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# Deal History Timeline

## COMPANY

PitchBook Data

## ROLE

Visual Design, Interaction Design

## RELEASE TYPE

Improvement

## TIMEFRAME

2 weeks

## USER NEEDS

Most companies in PitchBook Data feature a timeline at the top of their profile. The timeline shows financial events and employee count over time. With such dense pages, this is a helpful at-a-glance view for our users. Some users need to scan through hundreds of profiles per day to determine relevency. Data overload keeps them from making decisions quickly.

## BUSINESS NEEDS

Data integrity is extremely important. If users don't feel data is accurate or up to date, PitchBook loses credibility.

## GOAL

Improve the usability of the existing timeline in a way that is extremely fast and low cost to implement.

# The Problem

## USABILITY FINDINGS

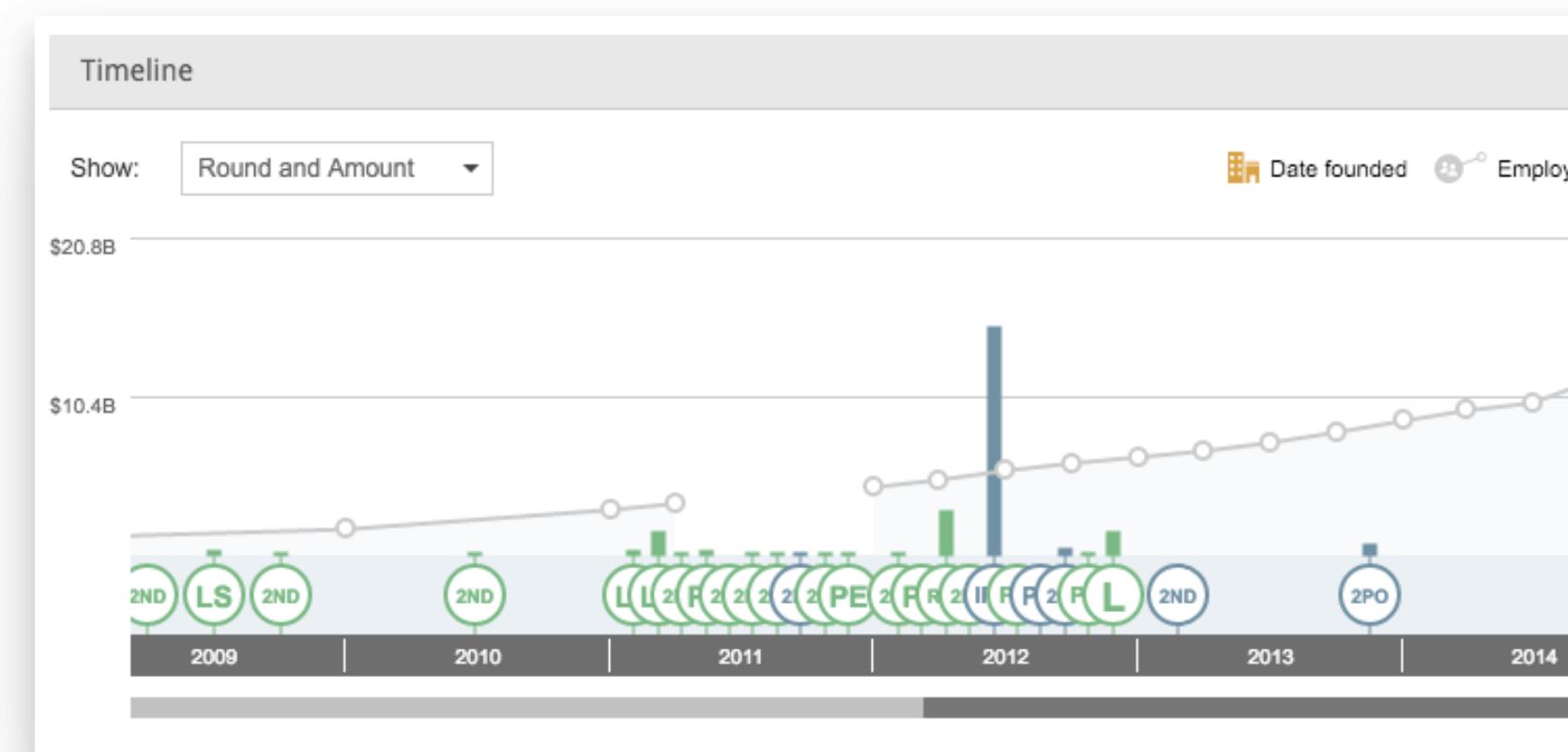
Usability tests showed that the timeline was difficult to navigate back and forth across time. Parts of the graph were difficult or impossible to read due to overlapping data or scaling issues. Users couldn't remember all the abbreviations.

## HEURISTICS

Employee dates were very confusing. Sometimes there were gaps in the data - and this was represented by an unfilled line on the graph with no indication that the data was actually unavailable.

## GOAL

Improve the usability of the existing timeline in a way that is extremely fast and low cost to implement.



