



Hi There! I'm Craig Gephart. I have 15 years experience as a design leader.

My interests lie at the intersection of design and technology.

I have actively participated in every step of the design process, from research, wireframing, & prototyping, writing production-quality code on a daily basis, to testing and iterating on designs.

I love collaborating with engineers and I believe the best solutions come from involving each other throughout the design/build process.

I have built and managed design teams and served as the product lead at rapidly-growing companies.

Here is a brief look at what I've been up to...

DESIGN MANAGEMENT

The design team's role goes far beyond creating layouts and wireframes. A design team can touch every part of the organization every day. It has the unique ability to capture the imagination and inspire team members.

It is the design team's job to educate the rest of the organization about design. This can take many forms, from creating a company design blog, to hosting internal design workshops.

Designers should learn from each other! We may all have different job functions, but we can all benefit from observing each other's talents and interests.

MANAGEMENT

Quarterly & Annual Team Planning
Weekly 1:1 with reports
Bi-annual reviews

DEVELOPMENT

Established design workshop with full screenprinting setup and shop tools charettes

OUTREACH

Established company design blog and design twitter feed philz partnership recognized by design blogs and work in UC quarterly design meetups published book

CULTURE

in-house design lecture series
office murals & graphics
stickers / culture items
company swag
recruiting cultural video
recruiting brand campaigns

SELF DEVELOPMENT



PROMOTE CAMARADERIE



DISSEMINATE MISSION



ENGAGE COMMUNITY



Visualizing the global supply chain network

Alloy is a platform for consumer goods companies to aggregate their supply chain and retail data to gain better insight into where their products are going, how they're performing, and where their untapped opportunities are.

I was among the first hires after the founders when the company had almost no revenue and the product consisted of the data layer and a static, basic dashboard. As the only designer my entire time at the company, I designed all aspects of the product, and all the branding and marketing materials.

Role

Head of Design

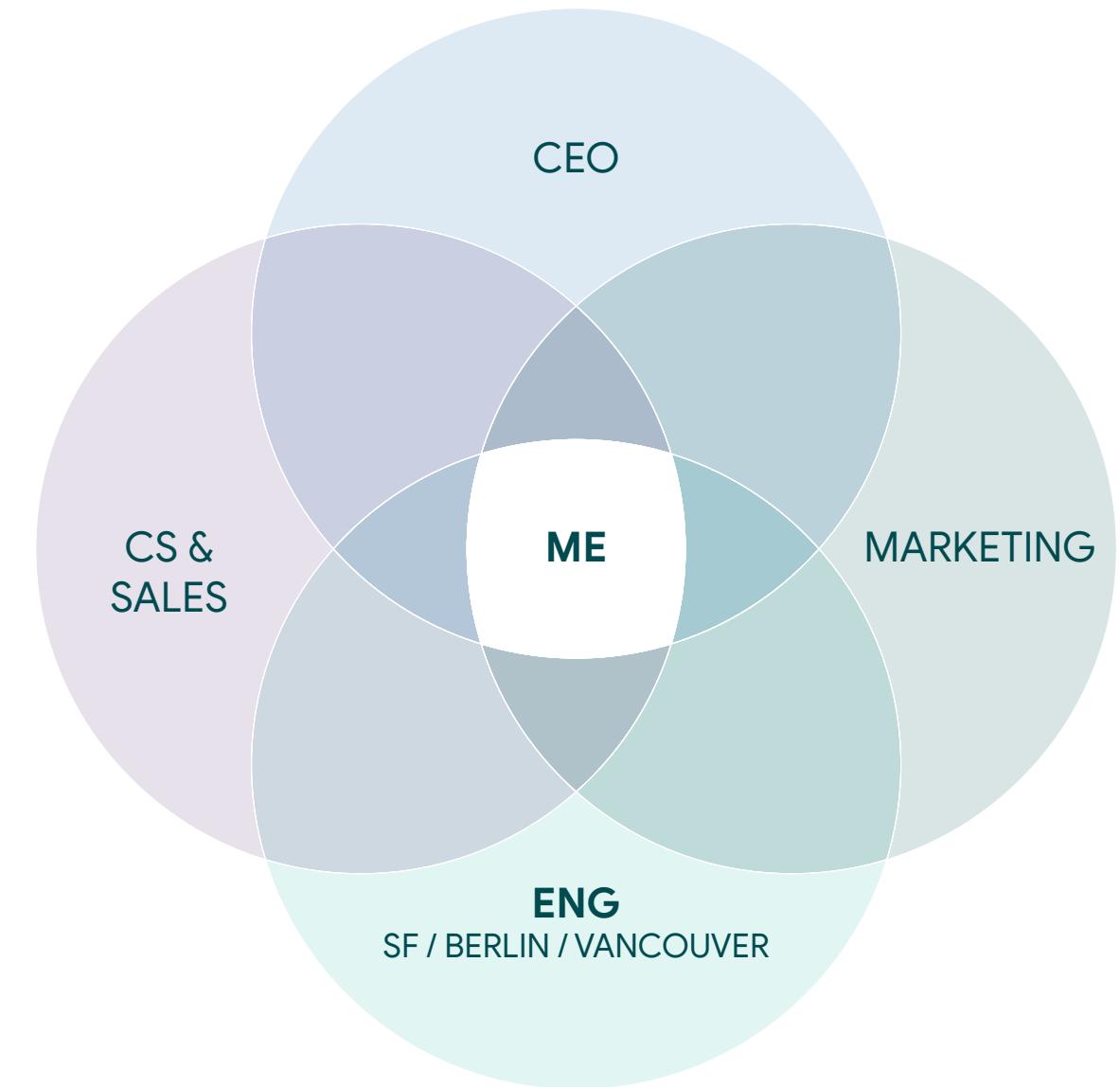
Years

2016-2019

With no product managers the majority of my time at the company, and an engineering team distributed across 3 offices globally, I acted as the defacto product lead. I sat with the client solutions team, learning about the gaps in the current product, and met regularly with the members of the sales team, who helped me understand where the opportunities to add new functionality might be. I translated those insights into the product backlog, and wireframes. Then I would meet with the 3 engineering leads to help plan the sprints. Since these teams were all working in remote offices, they lacked access to the CS & sales teams, as well as customers who visited the office.

KEY RESPONSIBILITIES

- Designed entire product, brand, & marketing materials
- Wrote majority of the production HTML/CSS code for the React app
- Created design component library
- Conducted extensive user interviews & research sessions
- Collaborated with sales & client solutions team to better understand gaps in the product
- Collaborated with all 3 engineering teams across 3 offices globally to build the product



MY PROCESS

User interviews sessions

Discuss findings with Client Solutions/Sales/Marketing/CEO

Define interaction flows & critical tasks

Visual Exploration / rough wireframes

Follow up with specific users for feedback on mockups

Refine wireframes

Meet with eng leaders

Build Prototypes

Plan with CS/Sales to identify prospects for feedback

Create Production Specs

Build production functionality

Meet with CS to asses gaps in product

Refine product

DESIGN PRINCIPLES

As the only designer at a fast-growing company spread across 3 offices globally, it was important that instill design-related thinking throughout the organization. I created a set of design principles to help guide others.

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.

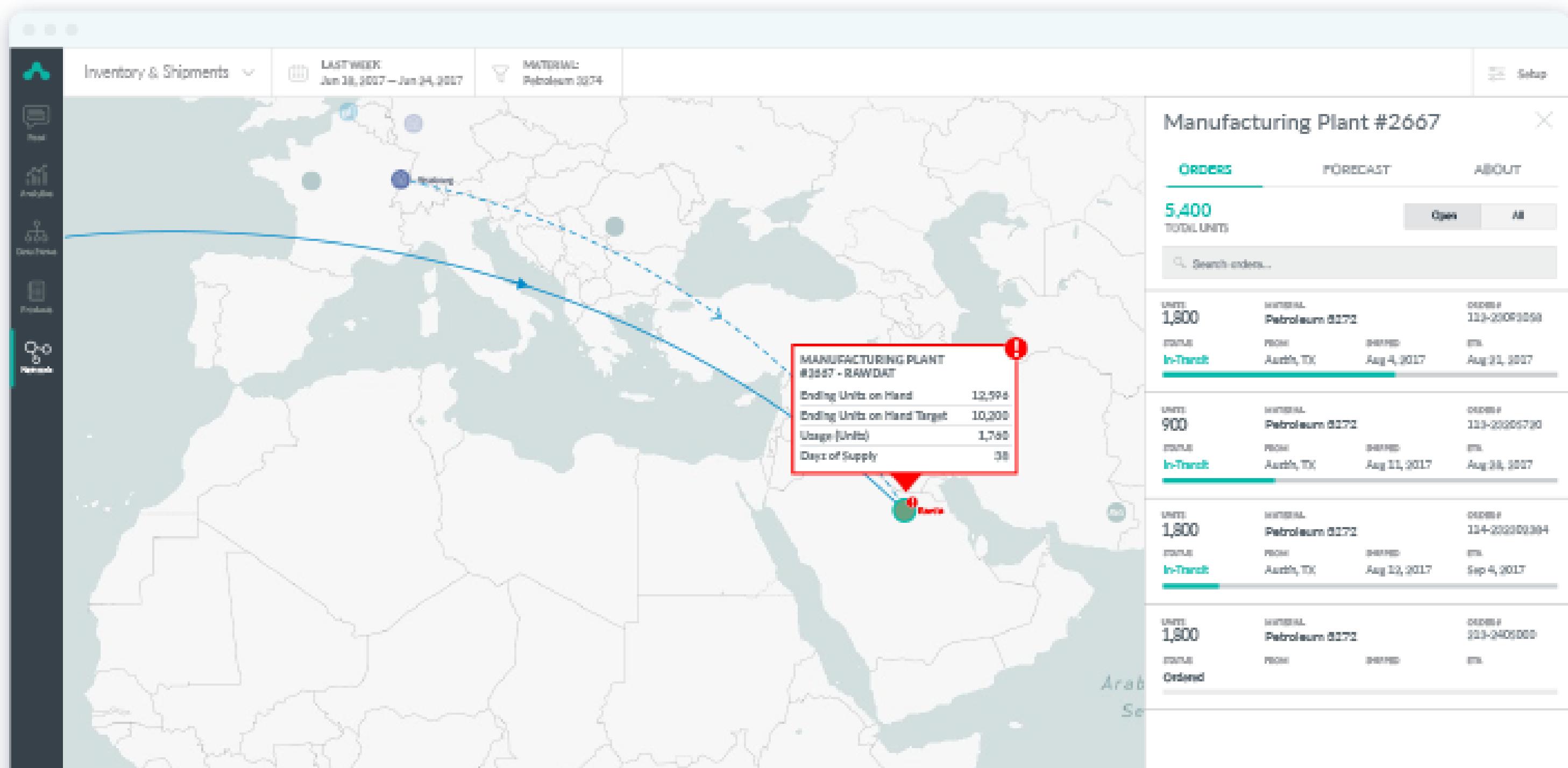
Prevent users from getting into states where the data doesn't work or the configurations are incompatible.

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.

CHALLENGES

One of the biggest challenges working with the product was balancing flexibility & customization vs. workflow-driven tools. Alloy allows customers to organize their data into customizable dashboards that fit their needs. Controls like the data chooser and filters needed to be easily accessible, while other less-used controls could be pushed away to avoid excessive screen clutter.



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.

However, this could feel daunting sometimes to users, 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.



The screenshot shows the "Configure Widget" interface with the following components:

- Top Bar:** Includes "About", "Types", "Options", and "Filters".
- Widget Types:** A grid of icons representing different widget types: Table, Pie Chart, Stacked Bar, Time Series, Timeline, Alerts, Location Map, Supply Network, Flow Chart, and Calendar.
- Buttons:** "Delete Widget", "Cancel", and "Update".
- Bottom Panel:** A calendar for May 2017 with specific dates highlighted, and a search bar with checkboxes for "Target", "Walmart", "ACME Tech", "ACME Tech Warehouse", and "Unknown Retailer", with an "Apply" button.



RESEARCH

I initiated a multi-months effort to try and find the biggest opportunities to add workflow tools to the product.

First, I interviewed a mix of current customers, sales prospects, and industry consultants across 5 different roles in the supply chain industry. The goal was to learn more about the things they think about in their daily routines.

I asked questions like:

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)

SPG - Joe - Call - 11/14/16

- what's on your mind these days? what are you looking at?
(the setup is decent, found myself having to change the setup quite a bit to get to the data that i want.)
my goals: with allys this is the best chance to help my buyer out. create the monthly summary to a buyer - export out - here are the key points that i would like to share
 - compare trend change to last year - ex) sales - did i have any promotions?
 - you are the owner of this report"
- internally we have pivot table of the same report - aggregate performance at retail is harder for us to view it as an aggregate - different calendars for each retailers - different data coming in for each retailer - ex) bosc pro shop doesn't show sales in dollars, only in units

ng Lead at GoPro

of overview of the product and showed a couple views, since that's immediately where the discussion went.

tal (EMEA, APAC, NA, LatAm), when it comes to ads

at this level so can analyze and compare how they are sometimes only in print or only online what happens if they DON'T run them, they get warned off twice as hard to make that back up sales lifts

os within the top class, smaller retailers can afford to do regional sales groups) is a huge pain point

- an unhealthy level, 2) revenue is not going to meet/ back Friday, where they don't really have a choice and not share cost with retailer
- advance - they look at key selling periods and first look at information from the retailers - 2) impact, 3) units impacted
- information from the retailers - what money is owed for the retailer has to make a certain % on an item, so if i provide proof of performance which was then reconciled between their money and who did not
- derived from "Plan", "Tactical Plan", "Adjusted Forecast" - there is a difference
 - there does appear to be an industry standard
 - see the actuals when they come in
- artsheets, which is a simple calendar on top of a normalizing" the promo - how did it do?
there are a lot of teams that would have to get on board. she likes what she sees a lot.
in
their data and info, would be a great tool for people to any given week they could have as many as 50 promos id. maybe need a way to filter those promos based on
 - <- not sure what this is

- rent from the revenue target - the gap needs to be filled promos (possible product opportunity there)
- the data point main selling point is a cross-sell effort, and be part of our overall sales. the looking back, what happened last year? why? they may bring promos, without that context it may look like expand" on any note within the cell to see it closing, stores moving to online only, or closing their geographic information, weather information - all this at the data they will understand why things were the way which ones were more accurate, very useful when orthmic
know where they're at against their target, and they dont
- see more of the product and talk more.

