Sean Blanton, Designer.

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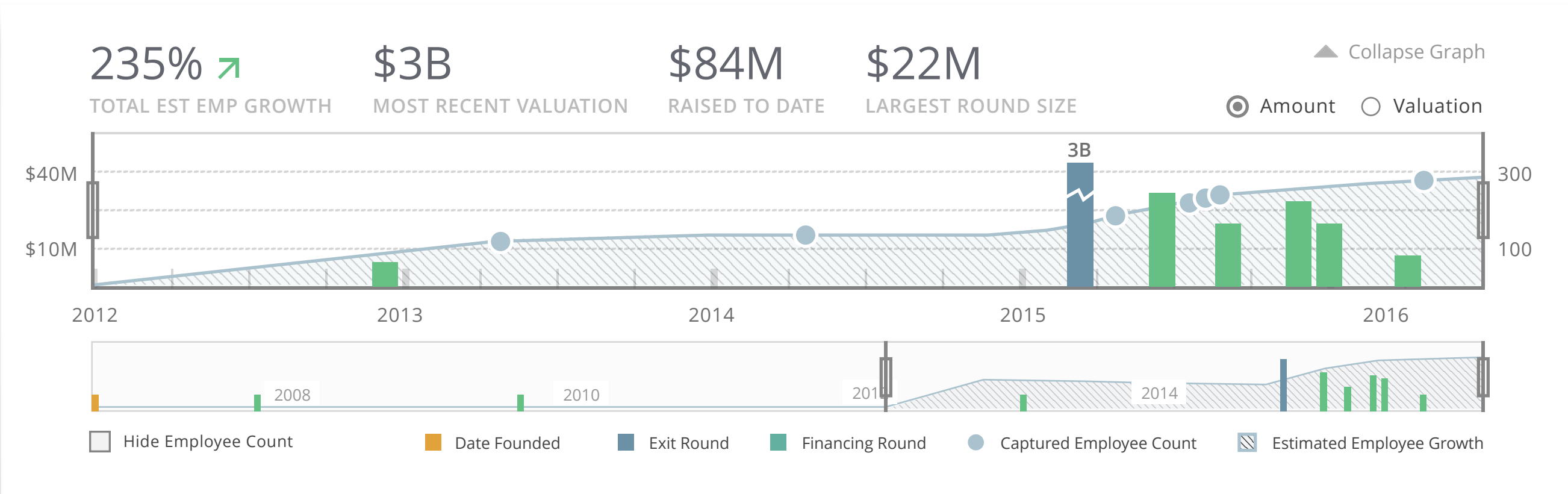
sean-blanton.com

