

Sean Blanton

Designer

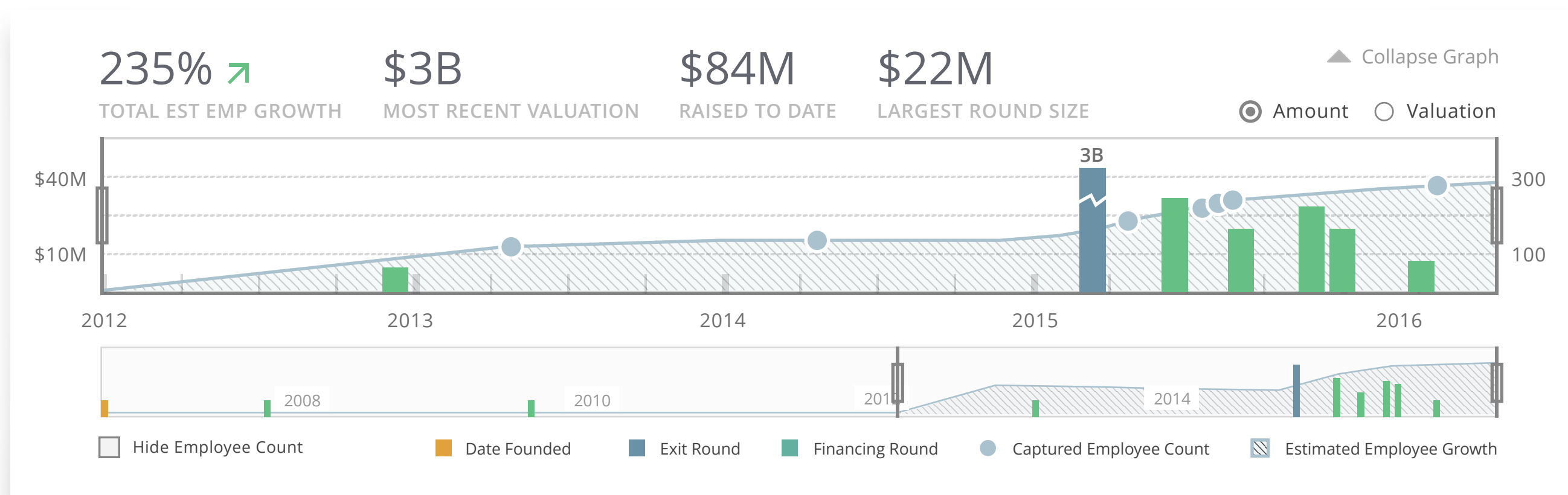
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PitchBook Data

