

# Sean Blanton

Designer

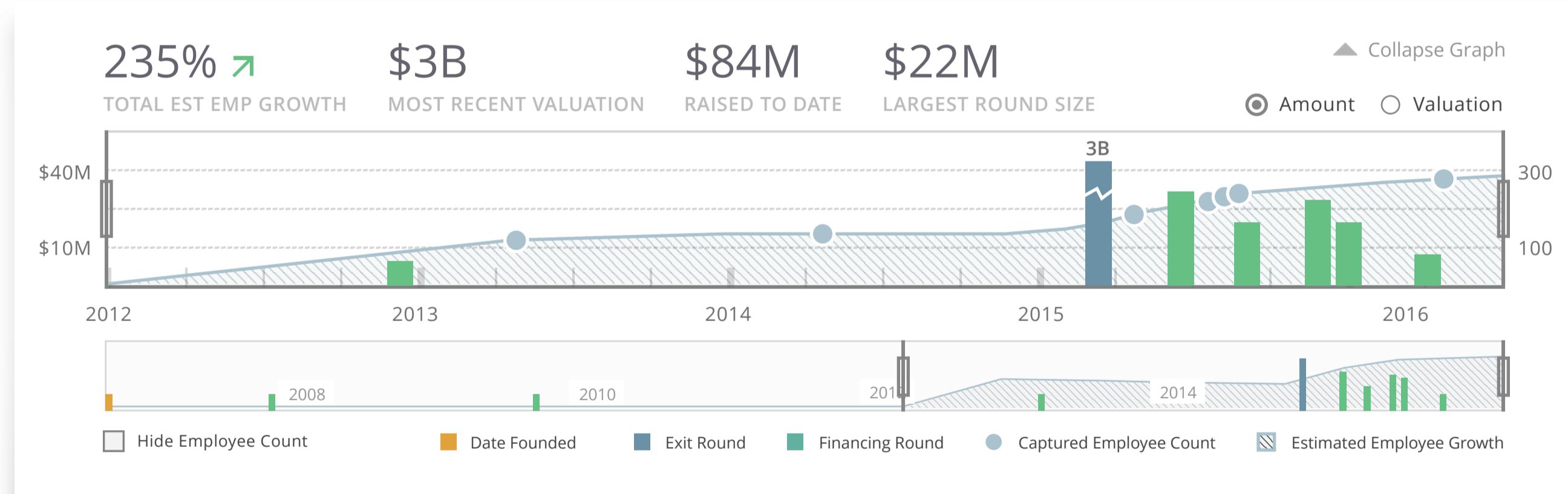
614-499-4950

[sean-blanton.com](http://sean-blanton.com)

# PitchBook Data

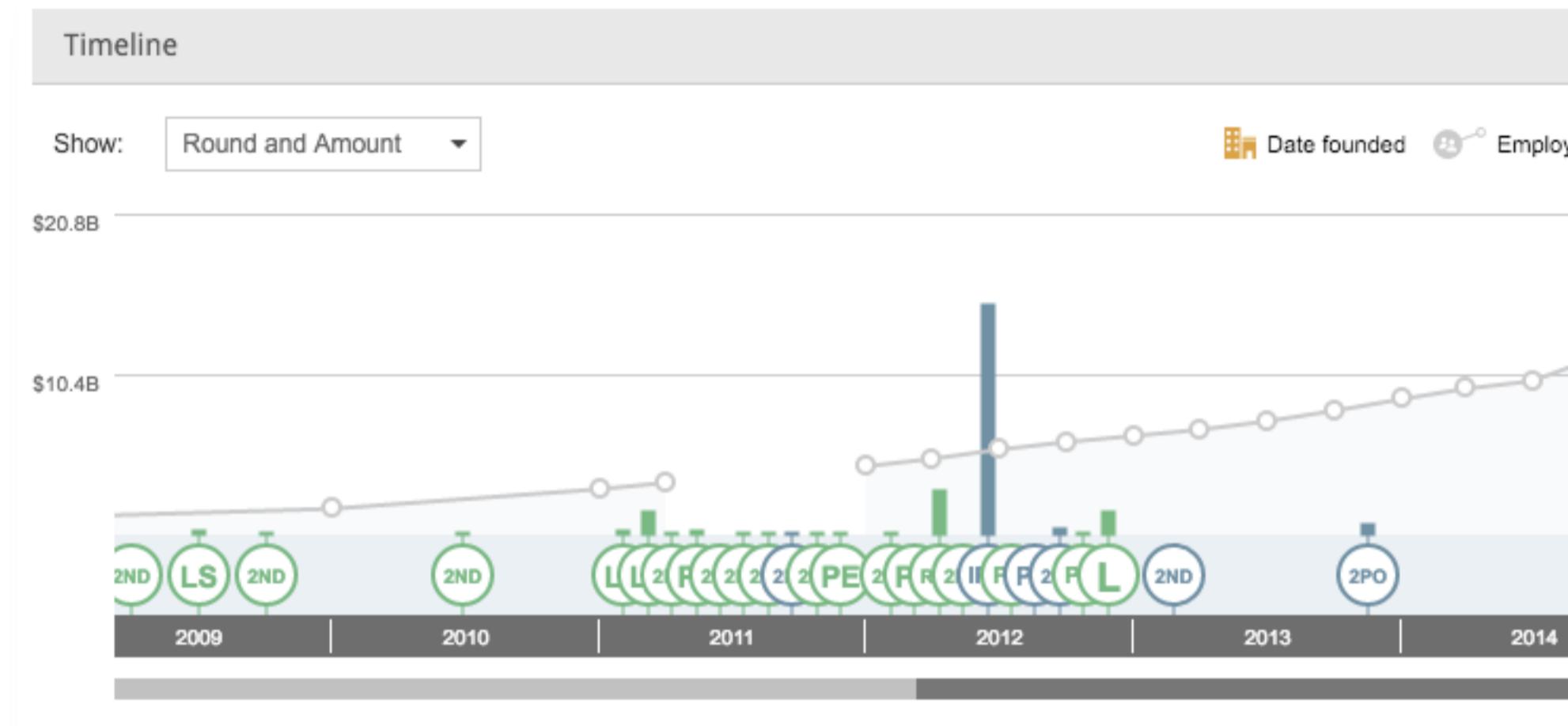
A project to revamp a timeline on company profiles to provide more actionable, glancible summarizations of deal history

