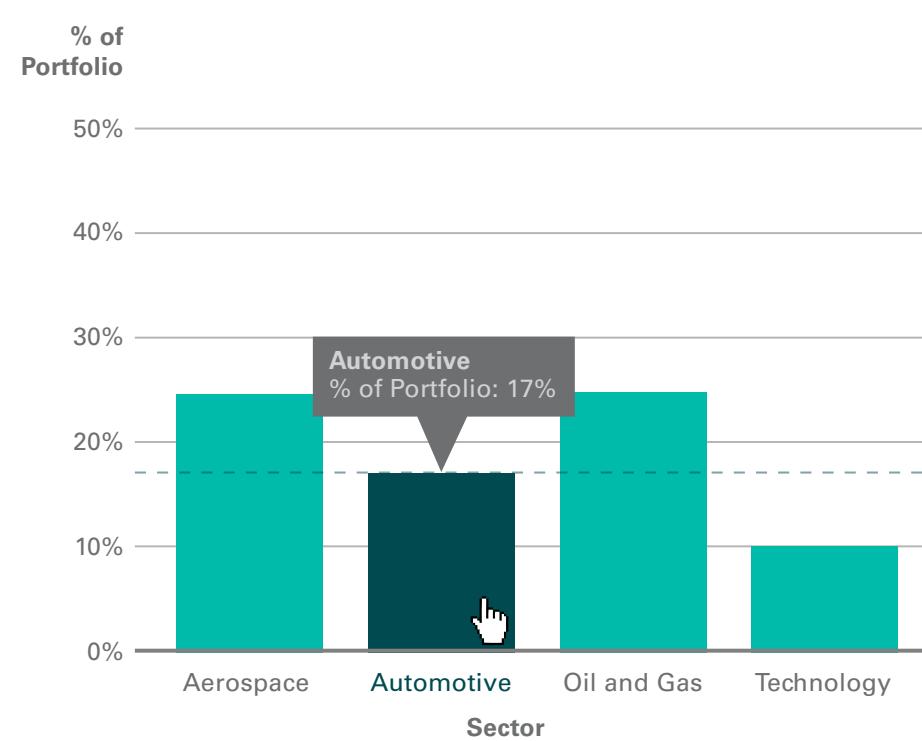
“Unit Sales for all products at walmart for last week was **614.**

[Click here to see the detailed report.](#)

# Enhanced Accessibility



Other: Insurance Benefit: 4%, Infrastructure: 3%, Mutual Fund: 2%, Warrant: 1%, Trust: 1%, Option: 1%



Color Palette

Hover Interactions

# Filters

**This is one of the most-used features of the dashboard.**

- Must always know what filters are applied to the views.
- There is a long list of filter types.
- Different by client

Alloy Craig

<https://localhost:3000/analysis/map-view>

FBB Twitter BBRef 7SCA Netflix HBO Pin It Dailies React Other Bookmarks

Map View EDIT

UNIT SALES (NET)  
Trailing 1 Week vs. 1 Week Ago 469,607 0.2%

SALES (NET)  
Trailing 1 Week vs. 1 Week Ago \$3,482,407 0.3%

SELL-THROUGH  
Trailing 1 Week vs. 1 Week Ago 17.6% 3.7%

SALES (NET) CHG (TRAILING 1 WEEK VS. 1 WEEK AGO)

RETAILER	SALES (NET) Last Month	SALES (NET) CHG Last Month vs. 1 Month Ago	UNIT SALES (NET) Last Month	UNIT SALES (NET) CHG Last Month vs. 1 Month Ago
Walmart	\$6,800,830	<b>28.1%</b>	928,147	<b>29.4%</b>
Midwest	\$1,543,751	<b>23.4%</b>	209,090	<b>24.9%</b>
East North Central	\$791,976	<b>14.3%</b>	107,030	<b>15.2%</b>
West North Central	\$751,775	<b>34.7%</b>	102,060	<b>37.1%</b>
Northeast	\$629,041	<b>6.9%</b>	87,022	<b>7.7%</b>
<b>TOTAL</b>	\$16,018,616	<b>12.9%</b>	2,164,465	<b>13.1%</b>

Alloy Craig

<https://localhost:3000/analysis/map-view>

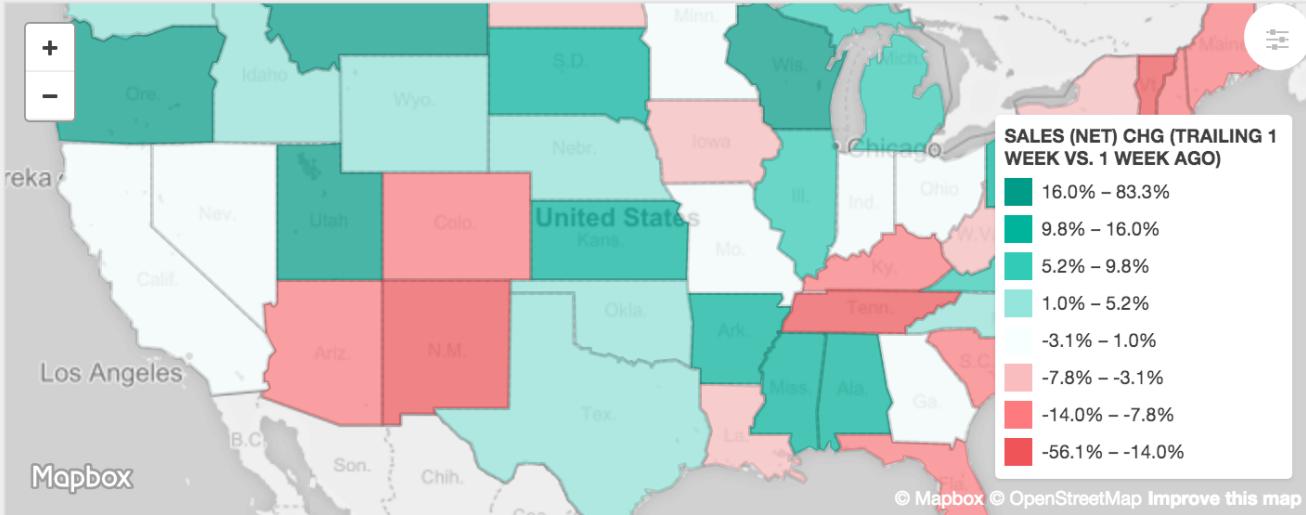
FBB Twitter BBRef 7SCA Netflix HBO Pin It Dailies React Other Bookmarks

 Map View EDIT

UNIT SALES (NET)  
Trailing 1 Week vs. 1 Week Ago **469,607** **0.2%**

SALES (NET)  
Trailing 1 Week vs. 1 Week Ago **\$3,482,407** **0.3%**

SELL-THROUGH  
Trailing 1 Week vs. 1 Week Ago **17.6%** **3.7%**


 A choropleth map of the United States where each state is colored based on its sales change percentage from the previous week. The color scale ranges from -56.1% (red) to 16.0% (dark green). Most states show positive growth, with significant clusters in the West and Midwest.
   
 © Mapbox © OpenStreetMap Improve this map

**SALES (NET) CHG (TRAILING 1 WEEK VS. 1 WEEK AGO)**

A bar chart showing the percentage change in sales over time. The Y-axis ranges from -40.0% to 50.0%. The X-axis shows dates from July 2015 to July 2016. The chart shows several peaks in growth, notably around December 2015 and February 2016, and some periods of decline.

RETAILER	SALES (NET) Last Month	SALES (NET) CHG Last Month vs. 1 Month Ago	UNIT SALES (NET) Last Month	UNIT SALES (NET) CHG Last Month vs. 1 Month Ago
Walmart	<b>\$6,800,830</b>	<b>28.1%</b>	<b>928,147</b>	<b>29.4%</b>
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West North Central	<b>\$751,775</b>	<b>34.7%</b>	<b>102,060</b>	<b>37.1%</b>
Northeast	<b>\$629,041</b>	<b>6.9%</b>	<b>87,022</b>	<b>7.7%</b>
<b>TOTAL</b>	<b>\$16,018,616</b>	<b>12.9%</b>	<b>2,164,465</b>	<b>13.1%</b>

**Alloy** Craig

https://localhost:3000/analysis/map-view

FBB Twitter BBRef 7SCA Netflix HBO Pin It Dailies React Other Bookmarks

### Map View

UNIT SALES (NET) Trailing 1 Week vs. 1 Week Ago 469,607 0.2%

SALES (NET) Trailing 1 Week vs. 1 Week \$3,482,407 0.3%

SELL-THROUGH Trailing 1 Week vs. 1 Week Ago 17.6% 3.7%

**Configure Page**

**DATE CALENDAR TYPE**  
07/23/2016 Standard

**FILTERS**

- Census Region  Exclude  Unknown
- Add filter ...