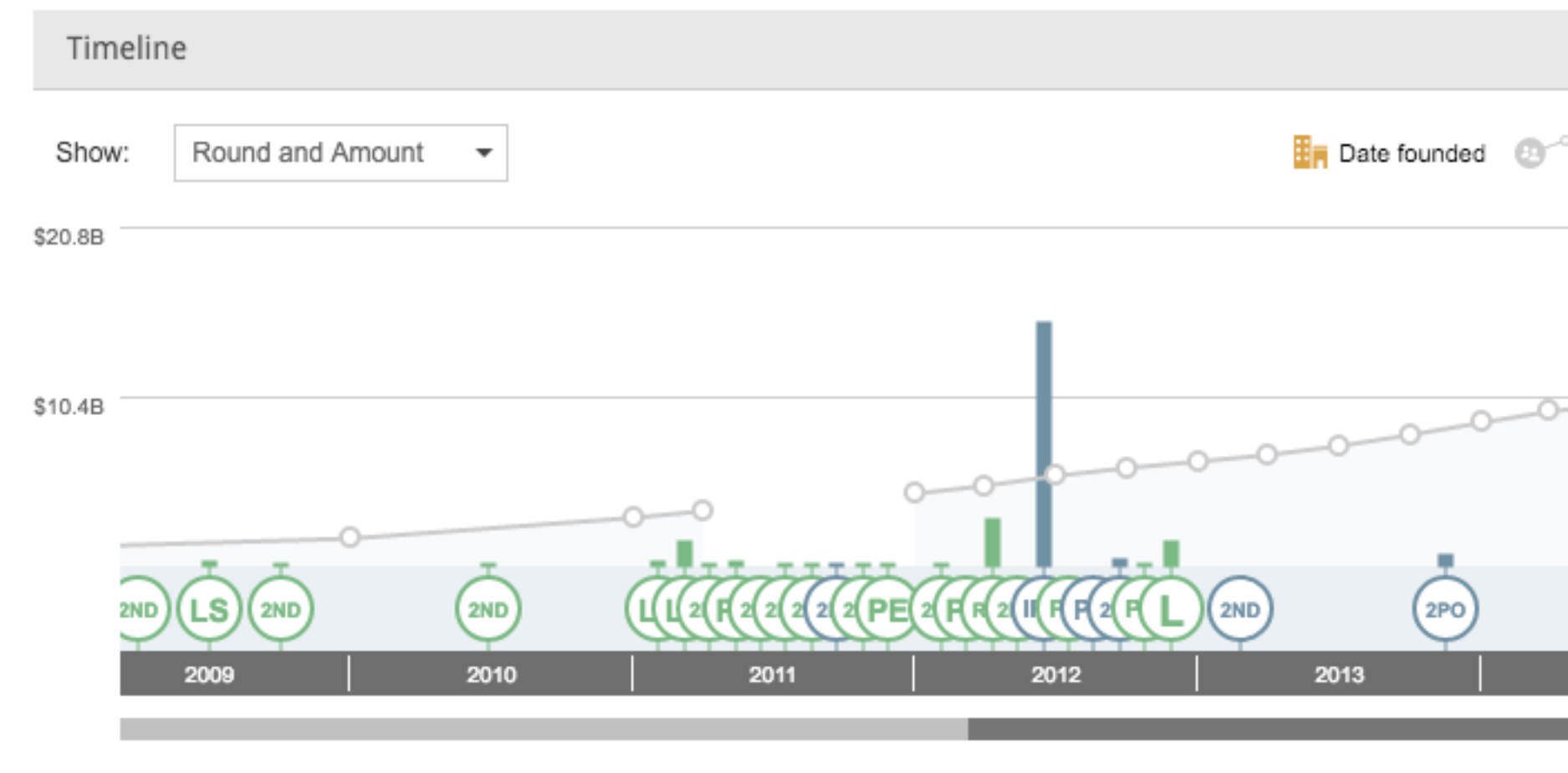
Deal History Timeline

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

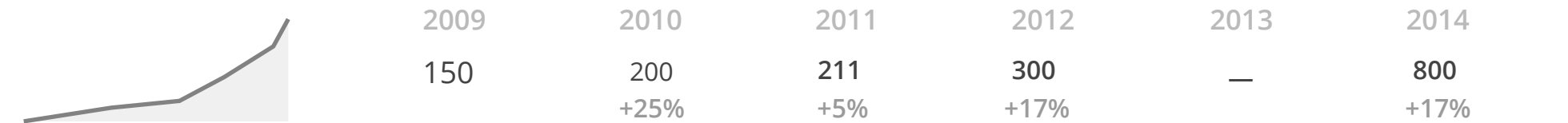
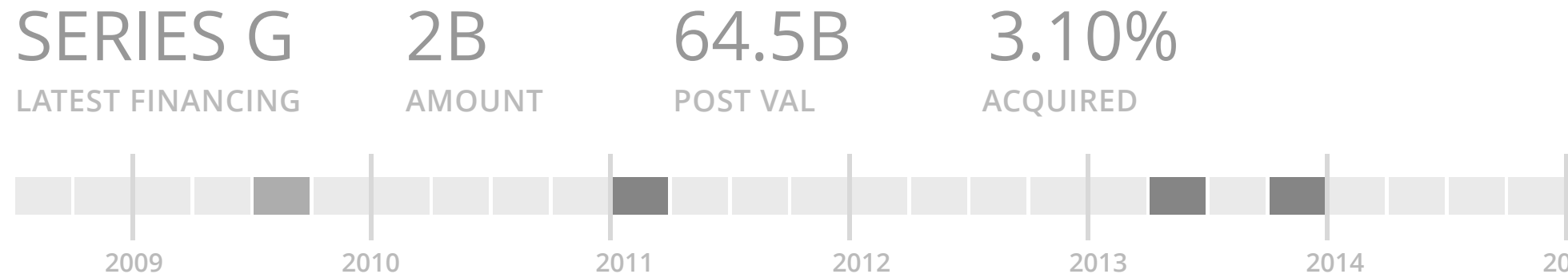