S

PitchBook Data

Deal History Timeline

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

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.
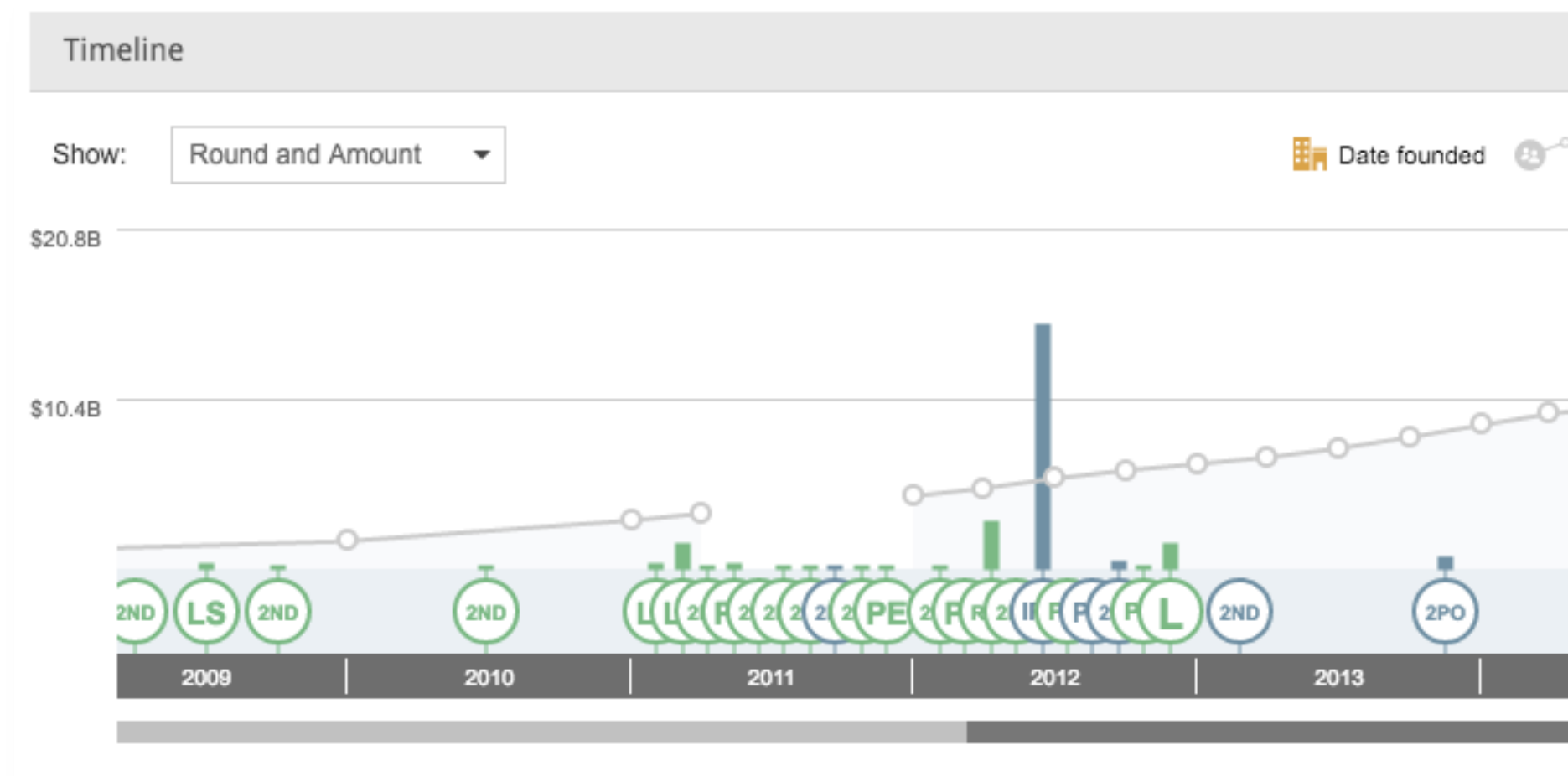
Employee dates were confusing. It was unclear what was reported or scraped data versus what was an interpolated estimation
