

# Sean Blanton

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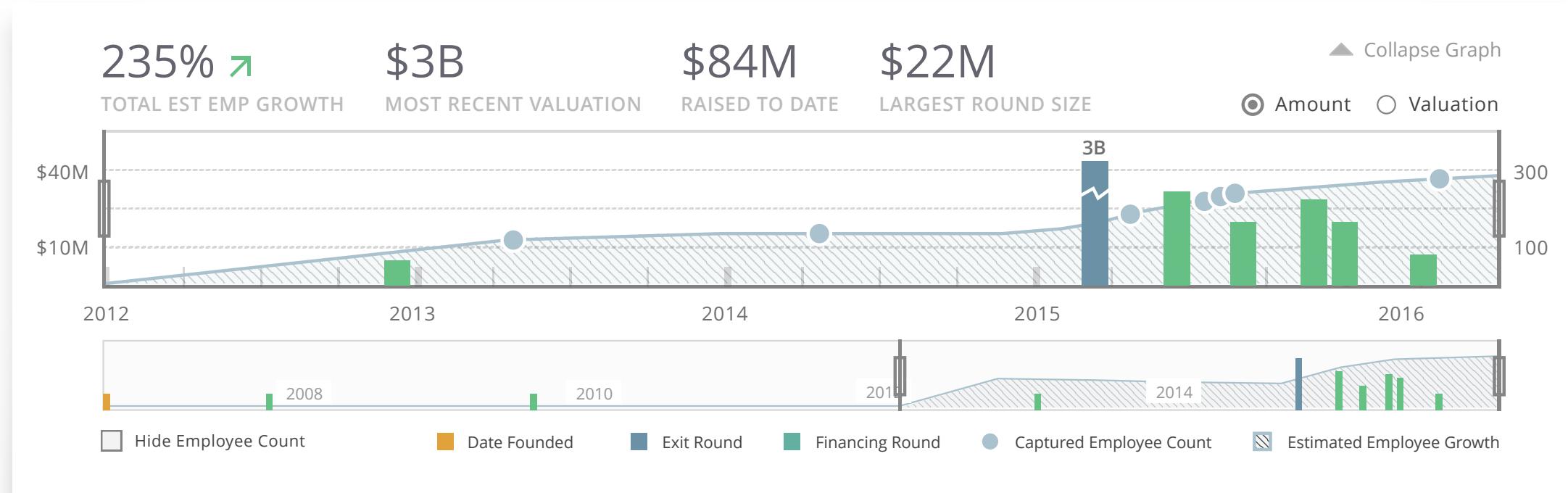
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# Deal History Timeline

PitchBook Data

Interaction Design, Visual Design



# Business Goals

Most companies in PitchBook Data feature a timeline at the top of their profile. The timeline shows financial events and employee count over time.

The existing timeline was wrought with usability issues that needed to be addressed sooner rather than later. Initial conversations with users after launch revealed that the current timeline took up too much of their screen real estate and was too hard to read to gain any meaningful insights.

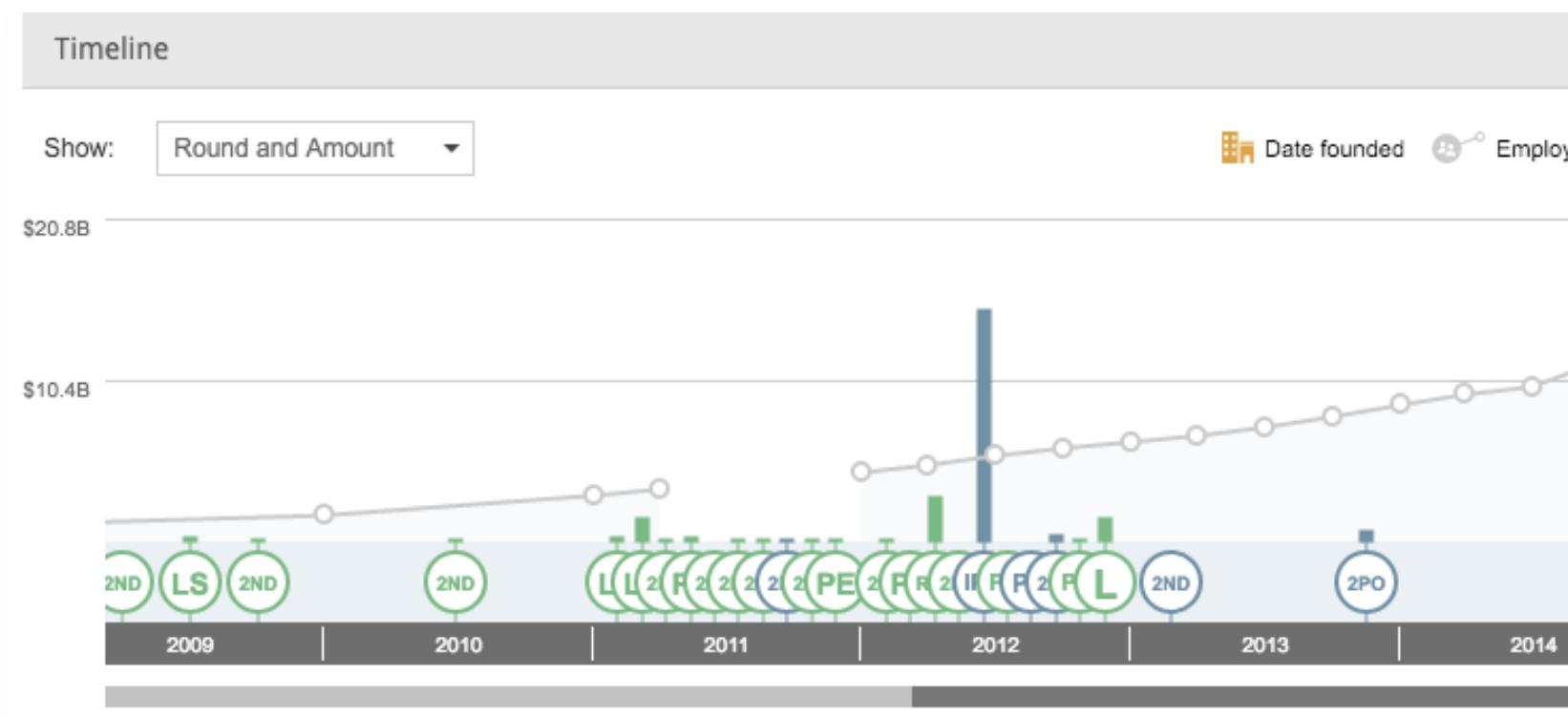
I revamped the timeline over the course of a week to be more glancible and insightful while taking up less vertical space on the profile at the same time.

# The Problem

Employee dates were confusing. It was unclear what was reported or scraped data versus what was an interpolated estimation.

The timeline was difficult to navigate back and forth across time. The bars representing rounds of financing were difficult to compare in relative size, especially in edge cases with very large rounds that skewed the graph's min and max ranges.

Users couldn't see deal codes when they overlapped. This happened any time multiple deals happened in the same quarter. Even when users could see deal codes, users couldn't remember what the deal code abbreviations stood for.