Deal History Timeline



# The Problem

The existing timeline was wrought with usability issues that needed to be addressed sooner rather than later. Initial conversations with users 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.



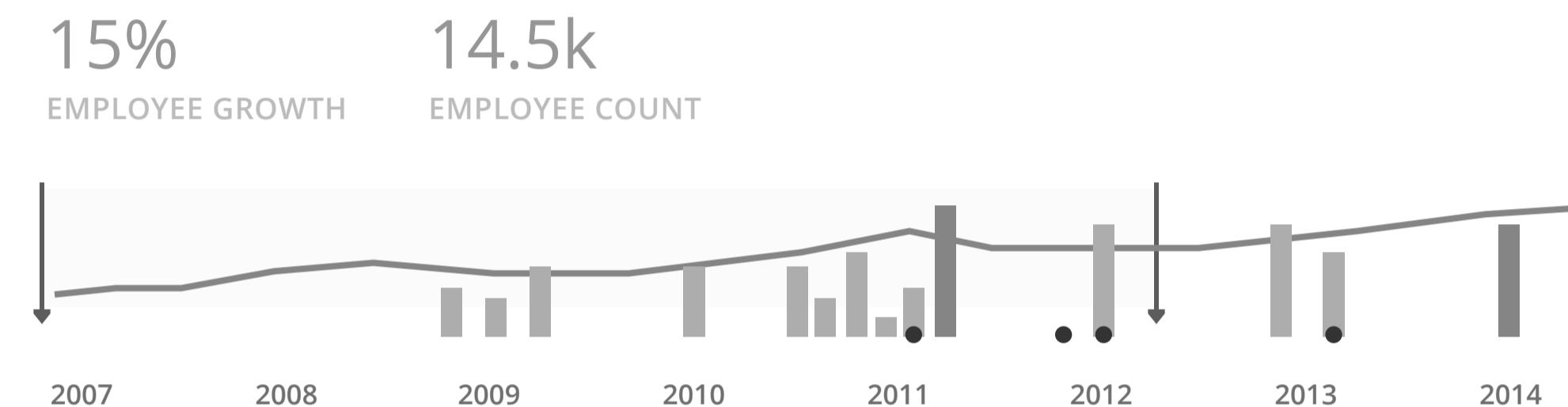
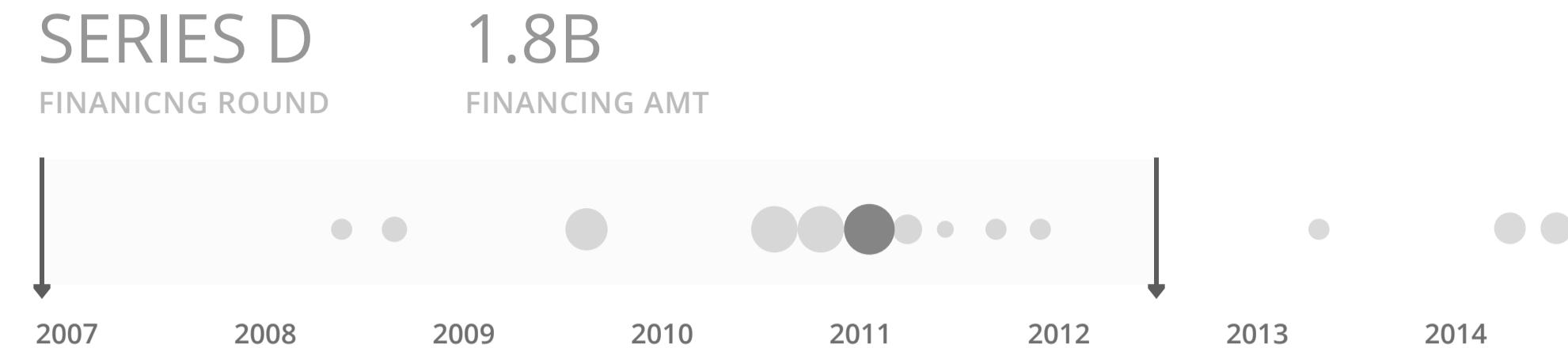
Employee dates were confusing. It was unclear what was reported or scraped data versus what was an interpolated estimation

The timeline was difficult to navigate and the bars were hard to read, especially in edge cases with very large rounds