SALES (NET) CHG (TRAILING 1 WEEK VS. 1 WEEK AGO)

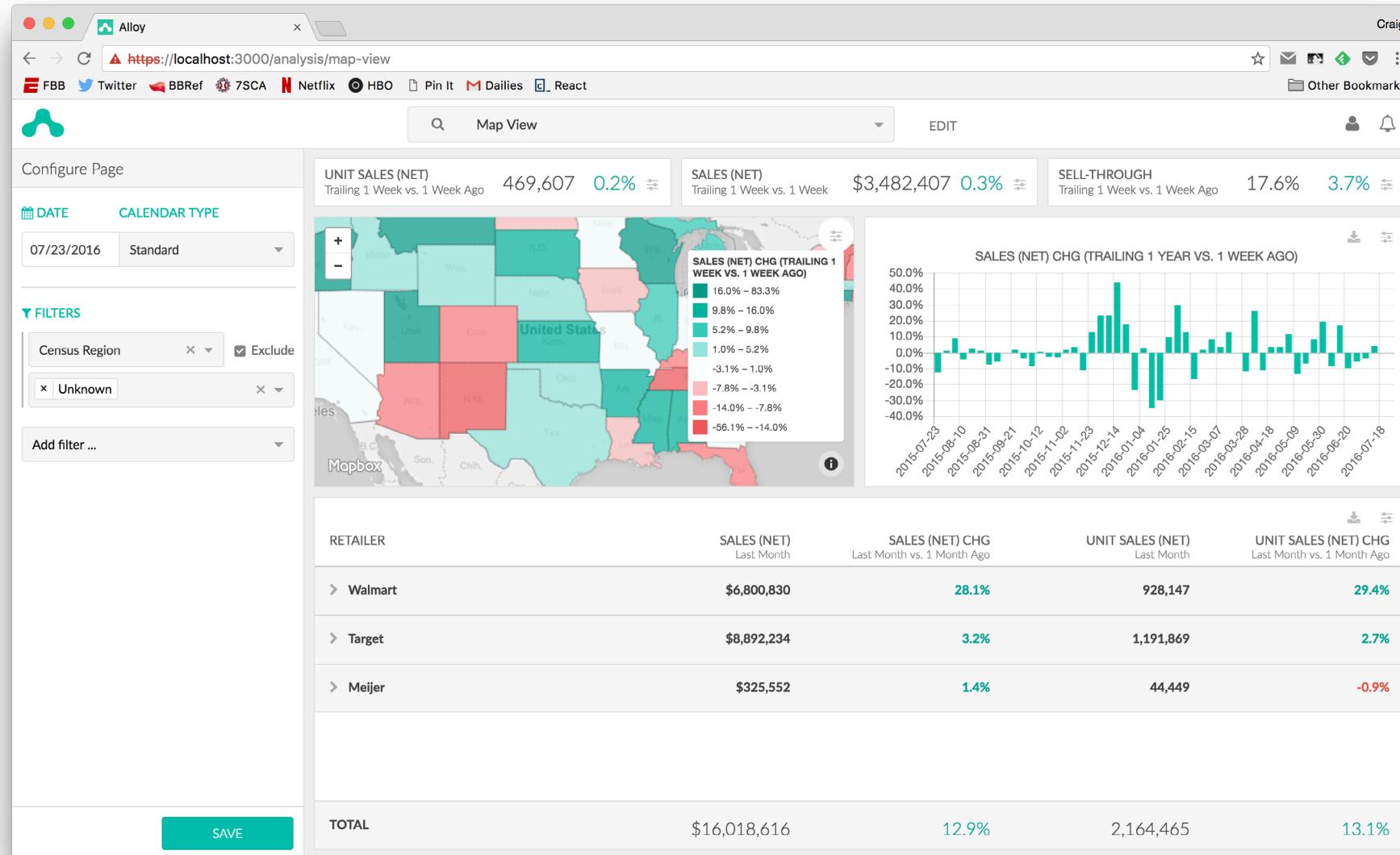
SALES (NET) CHG (TRAILING 1 YEAR VS. 1 WEEK AGO)

RETAILER SALES (NET) SALES (NET) CHG UNIT SALES (NET) UNIT SALES (NET) CHG

RETAILER	SALES (NET) Last Month	SALES (NET) CHG Last Month vs. 1 Month Ago	UNIT SALES (NET) Last Month	UNIT SALES (NET) CHG Last Month vs. 1 Month Ago
Walmart	\$6,800,830	28.1%	928,147	29.4%
Target	\$8,892,234	3.2%	1,191,869	2.7%
Meijer	\$325,552	1.4%	44,449	-0.9%
<b>TOTAL</b>	\$16,018,616	12.9%	2,164,465	13.1%

**SAVE**

# Design Audit



- functionality hidden in ‘edit’ button
- side-by-side infers real-time updates
- nothing happens until press save
- location of save button hidden at the bottom
- ‘save’ implies the changes will persist, but in reality it just updates dashboard to a dirty state
- what if i want to cancel and go back?
- first need to select filter category, then the the actual filter you want “retailer”
- no feedback if/when filter is applied.



When the user is thinking “I want to see my data for Walmart”, they can’t just add a Walmart filter. They must first think of the category of filter first. In this case, they would need to first select ‘Retailer’ for the category, and then ‘Walmart’ as an option for that filter.

# Research

sidebars

This screenshot shows a sidebar with various filters:

- Stops:** nonstop (\$586), 1 stop (\$440), 2+ stops (\$444).
- Times:** Take-off San Francisco (SFO) Thu 12:00a – Fri 12:00a; Take-off Cleveland (CLE) Thu 5:30a – 8:00p.
- Airlines:** Carrier | Alliance. Options include American Airlines (\$515), Delta (\$457), Southwest (get info), United (\$440), and Multiple airlines.
- Booking Providers:** American Airlines (\$515), Delta (\$457), United (\$440).
- More filters ▾:** Includes options like Show landing times, Relationship, Location, Current Company, Industry, Years of Experience, Past Company, School, Profile Language, Nonprofit Interests, Groups, Function, Seniority Level, and Interested In.

popovers

This screenshot shows a popover with two sections:

- Preferred Airlines:** Alaska (\$488), Frontier (\$392), Spirit (\$303), American (\$396), JetBlue (\$398), United (\$398), Star Alliance (\$371).
- Preferred Alliances:** oneworld (\$488), Star Alliance (\$371).

Below the popover are sliders for Material, Color, Thickness, Slant, and Width, and a "Color (2)" section showing color swatches for Aqua, Black, Blue, Brown, Dark Grey, Green, Grey, Ivory, Orange, Pink, Purple, Red, Tan, Teal, White, and Yellow.

megalists (modal)

This screenshot shows a modal dialog titled "Neighborhoods" with three tabs: Hollywood, Mid-Wilshire, and Venice. The Hollywood tab is selected and lists neighborhoods with checkboxes:

- Alhambra, Alondra Park, Altadena
- Anaheim, Arcadia, Arts District
- Atwater Village, Baldwin Hills, Bel Air/Beverly Crest
- Beverly Hills, Boyle Heights, Brea
- Brentwood, Buena Park, Burbank
- Cahuenga Pass, Carson, Cerritos
- Compton, Costa Mesa, Culver City
- Cypress Park, Dana Point, Del Rey
- Downey, Downtown, Duarte
- Eagle Rock, East Hollywood, East Los Angeles
- East San Gabriel, Echo Park, El Monte
- El Segundo, El Sereno, Elysian Valley
- Fountain Valley, Fullerton, Garden Grove
- Gardena, Glassell Park, Glendale
- Harbor City, Hawthorne, Hermosa Beach
- Highland Park, Hollywood Hills, Huntington Beach

The Mid-Wilshire and Venice tabs are also visible at the top.

Below the neighborhoods is a detailed filter modal for "Color". It includes sections for Brand, Material, Size (Men's), Style, Condition, Price, Format, Item Location, Seller, Delivery Options, and Show only. The "Brand" section is expanded, showing "AllSaints" selected. Other brands listed include 21 Men, A|X Armani Exchange, Abercrombie & Fitch, American Eagle Outfitters, Banana Republic, Bar III, Brooks Brothers, Buffalo Jeans, Calvin Klein, Chaps, Cialborne, Crosshatch, Daniel Cremieux, Denim & Supply Ralph Lauren, Luciano Barbera, Lucky Brand, Malo, Mark Shale, Miller, Missoni, Nautica, Old Navy, Original Penguin, Orvis, Paolo Mondo, Paul Stuart, Pendleton, Perry Ellis, Polo Ralph Lauren, rag & bone, and Ralph Lauren.

# Design Exploration

Configure Filters

**RETAILER**

- Include  Exclude
- Amazon X
- Best Buy X
- Walmart X

Add Another...

  
**CATEGORY**

- Include  Exclude
- Apparel X

Add Another...