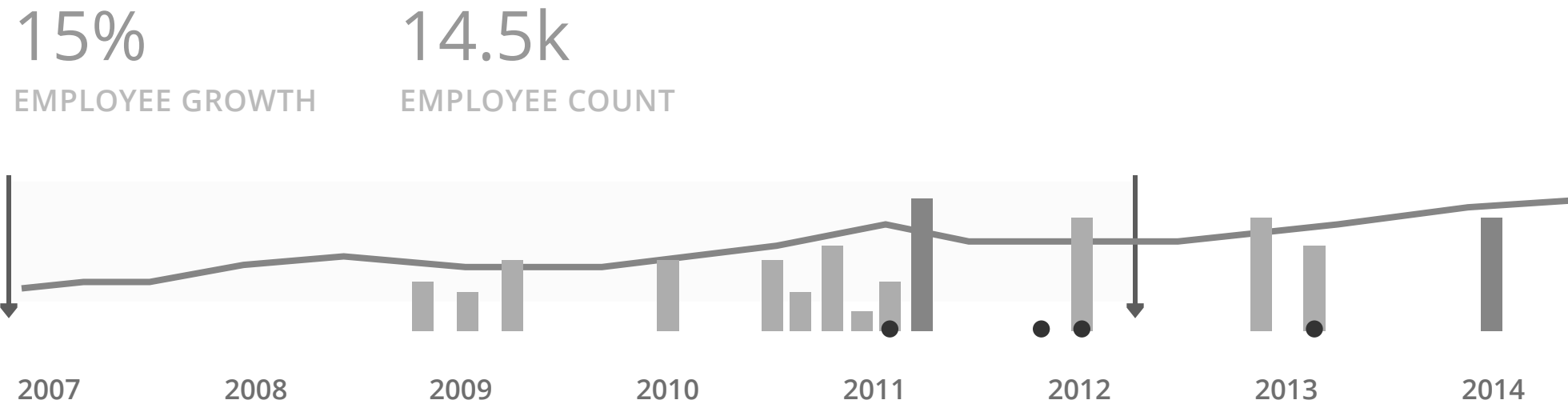
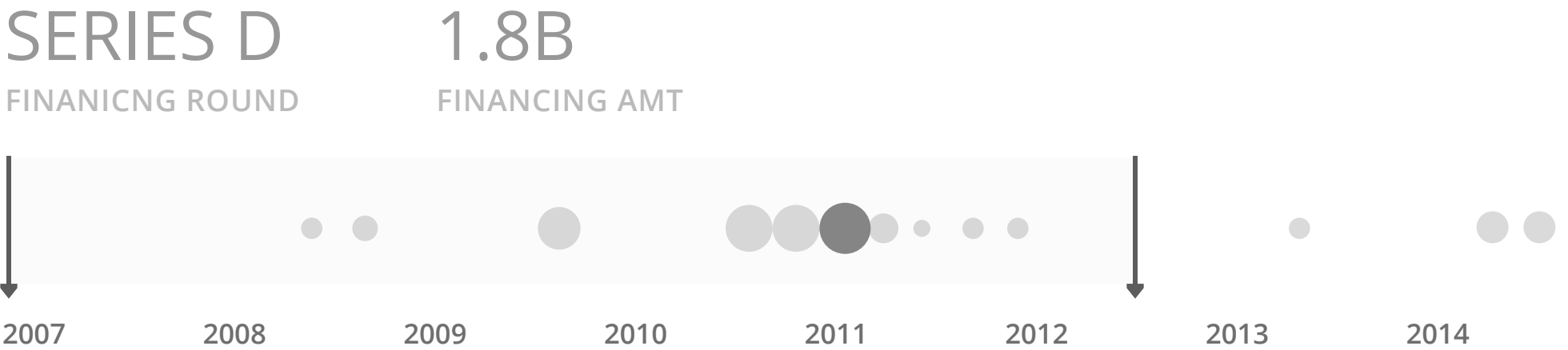
The timeline was difficult to navigate and the bars were hard to read, especially in edge cases with very large rounds