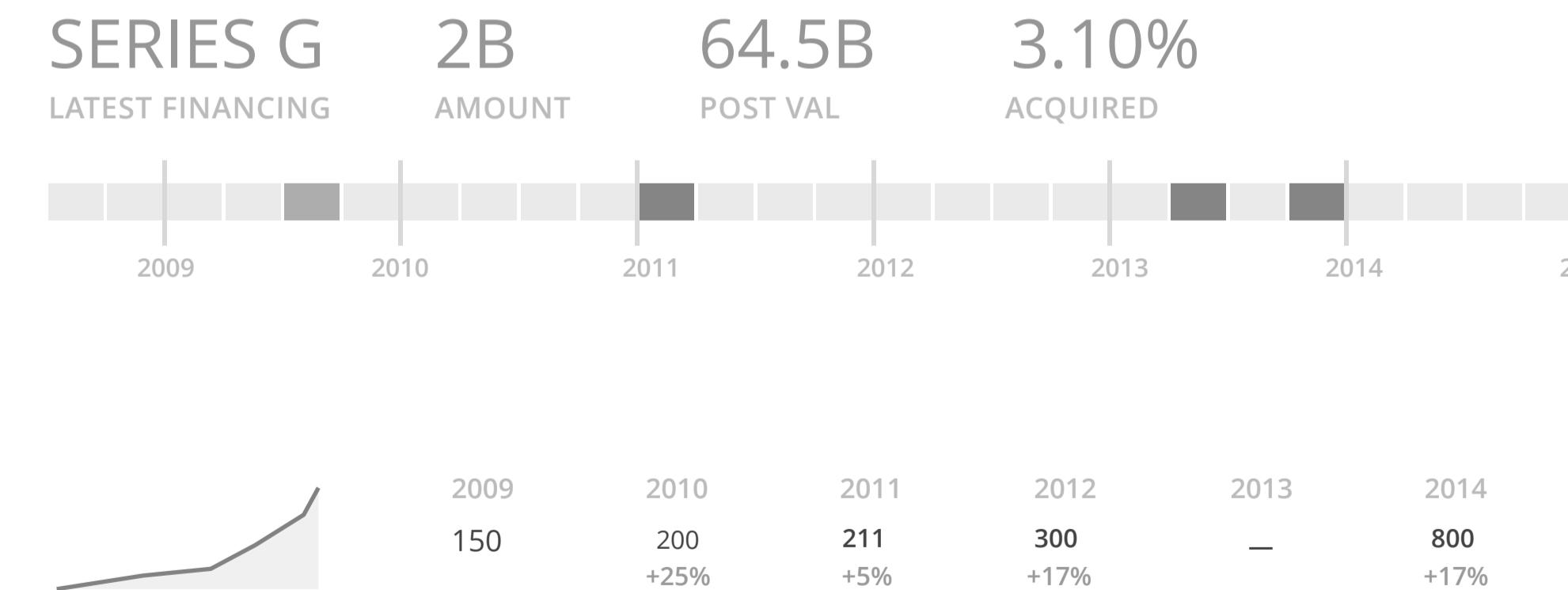
Users couldn't see deal codes when they overlapped. Even when they could see them, they couldn't remember what the abbreviations stood for

# Ideation

These early wireframes were attempts to tease out the major issues. 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.



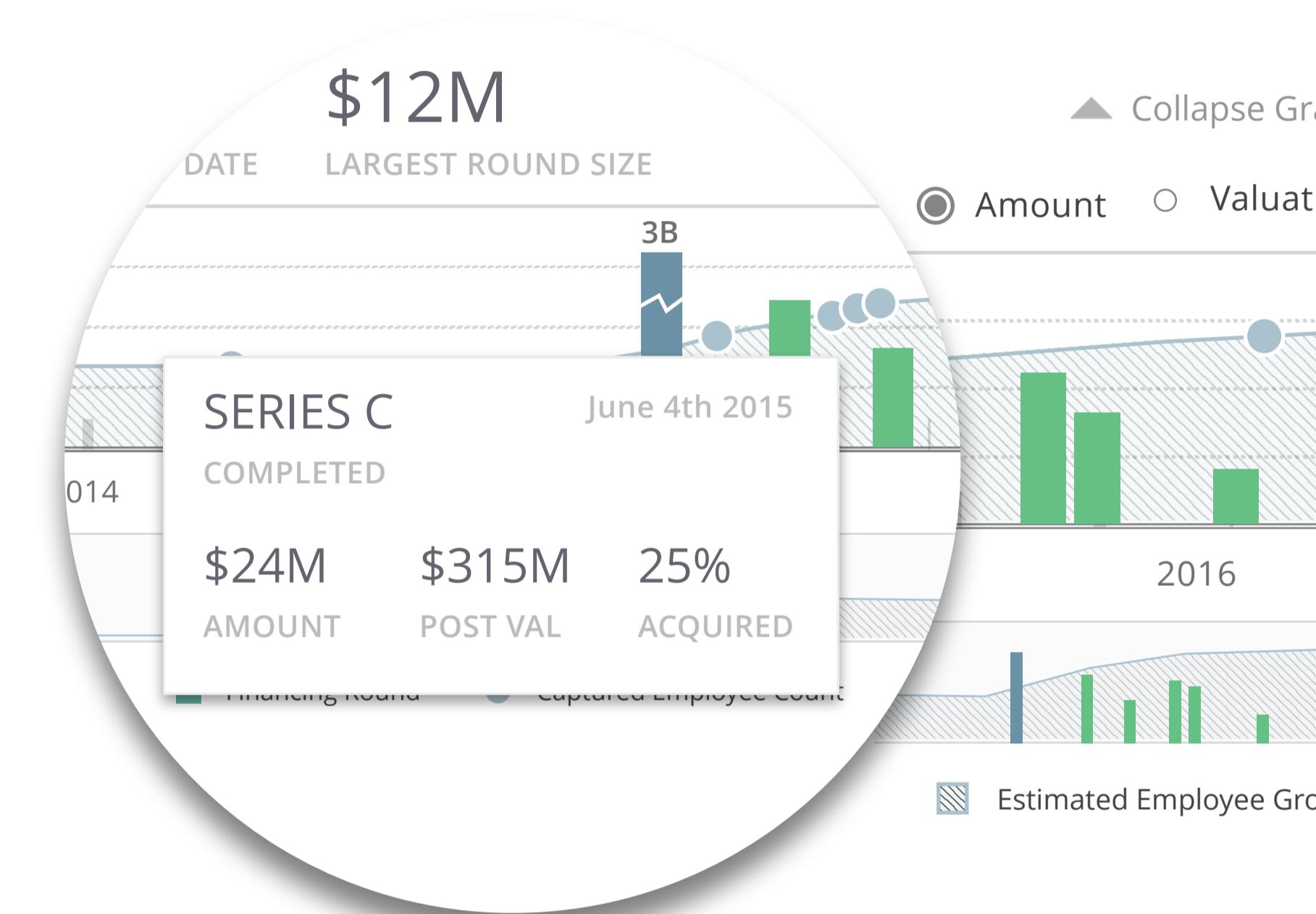
We experimented with different ways to visualize data. We interviewed clients and found that they preferred line and bar charts over other visualizations because it fit easily into their existing workflows.