+ Add Filter

Cancel Apply Filters

Filters

**Retailer (1)** All | None
 

- Walmart
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

  
**Category** All | None
 

- Product (1) All | None

+ Add filter

Cancel APPLY

Filters

**Retailer (1)** All | None
 

- Walmart
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

  
**Category** All | None
 

- Product (1) All | None

Cancel APPLY

Filters

**Retailer (1)** All | None
 

- Walmart
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

  
**Category** All | None
 

- Product (1) All | None

More Filters ▾

Cancel APPLY

Filters

**Retailer (1)** All | None
 

- Walmart
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

  
**Category** All | None
 

- Laundry
- Hand
- Home Cleaning
- Dish Cleaners
- Air Care
- Body

  
**Product (1)** All | None
 

- All-Purpose Cleaner
- Laundry Detergent...
- Gel Body Wash

Cancel APPLY

Filter By: Retailer (1) ▾ Category ▾ Product ▾ VIEW ALL

All | None
 

- Walmart
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

ALL | NONE

APPLY

Walmart
 

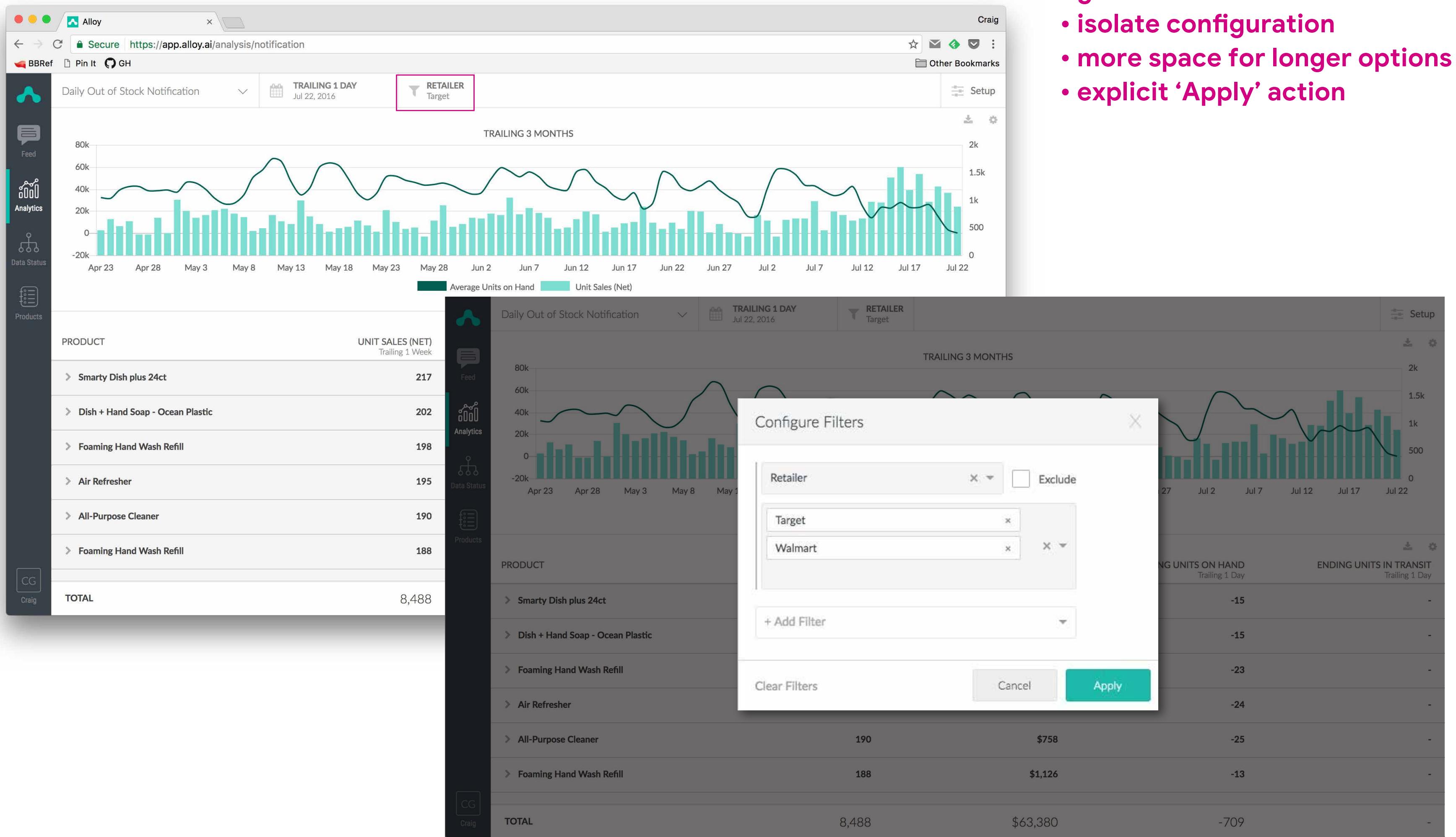
- Target
- Amazon
- Meijer
- Best Buy
- Nordstrom
- Unknown

ALL | NONE

Cancel UPDATE

	RETAILER: Walmart, Target CATEGORY: Apparel	RETAILER: Walmart, Target CATEGORY: Apparel	wal
		<a href="#">Edit Filters</a> <a href="#">Clear Filters</a>	RETAILER Walgreens Walmart  CATEGORY Wall Coverings  SUBCATEGORY Wallets

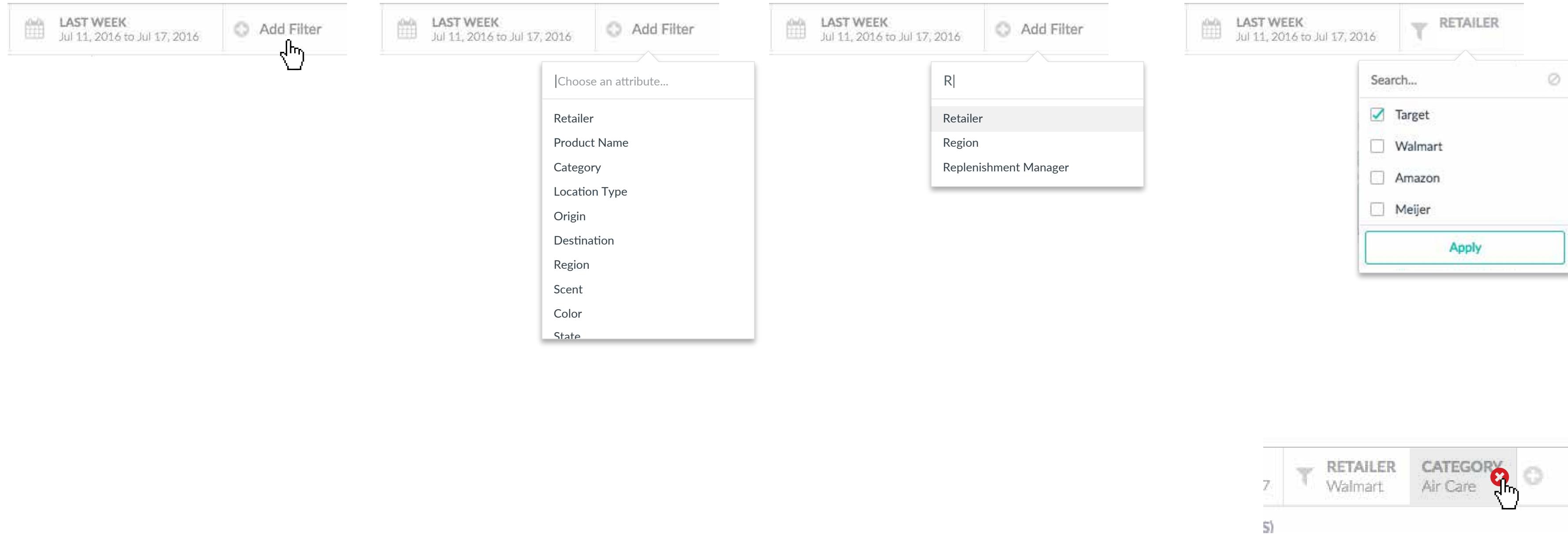
- give user feedback
- isolate configuration
- more space for longer options
- explicit ‘Apply’ action



# Filters version 1

- 1 click edit button to open modal mouse
- 2 click add filter select menu mouse
- 3 search for filter category from dropdown keyboard
- 4 click option from dropdown mouse
- 5 search for filter option from dropdown keyboard
- 6 click option from dropdown mouse
- 7 click apply to close modal mouse

**TOTAL: 7 actions - 4 switches**

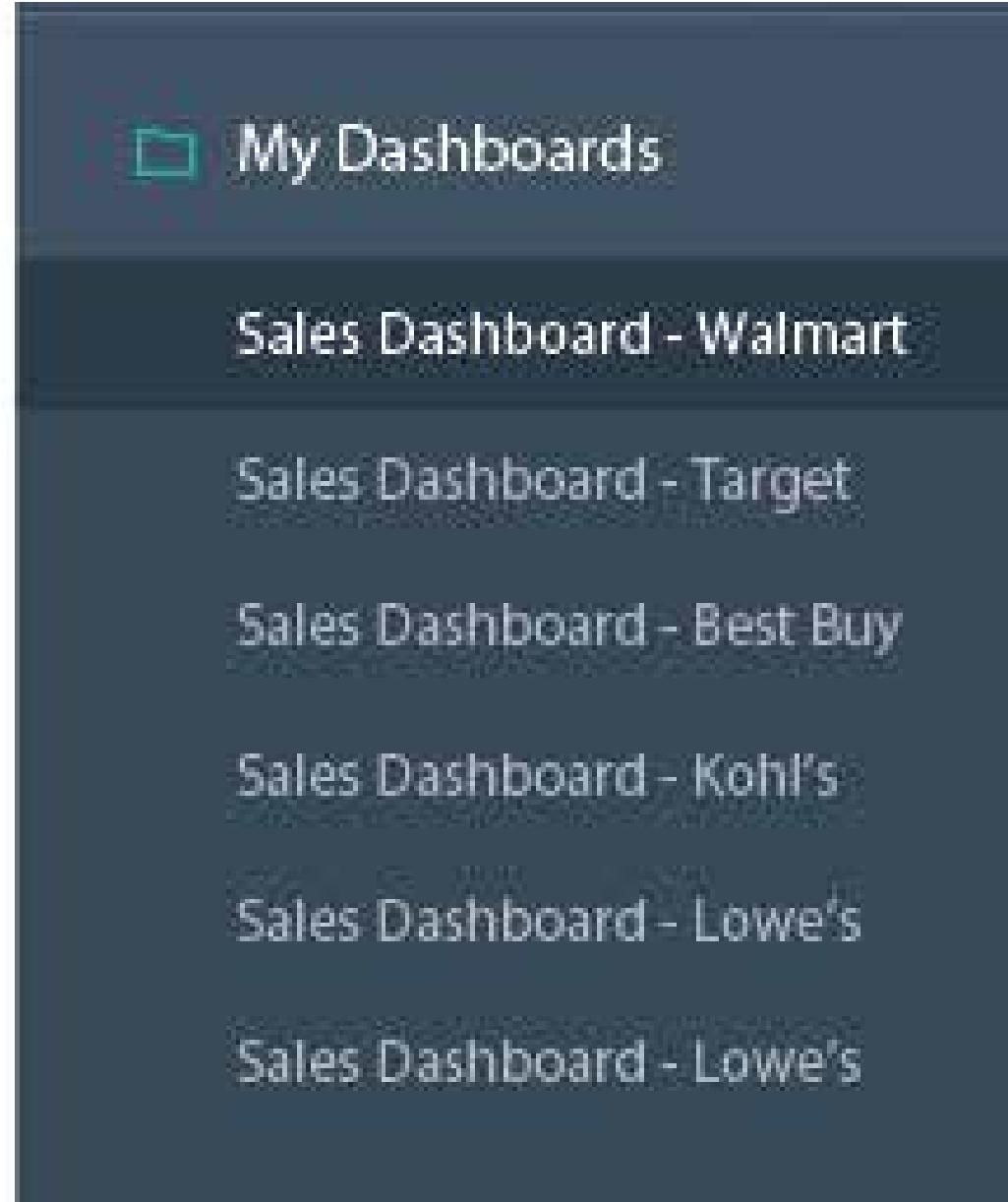


- Direct manipulation to add/change/remove
- Add a filter with as few as 1 click
- Searchable as well as discoverable
- Search and select can be done with the keyboard, avoiding back and forth between click and type
- Most-commonly used options listed first
- Remove with a single click