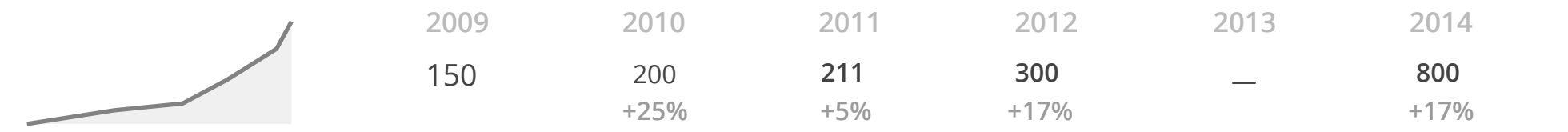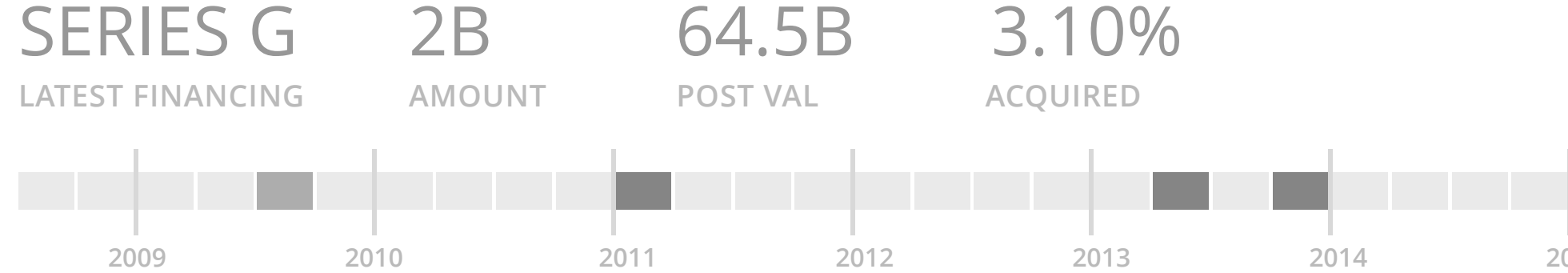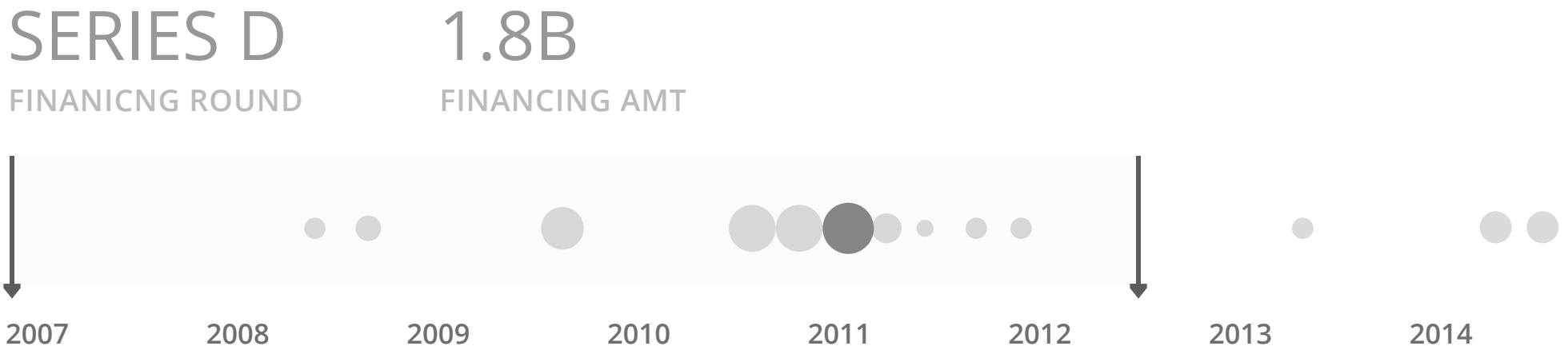
The timeline was difficult to navigate and the bars were hard to read, especially in edge cases with very large rounds