# Taking It Further

We 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 makes 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 utilize the timeline to get a general visual understanding of activity, rather than analyze individual deals.



# Building Design Systems

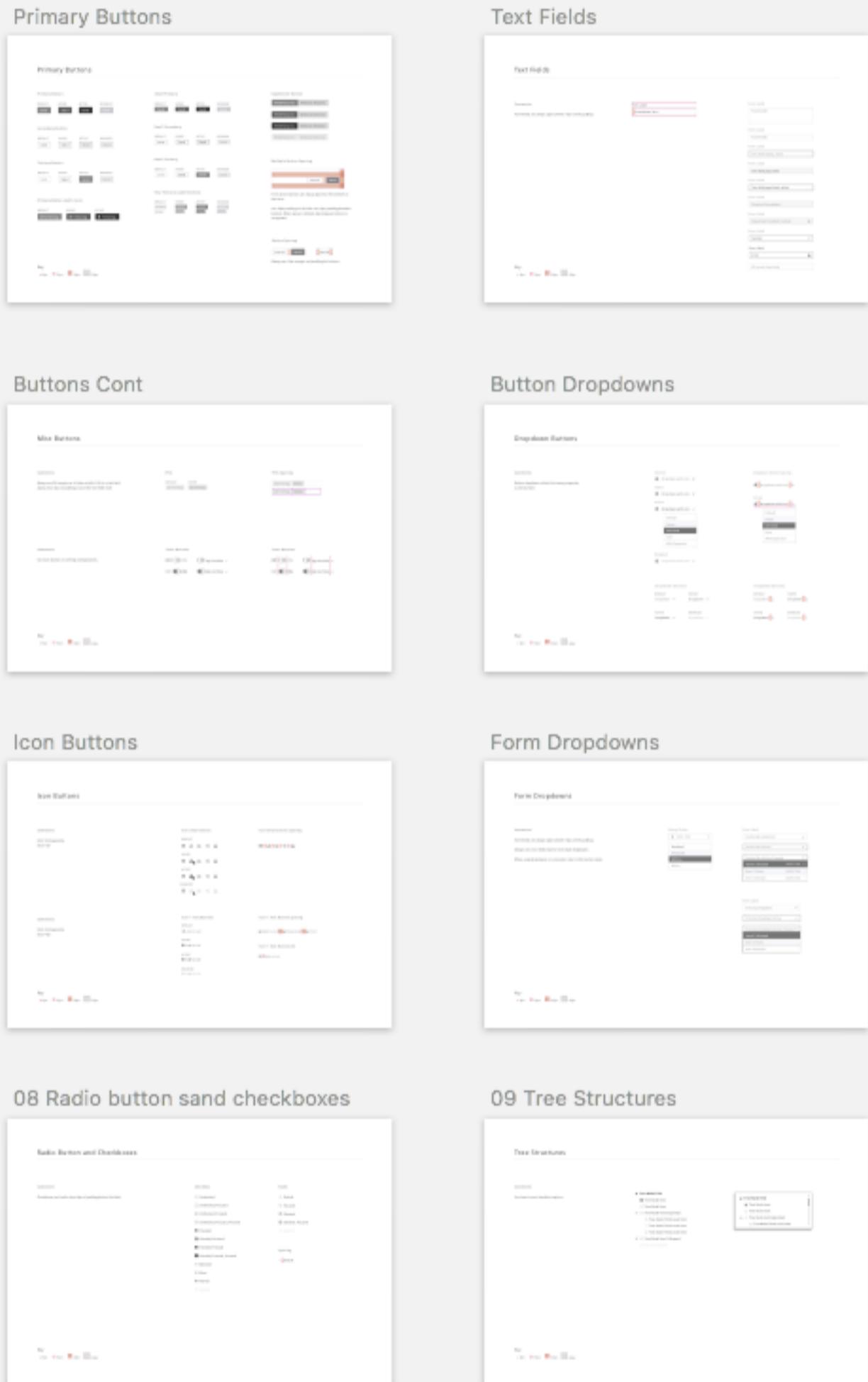
On developing PitchBook's Style Guide

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.