## Filters version 2

- 1 click add filter button mouse
- 2 search for category from dropdown or choose from one of the top results keyboard
- 3 search for filter option from list or choose from one of the top results keyboard
- 4 click apply button in popover mouse

**TOTAL: 4 actions - 2 switches**



Even though filters were easy to use, they were not discoverable enough.

**Sales - Dashboard**

LAST WEEK Jul 11, 2016 to Jul 17, 2016

Add Filter

**RETAILER**

SALES \$176,370,100 Trailing 52 Weeks

**SEGMENT**

SALES CHG 4.2% Last Week vs. 1 Week Ago

Category	Sales Chg
Bathroom Cleaner	14.9%
All-Purpose Cleaner	13.6%
Foaming Body Wash	10.7%
Power Foam Dish Soap	10.6%
Stainless Steel Polish	10.0%
Glass + Surface Cleaner	9.6%
Smarty Dish plus 45ct	8.6%
Hand Sanitizer	8.4%
Foaming Bathroom Cleaner	7.9%
Laundry Detergent - 50 Loads	6.9%

**PRODUCT NAME**

SALES \$180,157,844 Trailing 52 Weeks

**PRODUCT DESCRIPTION**

SALES \$4,462,298 Last Week

**INVENTORY TURNS, UNITS**

12.00 Trailing 52 Weeks

**SEARCH**

Search Retailers... ALL

- ALL
- Walmart
- Target
- Costco
- Costco Canada
- Boots
- DTC NA

Search Segments... After Shave

- After Shave
- Bar Soap
- Body Wash
- Cartridges
- Face
- Hair Care
- Hair Style

Search Product Names... ALL

- ALL
- Multiple Product Name Values
- Unknown Product Name
- 1.7 oz SPF Lotion

**DISPLAYED FILTERS**

Retailer Category Product Description

Type to search...

Cancel Update

# **Filters version 3**

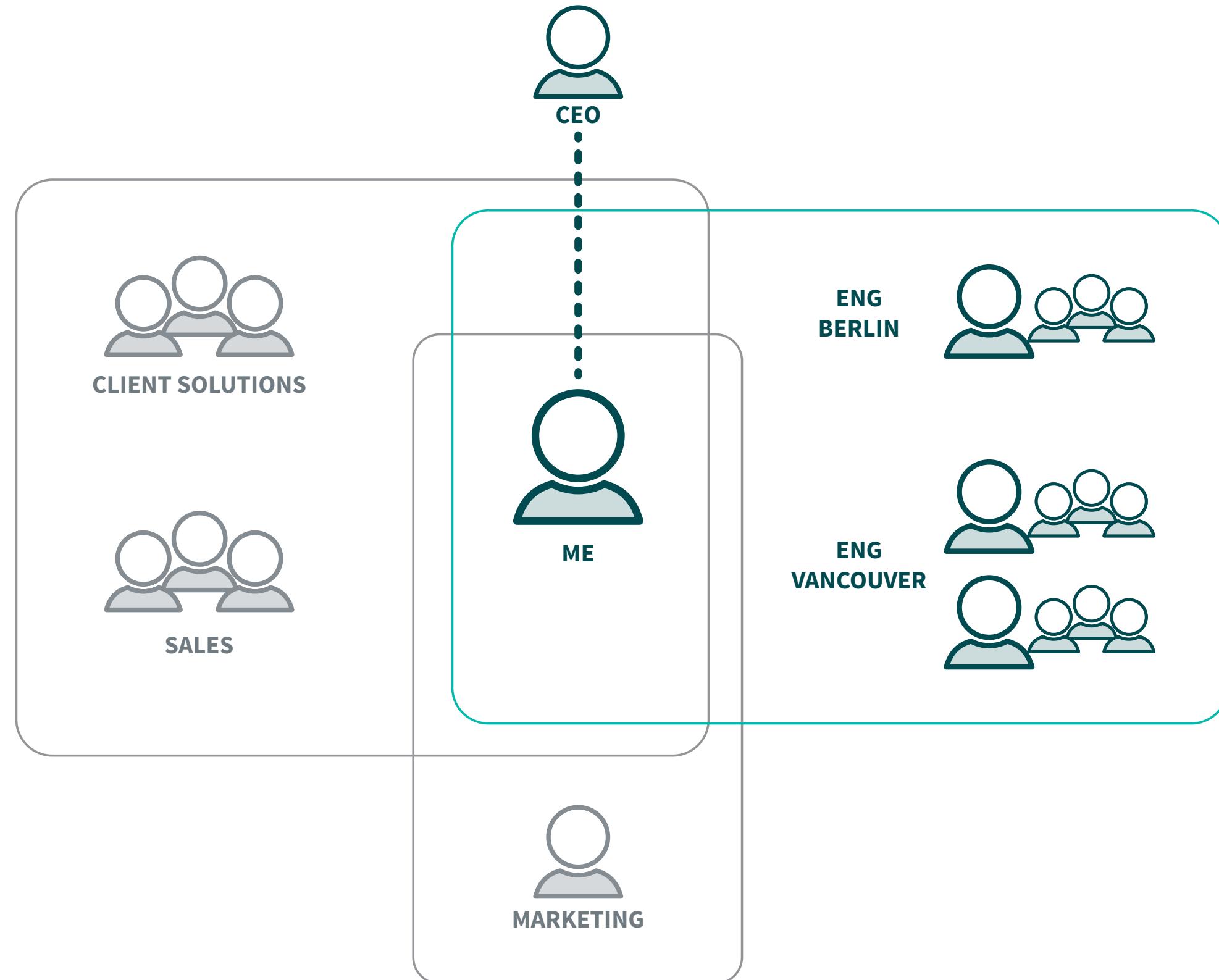
**1 click checkbox in side panel**

**TOTAL: 1 action**

“This is amazing, but what do you do with it?”

# The Problem

- By necessity, we built a powerful, extremely flexible tool that would allow users to visualize, and ‘slice and dice’ their data in any way they could imagine it.
- This was daunting to them because they were not used to having this much data at their fingertips, nor sophisticated tools to interact with them.
- We realized that we needed simpler, more workflow-driven tools built on top of this framework.



70+ Employees

3 Offices

# Interviews

What is your daily routine like?

What workflows do you do repetitively?

What things do you worry about?

What is your dream piece of software that would make your life easier?

What tools / software do you use?

What technology do you use? (hardware, operating system, browser, mobile device)



EXECUTIVE



MARKETING



SALES



FINANCE



SUPPLY CHAIN



Alloy Inventory Planning Dashboard

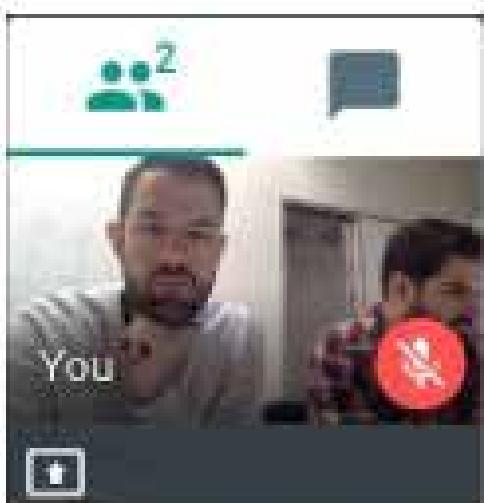
Inventory Status

Category	Current Stock	Target Stock	Min Stock	Max Stock
Raw Materials	1000	1200	800	1400
Work-in-Progress	500	600	400	700
Finished Goods	800	900	600	1100
Total Inventory	2300	2700	1800	3000

Inventory History

Inventory Forecast

Month	January	February	March	April	May	June	July	August	September	October	November	December
Actual	2000	2100	2200	2300	2400	2500	2600	2700	2800	2900	3000	3100
Forecast	2050	2150	2250	2350	2450	2550	2650	2750	2850	2950	3050	3150



Inventory Report

Category	Current Stock	Target Stock	Min Stock	Max Stock
Raw Materials	1000	1200	800	1400
Work-in-Progress	500	600	400	700
Finished Goods	800	900	600	1100
Total Inventory	2300	2700	1800	3000