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.

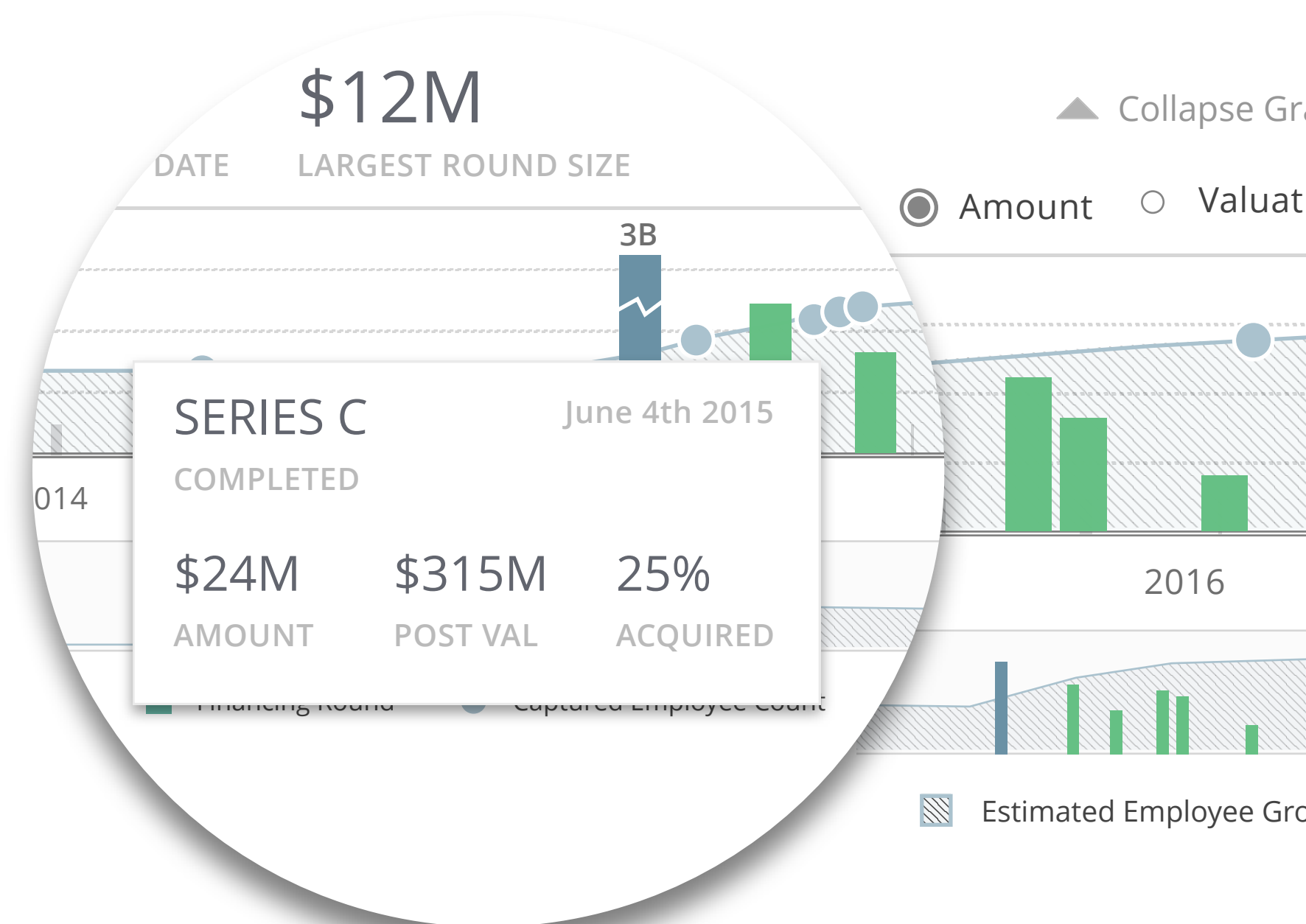
We experimented with different ways to visualize data. We interviewed clients and found that they preferred line and bar charts over other visualizations because it fit easily into their existing workflows.



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. 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 inconsistent from page-to-page, and designers were accustomed to introducing entirely new design patterns regularly.

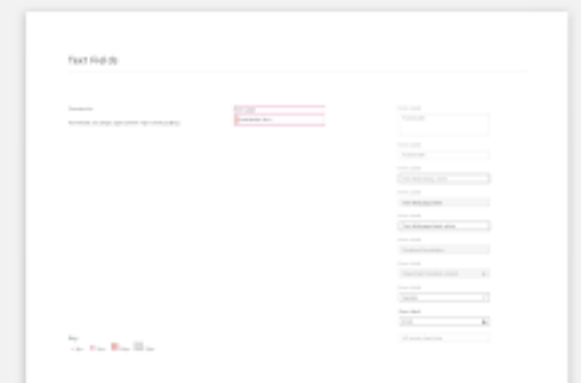
In early 2016 I began working developing a style guide and design system for PitchBook that would redefine the way the product team collaborated and maintained consistency across designs.

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.