# 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 could easily fit into every feature of the platform.

We started in grayscale, mocking up buttons, form fields, controls, and other single elements. We 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

Combo Box Selection ▾

Combo Box Active ▾

Combo Box Active, Pressed ▾

**Item 1 Selected** META TAG ✓

Item 1 Hover META TAG

Item 1 Default META TAG

### Form Label

Placeholder

### Form Label

Text field empty, active

### Form Label

Text field populated

### Form Label

Text field populated, active

### Form Label

Disabled Placeholder

### Form Label

Populated, Disabled, Locked

### 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

We 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, we 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.

We 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 KNOKW
WEBSITE	<a href="http://www.facebook.com">www.facebook.com</a>	The Facebook
OWNERSHIP STATUS	Publically Held	BUSINESS STA Profitable
UNIVERSE	Venture Capital	PRIMARY IND Social/Platfor
	Private Equity	
	Publicly Listed	
Investors (95)		INVESTOR TY
NAME		

# PitchBook Platform Redesign

Building for the future

 PitchBook

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

Hide Sidebar Advanced Search Dashboards History Following Saved Searches Saved Lists Reports News Plugins & Apps

**Contents**

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**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%



**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.

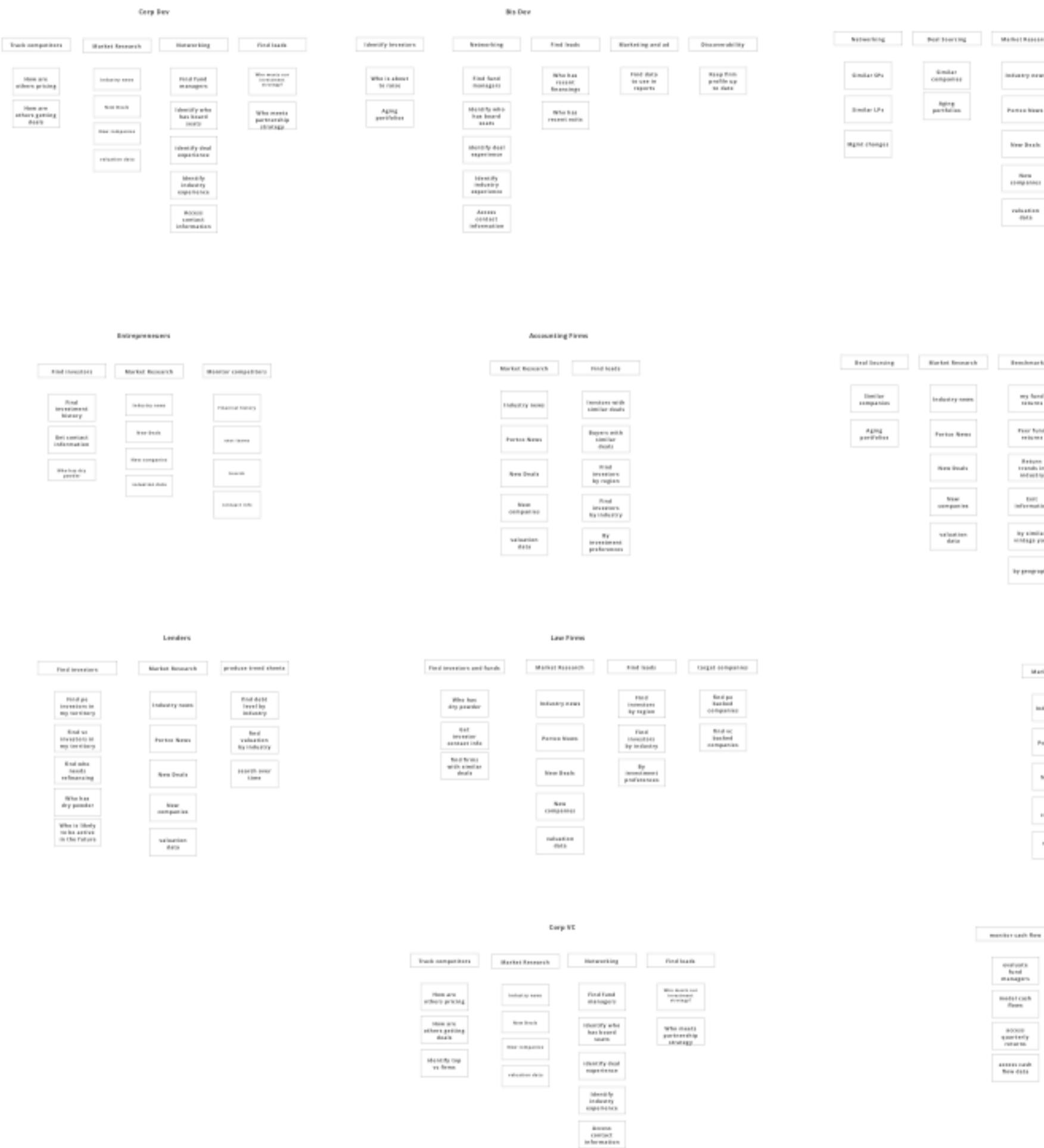
# User Needs

Shortly after starting at PitchBook Data I was simultaneously placed on two major projects. The first was centered around bringing collaboration tools 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.