Inventory History

Inventory Forecast

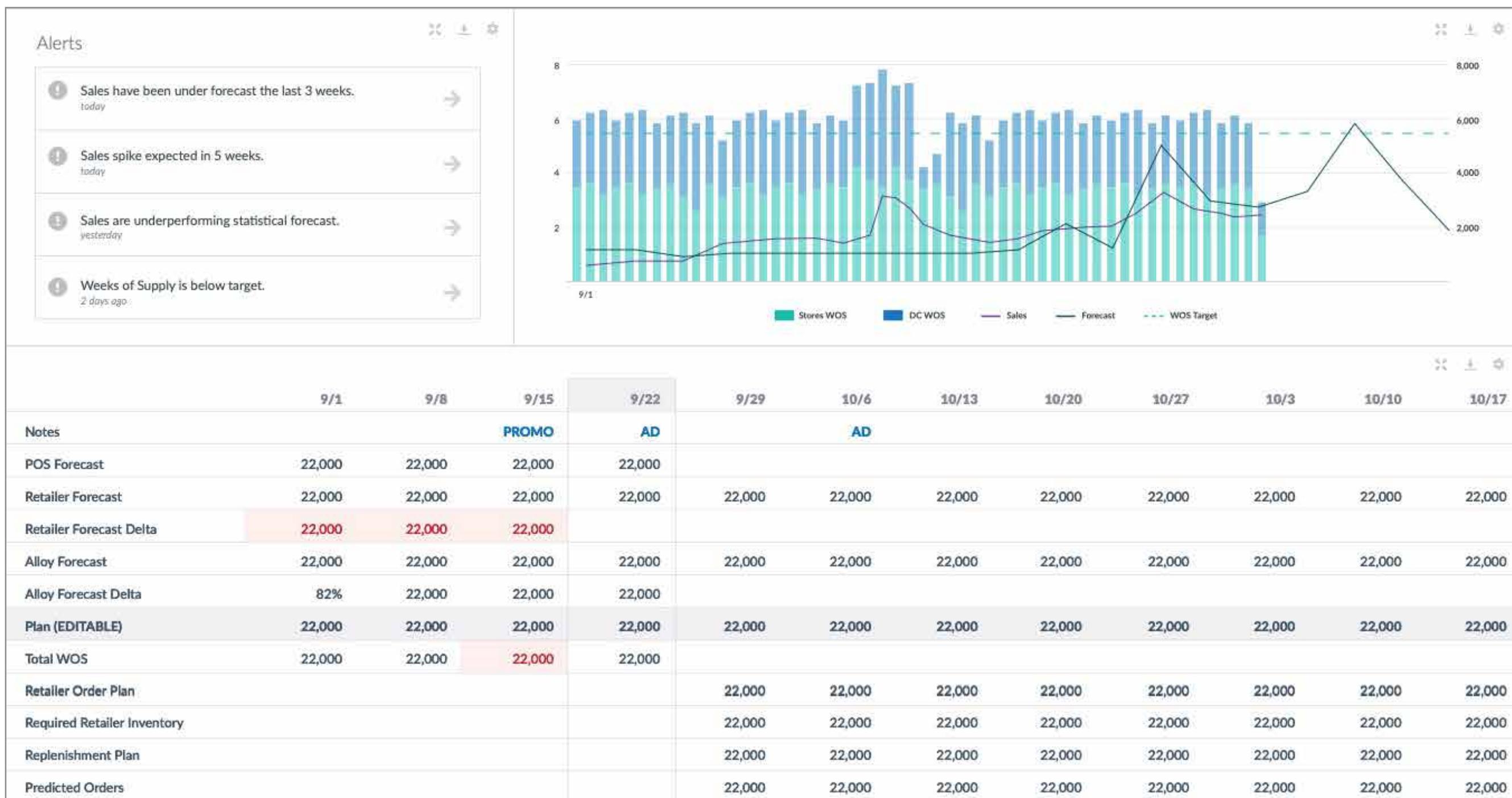
Month	January	February	March	April	May	June	July	August	September	October	November	December
Actual	2000	2100	2200	2300	2400	2500	2600	2700	2800	2900	3000	3100
Forecast	2050	2150	2250	2350	2450	2550	2650	2750	2850	2950	3050	3150

# Insights

- Multiple current customers were taking data from Alloy, exporting to spreadsheets, then had consultants do further calculations on top of those spreadsheets (historical sales, forecast, marketing)
- All keeping separate records as spreadsheets, ppt files
- No single source of truth
- Have to have weekly meetings to sync up their plans

## AHA! Moment

Everything we'd been building was analyzing historical data. (looking back).  
Most of these people's jobs were forecasting & planning (looking forward).



Rough mockup for initial feedback

Existing customers were very excited.

“If you **build** this, we will **pay** for it.”

Initial validation to build demo.

## **Immediate impact on sales pipeline**

“Just being able to mention that we’re working on a planning product has led to about 3x as many meetings.”

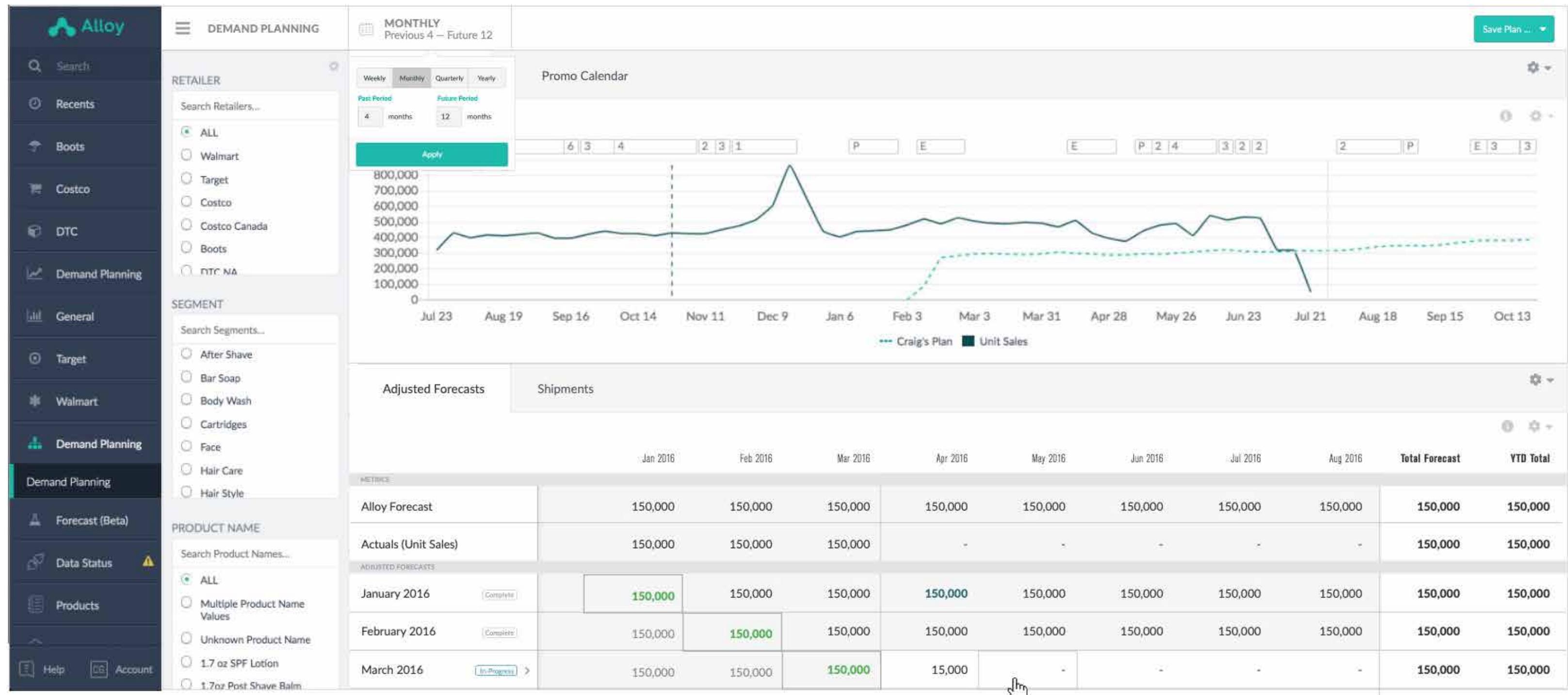
## Immediate Results

- Ppsells of current clients for planning product.
- One of our top prospects that we had been chasing for almost 2 years signed the biggest to date.