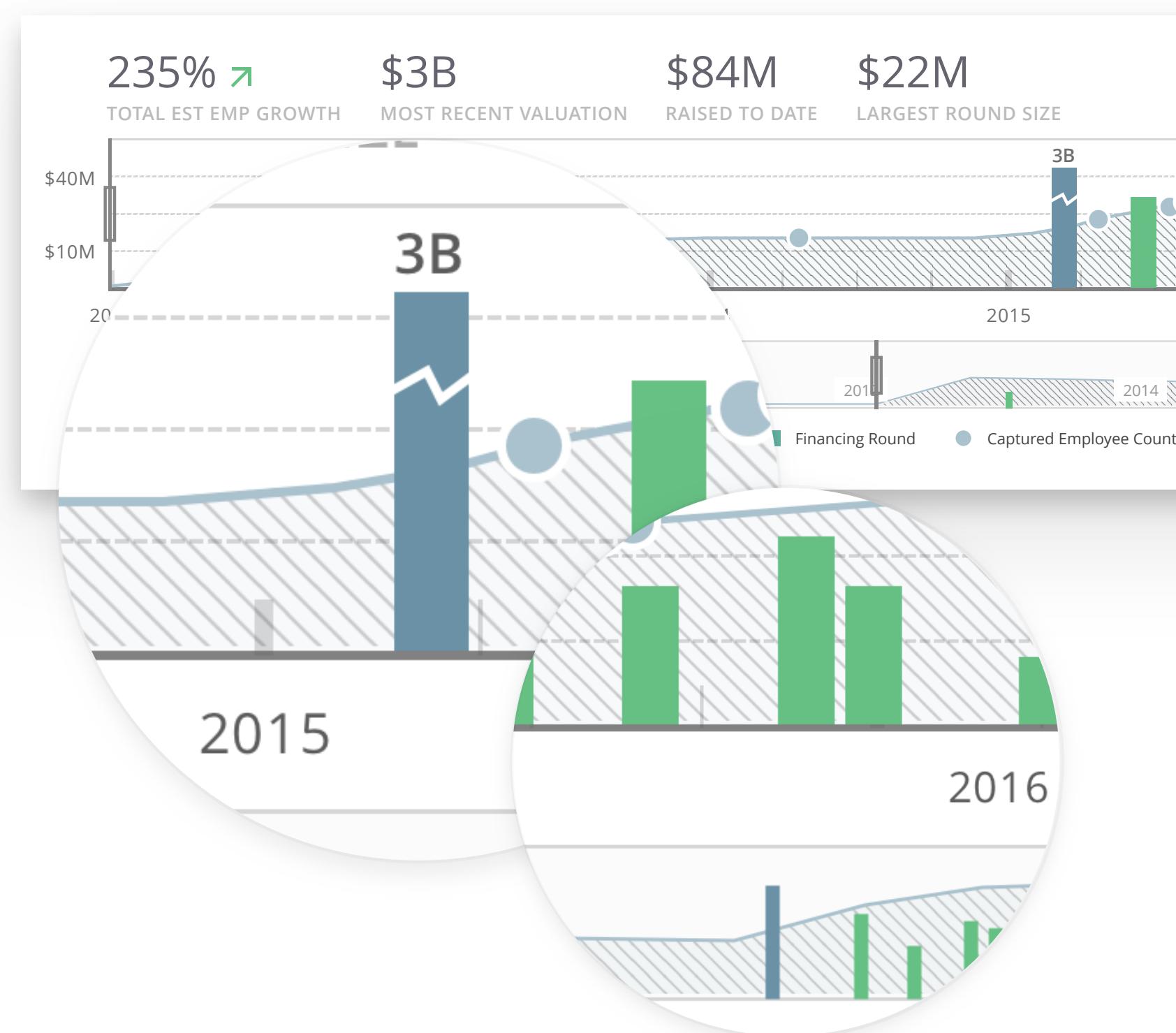
# The Solution

## MAKE IT EASIER TO READ

To address the problem of outliers skewing data visualizations, I introduced broken bars into graphs. Broken bars allow for data outside of a set standard deviation to be vertically truncated. Outliers have their value represented directly above the bar instead of on the axis.

The graph scrubber solves for companies who have a large number of rounds in quick succession. Users can zoom into specific ranges. This also solves for the opposite problem: when a company has only a few data points spread apart over a long time period. In this case, we can default the timeline to only the most recent years, so the user isn't presented with a graph that is mostly white space. Individual events no longer need to be crowded up against one another.

By providing some high level metrics at the top of the timeline, a user can get highlights without having to investigate individual graph elements.



# Library Filtering

## COMPANY

Curalate

## ROLE

Product Design

## RELEASE TYPE

Full Release

## TIMEFRAME

2 Months

## RESEARCH

6 client phone calls

Internal usability tests

Usage data from similar features

## USER NEEDS

Users are sourcing and uploading a massive amount of content into Curalate. But with all that content it can be very hard to know which action is most important to take. The sheer amount of content becomes completely overwhelming.

## BUSINESS NEEDS

We need to lay the foundation for future scale. This means setting the library up to be a collaborative environment that multiple users can take advantage of. Exposing the functionality to have multiple users view the same content and easily determine how to best take action on items. The increase here is all in efficiency to allow someone to more quickly determine what work they need to get done in our platform.

# User Stories

Habiliment is running an ad campaign. They want to upload into Curalate and productize as many images as possible, since they do not yet know which images will perform the best, but they need a way to see which of these images have not been productized or distributed already. They can apply a set of filters to easily see that they have 325 images that have not yet been productized nor distributed to ads, and focus their efforts on those images.

## User Interviews

“If we’re uploading things further in advance, just being able to find what you’re looking for is tough. Some kind of file structure would be helpful.”