We combined this 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

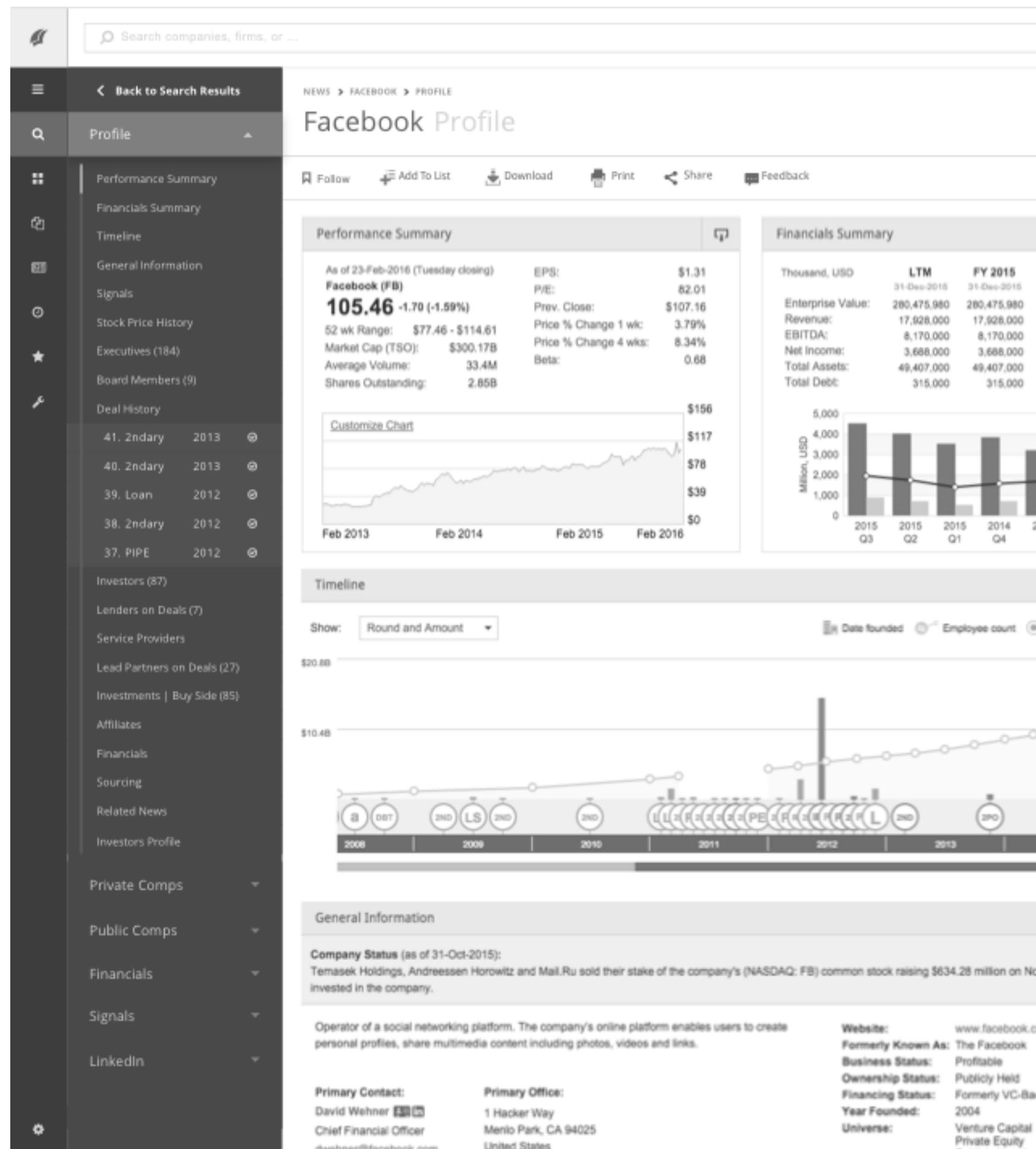
Our team considered not just the user experience aspects of the problem we were tasked to solve, but also the product a whole.

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 a week 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 Pitchbook for the future. 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.