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.

SERIES D
FINANICNG ROUND

1.8B
FINANCING AMT

2007   2008   2009   2010   2011   2012   2013   2014

15%
EMPLOYEE GROWTH

14.5k
EMPLOYEE COUNT

2007   2008   2009   2010   2011   2012   2013   2014

SERIES G
LATEST FINANCING

2B
AMOUNT

64.5B
POST VAL

3.10%
ACQUIRED

2009   2010   2011   2012   2013   2014   20

	2009	2010	2011	2012	2013	2014
	150	200	211	300	—	800
		+25%	+5%	+17%		+17%

Taking It Further

We added hover states and the abilty 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. This solved the user's need to go into Excel to run analysis on these data.

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.
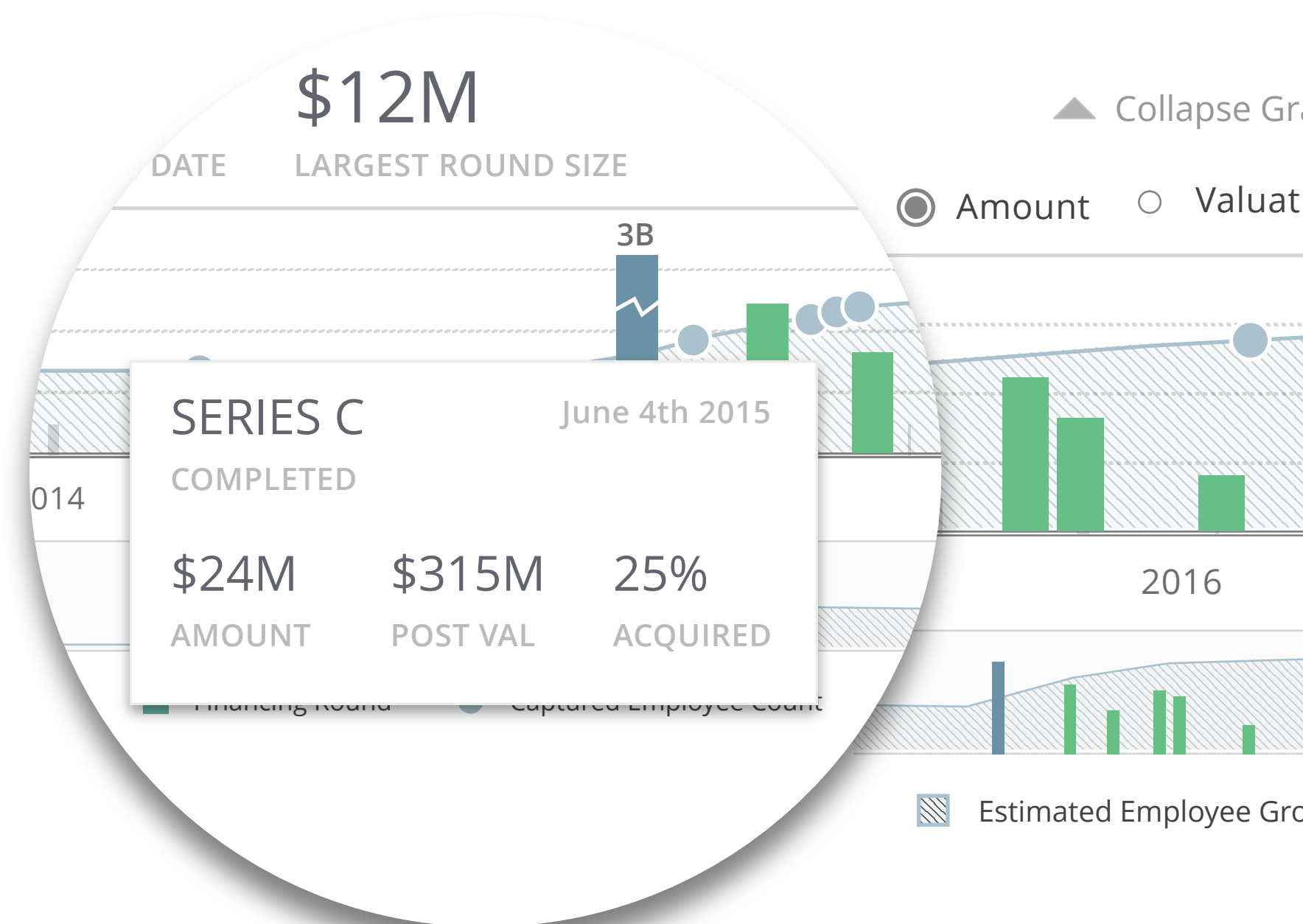
Building Design Systems

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 inconsistant from page-to-page, and designers were accustomed to introducing entirely new design patterns reguarily.

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 maintaned 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
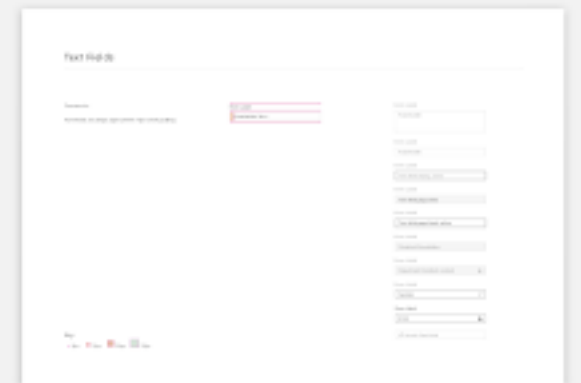
Buttons Cont

Button Dropdowns

Icon Buttons

Form Dropdowns
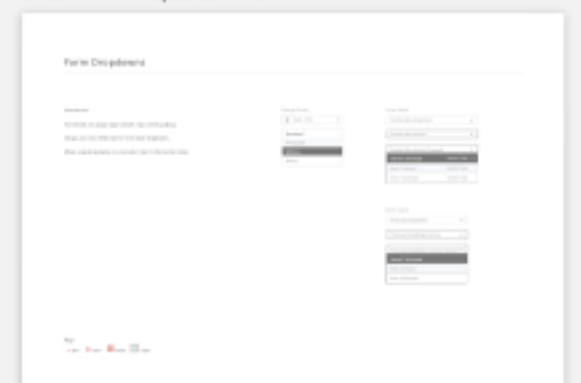
08 Radio button sand checkboxes

09 Tree Structures
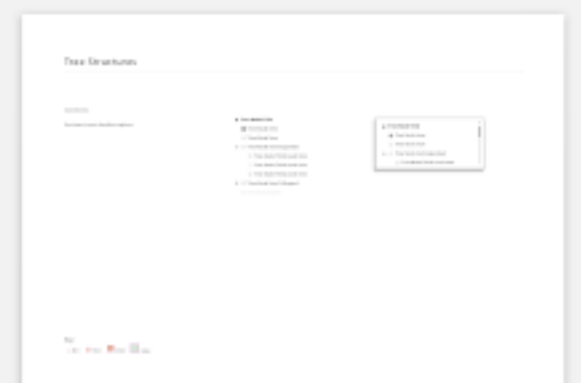
Start Small

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 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 and an 8pt grid that laid the groundwork for all content layout.