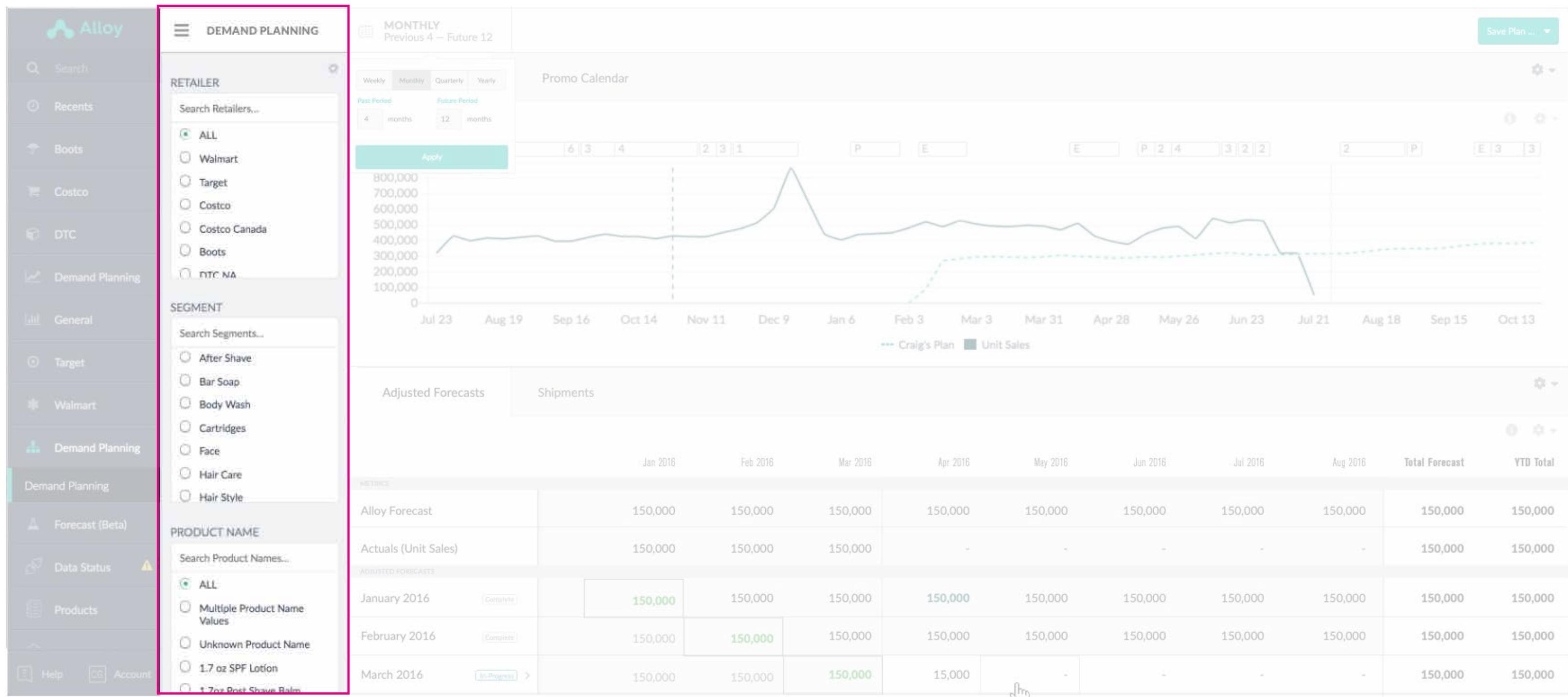
LOGO REDACTED

LOGO REDACTED

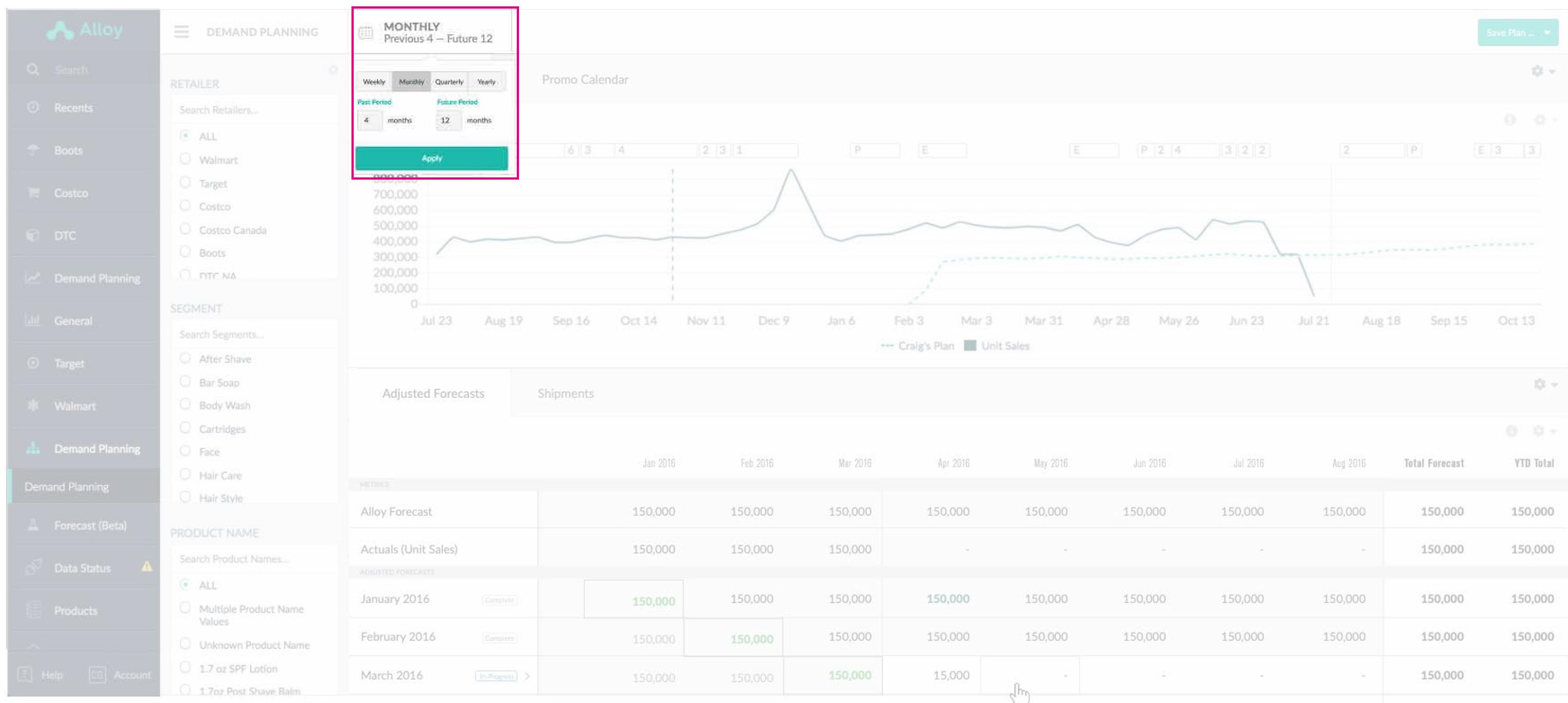
LOGO REDACTED



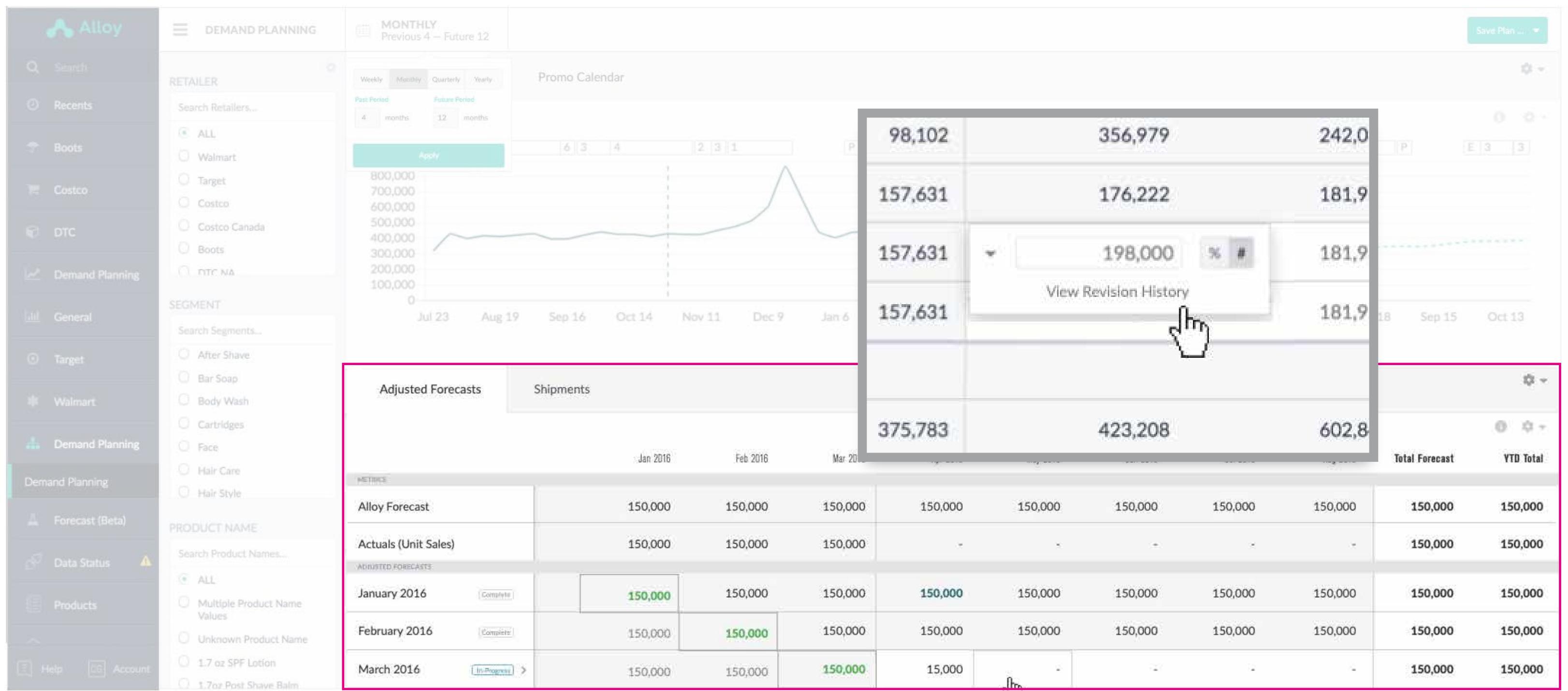
## Planning Product in Production



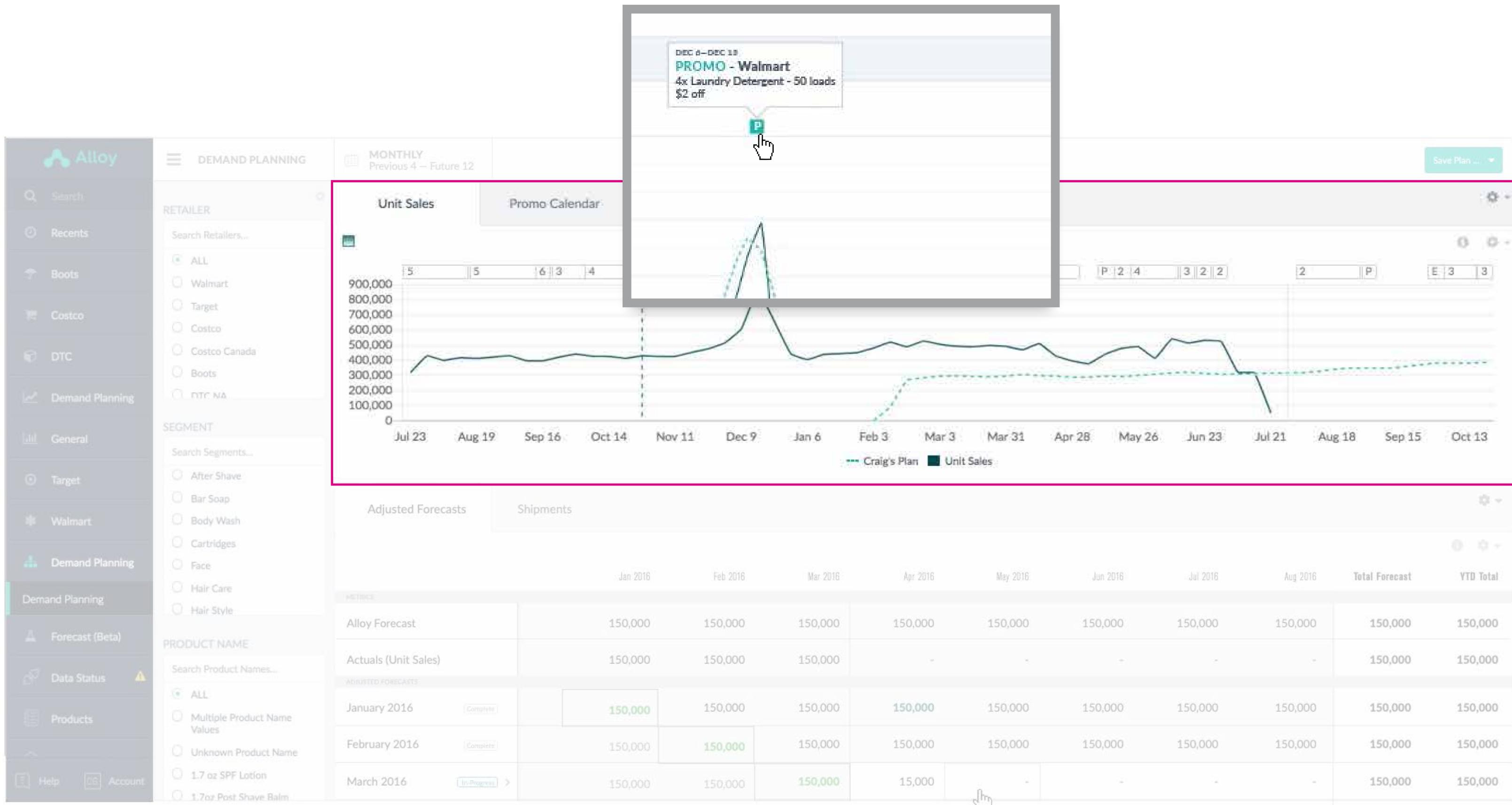
Filter by retailer, product, or hundreds of attributes