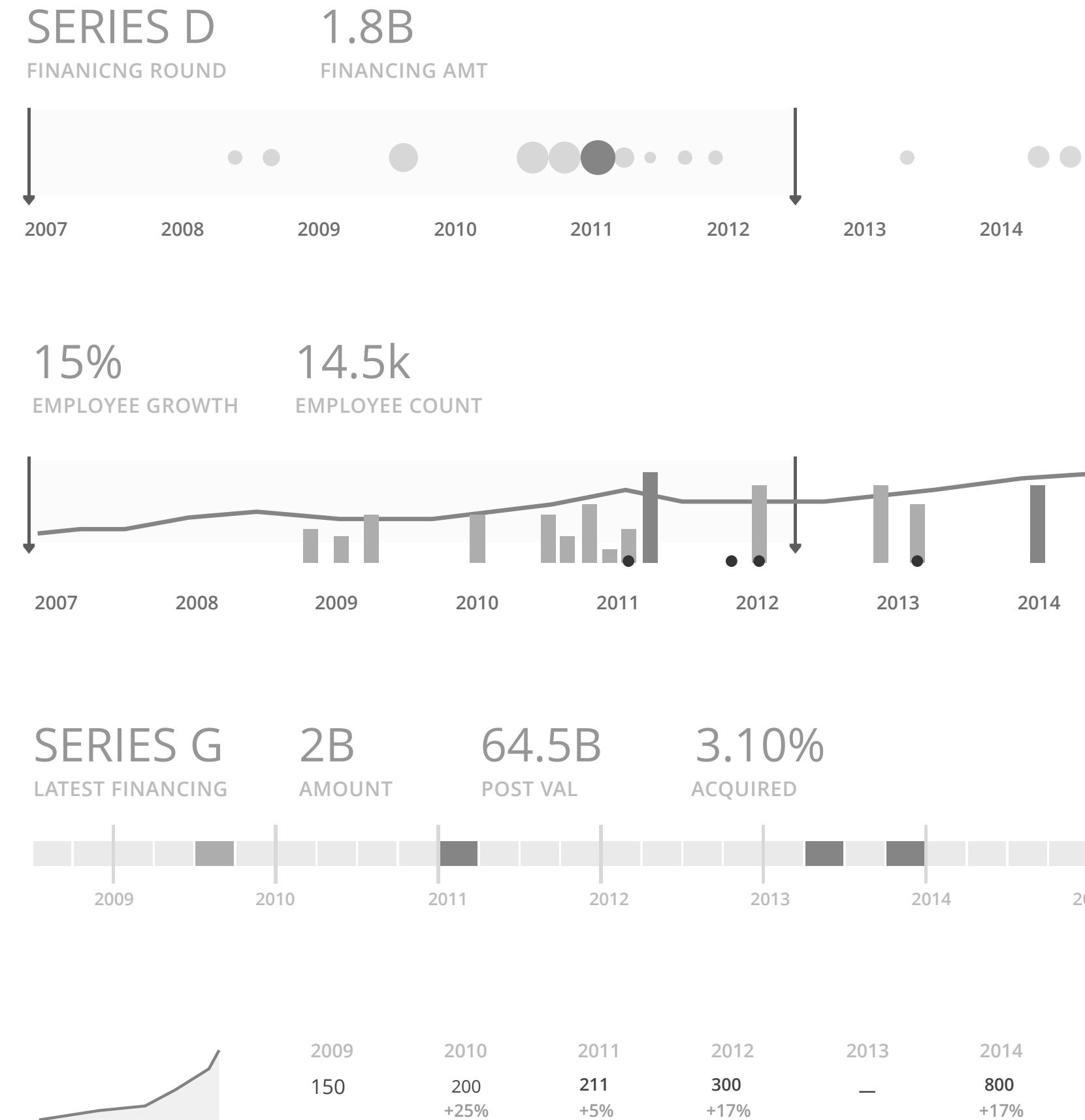


# Ideation

These early wireframes were attempts to tease out the major issues identified in research. Data points most valued by users were collected and stack ranked by priority. We used these data to find callouts to present to the user to make these overwhelming charts more digestible.

I also experimented with new ways to visualize the data. While it was good to explore other options, user interviews revealed that bar and line graphs were the visualizations they could digest most easily.

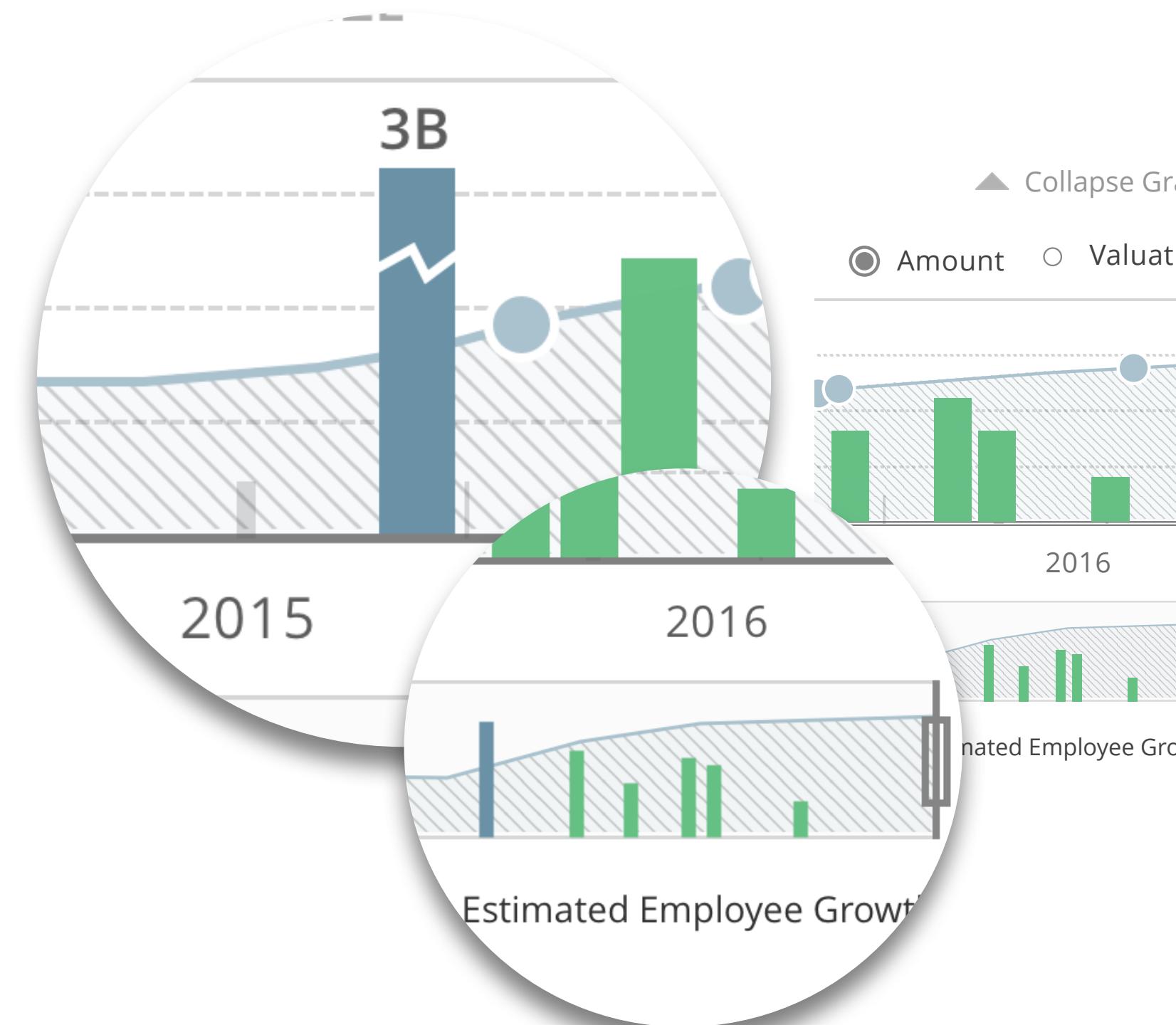
Keeping bars and lines also made the visualizations more useful in the future, should we add functionality to export these graphs to excel for a user to place in a presentation.



# Solutions

To solve the problem of outliers skewing data visualizations, I introduced the concepts of broken bars. 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.

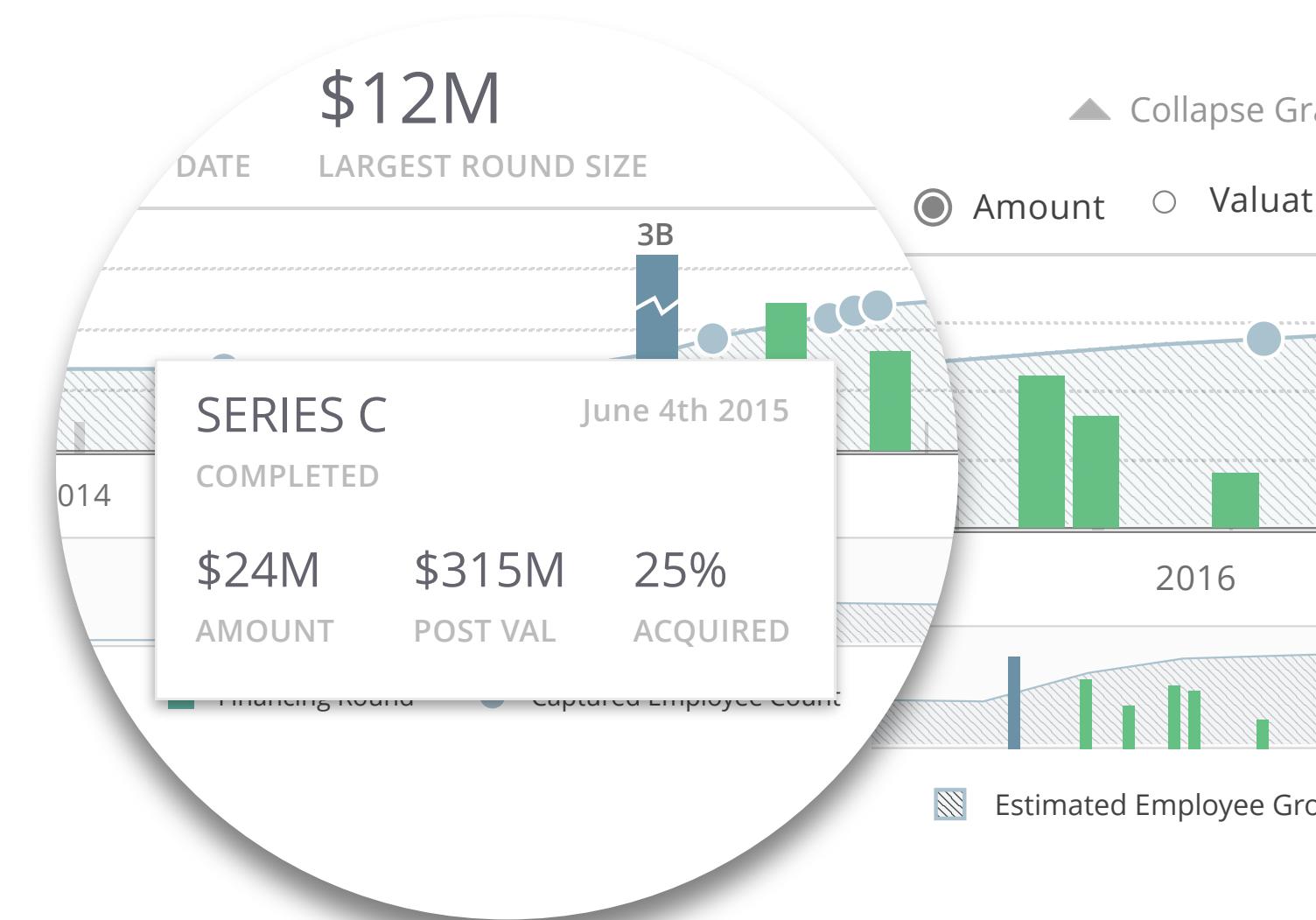
The graph scrubber solves for companies who have a large number of rounds in quick succession. Users can zoom into specific ranges. This also solves for the opposite problem: when a company has only a few data points spread apart over a long time period. In this case, we can default the timeline to only the most recent years, so the user isn't presented with a graph that is mostly white space.