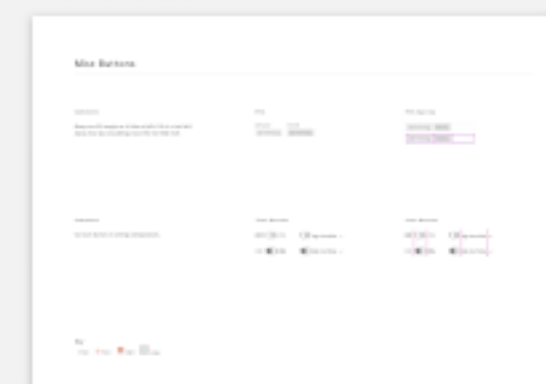
Primary Buttons



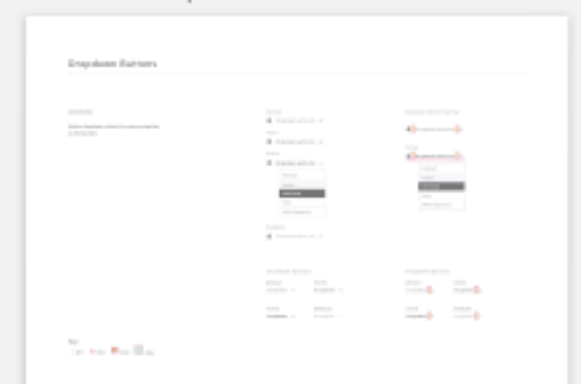
Text Fields



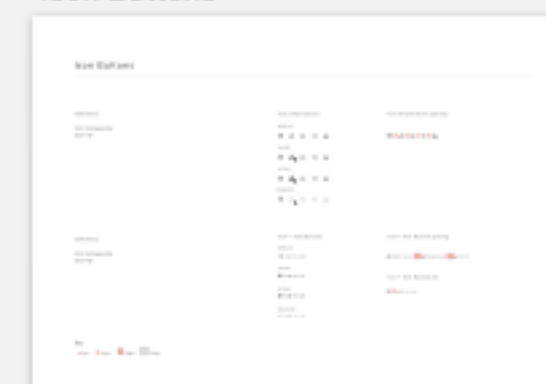
Buttons Cont



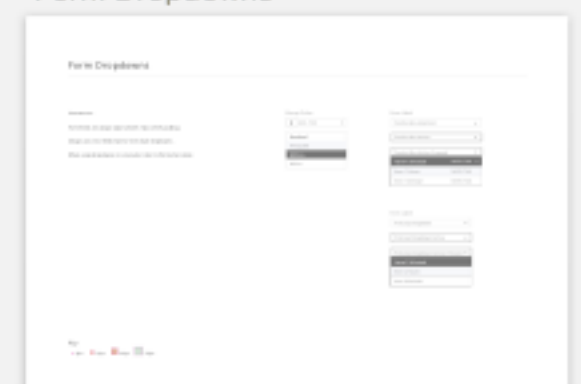
Button Dropdowns



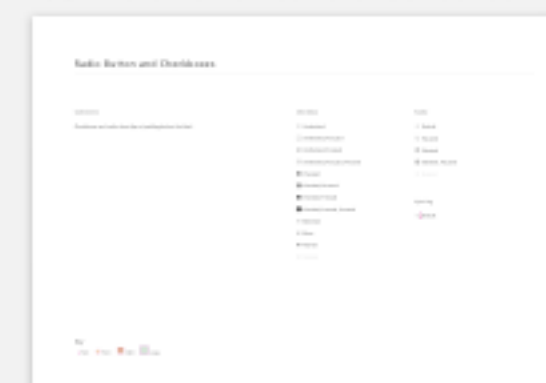
Icon Buttons



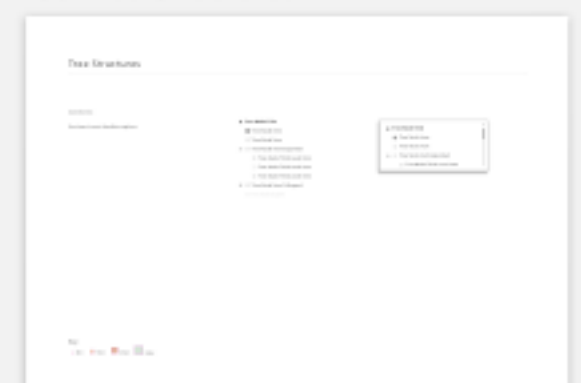
Form Dropdowns



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 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 SelectedMETA TAG ✓

Item 1 HoverMETA TAG

Item 1 DefaultMETA 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 multiple 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	ALSO KNOWN AS
www.facebook.com	The Facebook
OWNERSHIP STATUS	BUSINESS STATUS
Publically Held	Profitable
UNIVERSE	PRIMARY INDUSTRY
Venture Capital	Social/Platform
Private Equity	
Publicly Listed	
Investors (95)	
NAME	INVESTOR TYPE

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

ProfilePublic CompsPrivate CompsFinancialsSignalsLinkedIn

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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

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39. Loan2012

38. 2ndary - Open...2012

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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

\$156

\$117

\$78

\$39

\$0

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.