Interview Notes



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)

FLO REPORT WIDGET A/WIDGET B Forecasts for the Week Starting 12/6/2015																									
DPCI	Item Description	Item Info	Metrics			2015 Nov			2015 Dec			2016 Jan													
			Comments	Instock %	Vt. 1	Vt. 2	Vt. 3	Vt. 4	Vt. 1	Vt. 2	Vt. 3	Vt. 4	Vt. 1	Vt. 2											
000000001	WIDGET A	Press Me - Stock Goal	91.2	005%	4.2%	4.8%	4.1%	4.5%	2.9%	376	347	321	354	306	461	613	574	439	362	352	348	332			
		COGS Goal	4.5																						
		Stores Tracked	1,773																						
		LY Actual Sales	1,504																						
		LY Orders Done	1,536																						
		Retail	\$4.26																						
		Unit	1.82																						
		SKU001																							
		LY QO5 %	0.1	0.1	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.1		
		LY Sales Min	0	0	0	0	0	0	0	1,877	1,876	1,863	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857	1,857		
		Orders Imp (In Store)	1,688	1,684	1,689	1,687	1,687	1,687	1,687	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1,687	
		SOGLYS Suggested Order Qty	354	1,093	330	1,077	394	2,203	1,465	769	1,393	1,596	4,559	0	2,962										
		Vendor Suggested Order Qty	0	746	0	753	0	2,353	2,007	801	1,406	1,588	4,551	0	3,070										
		Total Inventory EOM (Supplier)	2,800	2,800	1,689	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687	1,687		
		WOS (Shipping)	7.5	9.9	7.1	9.8	11	9.4	9.4	7	4.7	4.8	6.1	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2		
		WOS (Demand)	8.5	12	6.4	11.3	8.6	9.4	8.5	9.7	9.7	11.6	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5	11.5		
		DST CDM Info																							
		DST CDM Sales																							

Masters Inventory Grid: Sales & Order Estimates											
Any user can view or edit the grid by clicking on the cell. The cell will turn red if it has been modified.											
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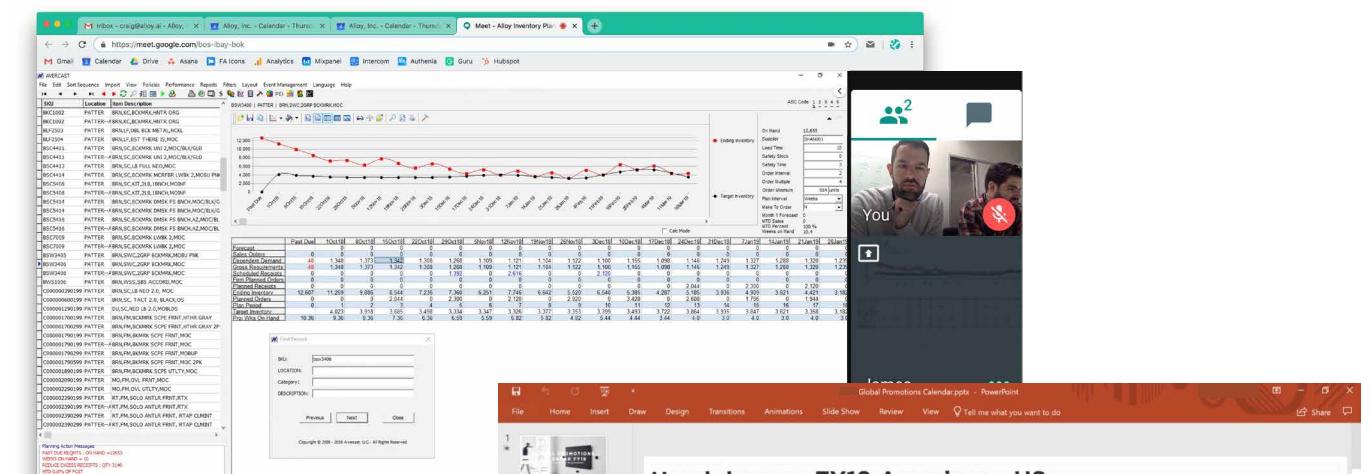
- All keeping separate records as spreadsheets, ppt files

Inventory Planning Spreadsheets

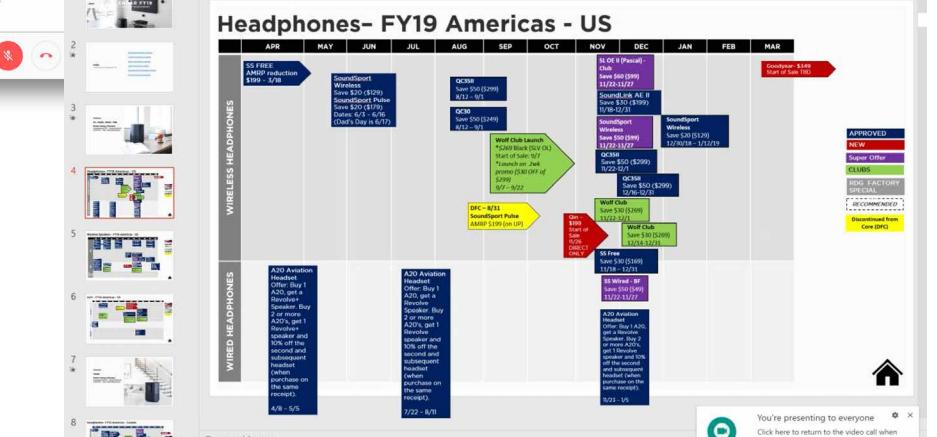
- No single source of truth

- Have to have weekly meetings to sync up their plans

- A lot of what we had built was analyzing historical data. (looking back), but most of these people's jobs revolved around forecasting & planning (looking forward).



Inventory Planning Software



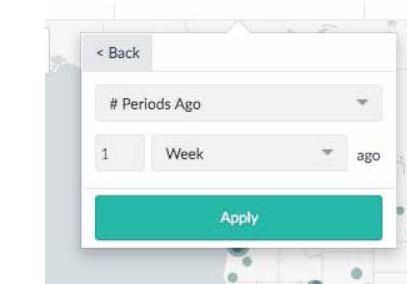
Marketing Calendar Decks

Waterfall Table Widget:

A new widget that lists plans, and possibly forecasts, along the Y axis, time periods along the X axis, and displays a single metric. Actuals are displayed with special formatting as described below.

Not sure where this ends up, but my guess is in the long run this goes away...

This could be a modal, or perhaps a popover is even better.



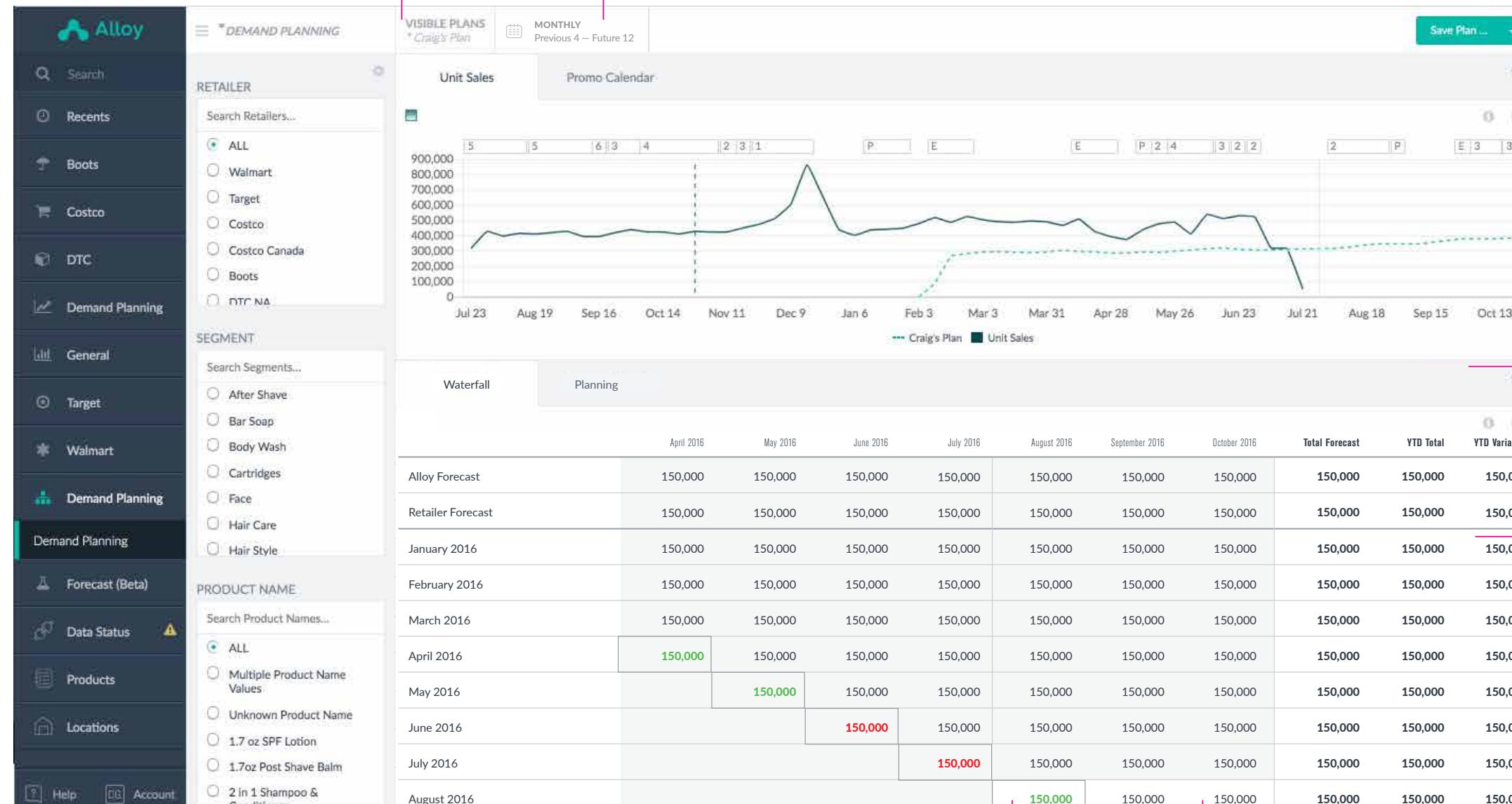
Configure Period

Weekly Monthly Quarterly Yearly

Past Period Future Periods

4 12

Cancel Update



Forecasts are listed first, followed by plans ordered old to new

Actuals are displayed with a box around the cell, with conditional color formatting compared to most recent forecast.

Configure Waterfall Table

Forecasts Metric

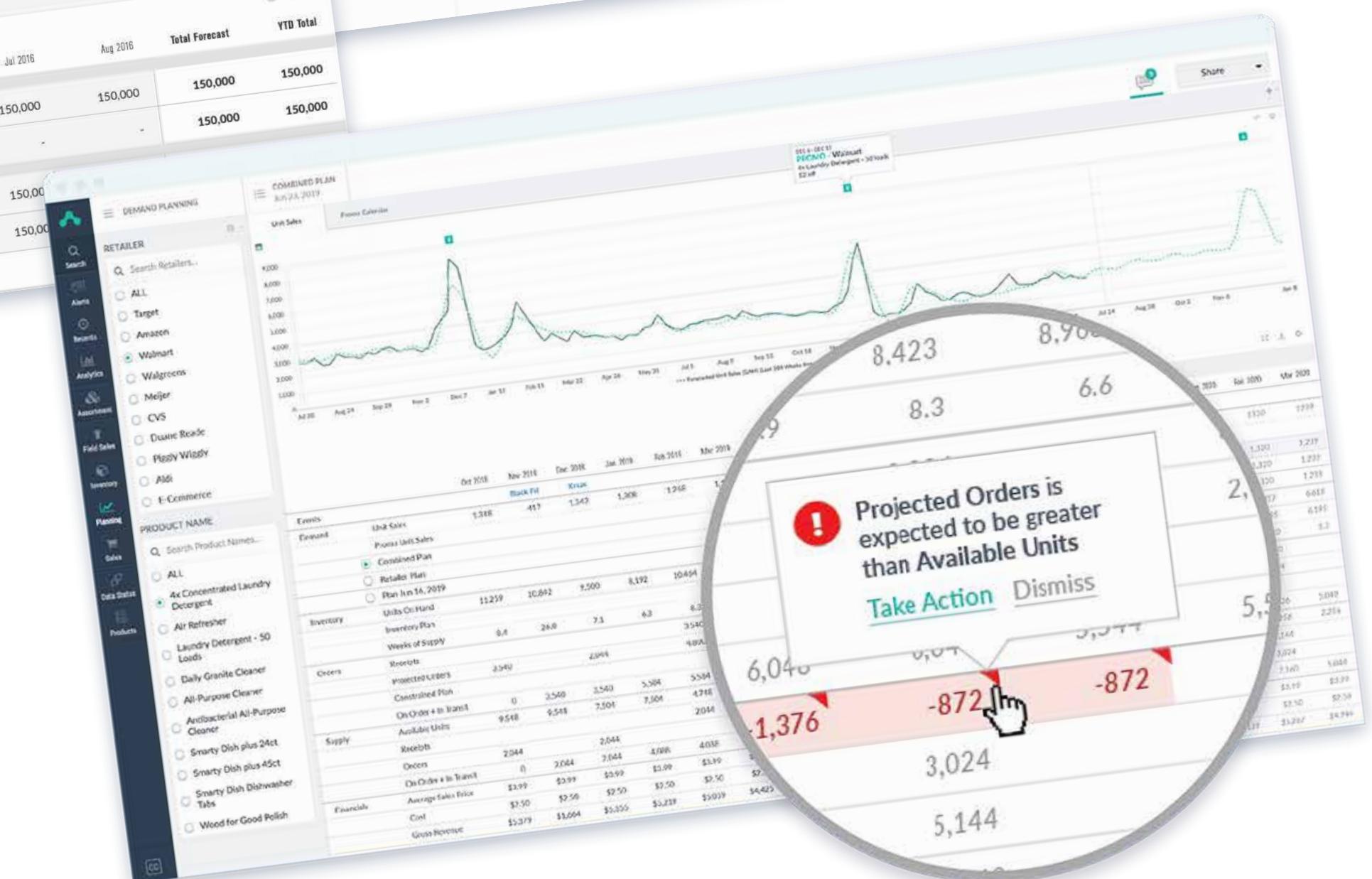
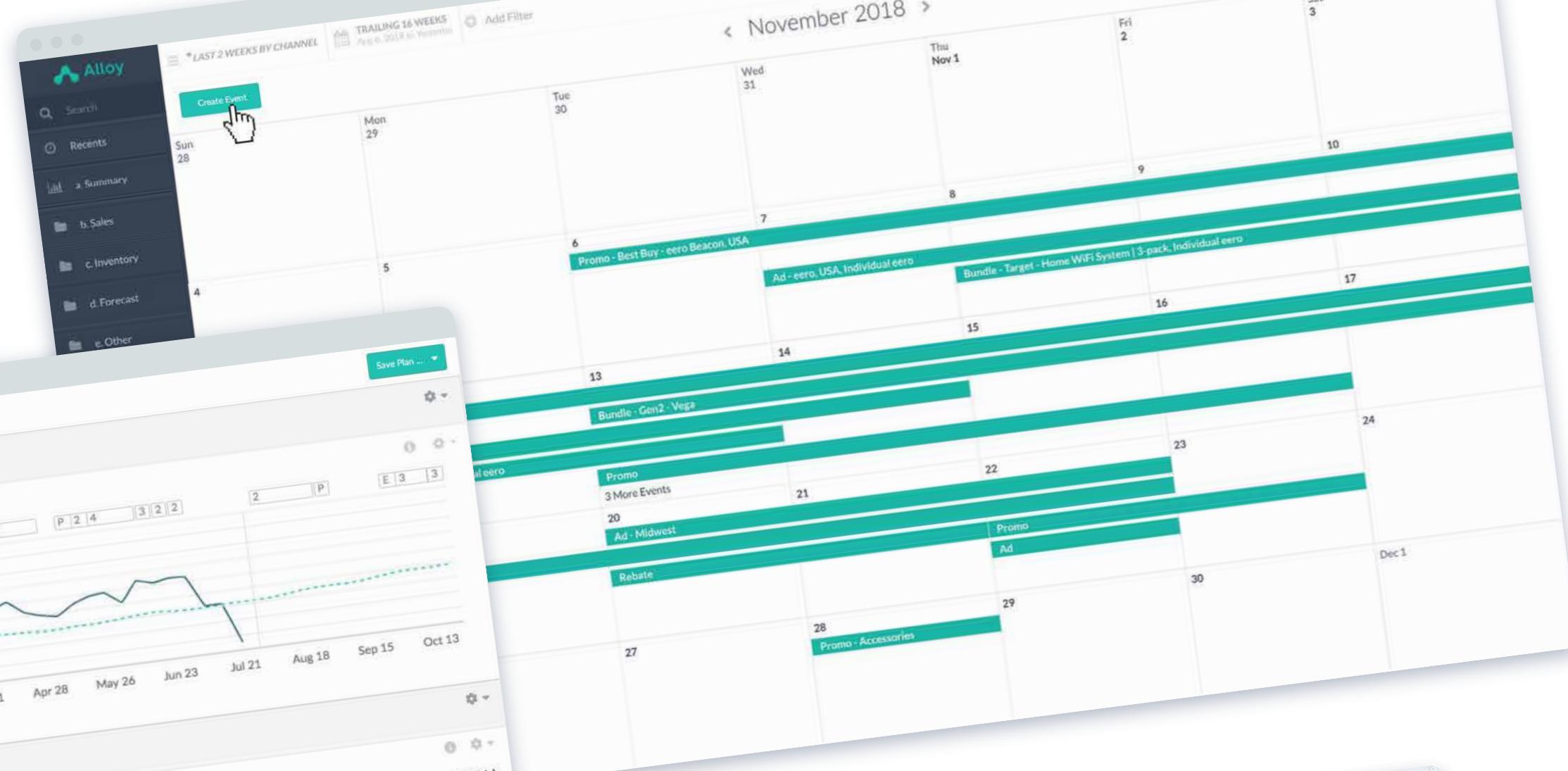
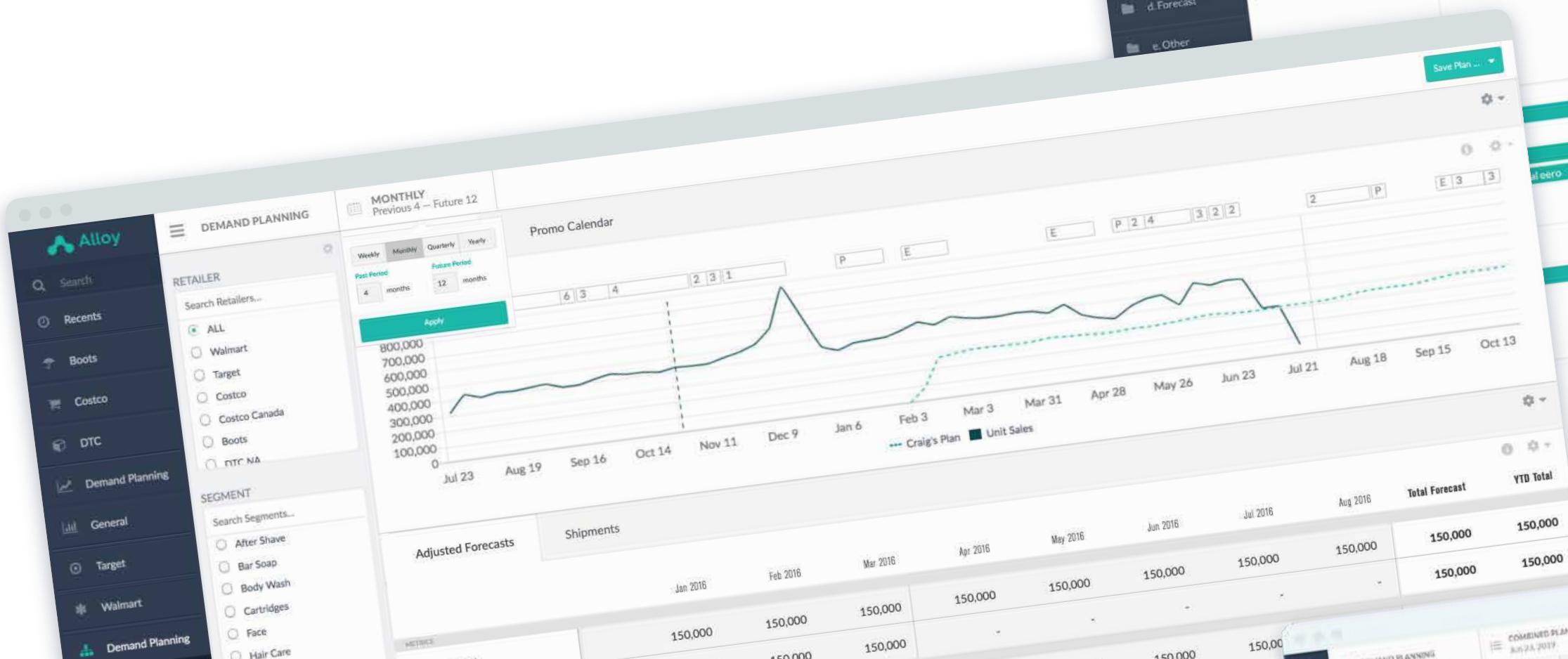
Alloy Forecast Unit Sales