# Taking It Further

I added hover states and the ability scrub between points in the timeline. This allowed a user to select areas of time that were important to them and see growth metrics for that time period. Users wouldn't need to export data to Excel to understand trends.

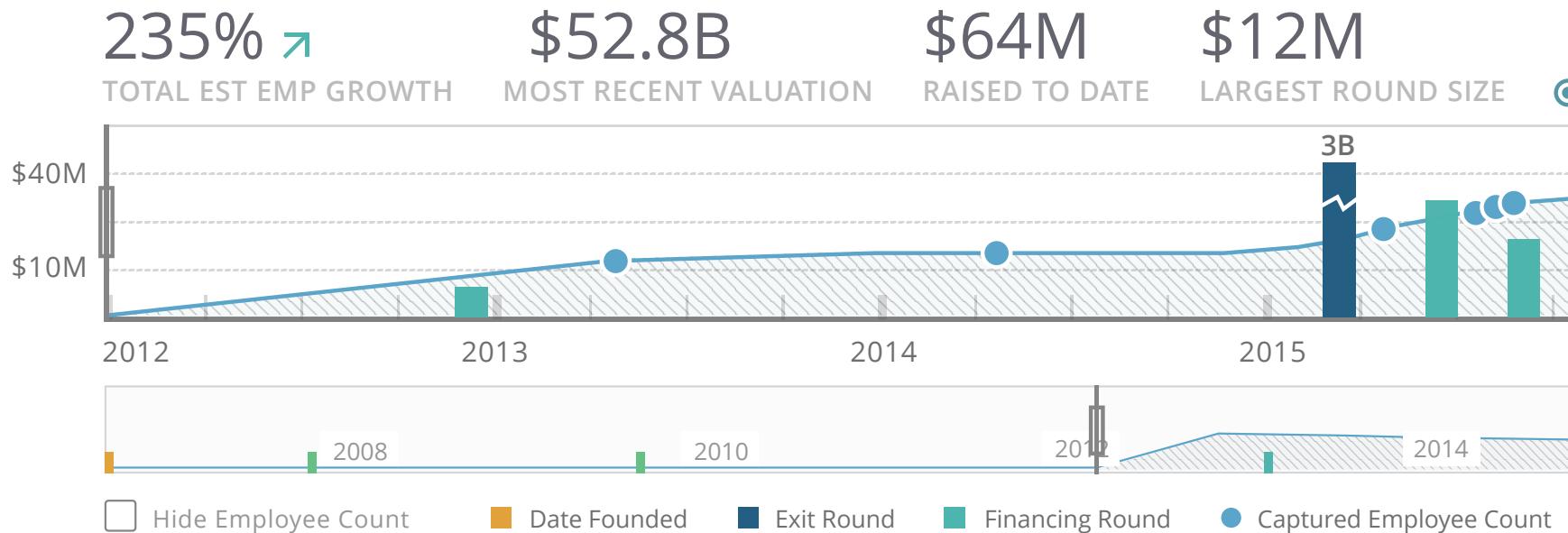
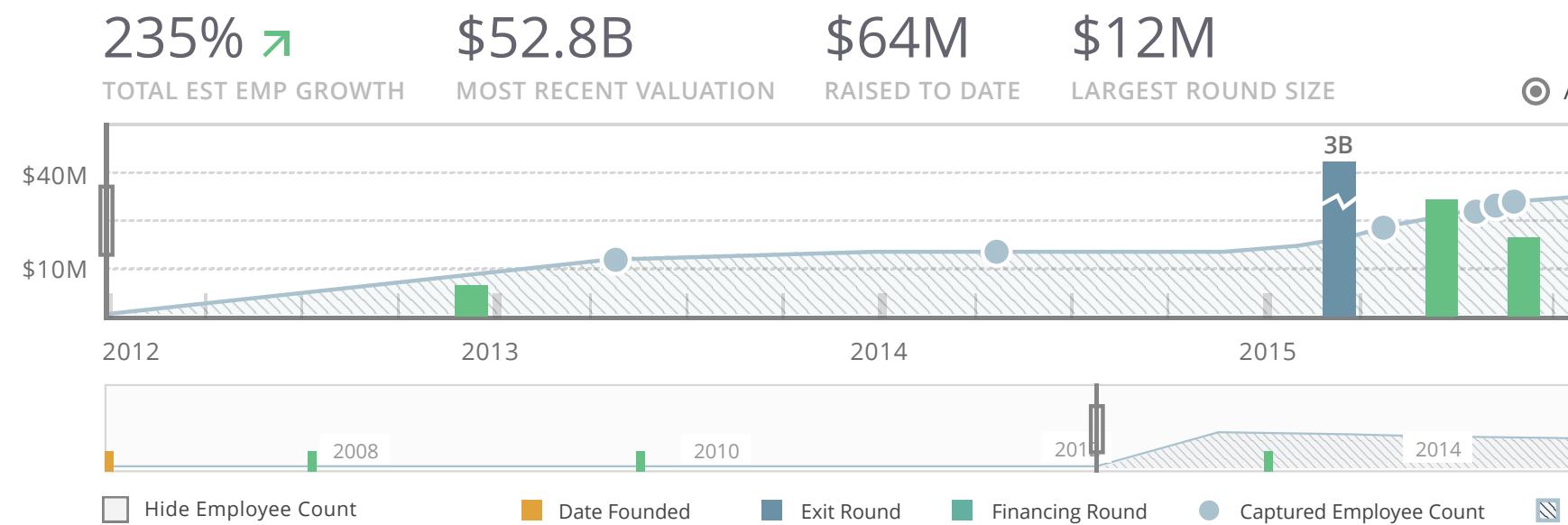
Allowing the graph to collapse made it easy for a user to reclaim vertical space in their browser. Collapsing the graph hides the deal trend and leaves only the scrubber and summary metrics in view. This is ideal for the user who wants to use the timeline to get a general visual understanding of activity, rather than analyze individual deals.



# Future Facing

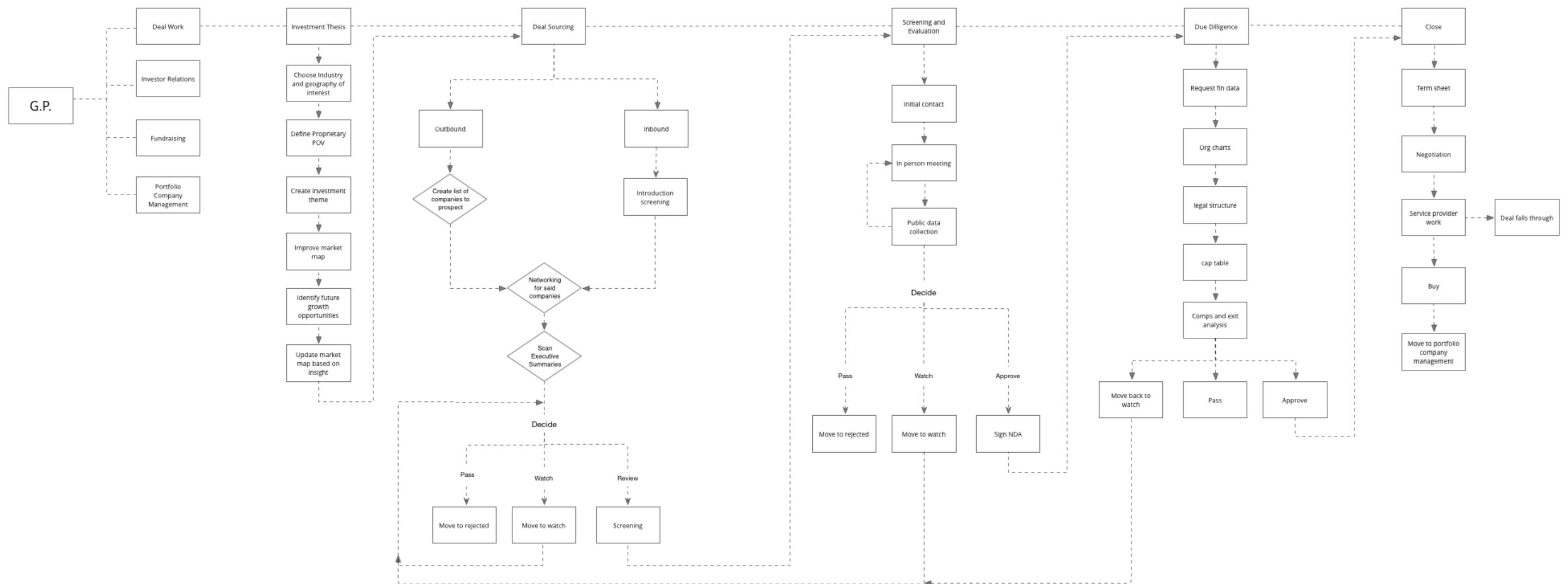
The new timeline would need to be released just prior to a platform redesign. When it came to visual design, I made sure to develop a visual language for the new timeline that could live in both the existing platform and the new release without the need to greatly alter the visual design.