Explore Library Share | Schedule Tilt Fanreel Reveal Like2Buy Ads

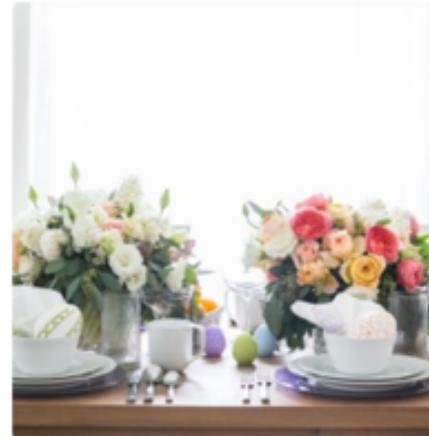
Group: Crate & Barrel

## Library

### Users

#### ∞ All

- My Uploads
- Alicia Waters
- Ashley Jones
- Ashley Reed
- Aspasela Papa
- Coartney Zimmerman
- Cristina Roti
- Danielle Kurtz
- Deb Berman
- Hannah Bollman
- Jamie Yang
- Jane Prizer
- Joe Orlando
- Kevin Esquivel
- Lauren Baker
- Lauren Hise
- Lindsey Silvetti
- Lizzy Schofding
- Megan Wertymer
- Melissa Liotus
- Melissa Riani
- Mike Moore
- Rachel Dorton



## LOOKING AT THE DATA

Designing on assumptions can sometimes lead to mistakes. When we first designed the ability to filter by user, we found that the average client in Curalate had 10 users under their account.

What we failed to take into account was the outliers. During internal testing we quickly discovered that certain clients had way more than the average number. Our original design proved to be overwhelming for users during testing.

We updated our design with a new interaction that allowed users to be filtered in a searchable list not bound to the sidebar. This allowed us to have a list with any number of users in it, as well as set us up with a design that scaled better into what we already had slated for future iterations of this feature.

Group: Crate &amp; Barrel

## Library

## Labels



## MOST USED

- gallery
- homepage
- dining
- kitchen
- furniture
- decor
- giftregistry
- cocktail
- christmas
- seo

## Product Tags

Has Product Tags

## All Content

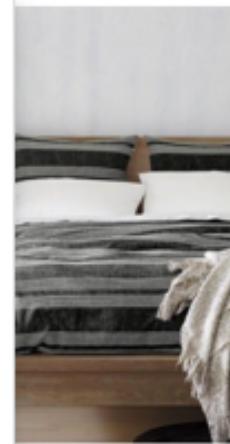


## CONTENT

- All Content
- All Team Content

## TEAM MEMBERS

- Samantha Yost
- Alecia Waters
- Ashley Jones
- Ashley Reed
- Christina Roti
- Deb Berman
- Jamie Yang
- Joe Orlando



# Curalate Style Guide

## COMPANY

Curalate

## ROLE

Product Design

## RELEASE TYPE

Ongoing, Internal

## USER NEEDS

The design team is growing rapidly. Consistency is key. As the teams grow, designers need to have documentation on style usage and patterns so that they can spend more time solving hard problems and less time fixing UI bugs and inconsistencies.

## BUSINESS NEEDS

The more predictable our system is, the easier it is to debug. With years of disparate teams moving very quickly, product market fit was found, but front end architecture has suffered. As a result the product itself feels more siloed off than the business intends for it to be.

## GOALS

Create a style guide to help new and existing designers introduce new features and build on existing ones without introducing design debt. Build a style guide that is agnostic enough to be immediately applicable, but extendable enough to grow with the brand.

# Atomic Mindset

## F(CSS)

A key goal for the design team was to shift away from a BEM style css naming convention towards a functional, atomic set of css utility classes. This made styles easy to debug by both engineering and design without having to dig through pull requests to find styles hidden inside of logical expressions. It also meant we could employ the production set of styles to prototype with, too.

## TYPOGRAPHY

Special focus was put on typography. Previously, only one line-height was used throughout the platform. This resulted in many UI elements having inconsistent top and bottom padding. This cropped up in buttons, dropdowns, and many other places. By introducing multiple types of leading, we can designate that certain types of UI elements get proper type attention.

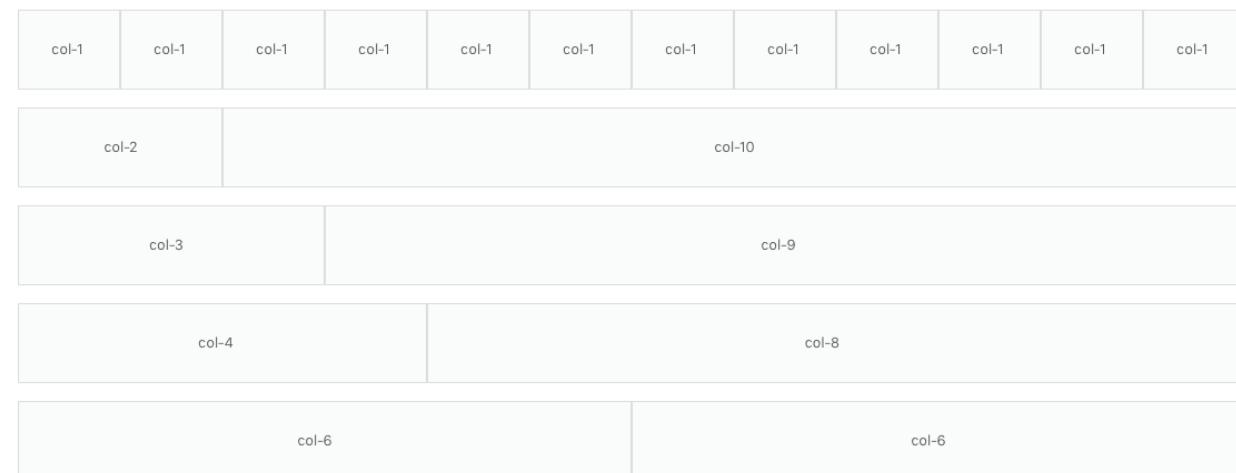
```
<div class="float-l bg-white xs-pa3 bs-b-solid bw1 border-gray1 xs-flex xs-flex-items-center xs-flex-justify-between">
```

## Layout

### Grid System

Unison utilizes a fluid responsive 12 column grid for laying out pages. Combine the grid columns with media query breakpoints to create collapsing grids. Grids are infinitely nestable.