Retailer Forecast

+ Add Forecast

Cancel Update

I created detailed construction documents outlining all the functionality needed to create the Planning module.



The finished product allowed users in multiple roles across the org to see all their forecast, promo, & historical data in a single place.

RESULTS

- Immediate impact on **sales pipeline**.
- **Two upsells** of current clients for planning product.
- **Harry's**, a prospect we had been chasing for almost 2 years signed a contract for \$150k annually.
- Signed multi-year, multi-million dollar contracts with **Ferrero-Rocher** and **Valvoline**, which were successively each the largest deals we'd ever signed, by orders of magnitude.

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



Making Hiring a Delightful Experience

Livelii makes tools to help restaurants automate their hiring process.

Restaurant operators are already busy enough managing their business, yet still must find time to hire employees. The restaurant industry typically sees turnover rates over 100% annually, so this is a never-ending process. We created a tool that makes it easier and faster for managers to source, screen, and schedule candidates with just a few clicks, and made the tool available on all devices, from desktop, to tablets and mobile phones.

[Livelii was acquired in 2016.](#)

Role	Years
Co-Founder, Head of Design	2014-2016

KEY RESPONSIBILITIES

- Designed entire product, brand, & marketing materials
- Wrote the entire fully-responsive HMTL/CSS front-end, & client and server-side javascript
- Conducted numerous user-research sessions with current and prospective clients

INSIGHTS

- The majority of jobseekers use their phones for the job-search process, and a lot of job seekers don't even have access to computers.
- Filling out each application can take as long as 45 mins, and they have to input the same information again and again for each application.
- Jobseekers usually apply to several jobs at once.
- Time-to-hire is the single biggest factor to making a hire.
- Craigslist is the dominant platform in sourcing candidates.
- A manager's first priority is operating the day-to-day of the store, hiring is almost an afterthought.
- Managers often try to make sense of applications that are incomplete or ambiguous:
- Scheduling candidates for interviews can involve several emails or texts back and forth between the candidates.

BRAND PERSONALITY

Even though Livelii was a technology company which automated some processes, we wanted to project the image that people were behind all the actions, facilitating the process. We established a strong brand personality through the use of color and language that would extend throughout the product, marketing materials, and interactions with customers.

A bright and colorful palette reinforces the idea of optimism and liveliness. A significant portion of users spoke either no English or were ESL. It was important that all of our communication was very simple and clear. We made it a point to use plain language throughout the app and all our communications with customers.

COLOR PALETTE

PRIMARY COLOR PALETTE



BRAND ARCHETYPE



Everyman

Friendly, Humble, Authentic, Hard-working

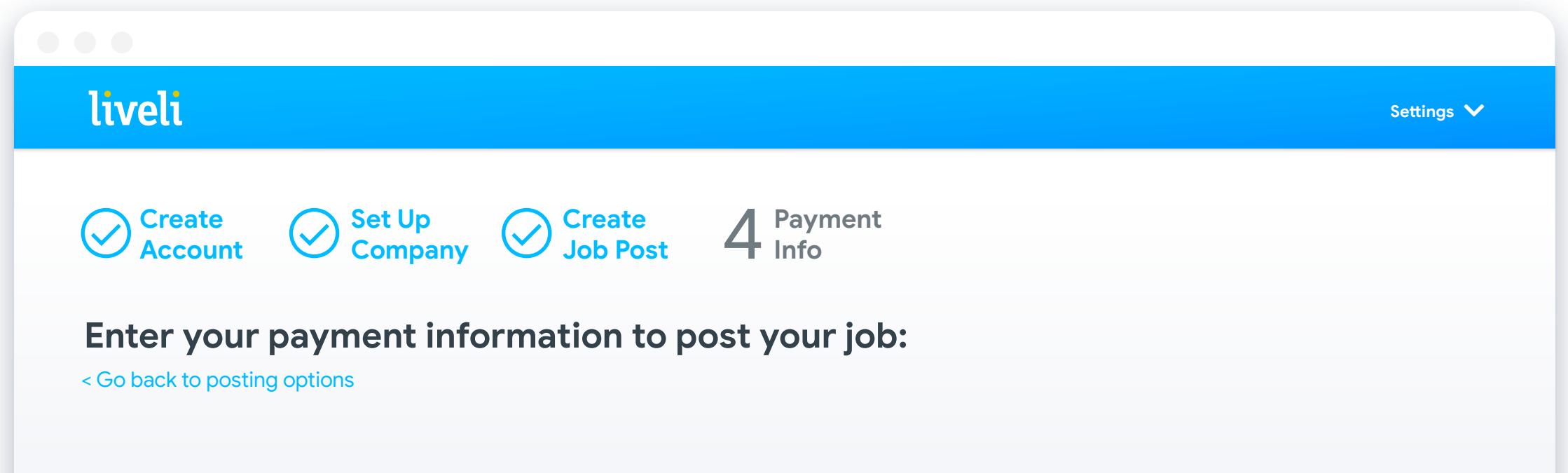
ONBOARDING FLOW

Initially we had the paywall higher up the conversion funnel. we thought capturing payment info earlier would lead to more conversions, but we realized this was problematic because users werent able to understand what liveli did or what value it provided.

- 1 Create Account
- 2 Payment Info
- 3 Set Up Company
- 4 Create Job Post

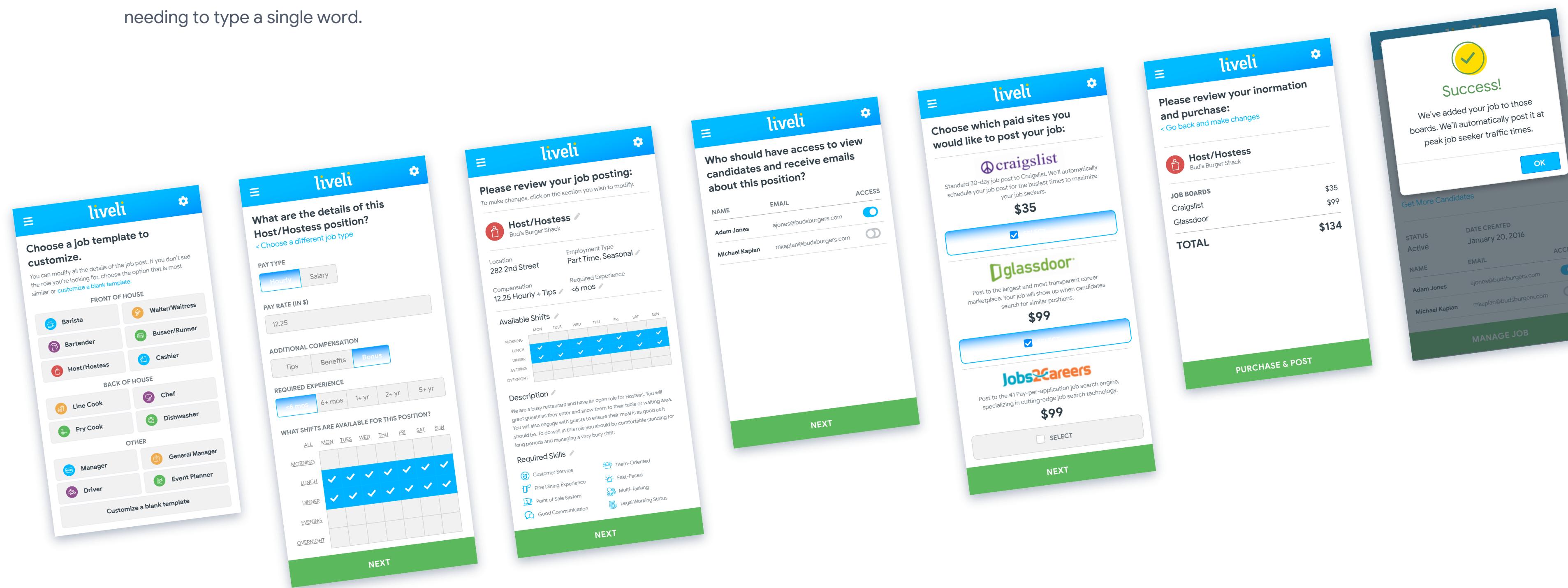
In the revamped flow, we allowed the prospect to go through the flow to create a job post. that allowed them to see just how easy that process was, and actually use the app, before asking for their payment information. they had more investment because they created something, and we also had a lot more information about their business and what they were looking for, which we could use to retarget abandoned users.

Then we allowed them to choose which job boards to post to as the last step. the results were immediate. we saw a 60% increase in conversions, and since most customers went on to post more jobs through the platform, this had an exponential effect on revenue spent through the platform.