## Right

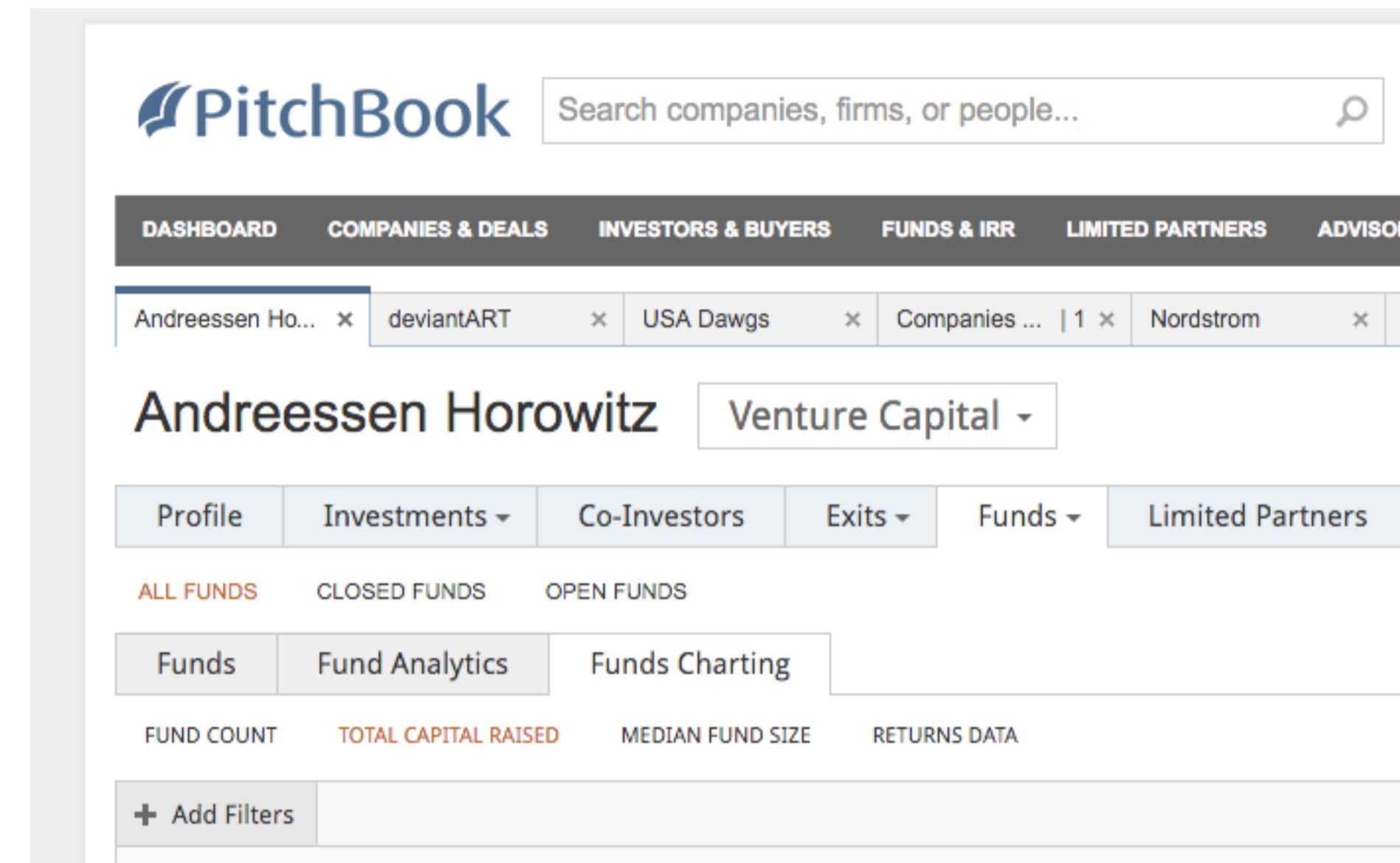
A very early wireframe used to propose a new architecture to various business stakeholders.