Right
Examples from the black and white verison 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 consistant in mockups, we created multple versions of the grid at several breakpoints in the design to account for this. These servered as template files for designers to use as starters when creating new designs.

We created 4 grids at two different breakpoints. This helped us communicate how content would move in the site without needed to build prototypes for every piece of content.

Details

WEBSITE
www.facebook.com

ALSO KNOKW
The Facebook

OWNERSHIP STATUS
Publically Held

BUSINESS STA
Profitable

UNIVERSE
Venture Capital
Private Equity
Publicly Listed

PRIMARY IND
Social/Platfor

Investors (95)

NAME

INVESTOR TY

PitchBook Platform Redesign

Building for the future

Hide Sidebar

Advanced Search

Dashboards

History

Following

Saved Searches

Saved Lists

Reports

News

Plugins & Apps

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

ⓘ This profile has updated information
Deal History: Deal #41: Secondary Transaction - Open Market, $634.28M, Completed; 16-Nov-2013

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Affiliates
Financials

Performance Summary

As of 11-April-2016 (Monday Closing)
FB
108.99 ↗ 1.64 (1.48%)

Customize Chart

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

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DESCRIPTION	LTM	FY 2015	FY 2014	FY 2013
Enterprise Value	280,475,980	280,475,980	196,879,280	126,578,533
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EBITDA	8,170,000	8,170,000	6,237,000	3,815,000
Net Income	3,688,000	3,688,000	2,940,000	1,500,000
Total Assests	49,407,000	49,407,000	39,966,000	17,895,000
Total Debt	315,000	315,000	233,000	476,000

Timeline

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.
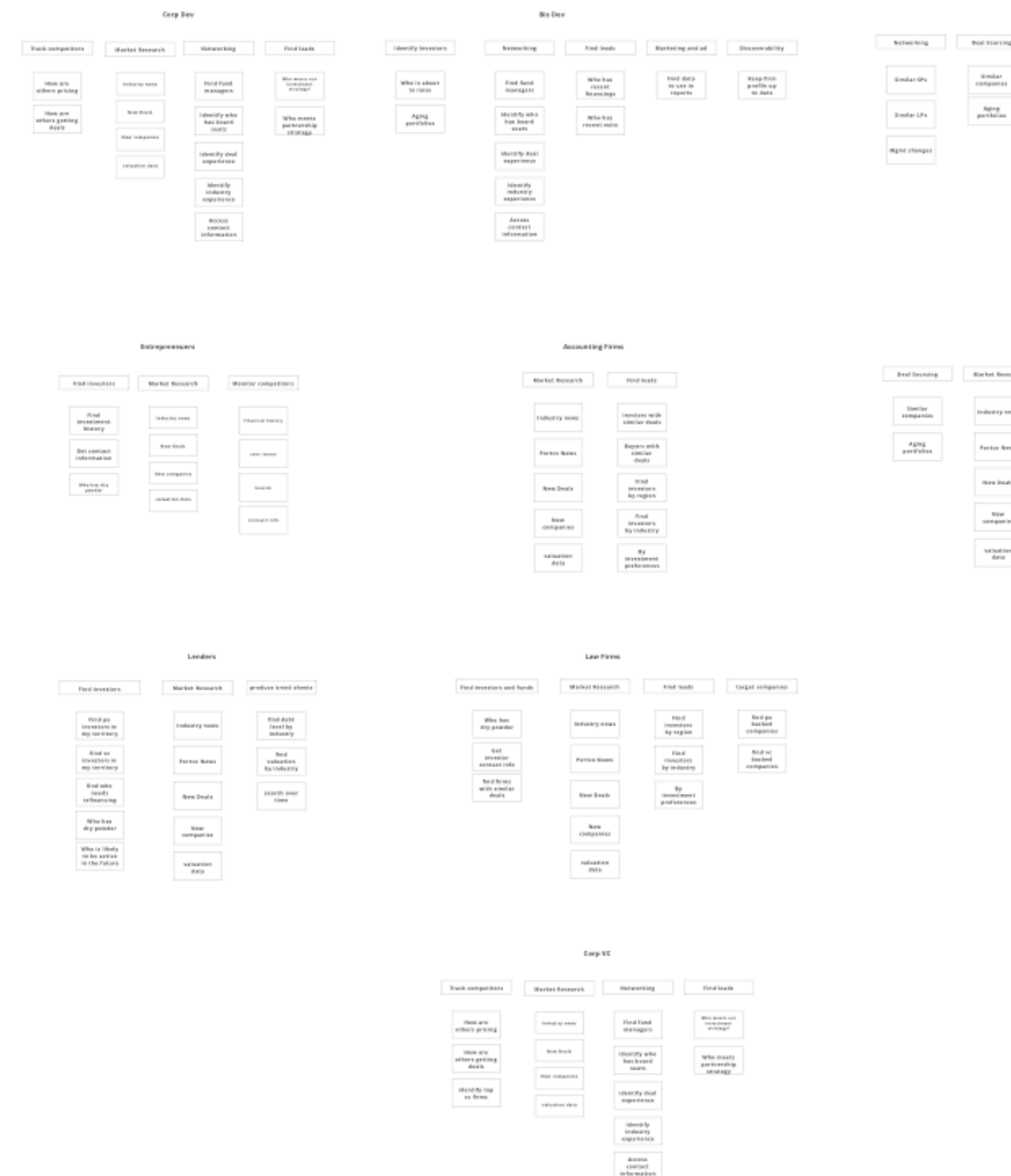
Product Meets Purpose