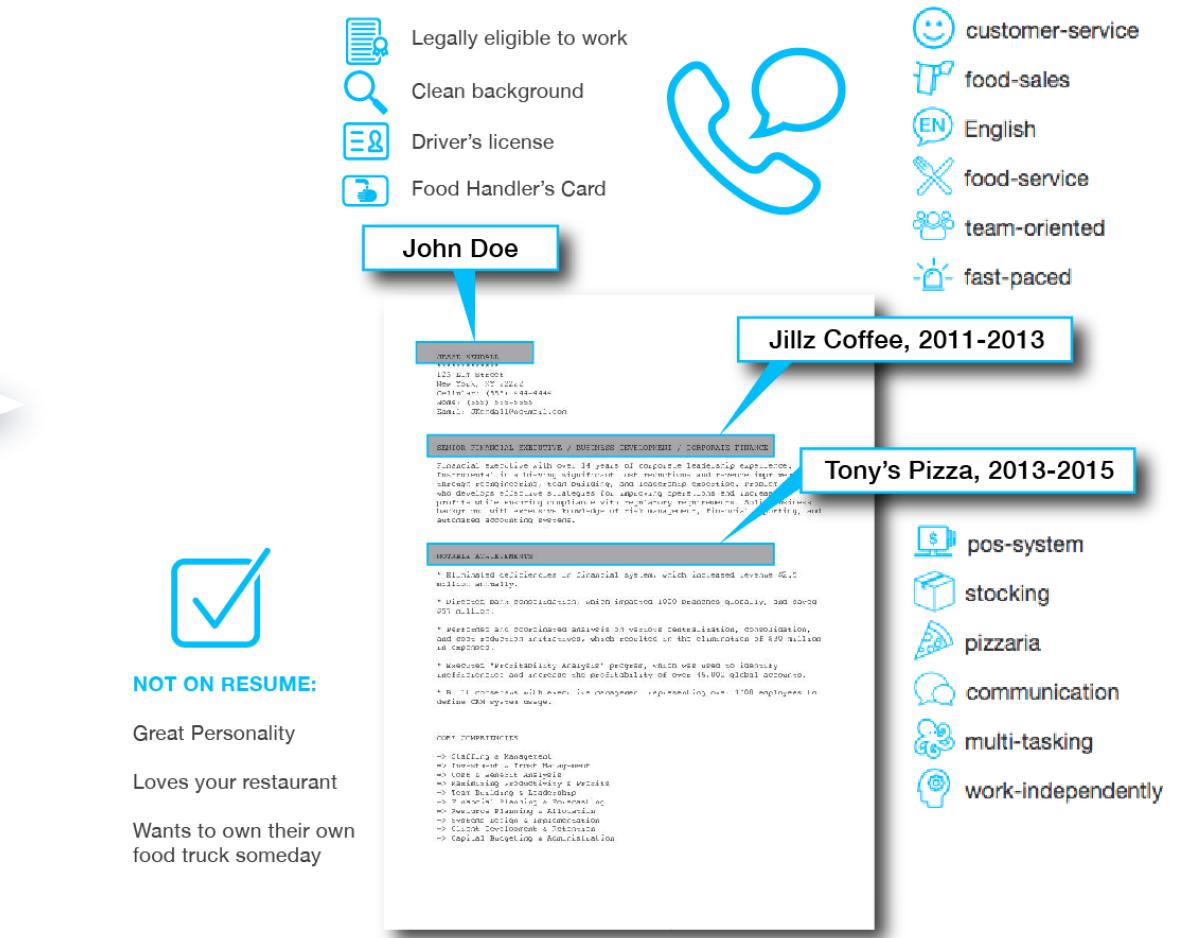
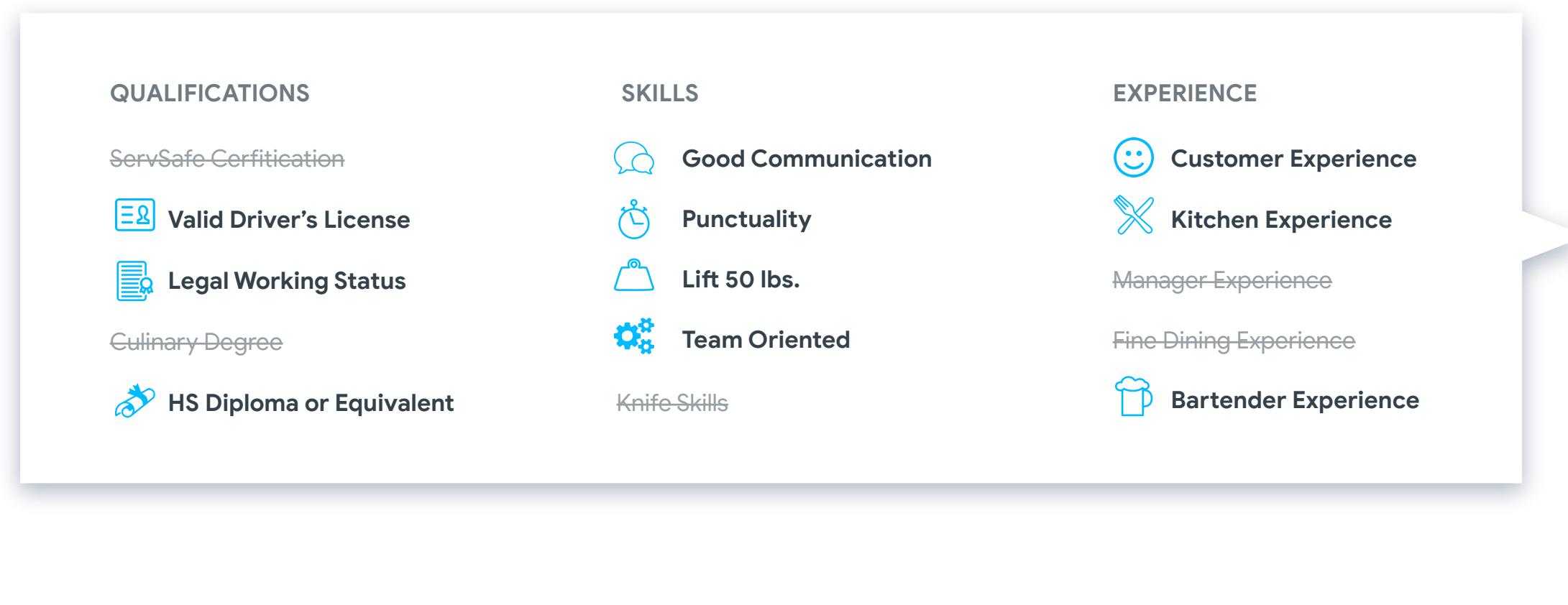


Craigslist is the dominant platform in sourcing candidates, and creating job posts is a painstaking process to generate and input all the necessary information. We conducted an extensive audit of Craigslist job posts and found that many posts were missing information about the restaurant, location, job description, interview times, & pay. Many had unclear Calls to Action, and in some instances the posts the CTA was completely missing.

Liveli streamlined this workflow to be as simple as creating a dating profile. Managers could choose from several job templates to start with, then customize with just a few taps, without needing to type a single word.



We broke down each of the job titles into a set of qualifications that could be mapped to each candidate. I created a set of dozens of icons for each of the skills, which made the skills in the lists easier to scan and understand visually. I turned all the icons into a font so that it could be used in the web application.



Hiring managers could easily scroll through lists of candidates automatically organized by job, location, and status and view detailed candidate cards that were populated via the automatic resume parser. Presenting candidate info in a consistent format made the candidates easier to scan and compare.

Name	Position	Location	Status	Applied
Steve Holt	Cashier	Newport Beach Pier	New Application	2 hrs ago
Rita Leeds	Dishwasher	Balboa Island	New Application	3 hrs ago
Stan Sitwell	Driver	Balboa Island	New Application	3 hrs ago
Michael Bluth	Cashier	Newport Beach Pier	New Application	5 hrs ago
Lindsay Fünke	Driver	Balboa Island	New Application	8 hrs ago
Ann Veal	Cashier	Newport Beach Pier	New Application	10 hrs ago
Marta Estrella	General Manager	Balboa Island	Invited to interview	Yesterday
Maggie Lizer	Cashier	Newport Beach Pier	Not Interested	Yesterday
Lucille Austerio	Dishwasher	Newport Beach Pier	BG Check Pending	2 days ago
			Not Interested	3 days ago
			Hired	4 days ago

Steve Holt
Invited to Interview
View Resume

Position: Bartender
Location: Newport Beach Pier
Applied: 3 days ago
Source: Craigslist
Email: steveholt@gmail.com
Phone: (555)994-1236

QUALIFICATIONS

- ServSafe Certification
- Valid Driver's License
- Legal Working Status
- Culinary Degree
- HS Diploma or Equivalent

SKILLS

- Good Communication
- Punctuality
- Lift 50 lbs.
- Team Oriented
- Knife Skills

EXPERIENCE

- Customer Experience
- Kitchen Experience
- Manager Experience
- Fine Dining Experience
- Bartender Experience

EMPLOYMENT HISTORY

- Barney's Beanery - Bartender - 1 year 11 months
- Yard House - Server - 3 months
- The 35er Bar - Bartender - 6 months

EDUCATION

- Bay Area Technical College

BACKGROUND CHECKS

- NATIONAL CRIMINAL CHECK - CLEAR - This candidate has been verified by OnFido
- SEX OFFENDER CHECK - CLEAR - This candidate has been verified by OnFido

ACTION

The screenshot shows the 'APPLICATIONS' section of the liveli app. At the top, there's a purple circular icon with a beer glass and the text 'Bartender' and 'Newport Beach Pier'. Below it, a navigation bar has tabs: 'New', 'Interviews', 'Hires', and 'All' (which is highlighted). The main area lists five candidates:

- Steve Holt** [New] - Bartender, Newport Beach Pier via Craigslist - 4 hours ago
- J. Walter Weatherman** [New] - Bartender, Newport Beach Pier via Craigslist - yesterday
- Tobias Fünke** [Invited to Interview] - Bartender, Newport Beach Pier via Craigslist - 2 days ago
- Barry Zuckerkorn** [Not Interested] - Bartender, Newport Beach Pier via Craigslist - 3 days ago
- Kitty Sanchez** [Invited to Interview] - Bartender, Newport Beach Pier via Craigslist - 4 days ago

At the bottom is a green 'ACTION' button.

This screenshot shows the profile of **Steve Holt**. At the top, there's a small circular profile picture and the name 'Steve Holt' with a green 'INVITED TO INTERVIEW' button below it. Below the button, detailed information is provided:

- Position:** Bartender
- Location:** Newport Beach Pier
- Source:** Craigslist - 3 days ago
- Email:** steveholt@gmail.com
- Phone:** (555)994-1236

Below this, sections for 'EMPLOYMENT HISTORY' (listing 'Barney's Beanery' and 'Yard House') and 'EDUCATION' (listing 'Bay Area Technical College') are shown. At the bottom is a green 'ACTION' button.

This screenshot shows a modal window titled 'INVITE TO INTERVIEW' for **Steve Holt**. It contains five options:

- NOT INTERESTED**
- REQUEST BG CHECK**
- HIRE**
- MAKE A NOTE**
- CANCEL**

At the bottom right of the modal is a green 'MANAGE JOB' button.

This screenshot shows a confirmation message: 'Invitation Sent!' with a yellow megaphone icon. It includes a note: 'When the candidate selects a time, you will receive a notification that they have confirmed the interview.' Below this is a blue 'Go back to candidate profile' button. At the bottom, there's a section for managing other candidates with columns for STATUS, NAME, EMAIL, and ACCESS.

This screenshot shows the 'Calendar' tab of the liveli web interface for November. The month view shows various scheduled events:

- TUE 24:** STORE OPENING (7:00am to 11:00am), INTERVIEW (9:00am to 1:00pm)
- WED 25:** MANAGER MEETING (11:00pm to 1:00pm), TRAINING SESSION (11:00pm to 1:00pm), INTERVIEW (11:00pm to 1:00pm)
- FRI 27:** INTERVIEW (9:00am to 2:00pm)
- SAT 28:** TRAINING SESSION (11:00pm to 1:00pm)
- SUN 29:** TRAINING SESSION (11:00pm to 1:00pm)

Each event is color-coded and includes its start and end times. The left side shows a vertical timeline from 7:00AM to 7:00PM.

With just a few clicks, they could review candidates and automatically txt a link to easily schedule interviews to the open time of their choosing.

RESULTS

- Customer base grew to hundreds of customers nationally
- Became exclusive hiring platform for all 150+ locations of a national restaurant chain
- **Liveli was acquired in October 2016**

“The best job-finding interface I have used.”



Managing complex portfolios

Addepar is a financial services platform that allows investment managers to bring all their data together in one place, analyze portfolios with interactive dashboards, and create reports for their clients.

I joined the company pre-revenue, designed, prototyped, & shipped the first version of the web application. The product is used by all customers today, and the platform has \$1.7 trillion under management.

Role	Years
Design Lead / Design Manager	2011-2014

In over 3 years at the company, I was deeply involved in the entire design process, from user research and testing, product specs, wireframes, prototyping, to implementing designs directly with engineers, many times committing front-end code to both our desktop and web applications. Together with the an engineering team lead, I co-manage a team of 6 engineers, curating the product request backlog into a product roadmap, then orchestrating engineering sprints and daily scrums. Designed the first two versions of the Client portal, the first web application at the company. Designed and co-implemented the open source project Ember Charts (800+ stars on GitHub).

KEY RESPONSIBILITIES

- Prototyped & designed first several versions of the web product
- Designed logo and brand identity
- Recruited and managed communication design team
- Co-led a team of 8 engineers, along with engineering manager
- Served as product manager for Client Solutions team
- Created BUILD recruiting campaign
- Worked with C-Suite to product fundraising and board decks
- Oversaw construction, buildout, and design of new office

ARCHITECTURE CHALLENGES

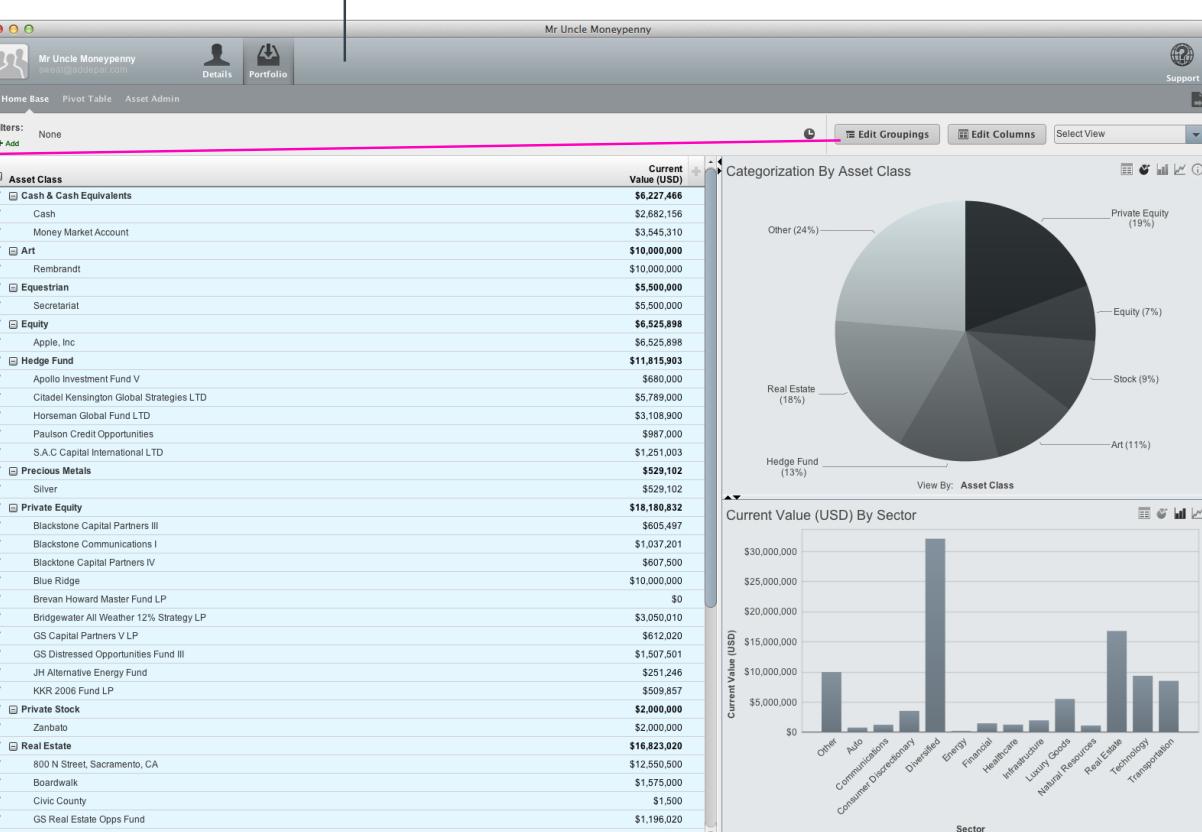
The beta version of the product was a java desktop client. the initial home screen was a list of all the clients with portfolio values. Clicking on a client name would launch a new window with dashboard where managers could perform analysis on the selected portfolio. The thought was that the manager could launch multiple of these windows at once and compare portfolios across clients. there were separate tools for reports, files, and transactions.