Column gutters can be constructed using padding. Use a minimum of 8px padding inside columns.



### Spacing

Unison uses a scale for composing margin, padding, and element sizes based on powers of two. This starts at 4px and moves up in whole and half increments. Sticking to this scale for all margin and padding will result in a vertical rhythm that is consistent with the type scale. Layout should always be specified with a spacing variable rather than an absolute value.



### Box Shadows

Unison uses shadows to allude to depth in a design. Shadows should directly correspond to the elevation of an object. Elevations should directly correspond to z-indexes. Combine shadows with animation to provide cues into the behavior of an object.

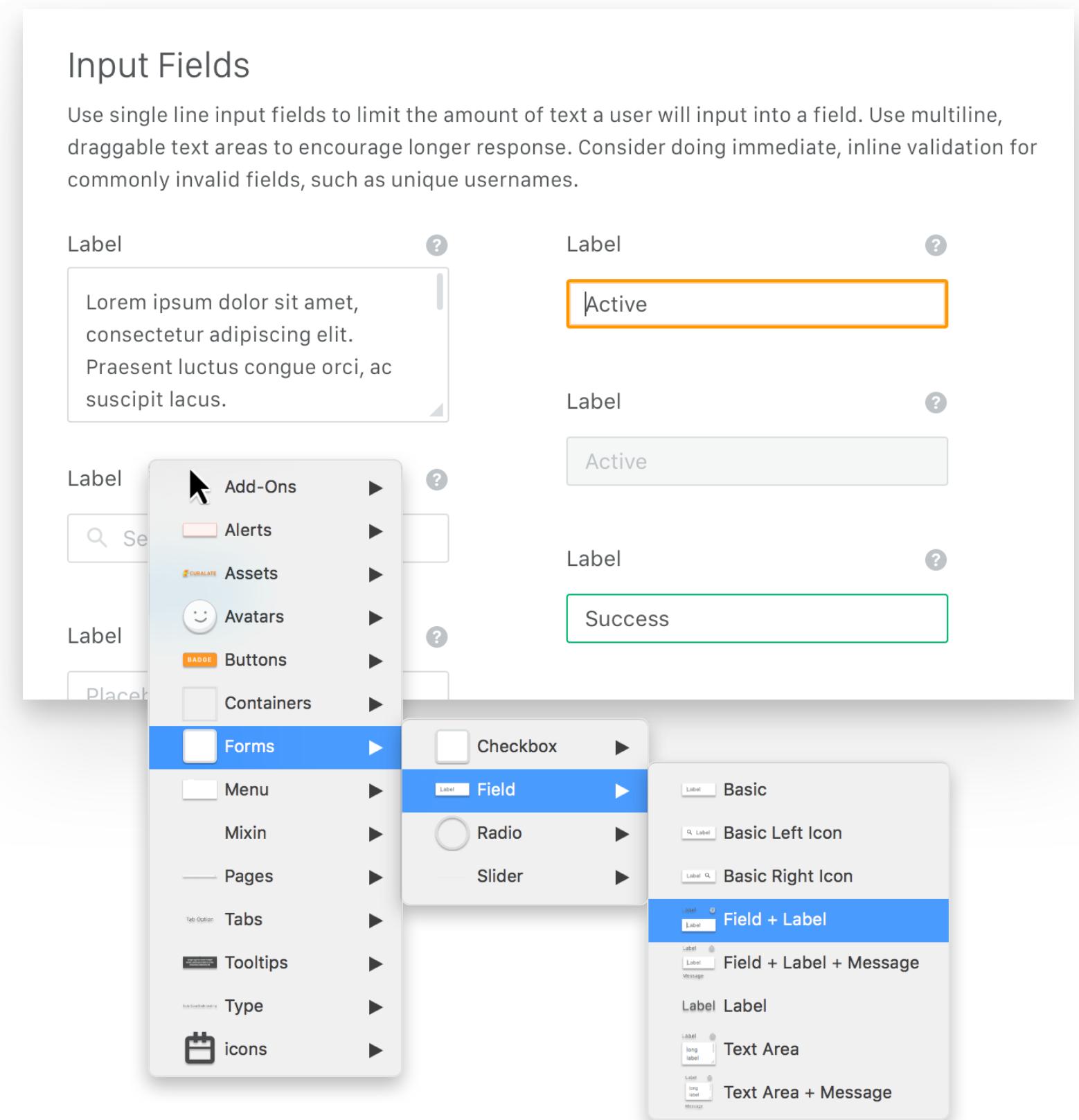
# Build for Consistency

## LEVERAGING COMPONENTS

By treating as many elements as possible as components, it was possible to create very commonly used UI items such as dropdowns, form fields, and buttons to be extendable and composable from within Sketch. This makes it easy to keep the style guide up to date and easy for a designer to repurpose other parts of it to create something new and novel. This means that the pattern library grows, but the style guide itself does not.

## WHY IS THAT A BIG DEAL?

Styles are much harder to deprecate over time than components and patterns are. By creating smart abstractions, we can ensure our code bloat stays under control and when styles do need to be updated, it doesn't take forever.