# 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 (at most).

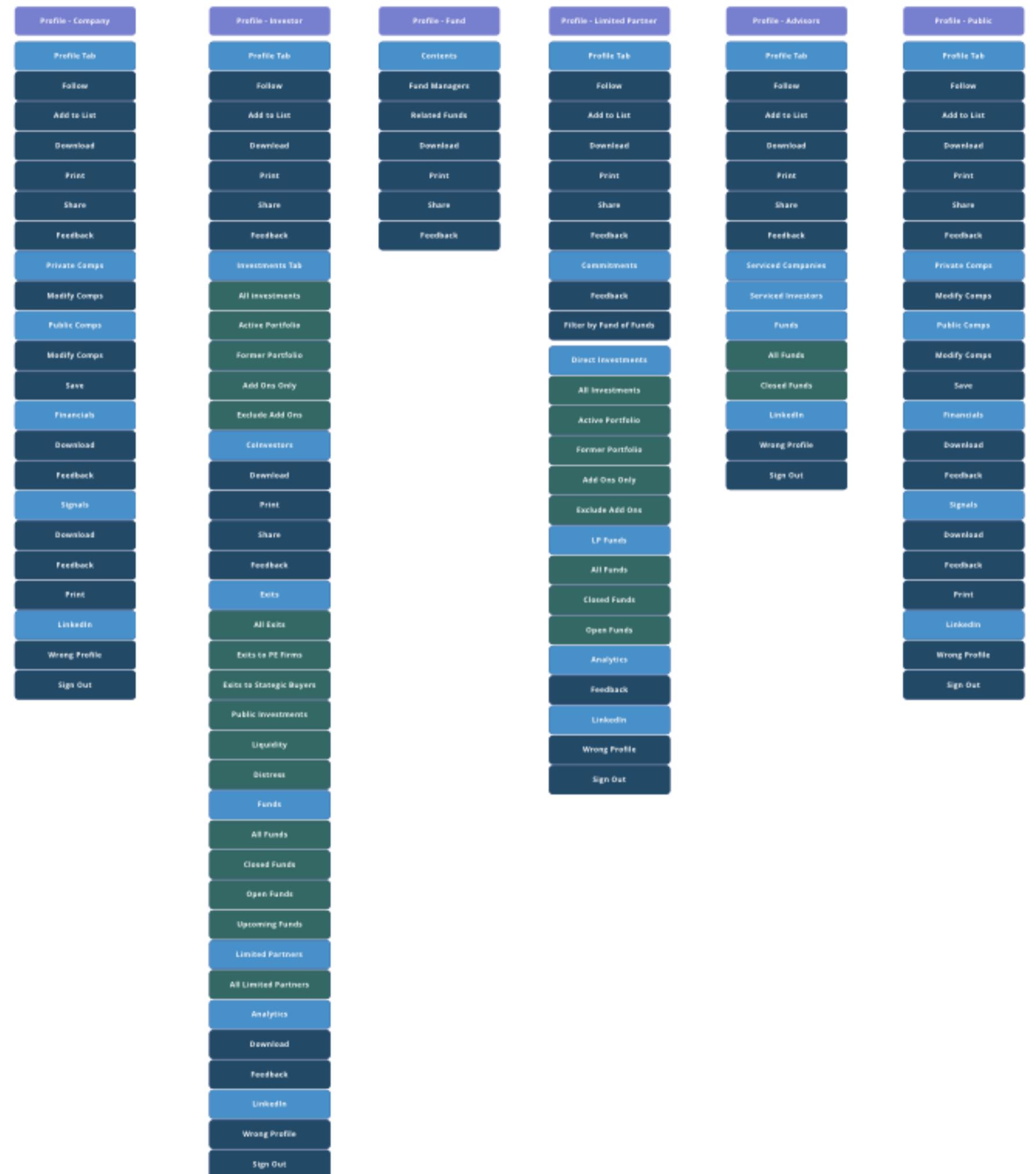


## Right

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

# Actions

We also standardized and simplified actions within major flows. We wanted give users a sense of familiarity from page to page to help them complete their work faster without needing to worry about navigating to find the button they need to complete an action.

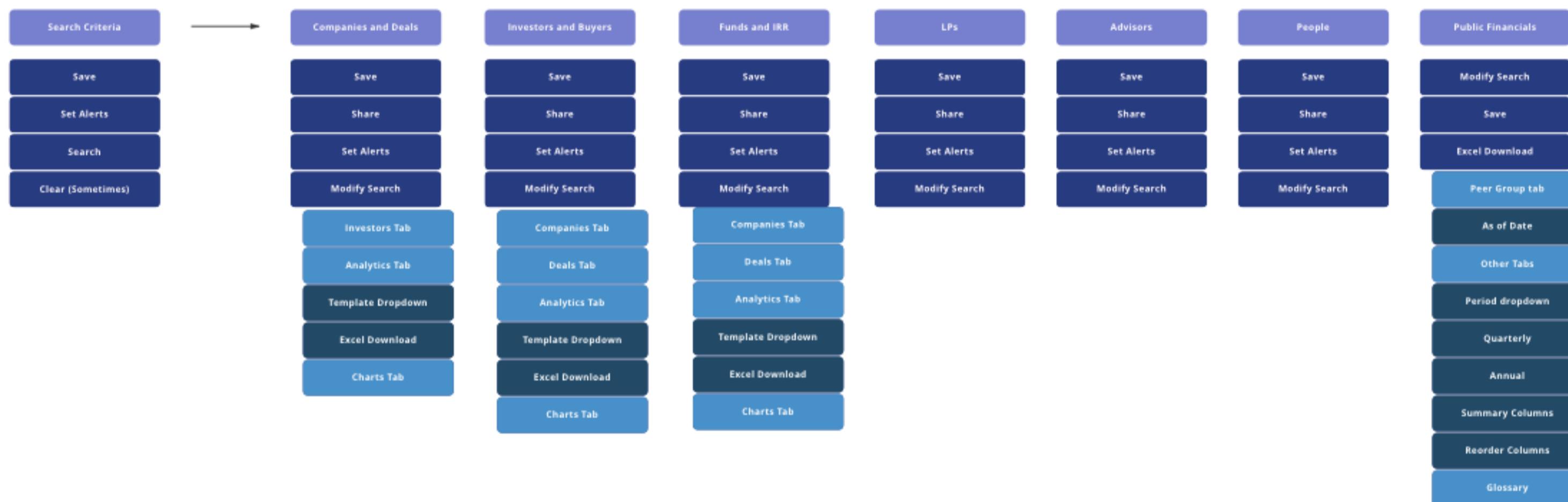


Right

A map of action buttons in the platform prior to redesign.

# Proposal

Our solution removed a number of unnecessary buttons and relocated others into a flat structure that scales across all pages in the platform.



Above

The proposed new action button map


≡ 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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📄 Reports

📰 News

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## Related News

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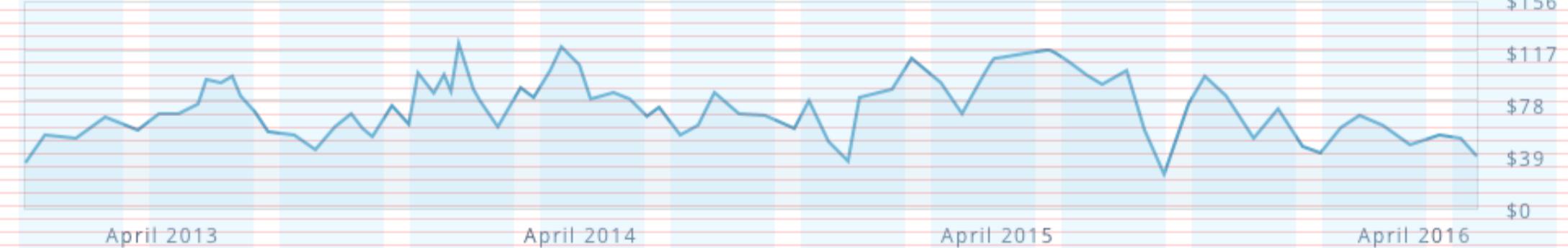
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## Contact Information

David Wehner

Chief Financial Officer

dwehner@facebook.com

[VCARD](#) [LINKEDIN](#)

PHONE

1+ (650) 543-4800

EMAIL

press@fb.com

PRIMARY OFFICE

1 Hacker Way

Menlo Park, CA

94025

United States

OTHER OFFICES

25 Pike Street

Seattle, WA 98101

United States