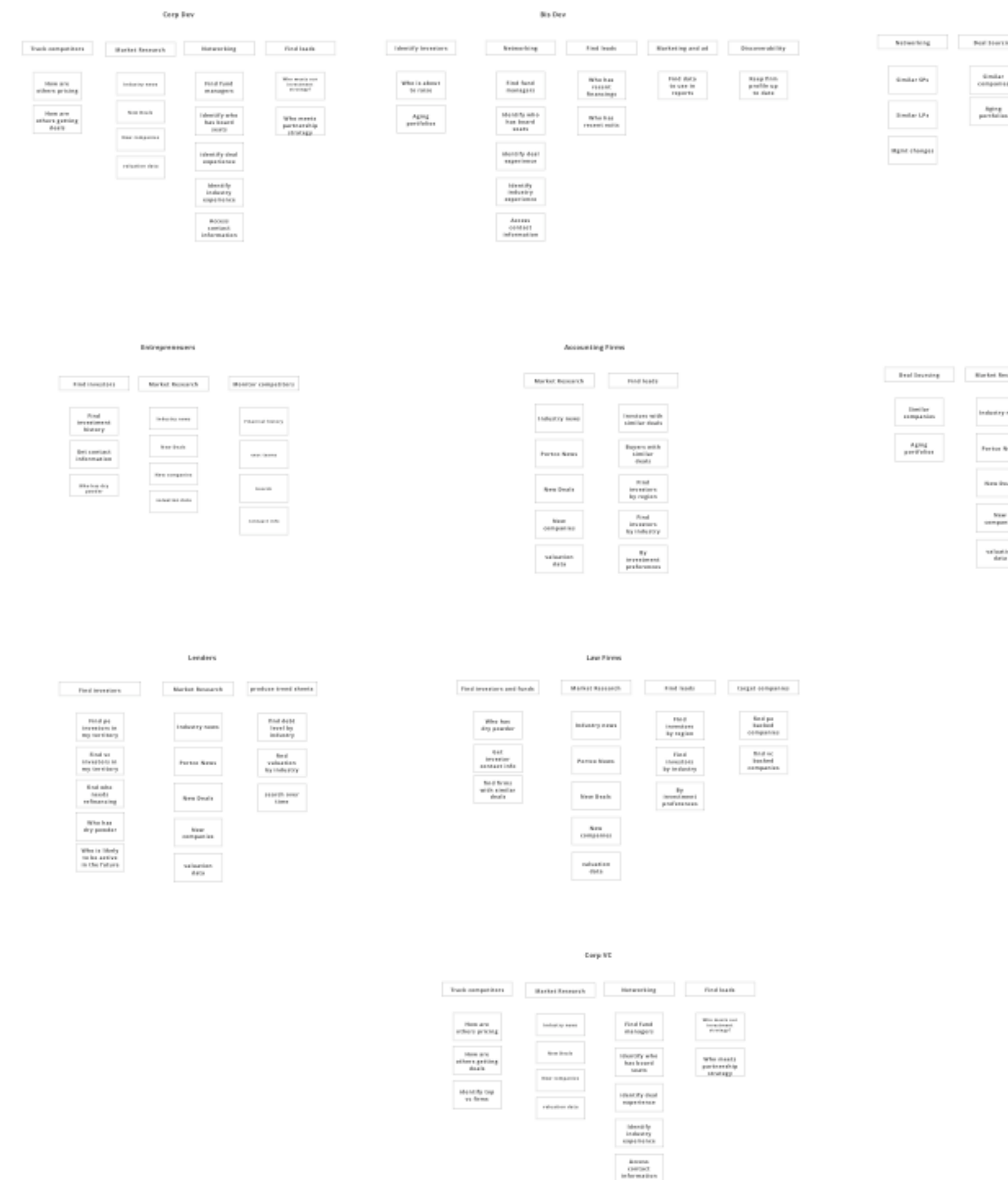
User Needs

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.



Product Meets Purpose

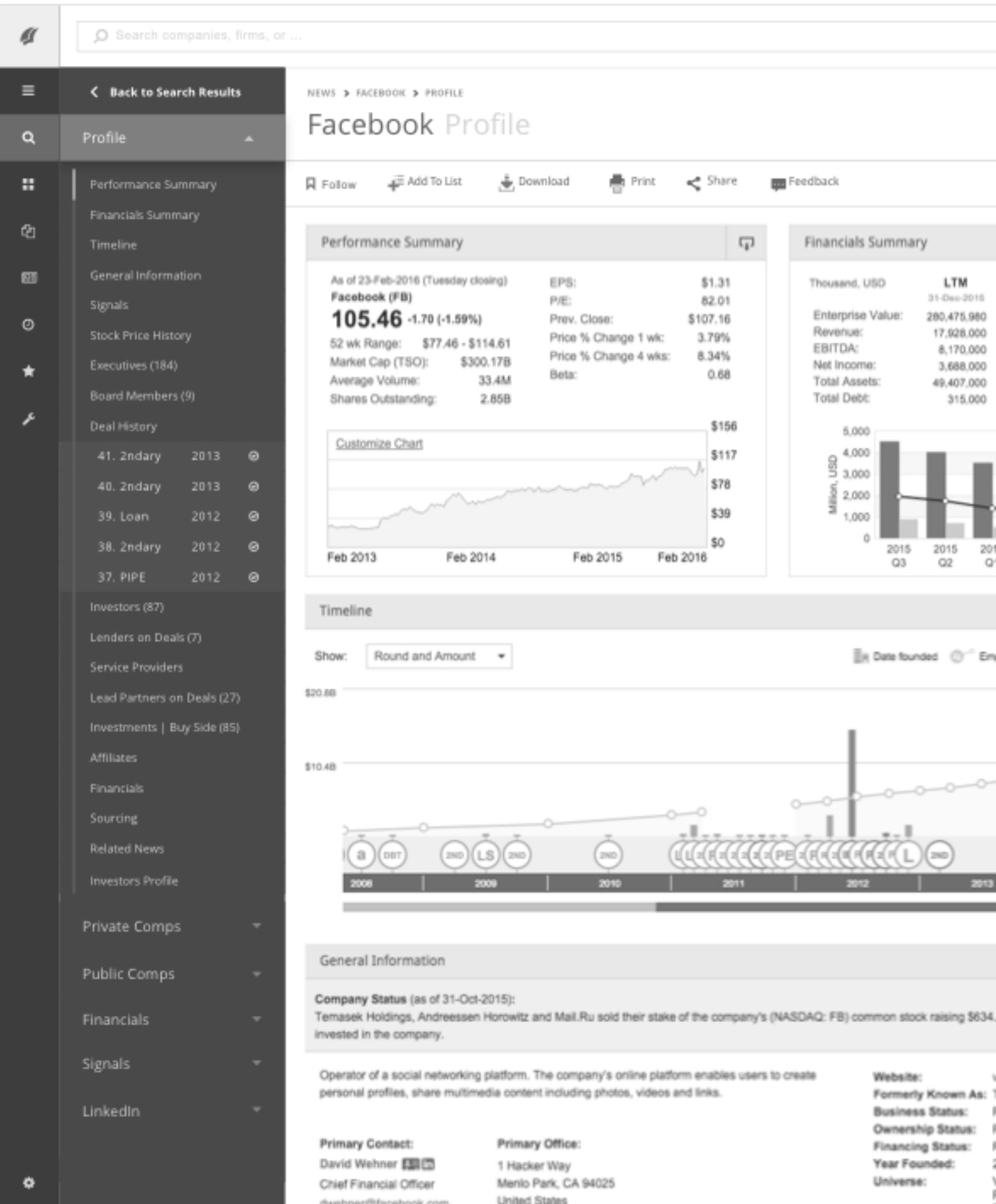
Our team considered not just the user experience aspects of the problem we were tasked to solve, but also the product a whole.