# Intelligent Product Tagging

## COMPANY

Curalate

## ROLE

Product Design, Visual Design, Interaction Design

## RELEASE TYPE

Demo

## TIMEFRAME

2 weeks

## USER NEEDS

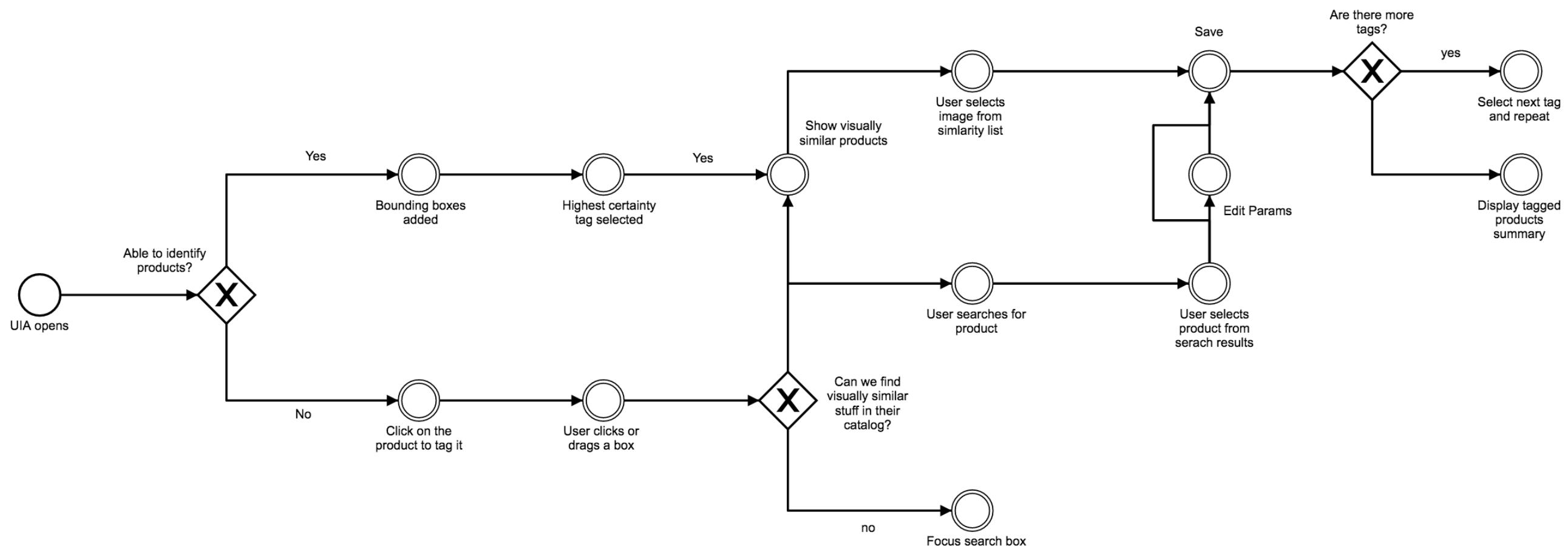
The act of tagging products inside of Curalate is an extremely manual one. It can take a user significant amounts of time to effectively tag a whole catalog.

## BUSINESS NEEDS

Curalate is making huge advancements in computer vision and machine learning. It's important for us to make a concerted effort to push this forward to be more public facing. If we can automate the process for users, it will dramatically increase our unique value proposition

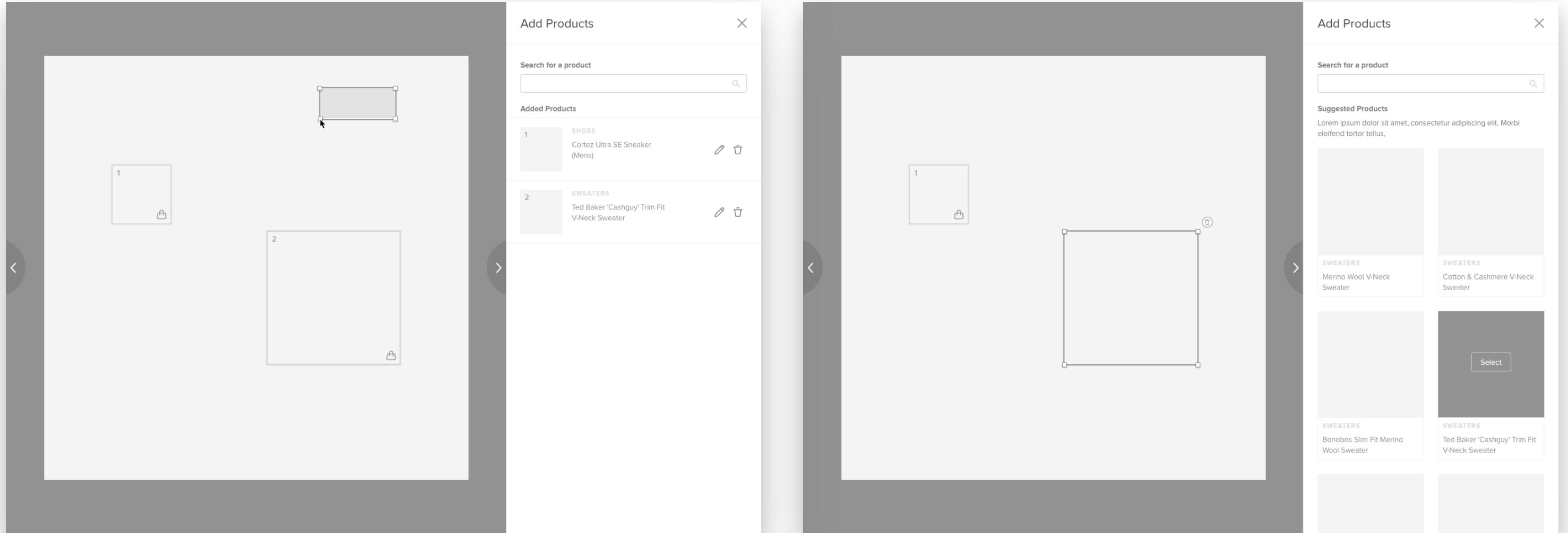
## GOAL

Given a very short timeframe, create an tagging experience that utilizes computer vision to identify products.