Users needed to be able to navigate to related portfolios, or tools relating to where they were currently in the nav structure. we needed a nav sctructure that reflected this matrix.

List of clients:
Clicking
launches a
new window
with analysis
dashboard

Client	Current Value (USD)	Last Viewed
Baeder, Kyle	\$4,554,837	October 5, 2012 3 days ago
Bagg, Heidi	\$1,103,001	October 5, 2012 3 days ago
Baker, Sam	\$266,638	October 5, 2012 3 days ago
Bar, Moran	\$16,249,425	September 17, 2012 3 weeks ago
Beal, Joel	\$20,771,163	September 27, 2012 11 days ago
Becher, Brian	\$10,807,260	October 5, 2012 3 days ago
BOX, SAR	\$287,926,619	October 8, 2012 4 hours ago
Chan, Darren	\$0	August 29, 2012 5 weeks ago
Chiang, Victor	\$52,106,698	October 8, 2012 4 hours ago
Ciampi, Michael	\$1,145,000	October 5, 2012 3 days ago
Client, New	\$92,373,177	July 13, 2012 12 weeks ago
Dough, Lisa	\$0	September 14, 2012 3 weeks ago
Family Office, Tex	\$2,548,697,776	October 4, 2012 3 days ago
Foster, Bracken	\$33,016,704	October 5, 2012 3 days ago
Gephart, Craig	\$12,869,650	September 20, 2012 18 days ago
Greenbaum, Michael	\$3,584,003	October 5, 2012 3 days ago
Hansen, Flynn	\$1,838,335	October 5, 2012

Home Screen:
provides little to no value in itself



Portfolio Analysis Screen:
to perform other workflows related to this portfolio user has
to navigate back to the home screen and launch a new tool

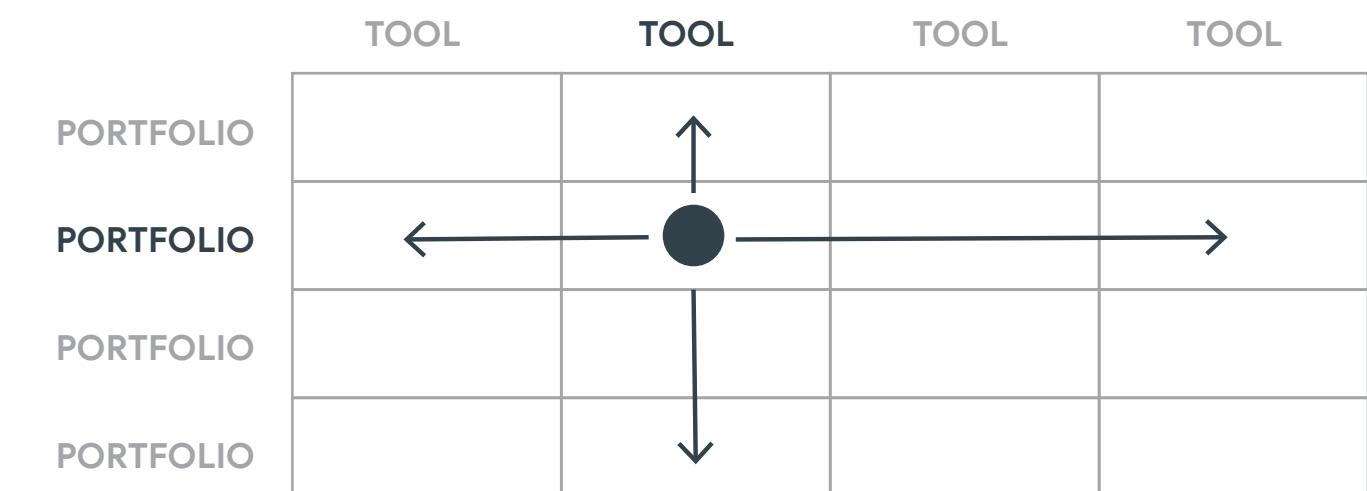
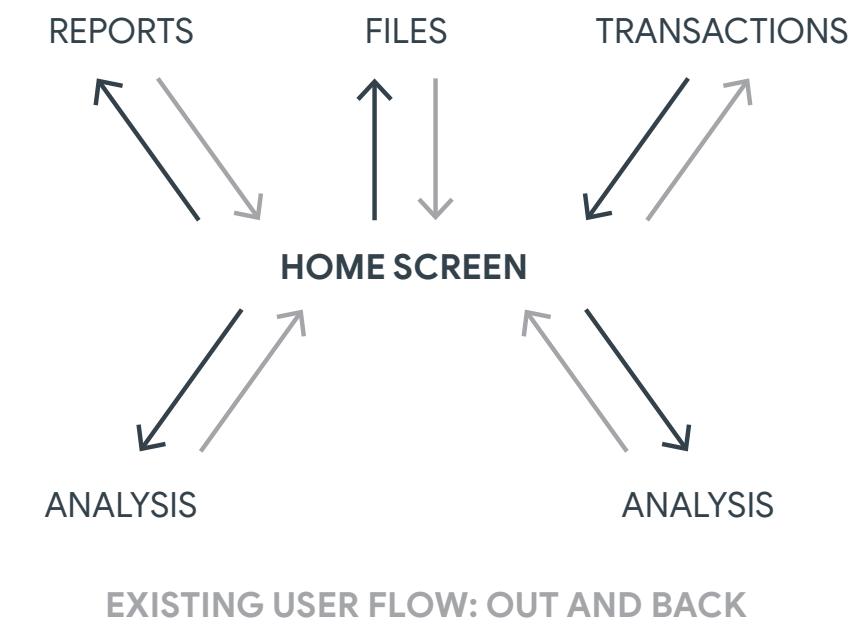
INSIGHTS

Through research sessions with the advisors we can away with some very useful observations. When advisors logged into Addepar each day, the first thing they would do would be to open up a high-level analysis view and review each client one by one. The way the navigation was set up, this would require them to launch a portfolio from the home screen, then open up the overview dashboard, then go back to the home screen, and repeat these steps for each of their clients.

Another insight, which turned out to be very related, was that advisors would focus on single clients at a time, but perform actions across several of the tools at once. This required them to switch between the analysis, reports, files, and transactions tools repeatedly to complete a workflow for a single client. The home screen was acting unnecessarily as the intermediary to navigate between all of these tools.

An ideal navigation solution would allow the advisor to open up a dashboard view, then change out the underlying portfolio data as they toggled down a list of clients in succession. Then, when they wanted to do a deeper dive into a client, allow them to jump between any of the tools directly from one another, without having to navigate back to the home screen each time.

I called this navigation architecture the ‘lilly pad’ solution, meaning that the user could jump to any adjacent node in the graph structure from where they were at currently.



PROPOSED USER FLOW: LILLY PADS

The main application provides wealth managers with a dashboard to rapidly traverse, visualize, and analyze financial data across the various portfolios they manage. Managers can rapidly assemble PDF reports via a layout tool, or share configured interactive views to their clients via a real-time client portal.

PORTFOLIO TRANSACTIONS REPORTS PORTAL dev@addepar.com

Terrabella Capital

CLIENTS

Adam Smith

2014-10-10 - 2014-11-10

Select a View Add Filter

Asset Table

GROUPING

Cash & Cash Equivalent

USD

Fixed Income

Automatic Data Processing

Bay Area Toll Auth Calif To...

Clear Channel Comms 4.5%

Credit Suisse High Yield B...

Crown Castle Intl 6.00 %

Dodge & Cox Income Fun...

First Data 3.00 % Due De...

Hershey's 3.75 % Due De...

ING Group NV 5.50 % Due Jun 30, 2022

Johnson & Johnson Callable 4.00 % Due Mar 31, 2029

Long Beach Calif HBR Rev 4.00 % Due Jun 30, 2022

Menlo Pk City Sch Dis GO 4.40 % Due Jan 2, 2023

MGM Resorts Int'l 4.00 % Due Dec 31, 2017

NYC School Dist GO 4.30 % Due Dec 31, 2034

PIMCO Investment Grade Corporate Bond Fund

SD CNTY Calif WTR Auth Water Rev BDS 4.00 % Due Dec 31

SF Calif City & CNT WTR Rev BDS 3.95 % Due Dec 31, 2017

TEVA Pharma 3.75 % Due Jun 30, 2021

Vanguard Limited-Term Tax Exempt Fund

Equity

3M

Total

Value (USD) grouped by Asset Class

Value (USD) grouped by Sector

Select Attribute

as

Asset Class

Assets Billed On...

Assets Billed On (USD)

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

Prioritized Cashflow

Value (USD)

\$6,082,433

\$8,501,132

\$139,324

\$151,579

\$38,737

\$799,996

\$16,818

\$486,789

\$42,074

\$144,207

\$42,147

\$142,856

\$872,131

\$810,279

\$33,900

\$205,166

\$1,060,000

\$227,096

\$300,409

\$146,531

\$2,841,093

\$15,999,140

\$0

\$50,636,497

Equity, 32%

Real Assets, 33%

Other, 6%

Cash & Cash Equivalent, 12%

Other: Hedge Fund (3%), Private Equity (3%)

Unknown: \$23,413,768.30

Investment Fund: \$8,771,548.36

Electronics: \$4,648,222.00

Investment trusts/funds: \$3,598,205.70

Leisure: \$3,196,966.35

Cash: \$3,135,002.07

Diversified: \$894,102.04

Software & Programming: \$745,396.40

Lodging & catering ind., inc.: \$743,397.20

Chemicals: \$541,726.00

Retail: \$405,778.80

Investment trusts/funds: \$300,406.83

Internet, software & IT ser...: \$241,884.44

Monthly Report

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

File Edit View Object

DATE
4/1/13 – 4/31/13

PORTFOLIO
Tony Stark

OUTLINE

Add Portfolio

star

Clients

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

Groups

- Stark Family

Entities

- Battlestar Gallactica
- Stark Industries

dev@addepar.com

Real Assets, 33%

Other, 5%

Univers 10 pt. Insert Factor

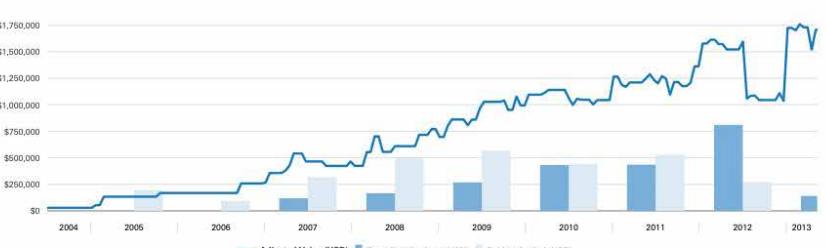
Bank of Addepar 

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	\$ 144,019	\$ 300,000	\$ 310,000	\$ 0	0.99	(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 %
Apax 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	13.95 %
Bessemer Venture Partners VIII	\$ 124,866	\$ 300,000	\$ 189,000	\$ 111,000	1.33	13.95 %
Total	\$ 1,846,238	\$ 3,450,000	\$ 3,025,000	\$ 435,000	1.35	11.91 %

Alternatives Cashflow

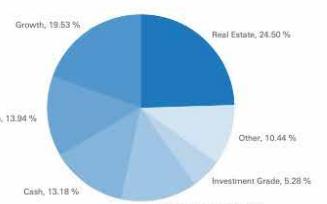


Adjusted Value (USD) Total Distributions (USD) Paid-in Capital (USD)

IRR

Buyout	8.33 %
Growth	28.17 %
High Yield	7.17 %
Venture	13.45 %

Strategy



Real Estate, 24.50 %
Growth, 19.53 %
Value, 13.94 %
Cash, 13.18 %
Municipal Bonds, 13.12 %
Other, 10.44 %
Investment Grade, 5.28 %

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.

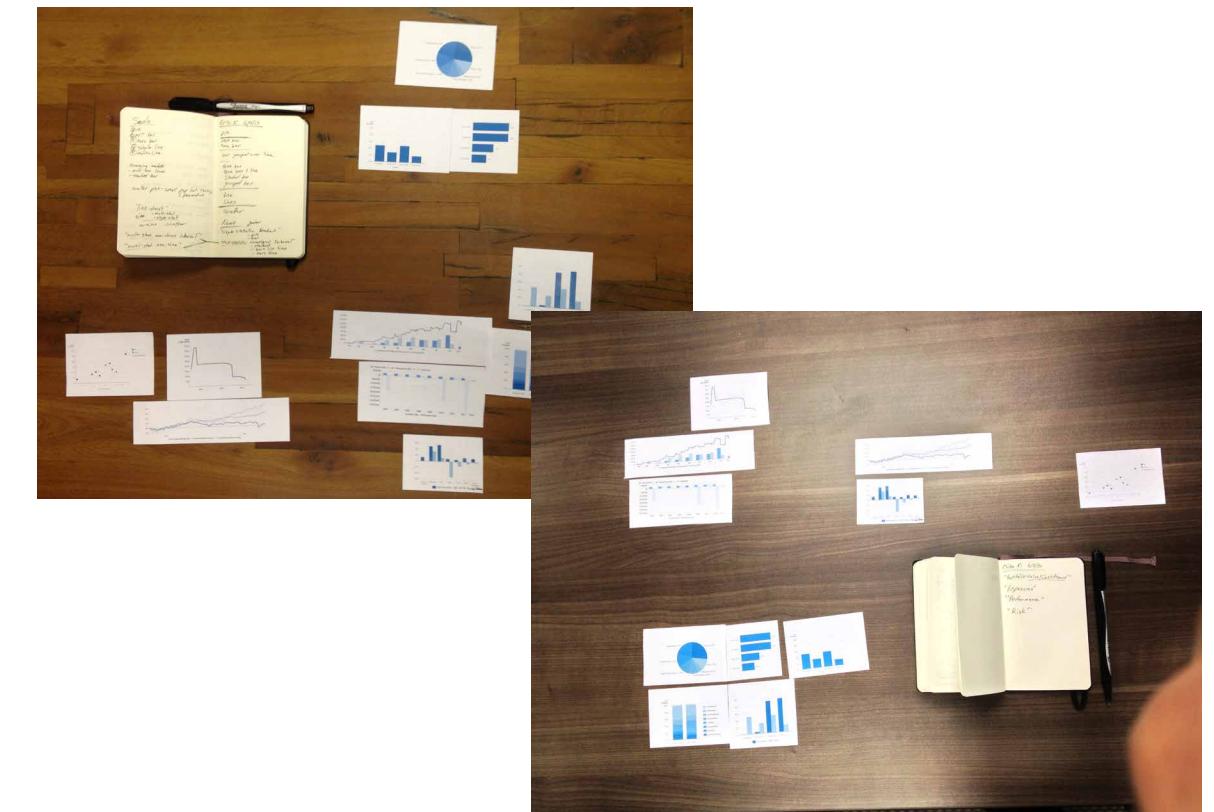
Because Addepar's visualizations are generated dynamically based on the underlying portfolio data, a great deal of research was needed to find the optimal set of parameters and controls. I produced product specs detailing how to produce each type of visualization, and worked directly with the engineers to implement the designs.

First, I interviewed users to gain a better understanding of how they thought about charts. What makes them choose one visualization type over another? Are there any types that they think are related to each other? What stories are they trying to tell with the charts?