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

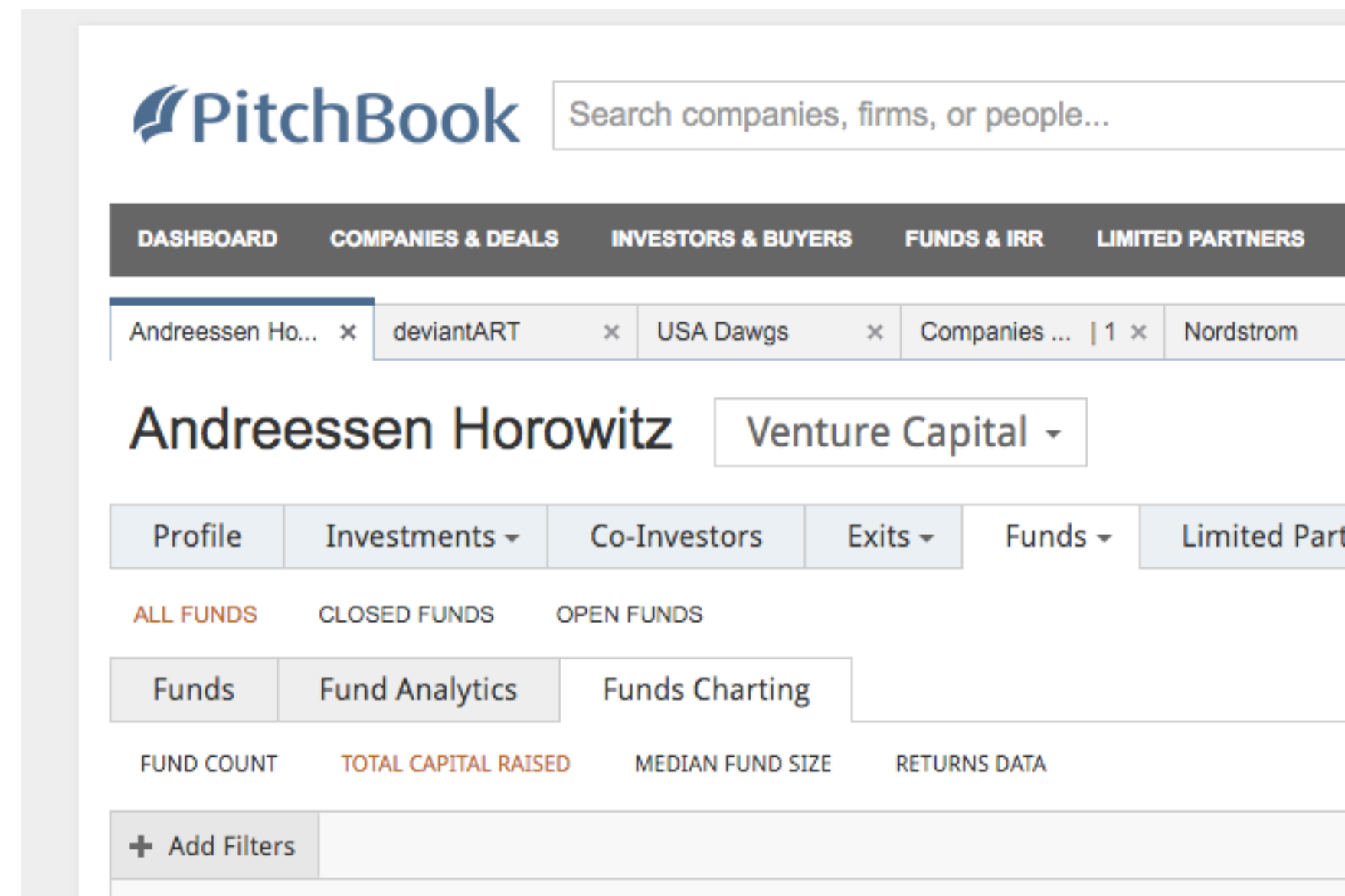
A very early wireframe used to propose a new architecture to various business stakeholders.