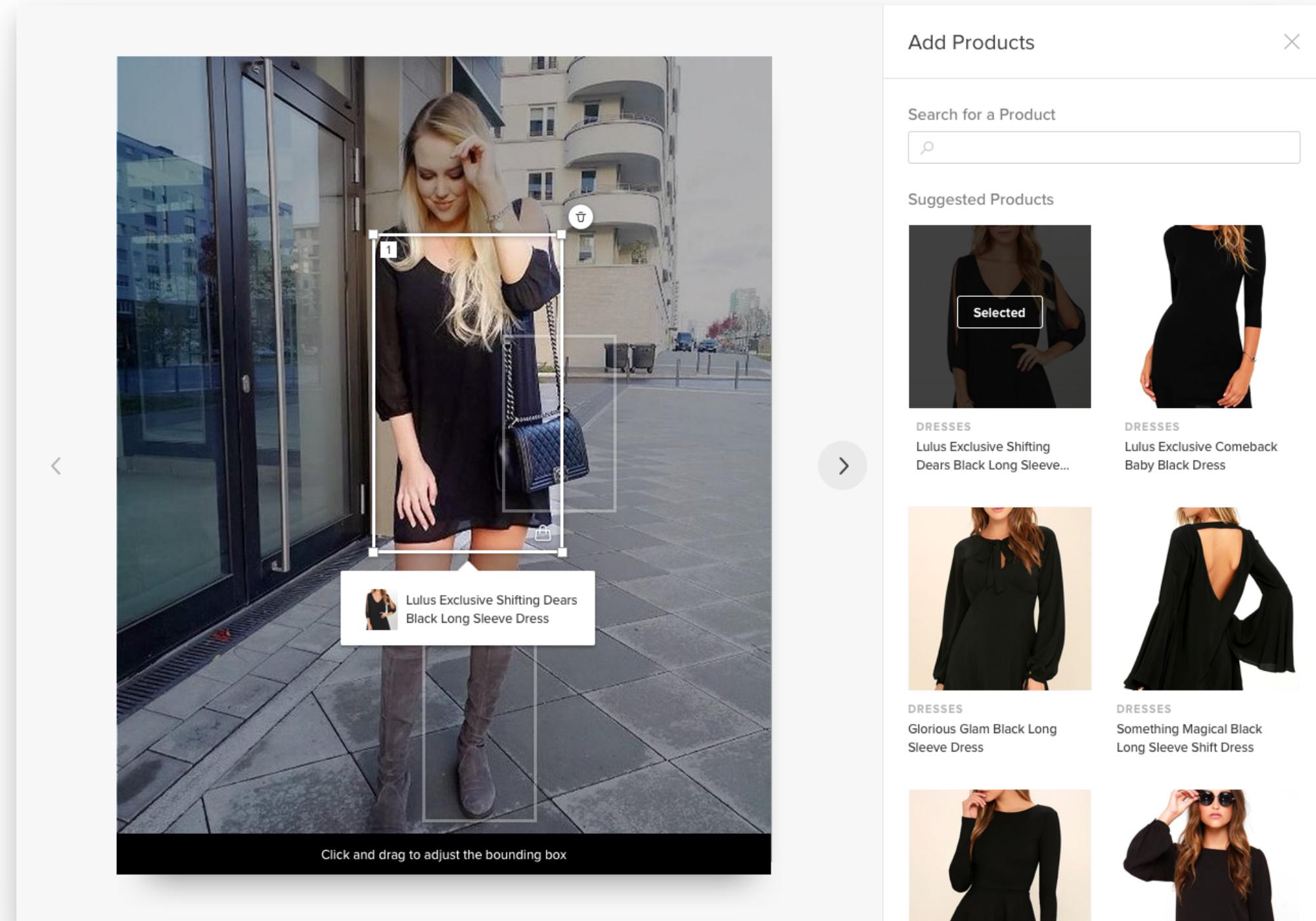
## UNDERSTANDING FLOW

This was the distillation of a whiteboarding session with the project team. It was useful in writing the initial technical design as well as determining exactly what the scope would need to be to pull this off.



## WIREFRAMES

Some lo to mid fidelity wireframes were put together to discuss with the product and engineering team. These were used to discuss the technical feasibility of some of the interactions we were planning, given the timeline.



## MOCKUP

Final mockups were given to developers - however due to the nature of this project, the developers mostly relied on clickable prototypes and close interaction and collaboration with design

# Collections

## COMPANY

Curalate

## ROLE

Product Design, Visual Design, Interaction Design

## RELEASE TYPE

Full Release

## TIMEFRAME

3 Months (Ongoing)

## USER NEEDS

Users need to be able to find content to take action on. Most clients have massive, ever growing catalogs of content to manage. It's difficult to share with others and difficult to organize that content in a way consistent with how our users operate on a day to day basis.

## BUSINESS NEEDS

We want to close the gap between discovery, curation, and distribution. Once we do this, we can automate some of this process for a user, greatly reduce the time the user needs to spend doing repetitive tasks. This will help us acquire substantially more data, and it will help our users operate at scale much easier.

## GOAL

Pave the way for a unified experience inside Curalate by tearing down the walls between our touchpoints. Allow users to group content in ways that are meaningful to them and give them the flexibility to automate some of the process of sourcing content.

# Aligned to Our Objectives and Key Results

## OBJECTIVE 1

Make it way easier for users to manage and collaborate on their content.

## KEY RESULTS

- Number of support tickets related to user education or user error in these areas decreases
- The average number of productized pieces of content per client increases relative to time spent in Curalate.
- Total events for library increases relative to other areas of the site
- Increase in percentage of traffic referred from Explore

## OBJECTIVE 2

Standardize and simplify how users prepare content for publishing.