The visual design feels like a natural progression from the existing timeline, yet still feels a part of the new design system, too. Only colors and text styles will need to be updated in the platform redesign.



# Deal Flow Management

PitchBook Data  
UX Design, Interaction Design



# Business Goals

PitchBook Data services a huge amount of clients who are using the platform to help them source new deals and conduct due diligence on potential investments.

My team was tasked with creating a system to better facilitate the process of deal sourcing within the platform.

# Existing Solutions

I reviewed eleven existing solutions to relationship management to understand the patterns being used to solve similar problems. I found that most systems made the user collect assets in a specific way. The ones that didn't required lengthy, complicated set up. Data inside these systems quickly became stale if users didn't constantly update them.

Pitchbook CRM Competitive Analysis		Date:	12/3/2015	Designer:		Sean Blanton	Microsoft Dynamics			Venture360					
CRITERIA		Salesforce IQ (Lightning System)			Salesforce (Classic)			Microsoft Dynamics							
	Score	Pros	Cons	Opportunities	Score	Pros	Cons	Opportunities	Score	Pros	Cons	Opportunities	Score	Pros	Cons
<b>Adding notes on profiles (contacts)</b>															
Format	4	Add as an "event" - comments, meetings, phone calls. Notes are NESTED, commentable, likable, and emails can be replied to inline.	No custom events. Can't assign users to comments, only to phone calls and meetings. Same comments not visible from account profile page	1		Title and body only. In separate page. Can relate to events, but chunks them here. Also have "cases" separately where specific people can be assigned		3	Facebook style wall format				3	Chat based. Ability to chat with a company directly and also ability to lock discussions as hidden from that company	Not sortable, searchable, exportable
Tagging people involved	0		No tagging or ability to connect two people	2		Not tagging strictly in notes		2		No easy way to tag another user in a post or share a post			0		No
Add files	0		No ability to attach files to an account	5	yes			0		No			0		No
Date Stamped	4	Last modified stamped	Filterable, but not searchable	5	yes			5	Yes				5	Yes	
<b>Custom Fields on Entities and People</b>															
Custom Contact fields	0		No	5	Complete control			0	Unknown				0	Unknown	
Add relationships	3		Only by adding an opportunity	5	Complete control			3	Yes				0	Unknown	
Custom sections	0		None	5	Complete control			0	Unknown				0	Unknown	
Activity History	2		Only visible in opportunity	5	All logged			3	Yes				0	Unknown	
Create profiles not tracked by platform	3	Yes		5	Yes			3	Yes				0	Unknown	
<b>File Attachments</b>															
To a person	0		No	5	yes			3	Attach to a note				5	Relates to a deal	
To an account	0		No	5	yes			3	Attach to a note				3	Relates to a deal. Ability for company to upload their own files for due diligence	Not table sortable
To an opportunity (deal)	0		No	5	yes			3	Attach to a note				3	Relates to a deal	Not table sortable
Signature Docs	0		No	0	No			0		No			5	Can be used in the deal close process	Not table sortable
<b>Task Management</b>															
To a person	4	yes	MUST be related to a contact	Recurring tasks	3	yes		0		No			0	Unknown	
To an account	4	yes			3	yes		0		No			0	Unknown	
To an opportunity	4	yes			3	yes		0		No			0	Unknown	
<b>Task Assignment</b>															

## Above

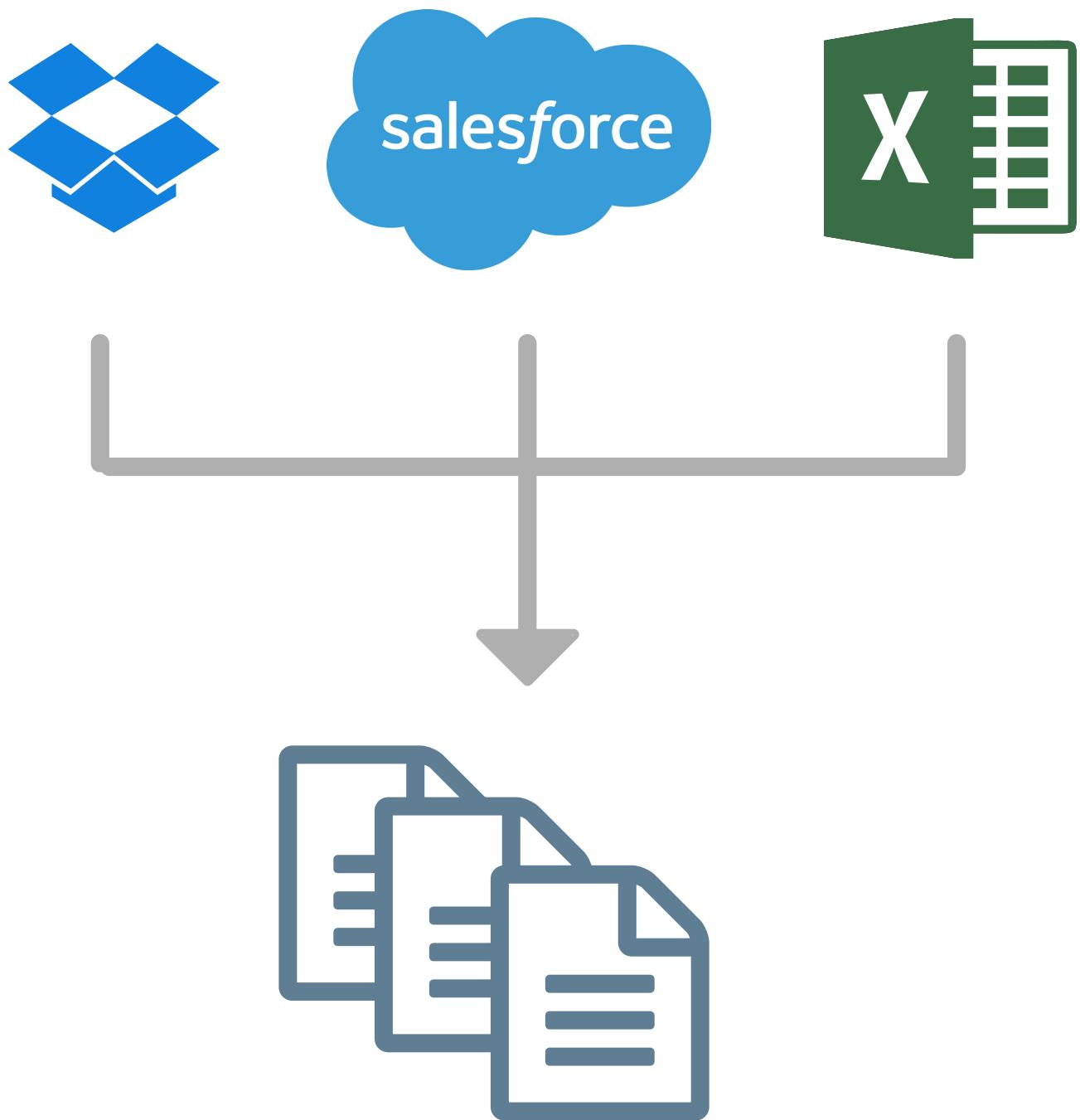
Excel doc comparing functionality between different competitor solutions to relationship management

# Prospecting

After I understood the existing solutions and previous attempts, I started user research. I spoke internally with sales and customer success to become more knowledgeable about user's general workflows before reaching out directly.