Next, I found examples of all the types of charts that Addepar needed to accommodate to use as a reference. While a lot of the charts were designed poorly, the data sets in them would be useful to test out chart ideas and in mockups.

KEY FINDING

USERS THINK ABOUT THE STORY THEY ARE TELLING FIRST., NOT THE TYPE OF CHART IT IS.



USER RESEARCH SESSIONS



SURVEY OF COMMONLY-USED CHARTS

ENFORCING LIMITS

Unpredictable data requires implementing limits to prevent the user from creating visualizations that a) work, and b) are understandable.

I had to design a system that would accomodate both screen (with interactions) and print applications. Color should have meaning and not be used randomly.



COLOR THEMES - TOO BUSY, COLOR LACKS MEANING

MONOCHROME THEMES - ALLOWS FOR PURPOSEFUL COLOR USE

TIME SERIES CHARTS: BAR + LINE COMBINATIONS



Any combination of lines and bars can be used in a time series, with a combined max total of 6. Lines follow the exact same rules as when they stand alone, and are shown on top of the bars. Bars generally follow the same rules as when they stand alone, with the exception of the first and second color. The first bar goes to a 60% tint, and the second bar color moves to a 45% tint. This allows the lines to be visible as they lay on top of the bars. Note that lines have the white drop shadow, particularly important as they cross over bars.

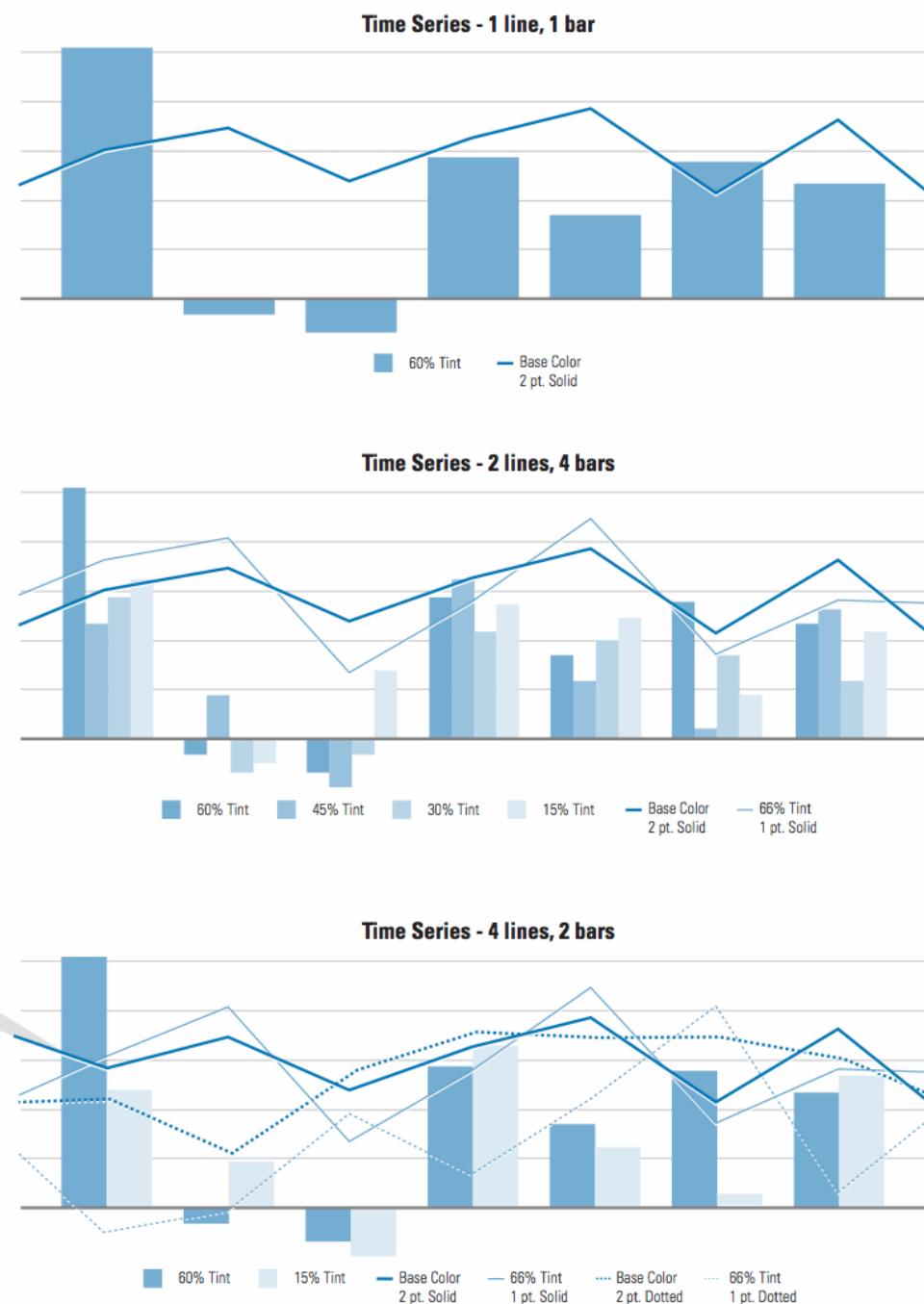
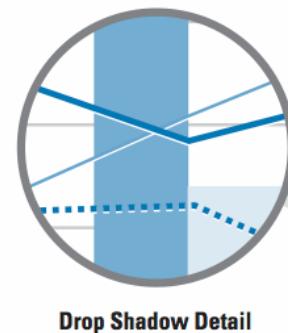
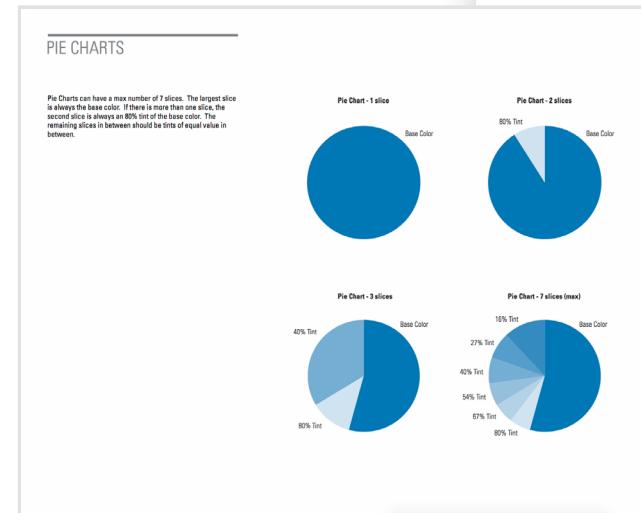
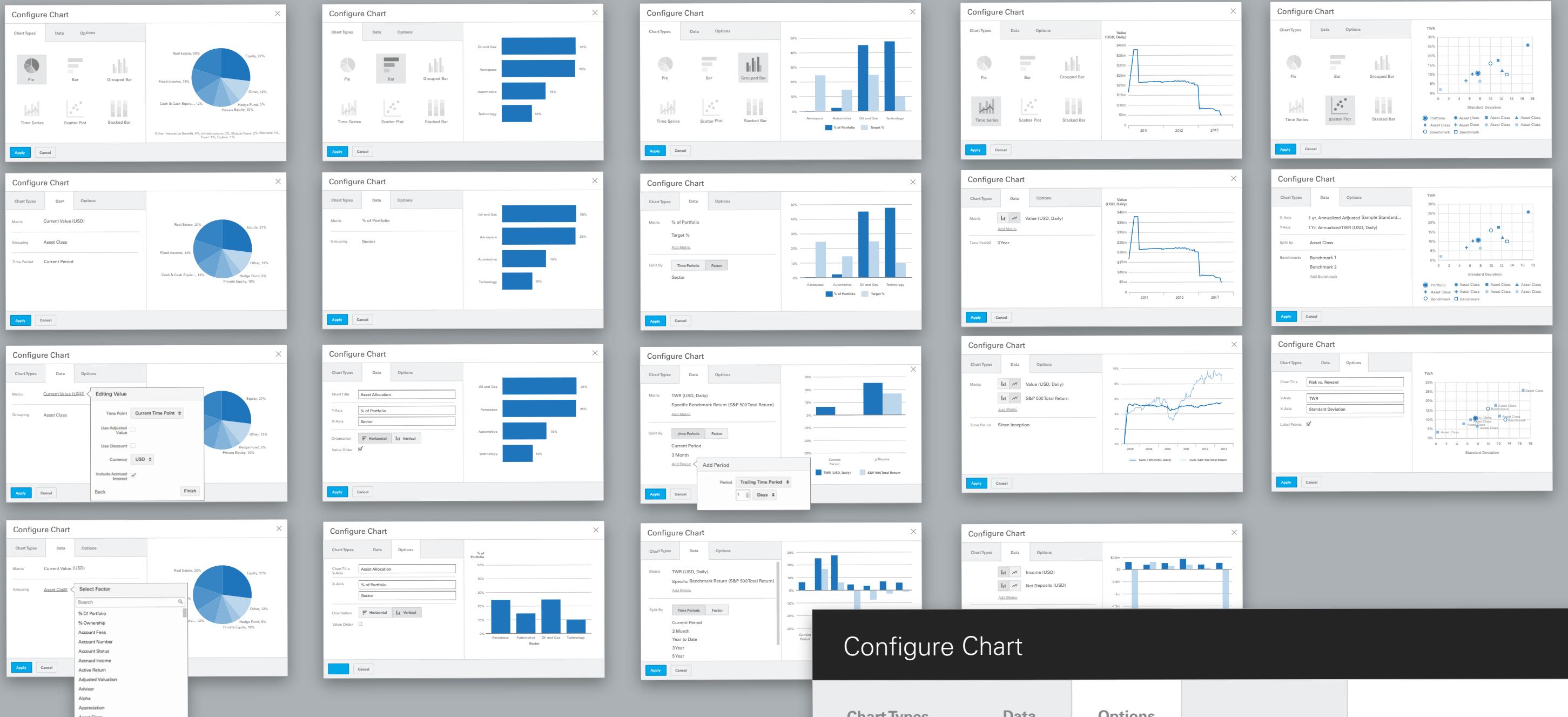
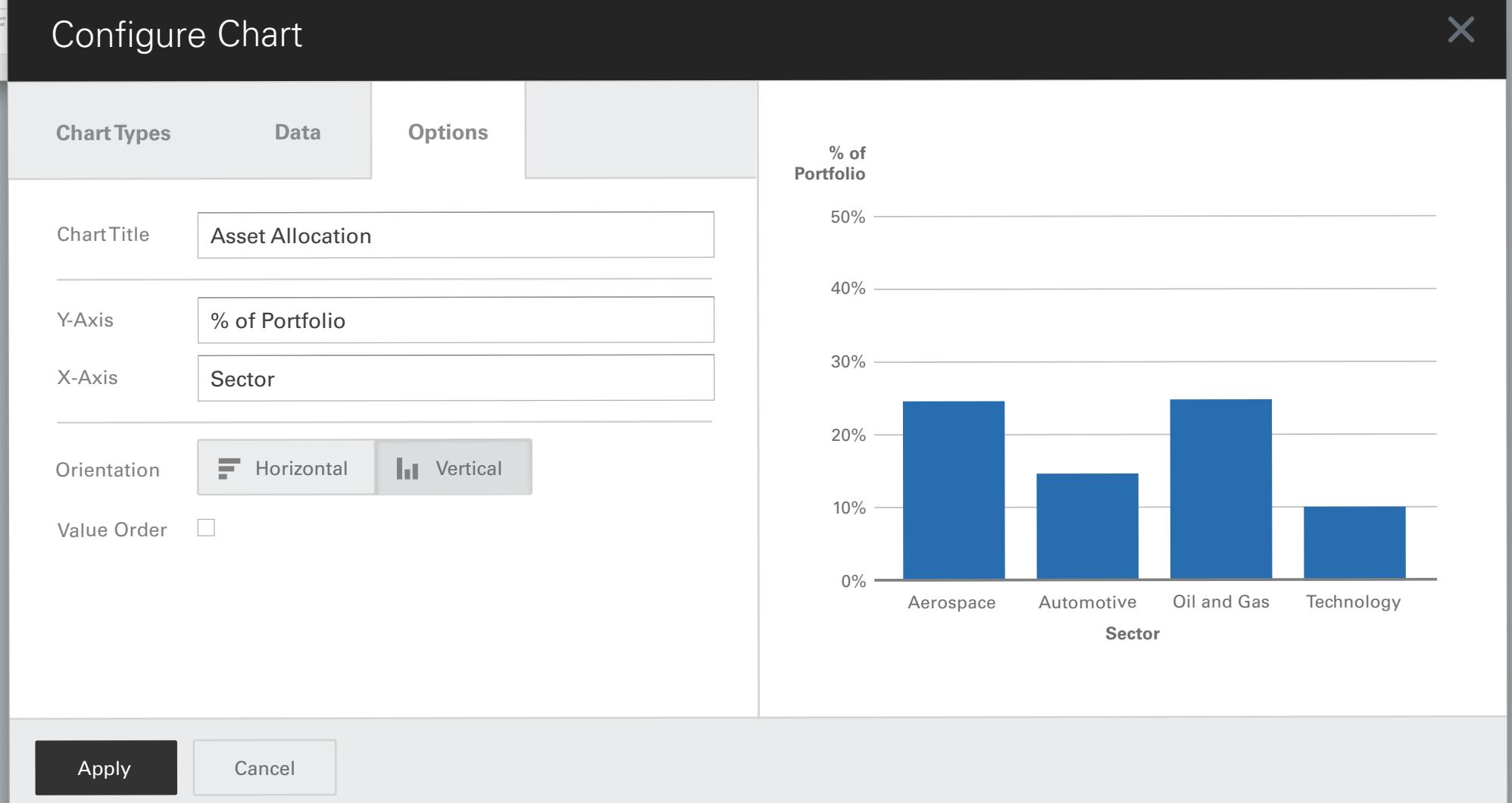