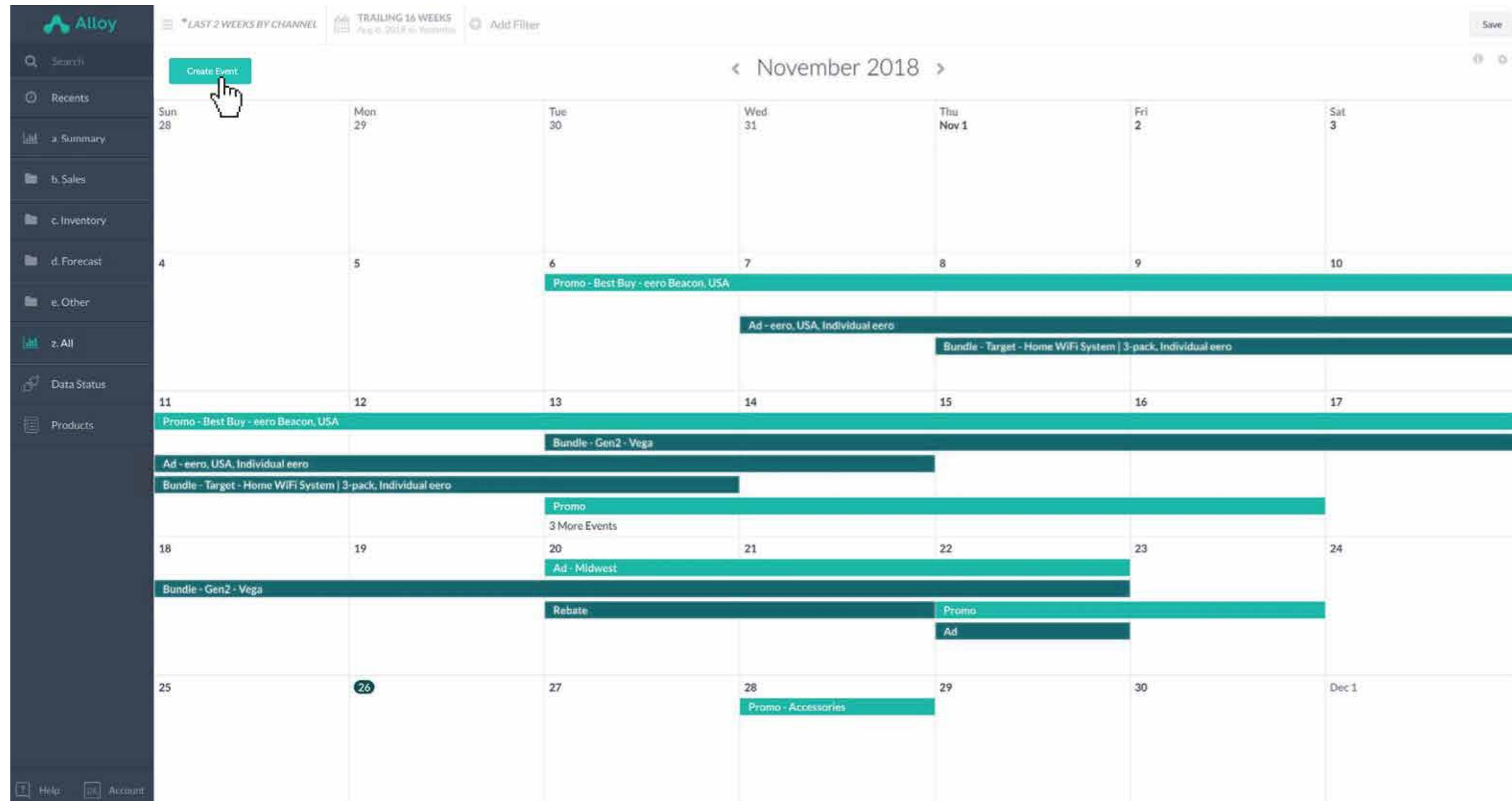
## Configurable date periods



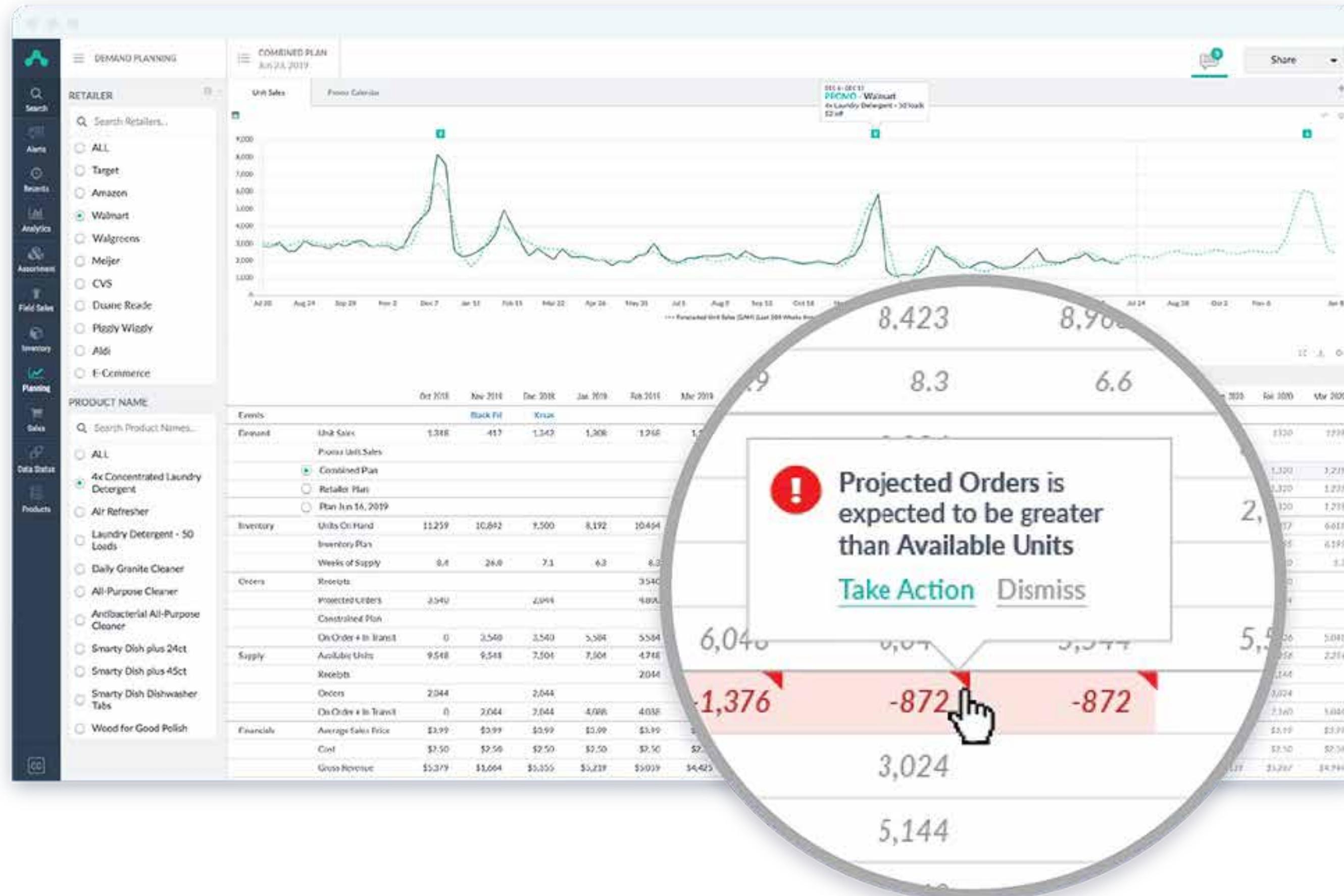
## Compare plans, forecasts, and historical sales



Compare plans, forecasts, and historical sales



View marketing calendar in familiar format



## Data Alerts

# Moving Forward

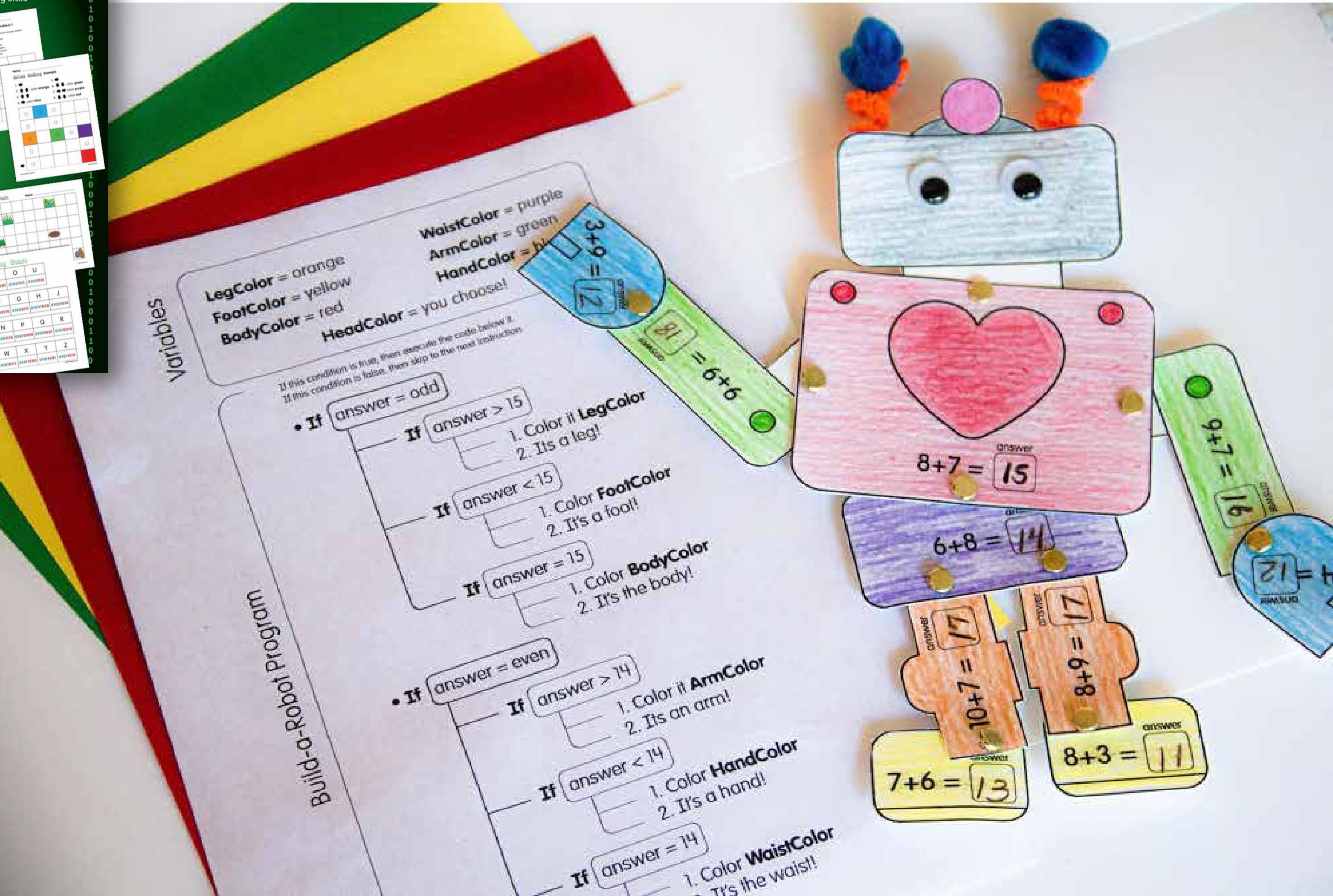
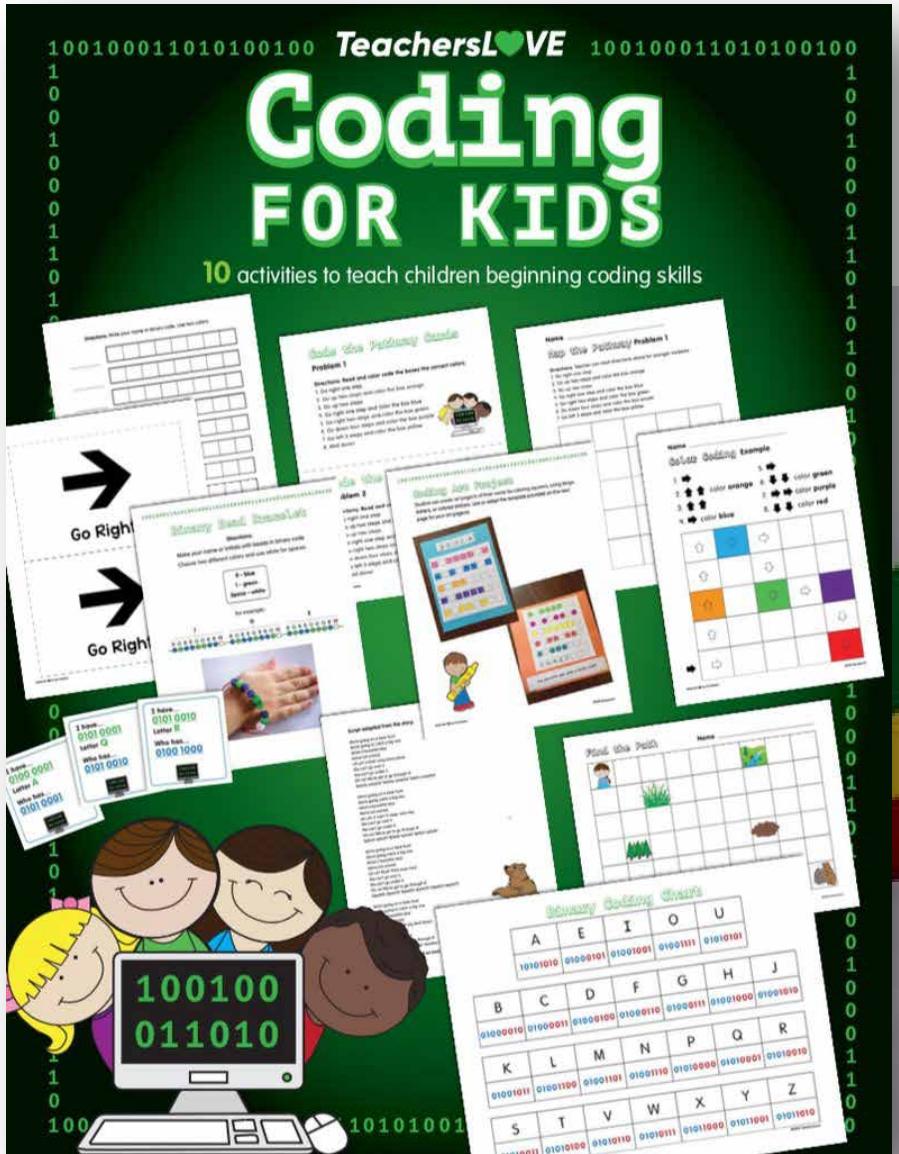
This laid the groundwork for contracts with two large conglomerates, which were successively each the largest deals we'd ever signed, by orders of magnitude.

A solid dark gray rectangular box used as a placeholder for a redacted logo.

LOGO REDACTED

A solid dark gray rectangular box used as a placeholder for a redacted logo.

LOGO REDACTED





**Thank you!**