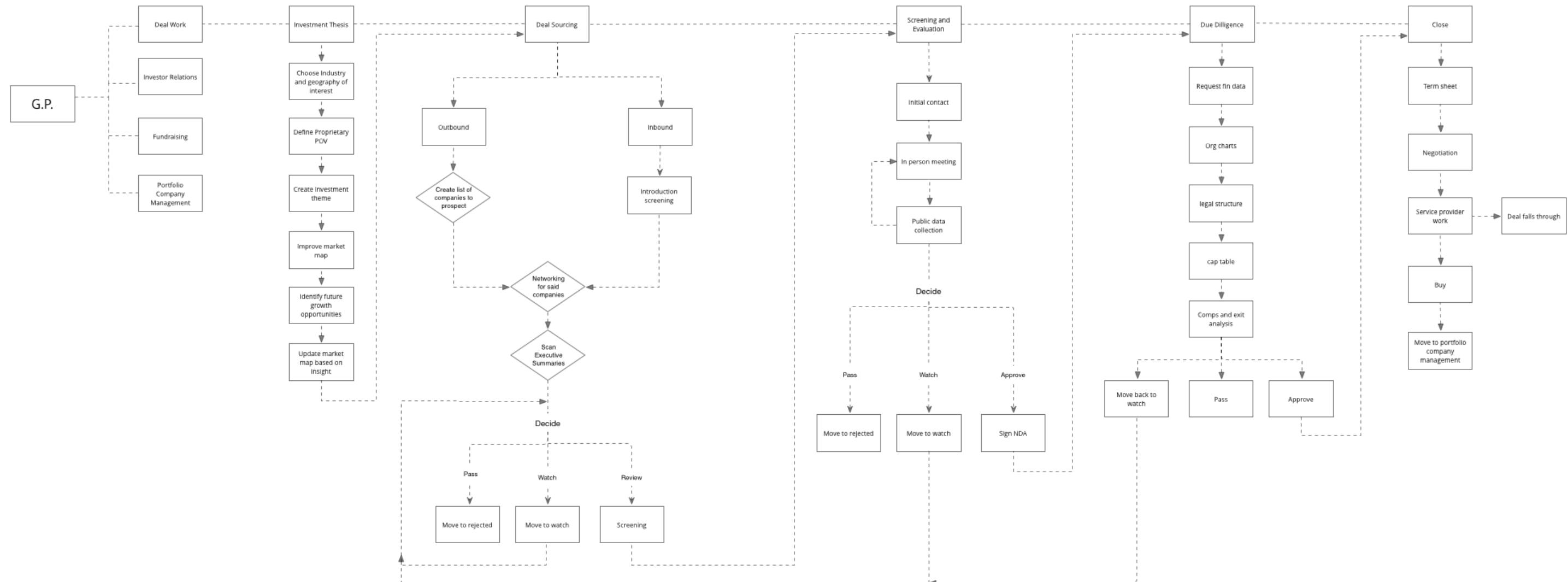
I contacted users in the venture capital, private equity, and investment banking space. I knew that analysts were the heaviest users of the platform, so I concentrated on speaking with them to understand what their current process was for sourcing a new deal.

What I found was that firms have a ton of different ways to organize their data. Some use Box or Dropbox, some use Excel and Outlook, some use Salesforce, some use Post-Its on their monitors even, but all of them feed back to a list they manage.



# Workflows

I created a user flow for the deal flow to understand the parts we could and couldn't solve based on our current product. This helped inform the strategy I would present to stakeholders. I needed to focus on a solution that would have the greatest impact over time and also scale into solving further needs of our users in later phases.



# Hard Problems, Simple Solutions

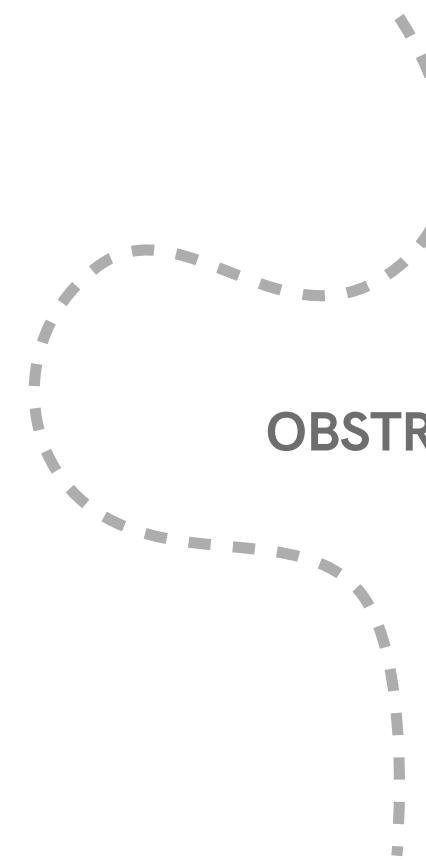
The big problem for users was that they had so many systems for capturing data that they spent as much time managing the systems as they did managing the data. Instead of providing yet another thing to manage, why not remove the user's obstructions?

Our system needed to be **either** a central phone book for users **or** a companion to other systems.

We need to help our users **capture** and **fascilitate** their findings.

We needed to marry the **content** to the **workflow**

**PROBLEM**



**OBSTRUCTIONS**

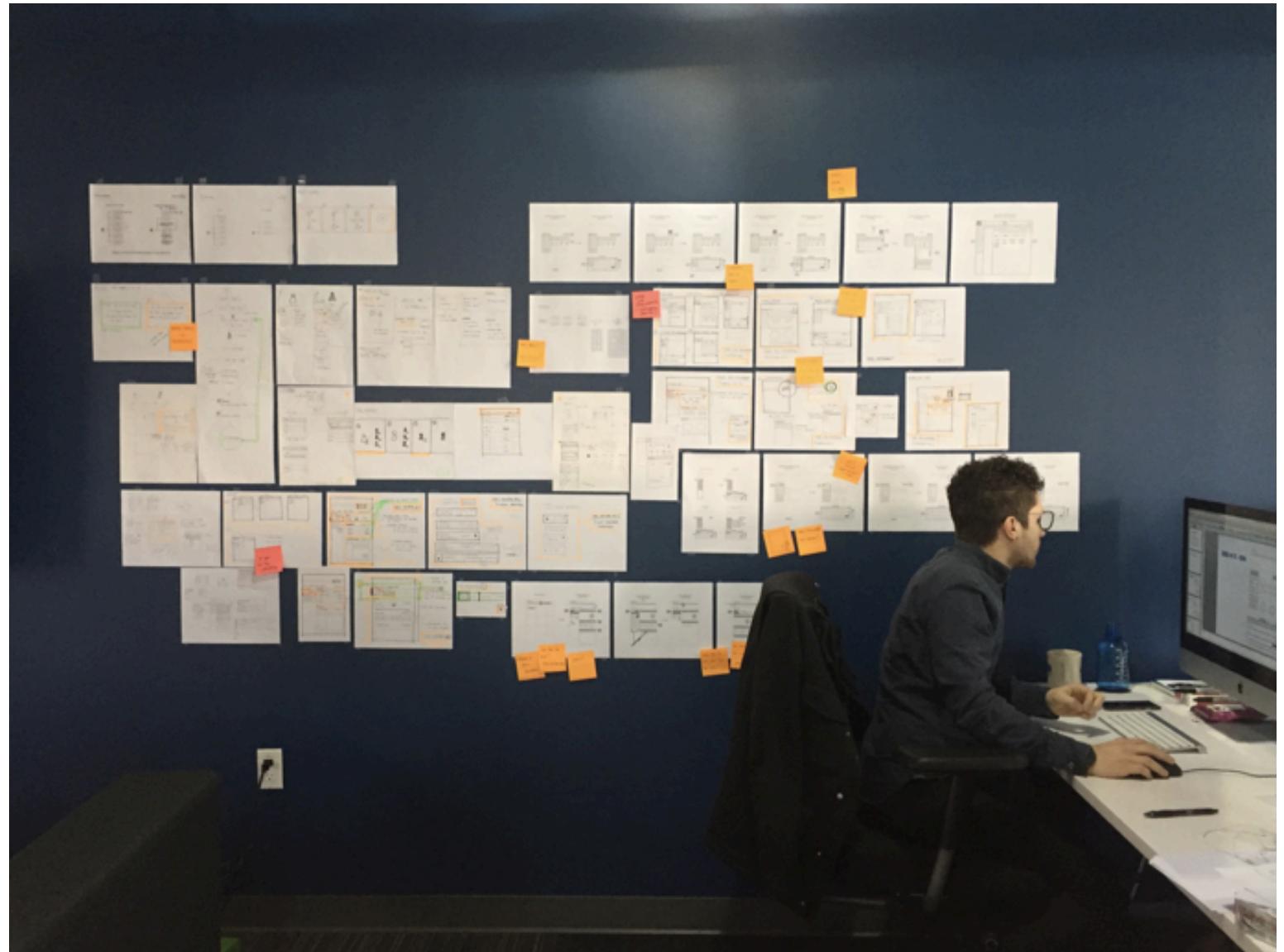
**END RESULT**

# Ideation

I started thinking about how we could marry content to workflow by a few days of sketching together and separate.

I came up with six different solutions to start to socialize with stakeholders. I explored options that were more integrated with the current system, but the solution that scaled the best sat on top of the existing system as a companion tool the user could call and dismiss as necessary.

Solutions centered around the ability for a user to add and manage lists and share them with others above and below them. Users could assign work to other users and specify levels of transparency at any level.



Above

We kept all of our best possible solutions on the wall for quick reference during these early stages.

# Ideation

I opted for a drawer solution that allowed the user to continually view information about an entity and simultaneously add notes and attachments related to due diligence about an entity without having to navigate away or have multiple tabs open at the same time.