CHART COLOR GUIDELINES

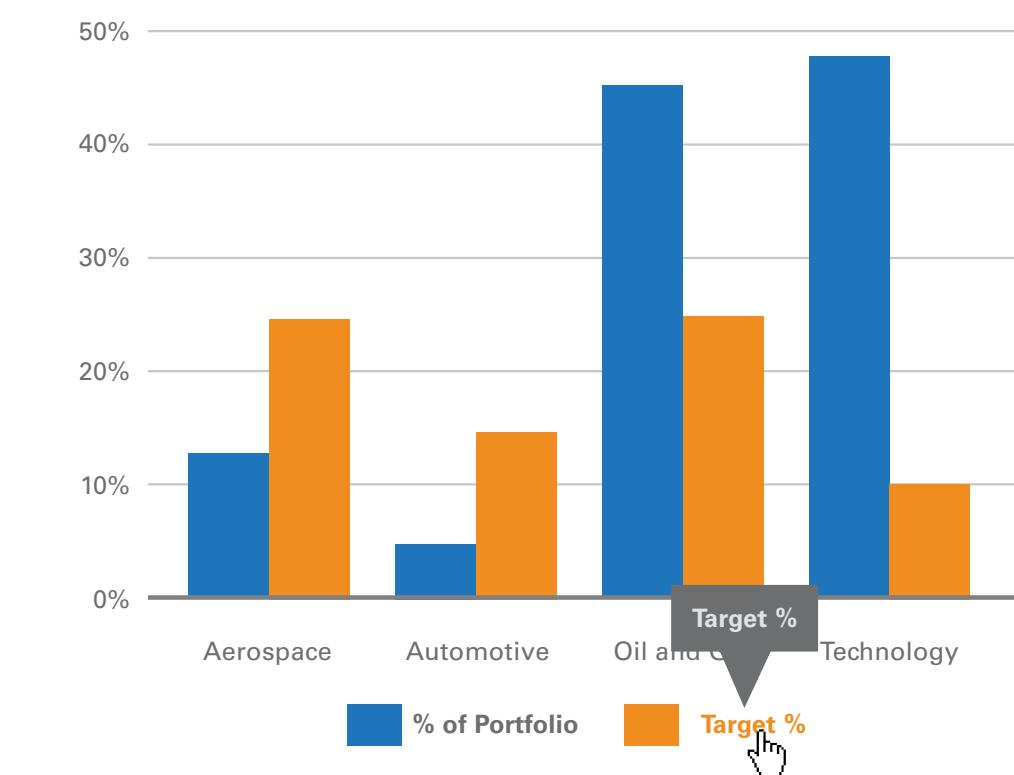
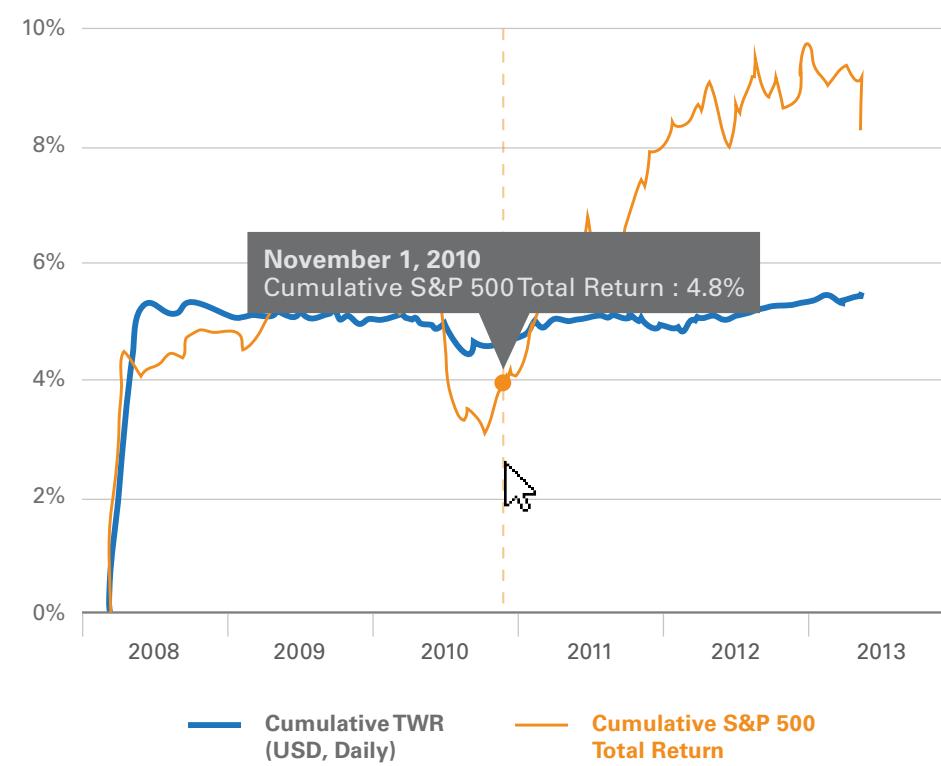
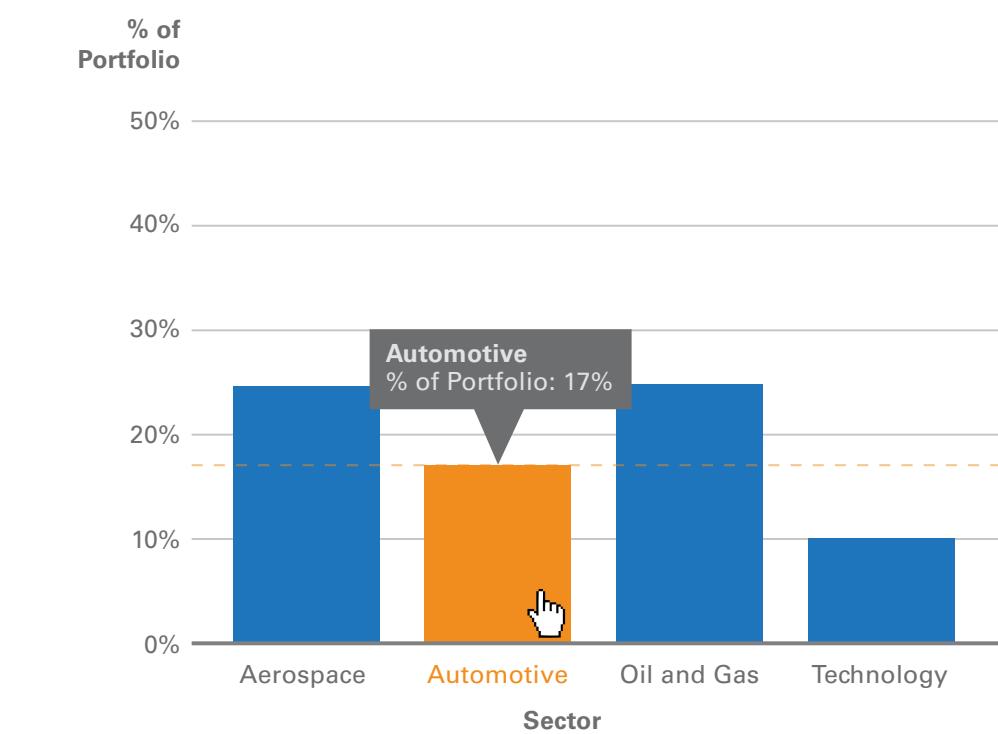
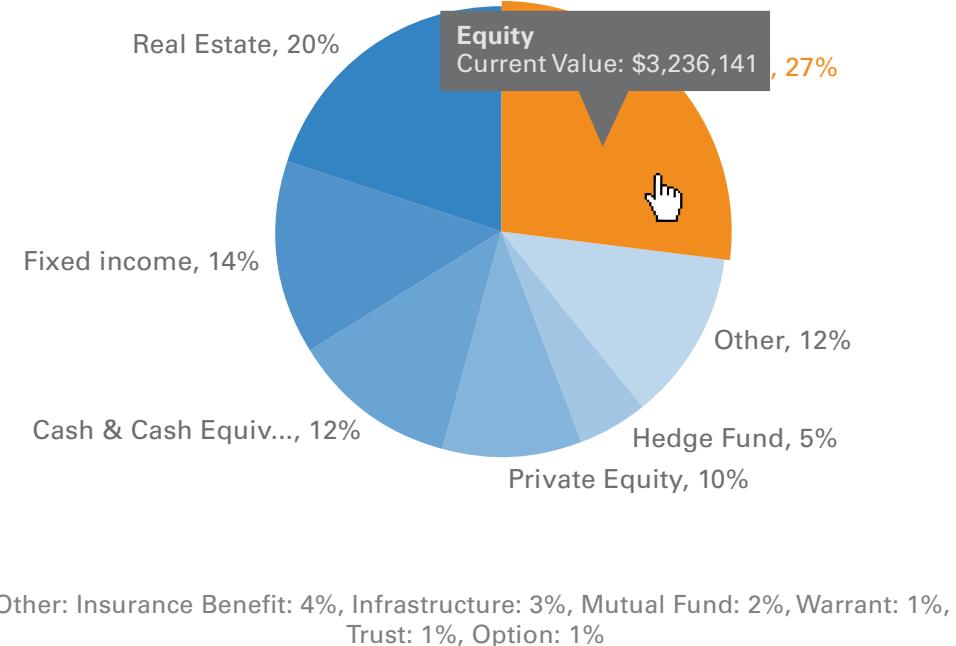
I created detailed documentation for how color should be applied to each of the chart types Addepar would accomodate.



Each type of chart also needed an interface for managers to easily configure and visualize the data in format of their choosing. As each chart type has its own set of controls, I separated the steps into tabbed wizard-style chooser to help simplify the configuration. Using a modal for configuration created a consistent user experience in both the interactive dashboard tool, as well as the static print-layout tool.



Each chart would have its own hover and click interactions, which really unlocks the power of interactive visualizations. Enforcing a monochrome color palette allows for highlighting hover states and key pieces of information.



We built a library of charts based on all this research, which we eventually released as an open-source library that has almost 800 followers on GitHub.

The image shows a composite screenshot of the Ember Charts project. At the top is a dark-themed landing page with the title "EMBER CHARTS" and a "DOWNLOAD EMBER-CHARTS" button. Below it is a white GitHub repository page for "Ember Charts". The GitHub page includes a "View on GitHub" button, a star icon with the number "794", and sections for "EMBER CHARTS" (Overview & Getting Started, API & Documentation), "Horizontal Bar Chart", "Vertical Bar Chart", "Stacked Bar Chart", "Pie Chart", "Scatter Plot", and "Time Series Chart". Each chart type is accompanied by a small thumbnail image. A large callout box at the bottom left highlights the GitHub star count "Star 794".

ADDEPAR OPEN SOURCE

EMBER CHARTS

A powerful and easy to use charting library for Ember.js.

View on GitHub

Star 794

EMBER CHARTS

Overview & Getting Started

API & Documentation

Horizontal Bar Chart

Vertical Bar Chart

Stacked Bar Chart

Pie Chart

Scatter Plot

Time Series Chart

Time Series

Horizontal Bar

Vertical Bar

Stacked Bar

Pie

Scatter

Star 794

ADDEPAR CHARTS OPEN SOURCE LIBRARY





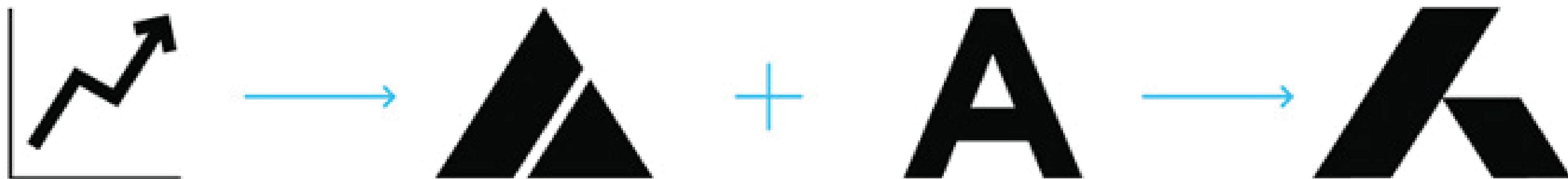
New York Meets Silicon Valley

As a startup company in the FinTech space, we wanted to position ourselves as the best of Silicon Valley technologist and the best of Wall Street Financial experience. The Addepar brand takes cues from the financial industry portrayed in a distinctly clean, modern, high end way.

I joined the company pre-revenue and designed the logo and brand guidelines in my first month. I then sourced, recruited, and built out the communication design team that I managed. This team collaborated with the business teams on marketing materials, the recruiting team on their materials, and operations on internal design needs.

Role	Years
Design Lead /Design Manager	2011-2014

Addepar's mark references a classic understanding of growth – up and to the right. The identity is a blend of high-touch finance and contemporary technology. We focused on modern design principles to speak of premium, pioneering, and precise brand qualities. We communicate clarity and integrity with refined typography, a minimal color palette, and effective use of white space. This upward and right angle would serve as a design device that would be repeated in many applications throughout the Addepar brand.





ADDEPAR Investments
1255 17th Street, Suite 1000
Denver, CO 80202

www.addepar.com
info@addepar.com
(720) 544-4282

Five Ways Technology is Transforming Investment



To learn more about ADDEPAR's investment platform,
please contact your Relationship Manager:
(720) 544-4282