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.
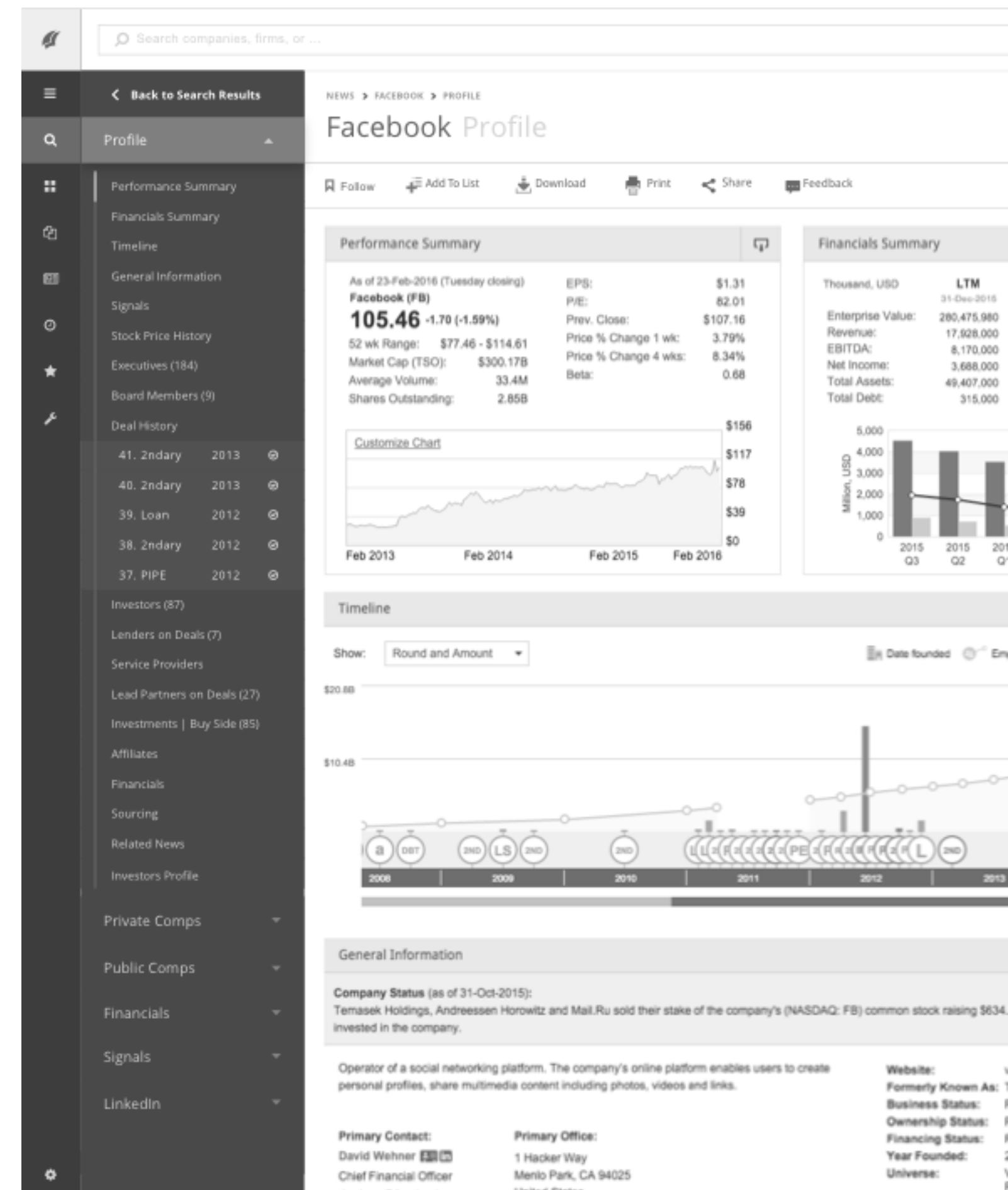
Simplifying