Above

An early stage wireframe of our "drawer" solutions

# Converging Ideas

This solution started to merge together with other projects. We realized that the need for list management needed to happen at the platform-level to be truly useful for our users.

We started considering the ability for users to create lists in a directory structure, with lists that could nest inside other lists. I wanted to let users organize information in ways that were personally meaningful to them, rather than forcing them to organize content in ways that might differ from existing workflows.

At this point, my project team was collaborating heavily with another team focused on rebuilding dashboards inside the platform to ensure that lists could mesh seamlessly into dashboards.

The screenshot shows the PitchBook software interface. The left sidebar has a dark background with white text and icons. It features a navigation menu with 'Dashboard' (grid icon), 'Projects' (list icon), 'Analytics' (chart icon), 'Library' (book icon), 'News' (newspaper icon), and 'Recently Viewed' (eye icon). Under 'Projects', there is a section for '[Firm Name]' which contains '2016 - Investor W...' (with 'SaaS (31)' and 'Clean Tech (47)' sub-items) and 'By Location' (with 'NYC (55)' and 'San Fran (6)' sub-items). A '+ Create New' button is also present. The right side of the screen has a light gray background with a search bar at the top. Below the search bar are four tabs: 'COMPANIES & DEALS', 'INVESTORS & BUYERS', 'FUNDS & IRR', and 'LIMITED PARTNERS'. The main content area displays a breadcrumb path 'Projects » [Firm Name] » 2016 - Investor Watch' followed by the title '2016 - Investor Watch'. The page is divided into sections: 'Details' (with 'Assigned To' and a list of four user icons), 'Description' (with a box containing text about business cards), and 'Priority'.

## Above

Directory structured list management for users as "Projects" with a contextual dashboard for each project

# Changing Tides

Sadly, shortly after this stage in the process, during the time when I was picking apart the details of how users could add and share notes, tasks, and attachments with each other about entities and lists, the project was placed on an indefinite hold.

A shifting set of priorities in the product roadmap made this project no longer the focus of the company's mission.

It's always difficult to see a project come to a halt uncompleted, but as I've moved onto new projects, I've kept this project as an active part of discussions because I know it will be back in the future. Our team has built a strategy around new product initiatives that include projects and list management as key components in later phases.

Tasks				
<a href="#">Add Task</a>				
	Name	Priority	Due Date	Description
▼ Today				
	Follow up with John Gabbert	Urgent	Jan 28	Enter a description about the task here
	Follow up with Nate Vail	Normal	Jan 28	Enter a description about the task here
	Follow up with That guy with th...	Normal	Jan 28	Enter a description about the task here
▼ Tomorrow				
	Follow up with John Gabbert	Urgent	Jan 29	Enter a description about the task here
	Follow up with Nate Vail	Normal	Jan 29	Enter a description about the task here
	Follow up with That guy with th...	Normal	Jan 29	Enter a description about the task here
▶ Later				

Above

An early wireframe for a tasks section of a project dashboard

# Platfrom Redesign

PitchBook Data  
UX Design, Visual Design

The screenshot displays the PitchBook Data platform's user interface for the company profile of Facebook (NYS: FB). The top navigation bar includes a search bar, advanced search options, and a user profile for Chester Wilkerson. The main content area shows the company name "Facebook (NYS: FB)" with a "Following" button. Below this, there are tabs for Profile, Public Comps, Private Comps, Financials, Signals, and LinkedIn. A warning message is present: "Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam semper nisi at ultrices semper. Sed efficitur facilisis dolor eu egestas. Aliquam non lacus maximus, pulvinar leo in, pellentesque magna. Integer hendrerit nunc augue, nec ultricies urna dignissim". The left sidebar contains links for Dashboards, History, Following, Saved Searches, Saved Lists, Reports, News, and Plugins & Apps. The main content area features a "Performance Summary" section with key figures: Price 108.99 (up 1.64 or 1.48%), as of 11-April-2016 (Monday Closing). It also includes financial metrics like 52 WK RANGE (\$77.46 - \$116.14), MARKET CAP (TSO) (\$310.22B), EPS (\$1.31), PREV. CLOSE (\$110.63), and XPRICE % CHANGE 1WK (-3.16%). Below this is a "General Information" section with a count of 313233. The right side of the screen features a large chart showing Stock Price History from April 2013 to April 2016.

Search for a company  Advanced Search

Help Chester Wilkerson

COMPANIES & DEALS

Facebook (NYS: FB) Public Company Following

Profile Public Comps Private Comps Financials Signals LinkedIn

History Following

Saved Searches

Saved Lists

Reports

News

Plugins & Apps

Contents

Performance Summary

**108.99 ↗ 1.64 (1.48%)**

As of 11-April-2016 (Monday Closing)

52 WK RANGE	MARKET CAP (TSO)	EPS	PREV. CLOSE	XPRICE % CHANGE 1WK
\$77.46 - \$116.14	\$310.22B	\$1.31	\$110.63	-3.16%

AVERAGE VOLUME	SHARES	P/E	BETA	PRICE % CHANGE 4WKS
35.6M	2.85B	84.75	0.79	-0.82%

April 2013 April 2014 April 2015 April 2016

General Information

313233

Company Status as of 16-Nov-2016

Temasek Holdings, Andreessen Horowitz and Mail.Ru sold their stake of the company's (NASDAQ: FB) common stock raising \$634.28 million on November 16, 2013. Aeon funds invested in the

Description

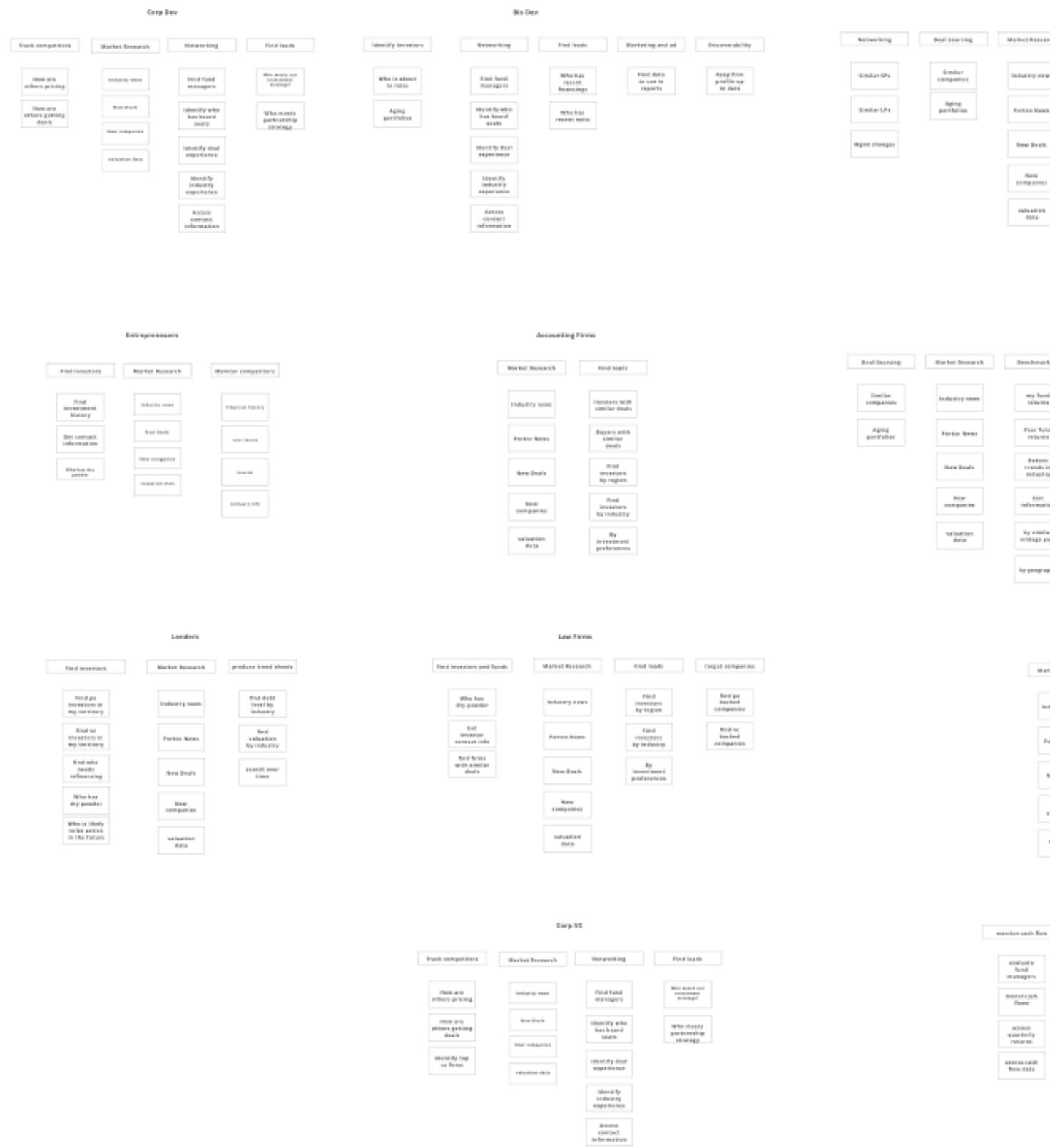
Operator of a social networking platform. The company's online platform enables users to create personal profiles, share multimedia content including photos, videos and links.