Addepar New York
212.544.4282
(888) 789.5757

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312.544.4282
(888) 789.5757

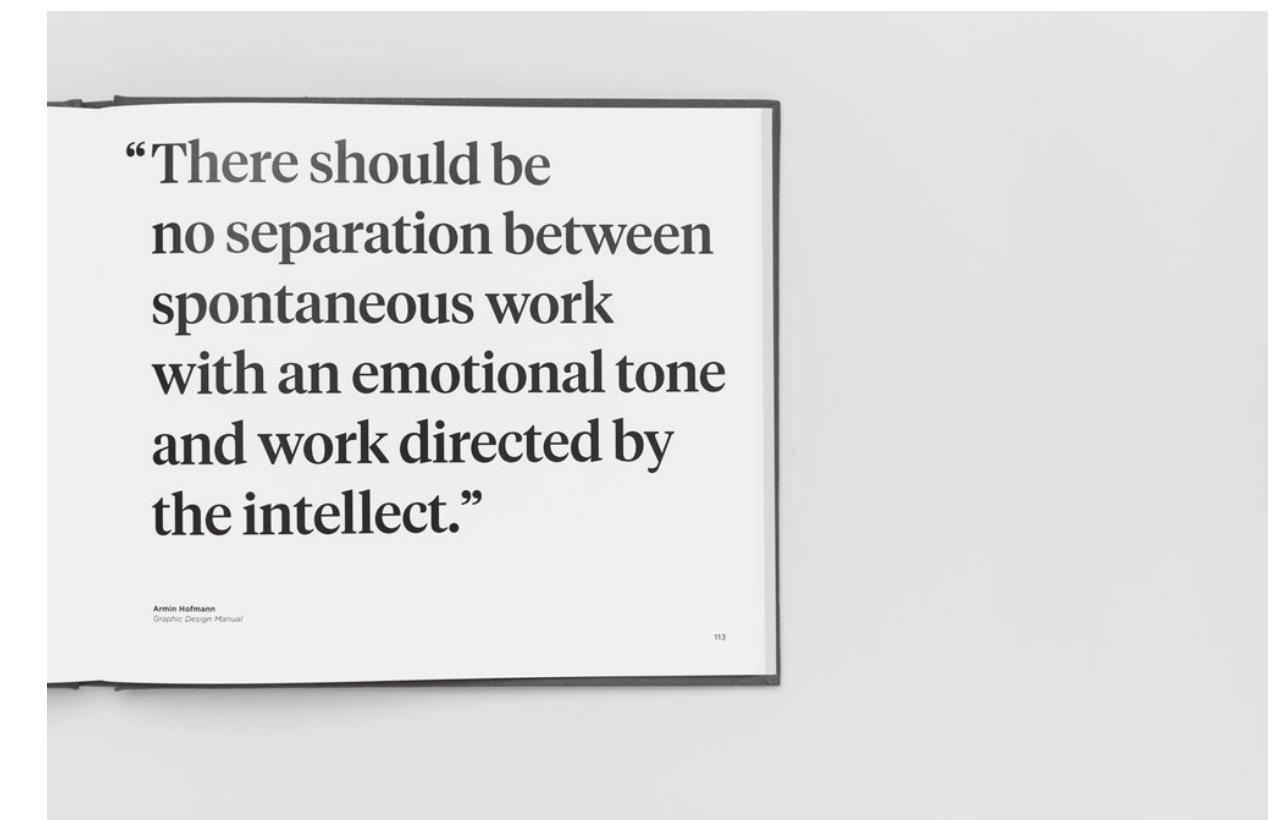
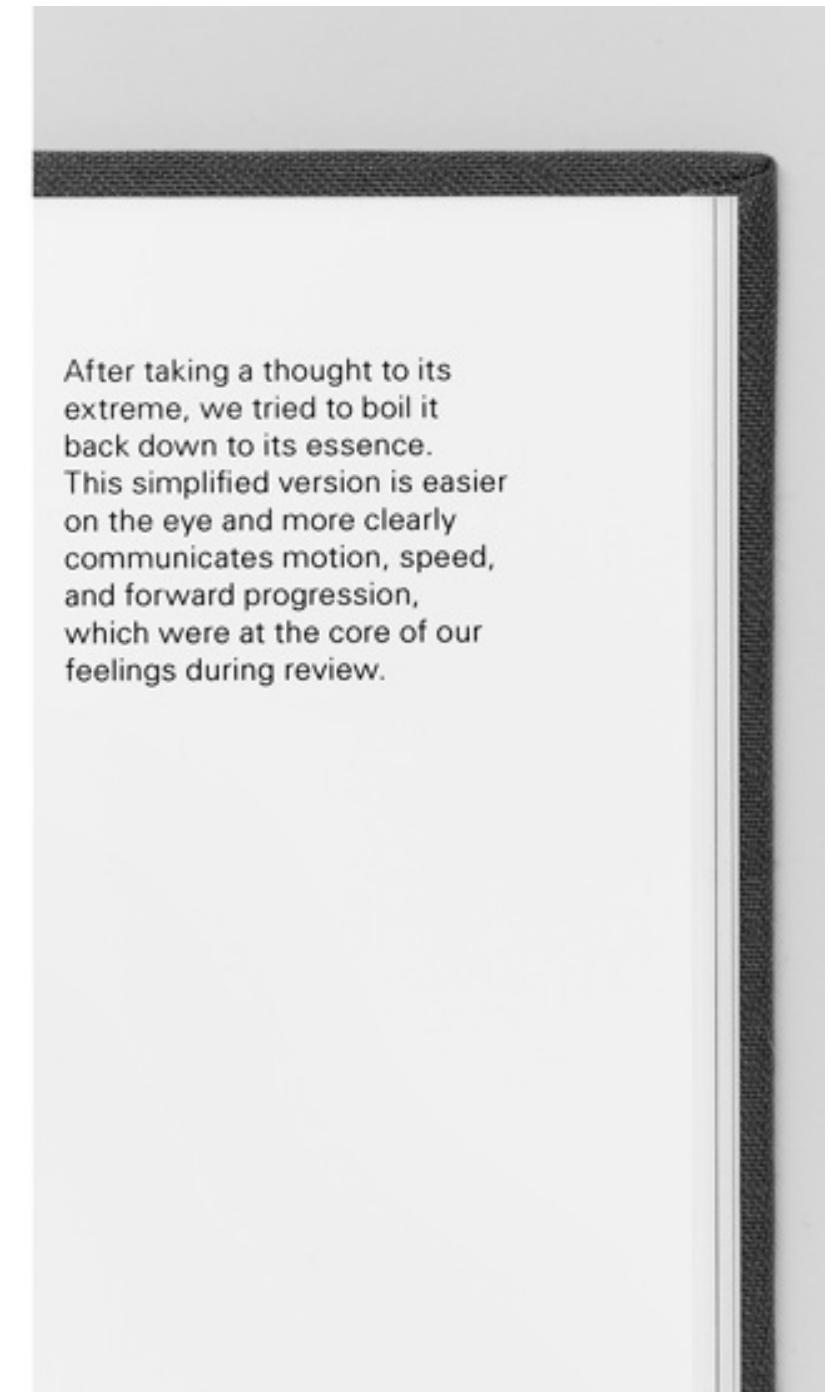
Addepar Investments
1255 17th Street, Suite 1000
Denver, CO 80202

Brand Exploration Process Book

I led my team on an academic exploration of the Addepar brand. Each exercise was designed to impose a set of limitations on the designers so that they could focus on one aspect at a time, while searching to exhaust all solutions. After each exercise, we would review and discuss the findings as a group. The goal was to continue to push the boundaries of what the brand could be, while defining the lines of which directions were drifting too far.



We then collected our most successful sketches and observations, and bound them into a book that we published into Addepar Form Studies. The book serves as both a reference and inspiration to fugure team members, but also serves as a document of both process and thought that the young designers could use as they moved on throughout their careers.

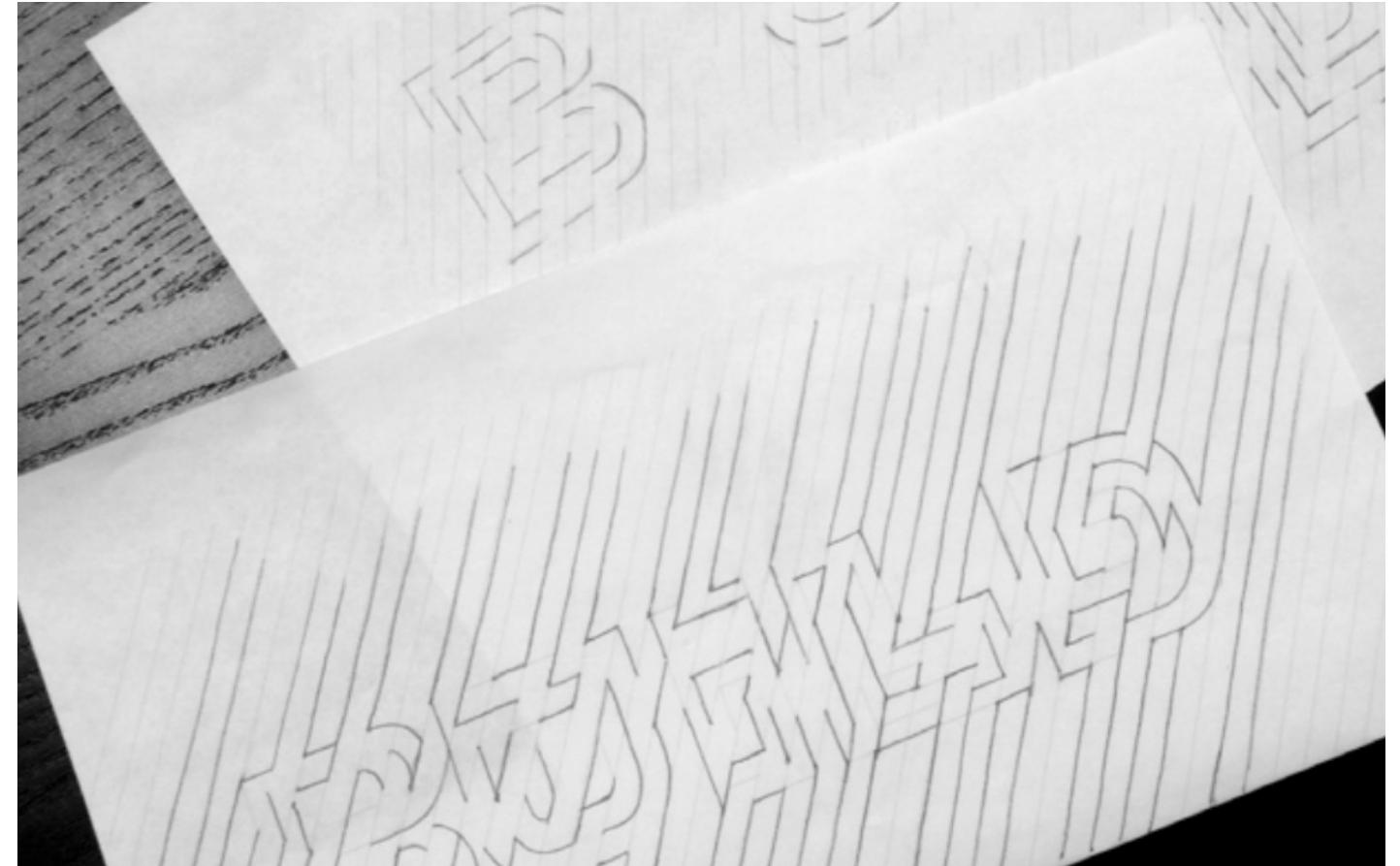


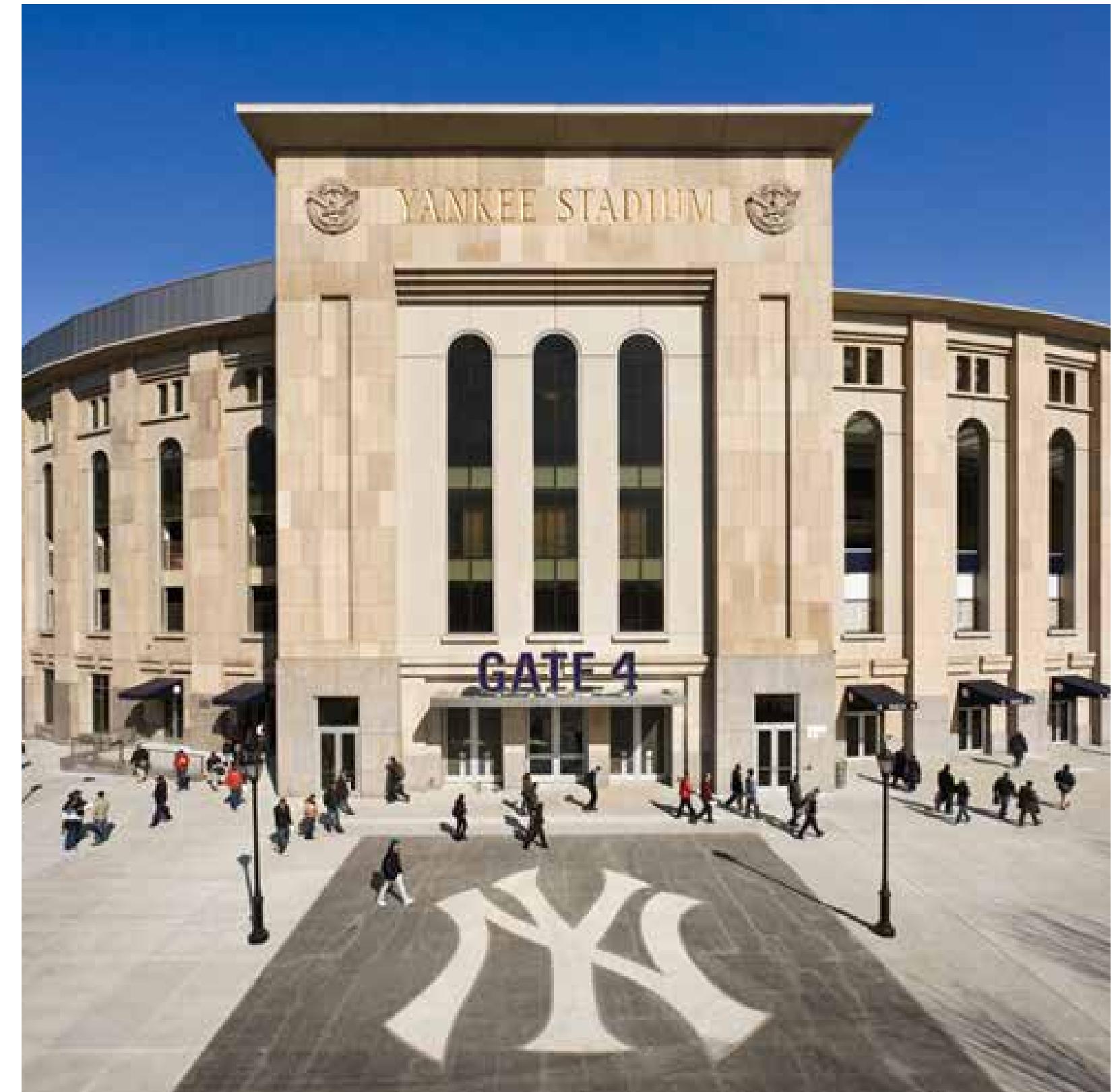
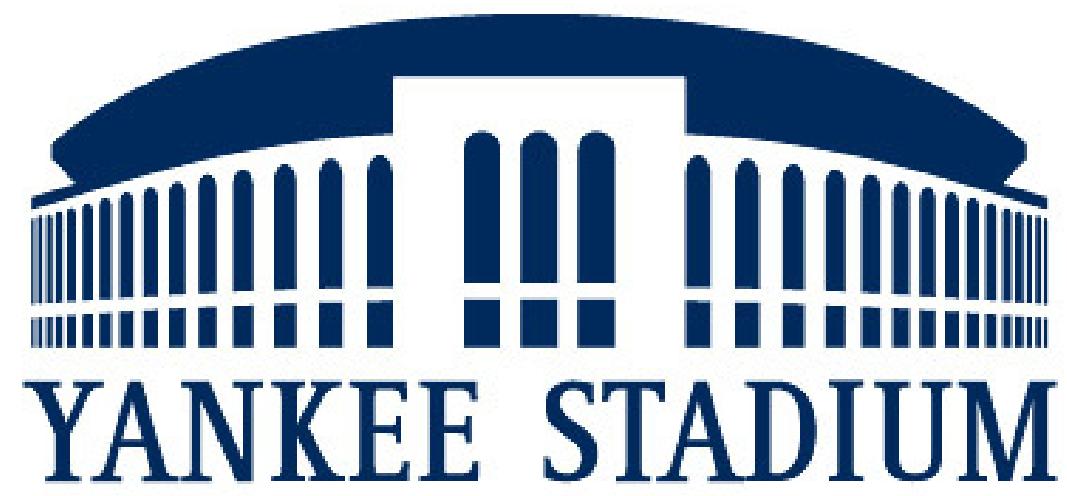
BUILD Recruiting Campaign

As a young startup company, Addepar didn't have the name awareness on college campuses as most of the larger, established companies at career fairs. People would not want or wear a logo t-shirt for a company they didn't know. My idea was to create a campaign that all the engineers and designers we came across could identify with, and feature that on the t-shirts and materials we gave out. Leading a team of 2 designers, we came up with the theme of "BUILD" as a message that both represented both the simplified manifesto of Addepar (building wealth / building a solid, lasting company), as well as a counterpoint to Facebook's HACK culture.

Each year the theme evolves to emphasize different aspects of the Addepar brand. The shirts were a huge success, and within 2 years we quickly became known at all the career fairs around the country for our BUILD shirts, we had people steal boxes of them, and we had requests from schools and companies across the globe to buy the shirts directly from us.

The award-winning campaign was featured in Print Magazine's Regional Design Annual.





Yankee Stadium / New York, NY
Identity and Signage



IDENTITIES & LOGOS

Clockwise from top left:

O'Shaughnessy Asset Management,
Financial Services / Stamford, CT

Tyche Risk Management,
Insurance Technology / New York, NY

Morgan Stanley Smith Barney,
Financial Services / New York, NY

Ripio
LatAm Financial Services Technology
Buenos Aires, AR

ABOUT ME

I've spent the last 9 years at early-stage startups, including **Alloy** & **Addepar**, where I have been in every phase of the design process, from research, wireframing, prototyping, to writing production-quality front-end code, and shipping iterations. I often play the role of product manager,

I started my career at **C&G Partners** in NYC, and I am experienced creating branding programs and guidelines. I have recruited and managed design teams.

I co-founded an HR tech company called **Liveli**, which was acquired in 2016.

I serve as a design advisor to several startups, including **Ripio**, and I have lectured on design at **Whitespace Design Accelerator** and **UC Berkeley**.



Contact me at craiggephart@gmail.com