## OBJECTIVE 3

Standardize and simplify how users prepare content for publishing.

# Research

## UNINTENDED USAGE

Users figured out how to use a feature called Share in a way it was never designed to satisfy a use case we never thought about. This feature was used to share content between third party affiliates. We found several instances of users utilizing this feature to create sharable folders of content around themes unrelated to affiliate sharing. Discussions with these users laid the foundation for how Collections would form.

**18% of all sessions led to a user adding content from Explore to his or her Library**

**20% of all sessions led to a user taking an action that indicates an interest in distribution**

## DATA FROM EXPLORE

We paired with another team to closely monitor the adoption rate of a new feature called Explore. Aimed around content discovery, we were eager to drive greater value around this feature by creating workflows that emphasised the relationship between Explore and user's Library. We found some interesting relationships between these two areas of the site.

This type of activity led us to believe that Explore is being used with the intent to source new content for distribution, not just for browsing. We believe we can drive greater adoption and engagement with both Explore and Library if we strengthen the relationship between the two.

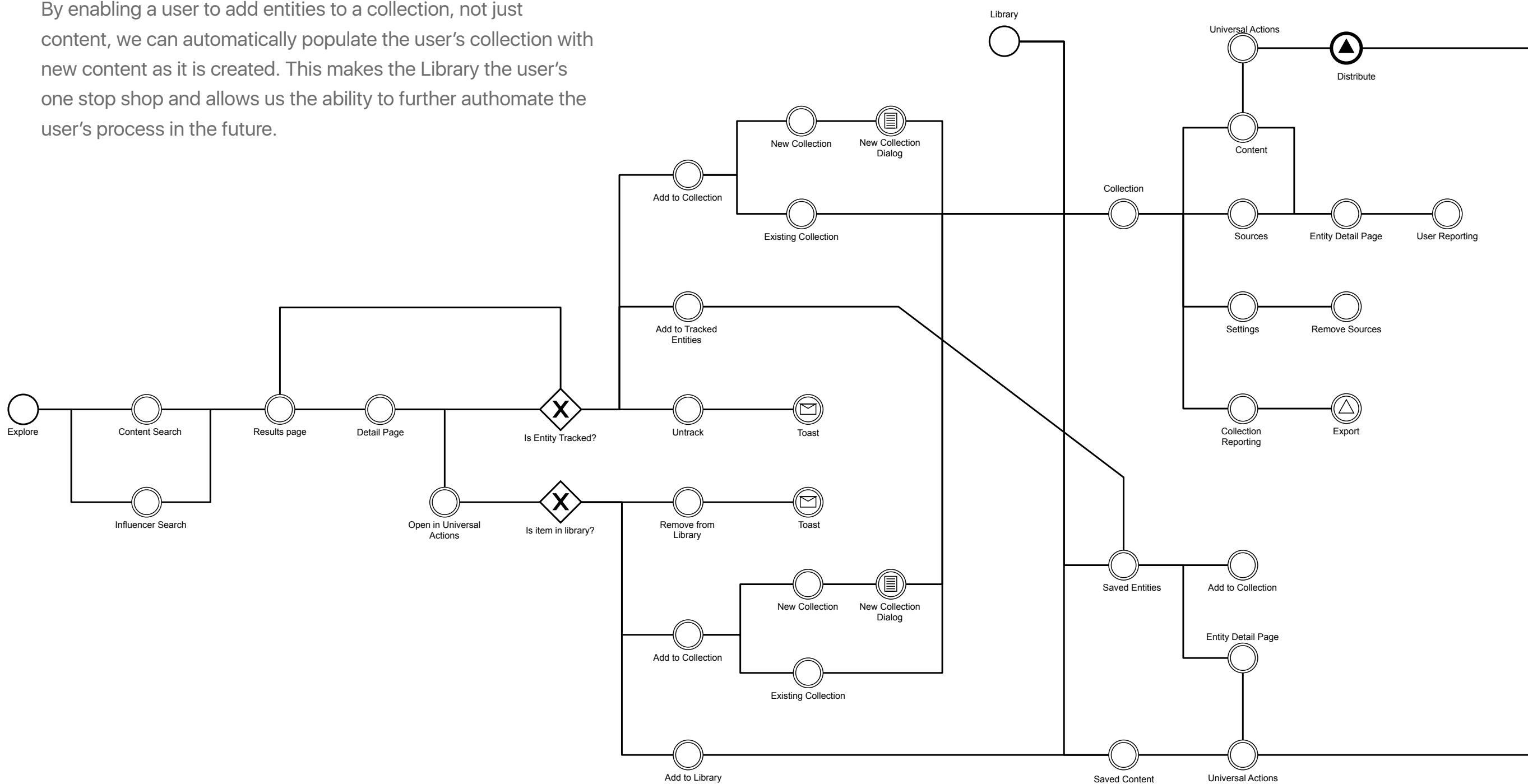
# User Stories

As an Influencer manager, I need to find promising influencers in Explore and save them for evaluation and curation at a later date. When I'm ready, I can easily access and act on the set of content relevant to my brand's campaign.

As a social media manager, I need to track Instagram content from a set of users (a, b, and c) that also contains hashtag X and/or @mention of my brand because they're creating content around a specific product for me.

## TWO KINDS OF ADDITION

By enabling a user to add entities to a collection, not just content, we can automatically populate the user's collection with new content as it is created. This makes the Library the user's one stop shop and allows us the ability to further authomate the user's process in the future.