# User Needs

Shortly after starting at PitchBook Data I was simultaneously placed on two major projects. The first was centered around bringing relationship management to the PitchBook platform. The second was to rethink the dashboard and landing page experience inside of the platform.

I was placed on both projects at the same time to bridge the gap in the projects to create a more cohesive design whereby each design's considerations informed the other to create a more seamless workflow in the end product.

We began user research with interview calls to existing customers to get a sense of their day to day routine and needs. I combined these with interviews conducted with sales representatives and account managers to understand the common problems both prospective and current clients faced, and how they looked to Pitchbook Data to solve those problems.



Above

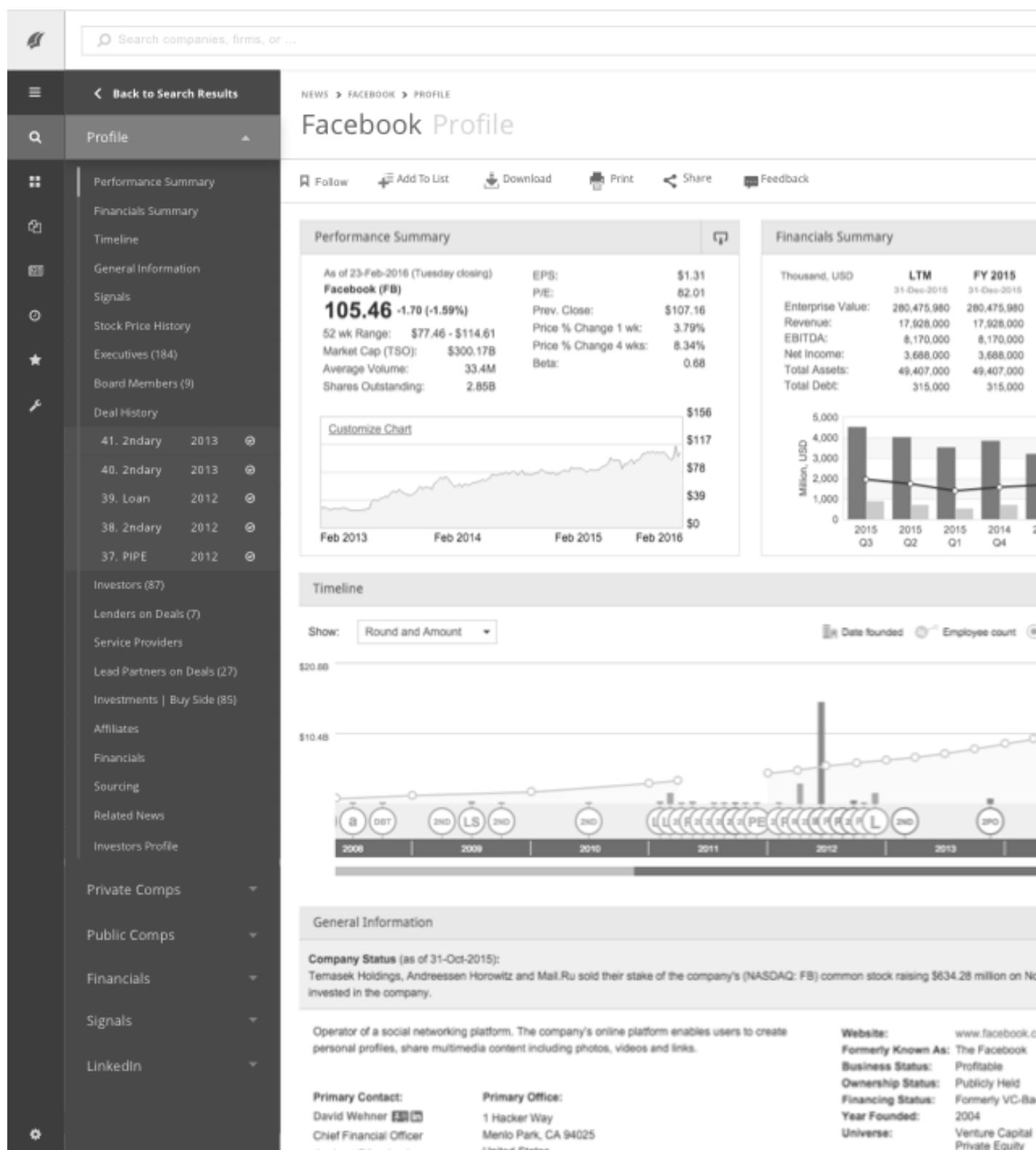
Affinity diagrams of user's needs grouped by user type

# Product Meets Purpose

Our team considered not just the user experience aspects of the problem we were tasked to solve, but also the product a whole.

We thought about what Pitchbook Data started out as (a data provider) and what it aimed to be in the future (a collaborative business tool with an integrated data set) and examined those larger product goals against what our current constraints were and what types of solutions were currently being asked of us.

After weeks of unpacking what it was our users truly needed and matching this up to the future business goals of the company, we proposed a solution that sought to align the platform toward its future self. We proposed a revised information architecture that set the product up to scale nicely into projects already slated for the second half of the year and a revised interface that was fluid and responsive so we could expose more data at larger screen sizes.



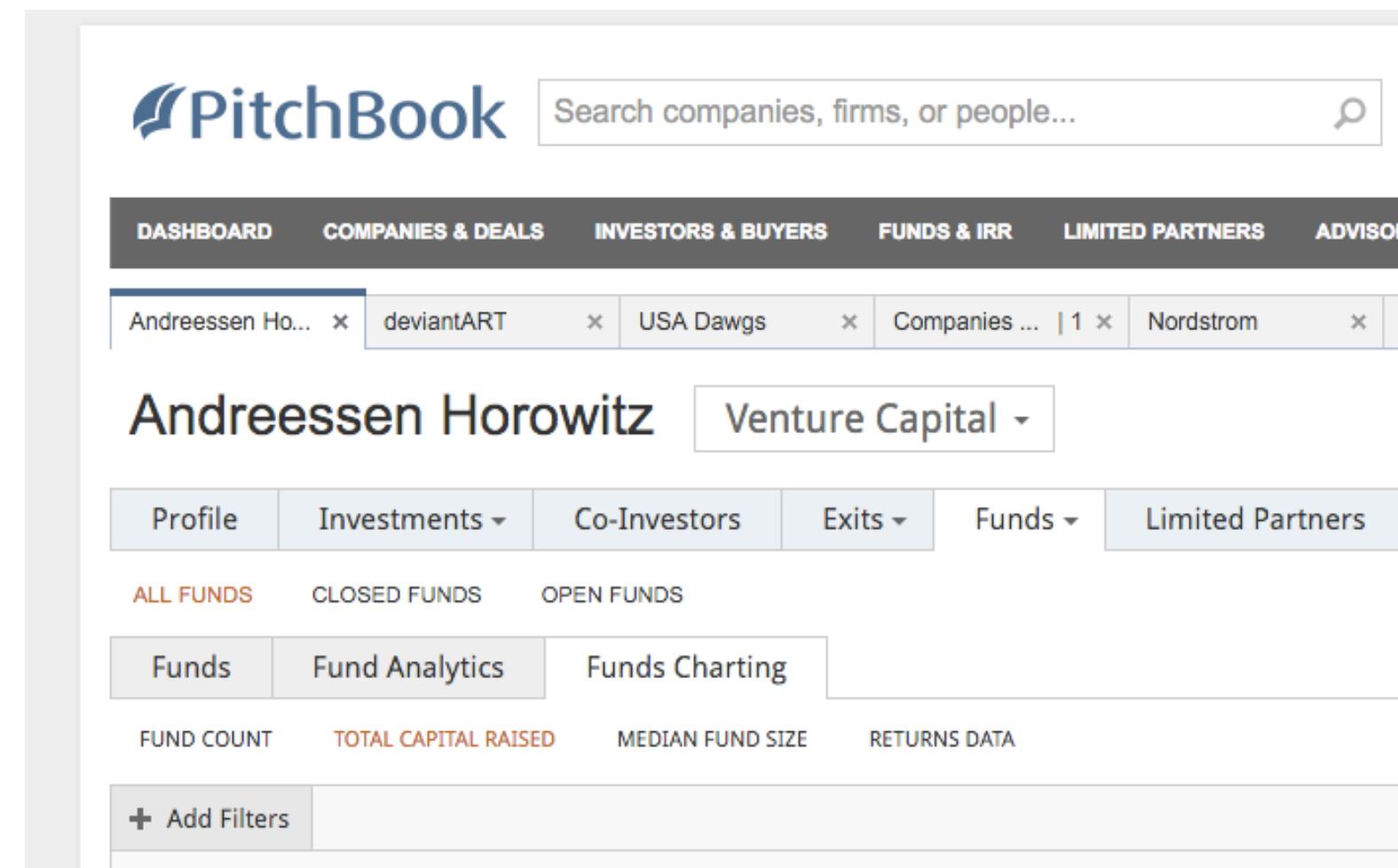
Above

A very early wireframe used to propose a new architecture to various business stakeholders.