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).
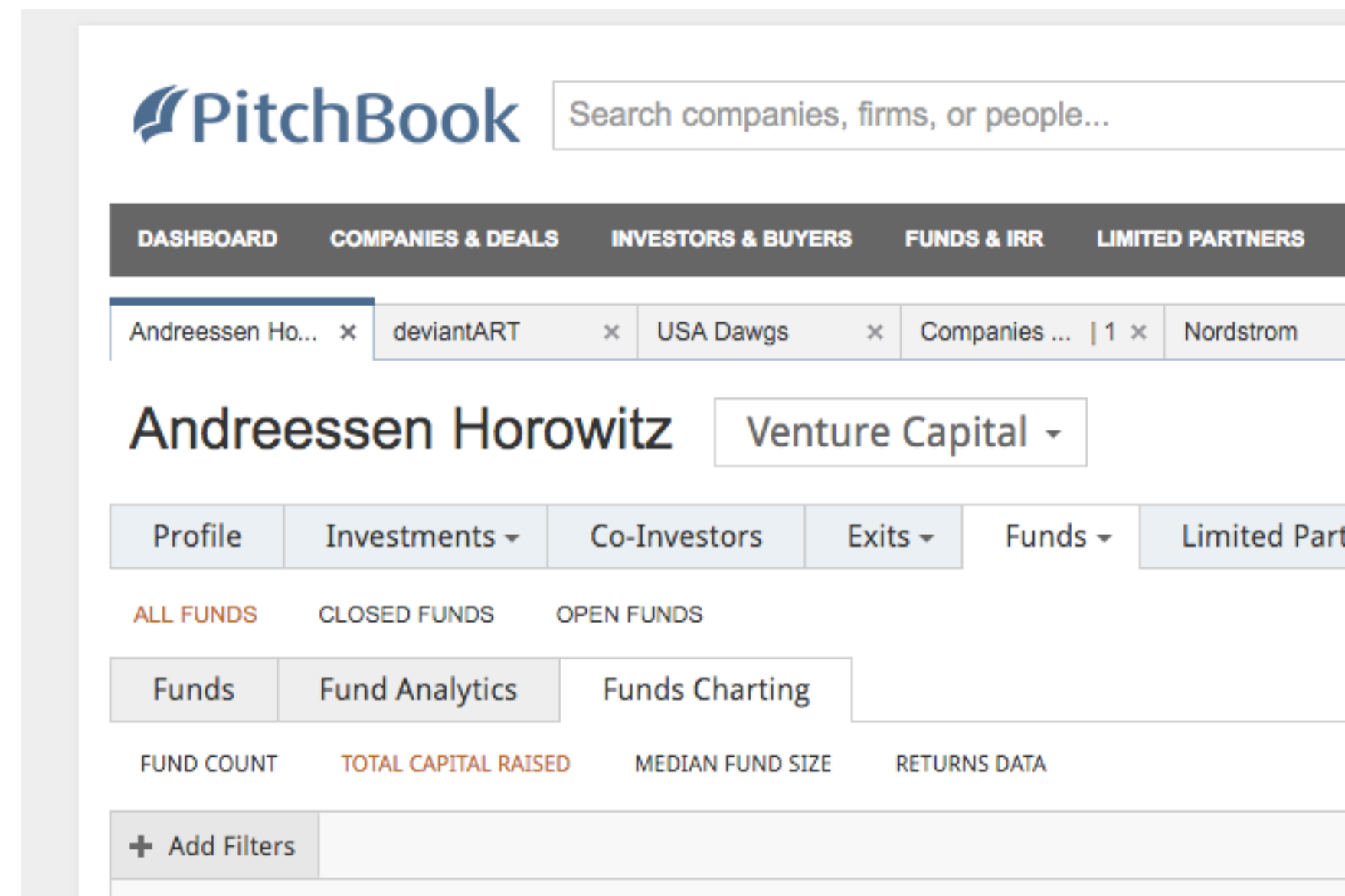
Right