The screenshot shows the Curalate platform's interface. At the top, there's a navigation bar with links like Explore, Library, Share, Schedule, Tilt, Fanreel, Reveal, Like2Buy, Ads, and Social. Below the navigation is a sidebar with sections for Content, Users, Hashtags, Locations, and Collections. The Collections section is expanded, showing 'Fall 2016 Campaign' selected. The main area displays a grid of 15 posts from various users, each with a thumbnail, the user's handle, their name, the date posted, and engagement metrics (likes and comments). A specific post by 'rainydaybites' is highlighted with a callout box showing its follower count (29.5K), engagement rate (2.3%), and a list of hashtags used in the post. The right side of the screen has a sidebar titled 'Social' with filters for Hashtags, Locations, Followers (5,000 to 50k range), Posted Date (Last 30 Days dropdown), Labels (search field), and Most Used Product Tags (checkboxes for betterouthere, hiking, hide, blog, snowshoeing, climbing, expert-advice, go-outside, trailrunning, laydowns).

## AT A GLANCE

We chose to include iconography for socially sourced content and content directly uploaded to Curalate by users themselves.

Because they can both live together in a collection, it was important to know which items were already brand owned assets

## EXPOSING SOCIAL CONTEXT

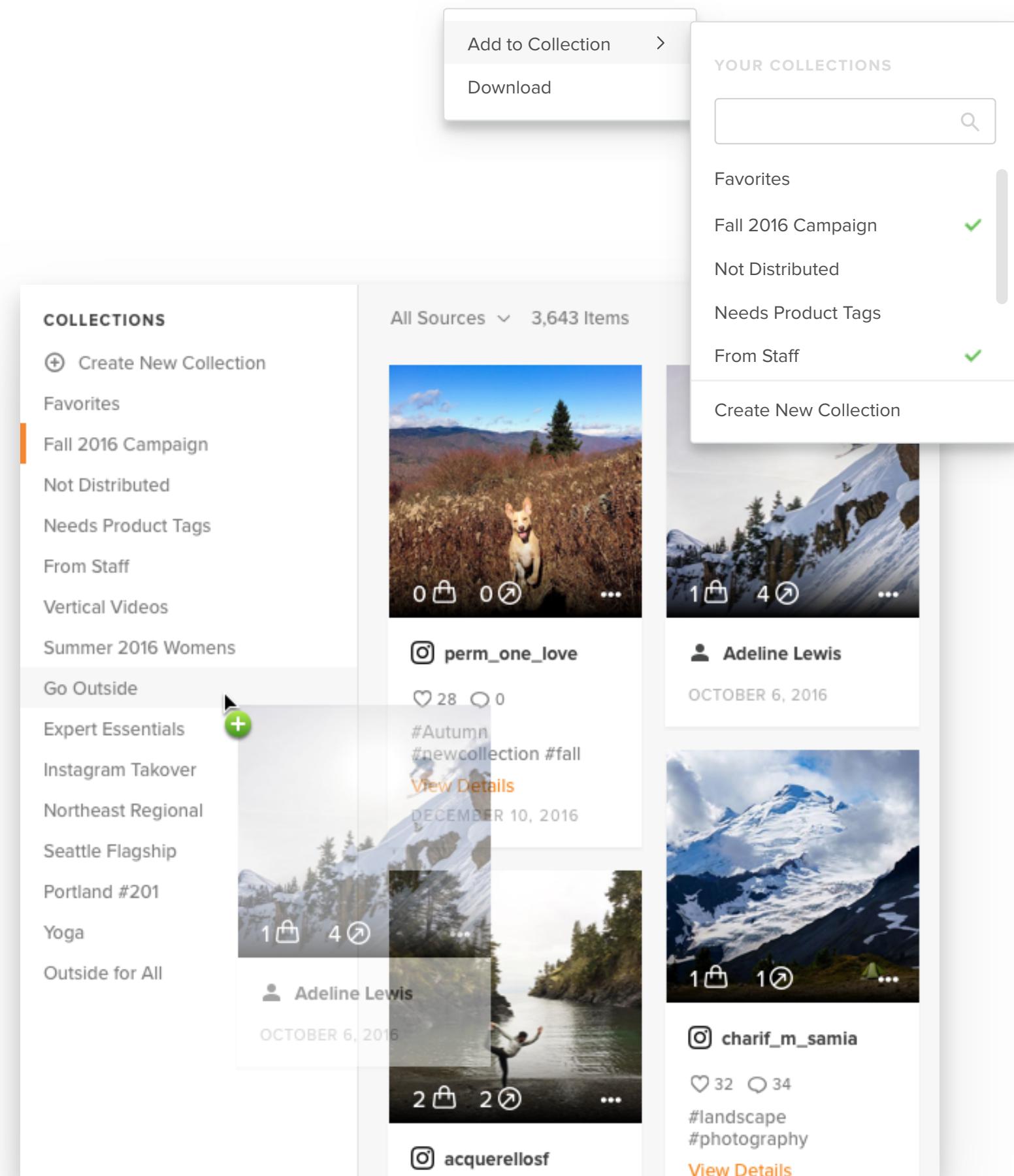
While Curalate is content first, marketers often need context behind social data to best understand it it fits for the brand. We exposed detail views so a user can get a similar context as was already offered in Explore to help them make better decisions about content.

# Interactions

## IMPLYING REFERENCE BASED ORGANIZATION

We needed to drive home the point that collections, just like the touchpoints their content is eventually distributed to, were reference based systems, rather than folders. The distinction here was the idea that one piece of content could live in multiple collections simultaneously.

The universal action menu is the primary way users interact with content. Multi-select menus were used to let a user know their content could live in multiple places. We also explored drag and drop functionality. By not leaving an empty space mid-drag, we can better help the user understand that her content won't be removed from one collection just because she adds it to another.



Thank You 🚀