# Simplifying

We took this redesign as an opportunity to slim down the amount of navigation complexity in the platform. The existing platform consisted of a series of stacked tabs that pushed content far down the page and made navigation confusing.

By introducing global left navigation bar, we were able to flatten the architecture from what was 7 layers of navigation down to 3 (in the worst case).



## Above

One of the most extreme cases of the existing system's navigation problems.

# Consistency

This redesign cleared up large amounts of design debt accrued over the years, resulting in a new site that was easier to navigate, far more visually consistent, and took advantage of the latest web technologies to help our users get the data they need faster.


≡ Hide Sidebar

🔍 Advanced Search

dashboards Dashboards

## COMPANIES &amp; DEALS

## Facebook (NYS: FB)

Public Company ▾

▶ Following

Profile Public Comps Private Comps Financials Signals LinkedIn


⌚ History

⚠ Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam semper nisi at ultrices semper. Sed efficitur facilisis dolor eu egestas. Aliquam non lacus maximus, pulvinar leo in, pellentesque magna. Integer hendrerit nunc augue, nec ultricies urna dignissim.

👤 Following

≡ Saved Searches

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## Performance Summary

108.99 ↗

1.64 (1.48%)

As of 11-April-2016

(Monday Closing)

💾 Saved Lists

📄 Reports

📰 News

🔧 Plugins & Apps

## Performance Summary

## Financials Summary

## Timeline

## General Information

## Signals

## Stock Price History

## Executives (184)

## Board Members (9)

## Deal History (42)

41. 2ndary - Open... 2013

40. 2ndary - Privat... 2013

39. Loan 2012

38. 2ndary - Open... 2012

37. PIPE 2012

## Investors (87)

## Lenders on Deals (7)

## Service Providers

## Lead Partners on Deals (27)

## Investments | Buy Side (85)

## Affiliates

## Financials

## Sourcing

## Related News

52 WK RANGE

\$77.46 - \$116.14

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\$310.22B

EPS

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**PitchBook**

Search for a company Advanced Search Help Chester Wilkerson

COMPANIES & DEALS

# Facebook (NYS: FB)

Public Company Following

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History Following Saved Searches Saved Lists Reports News Plugins & Apps

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Contact Information

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dwehner@facebook.com		Menlo Park, CA	Seattle, WA 98101
<a href="#">VCARD</a>	<a href="#">LINKEDIN</a>	94025	United States
		United States	

\$1.9B  
\$1.4B  
\$1.0B

# On Bounding Design Systems

PitchBook Data

Visual Design

After years of developing without a style guide, the platform had accrued considerable technical and design debt that needed to be addressed.

Colors, typography, button styles, and page layouts were inconsistent from page-to-page, and designers were accustomed to introducing entirely new design patterns regularly.

In early 2016 I began working developing a style guide and design system for PitchBook that would redefine the way the product team collaborated and maintained consistency across designs.

The lead UX designer and I started auditing the current system to understand all the existing dependencies that needed to be accounted for. This audit eventually led to an entire platform overhaul and a new style guide.

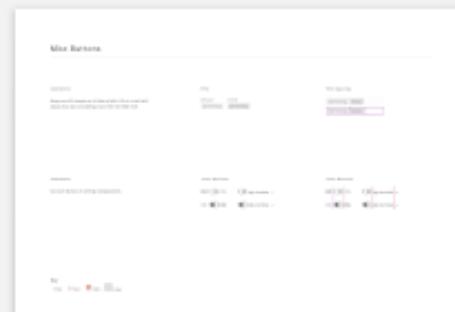
Primary Buttons



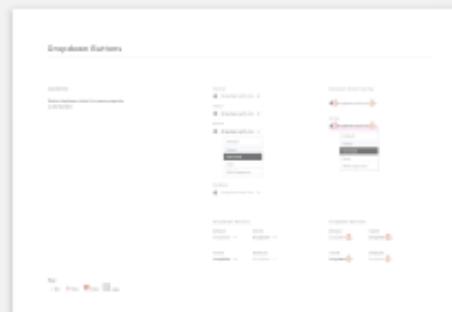
Text Fields



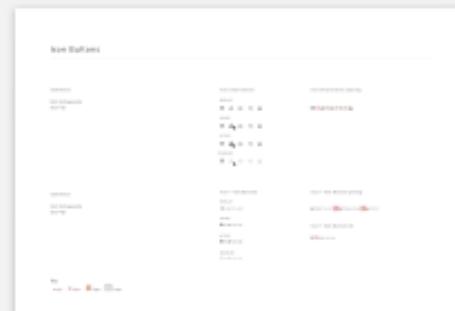
Buttons Cont



Button Dropdowns



Icon Buttons



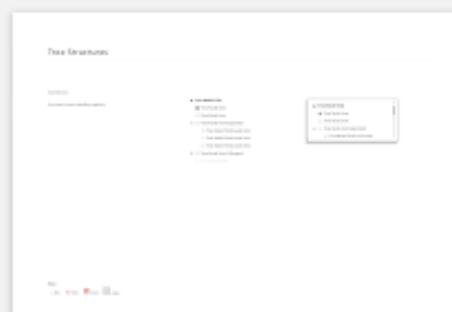
Form Dropdowns



08 Radio button sand checkboxes



09 Tree Structures



# Start Small

## Atomic Design

I wanted the development of this style guide to be built on atomic design principles.

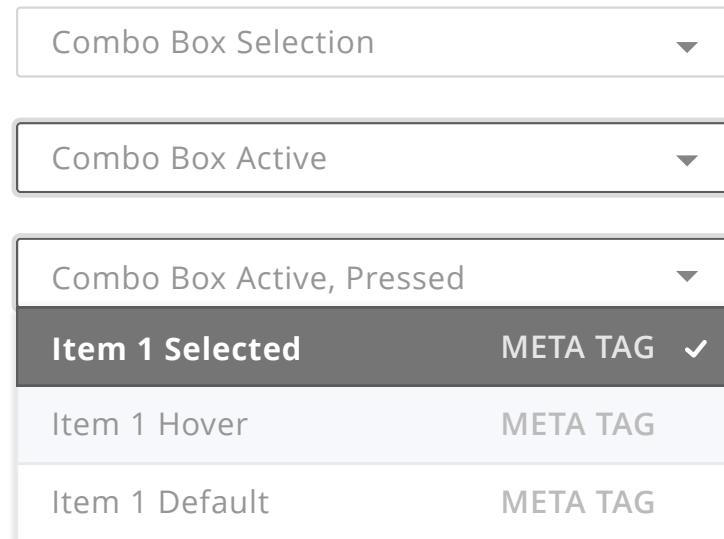
It was influenced by BassCSS and other f(css) fundamentals, and was aimed at creating a design system that provided our growing team of designers with a great toolkit to design quickly without losing creative freedom or consistency.

I started in grayscale so I could get a usable styleguide for wireframing out to the team quickly. I designed individual elements and their states first. I established global rules for typography, forms, and interactions that laid the groundwork for all content layout.

## Right

Examples from the grayscale version of the style guide

### Form Label



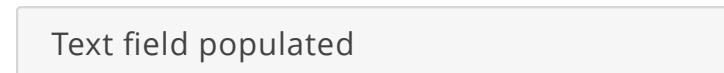
### Form Label



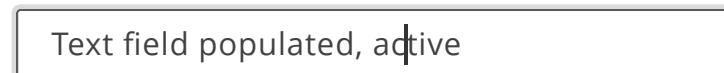
### Form Label



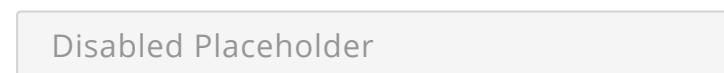
### Form Label



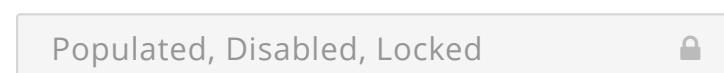
### Form Label



### Form Label



### Form Label



### Checkboxes

- Unchecked
- Unchecked, Focused
- Unchecked, Pressed
- Unchecked, Focused, Pressed

- Checked
- Checked, Focused
- Checked, Pressed
- Checked, Pressed, Focused

- Minimize

- More

- Nested

- Disabled

### Radio

- Default
- Focused
- Selected
- Selected, Focused
- Disabled

# Grid Systems

I defined a set of baseline grid based on an 8pt system with a fluid 12 column layout for content pages.

Because the page content is both fluid and responsive, the column sizes are arbitrary. To ensure layouts were consistent in mockups, I created multiple versions of the grid at several breakpoints in the design to account for this. These served as template files for designers to use as starters when creating new designs.

I created four grids at two different breakpoints. This helped us communicate how content would move within the site without needed to build prototypes for every piece of content.

Details		ALSO KNOWN AS
WEBSITE	<a href="http://www.facebook.com">www.facebook.com</a>	The Facebook
OWNERSHIP STATUS	Publically Held	BUSINESS STATUS
UNIVERSE	Venture Capital	Profitable
Private Equity	Publicly Listed	PRIMARY INDUSTRY
Investors (95)		Social/Platform
NAME	INVESTOR TYPE	

# Thank You

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