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

Actions

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

Profile - Company	Profile - Investor	Profile - Fund	Profile - Limited Partner	Profile - Advisors	Profile - Public
Profile Tab	Profile Tab	Contents	Profile Tab	Profile Tab	Profile Tab
Follow	Follow	Fund Managers	Follow	Follow	Follow
Add to List	Add to List	Related Funds	Add to List	Add to List	Add to List
Download	Download	Download	Download	Download	Download
Print	Print	Print	Print	Print	Print
Share	Share	Share	Share	Share	Share
Feedback	Feedback	Feedback	Feedback	Feedback	Feedback
Private Comps	Investments Tab		Commitments	Serviced Companies	Private Comps
Modify Comps	All Investments		Feedback	Serviced Investors	Modify Comps
Public Comps	Active Portfolio		Filter by Fund of Funds	Funds	Public Comps
Modify Comps	Former Portfolio		Direct Investments	All Funds	Modify Comps
Save	Add Ons Only		All Investments	Closed Funds	Save
Financials	Exclude Add Ons		Active Portfolio	LinkedIn	Financials
Download	Coinvestors		Former Portfolio	Wrong Profile	Download
Feedback	Download		Add Ons Only	Sign Out	Feedback
Signals	Print		Exclude Add Ons		Signals
Download	Share		LP Funds		Download
Feedback	Feedback		All Funds		Feedback
Print	Exits		Closed Funds		Print
LinkedIn	All Exits		Open Funds		LinkedIn
Wrong Profile	Exits to PE Firms		Analytics		Wrong Profile
Sign Out	Exits to Strategic Buyers		Feedback		Sign Out
	Public Investments		LinkedIn		
	Liquidity		Wrong Profile		
	Distress		Sign Out		
	Funds				
	All Funds				
	Closed Funds				
	Open Funds				
	Upcoming Funds				
	Limited Partners				
	All Limited Partners				
	Analytics				
	Download				
	Feedback				
	LinkedIn				
	Wrong Profile				
	Sign Out				

Proposal

Our solution removes a number of unncessary buttons and relocates others into a flat sturcture that scales across all pages in the platform.

Search Criteria		Companies and Deals		Investors and Buyers		Funds and IRR		LPs		Advisors		People		Public Financials
Save		Save		Save		Save		Save		Save		Save		Modify Search
Set Alerts		Share		Share		Share		Share		Share		Share		Save
Search		Set Alerts		Set Alerts		Set Alerts		Set Alerts		Set Alerts		Set Alerts		Excel Download
Clear (Sometimes)		Modify Search		Modify Search		Modify Search		Modify Search		Modify Search		Modify Search		Peer Group tab
		Investors Tab		Companies Tab		Companies Tab								As of Date
		Analytics Tab		Deals Tab		Deals Tab								Other Tabs
		Template Dropdown		Analytics Tab		Analytics Tab								Period dropdown
		Excel Download		Template Dropdown		Template Dropdown								Quarterly
		Charts Tab		Excel Download		Excel Download								Annual
				Charts Tab		Charts Tab								Summary Columns
														Reorder Columns
														Glossary

Above

The proposed new action button map

Hide Sidebar

Advanced Search

Dashboards

History

Following

Saved Searches

Saved Lists

Reports

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Plugins & Apps

COMPANIES & DEALS

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- Sourcing
- Related News

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Total Assests	49,407,000	49,407,000	39,966,000	17,895,000
Total Debt	315,000	315,000	233,000	476,000

Timeline

235% ↗   **$64M**   **$12M**
TOTAL EST EMP GROWTH   RAISED TO DATE   LARGEST ROUND SIZE

▲ HIDE GRAPH   ○ Amount   ● Valuation

3B

$40M

$10M

2012   2013   2014   2015   2016

300

100

2008   2010   2014

☐ Hide Employee Count   ■ Exit Round   ■ Financing Round   ● Captured Employee Count   ▨ Estimated Employee Growth

Contact Information

David Wehner
Chief Financial Officer

PHONE
1- (650) 543-4800

PRIMARY OFFICE
1 Hacker Way

OTHER OFFICES
25 Pike Street

Search for a company

Advanced Search

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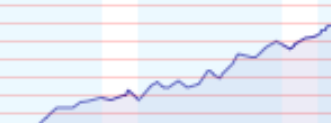
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HIDE GRAPH