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).

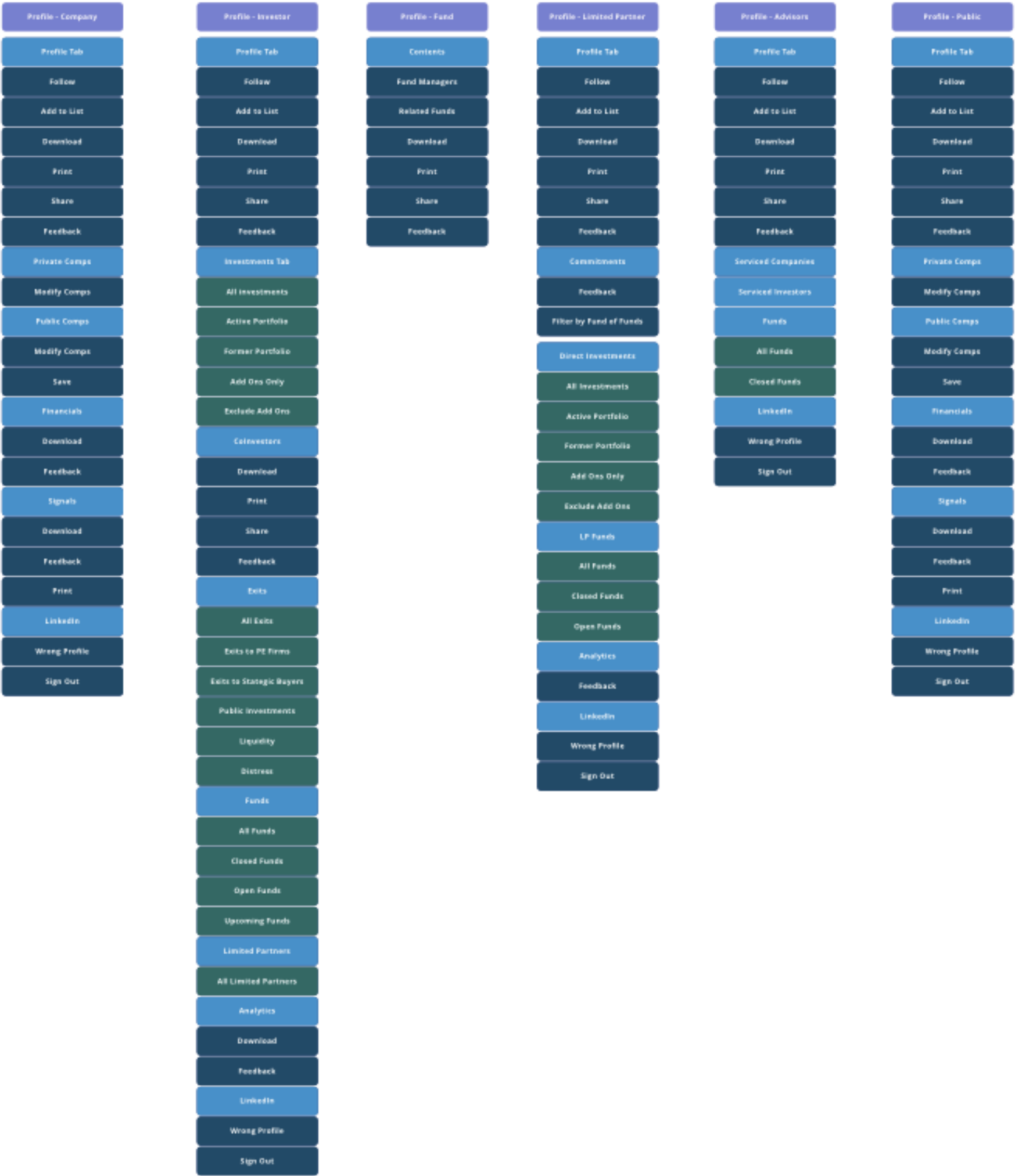


Right

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

Actions

We also standardized and simplified actions v 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.

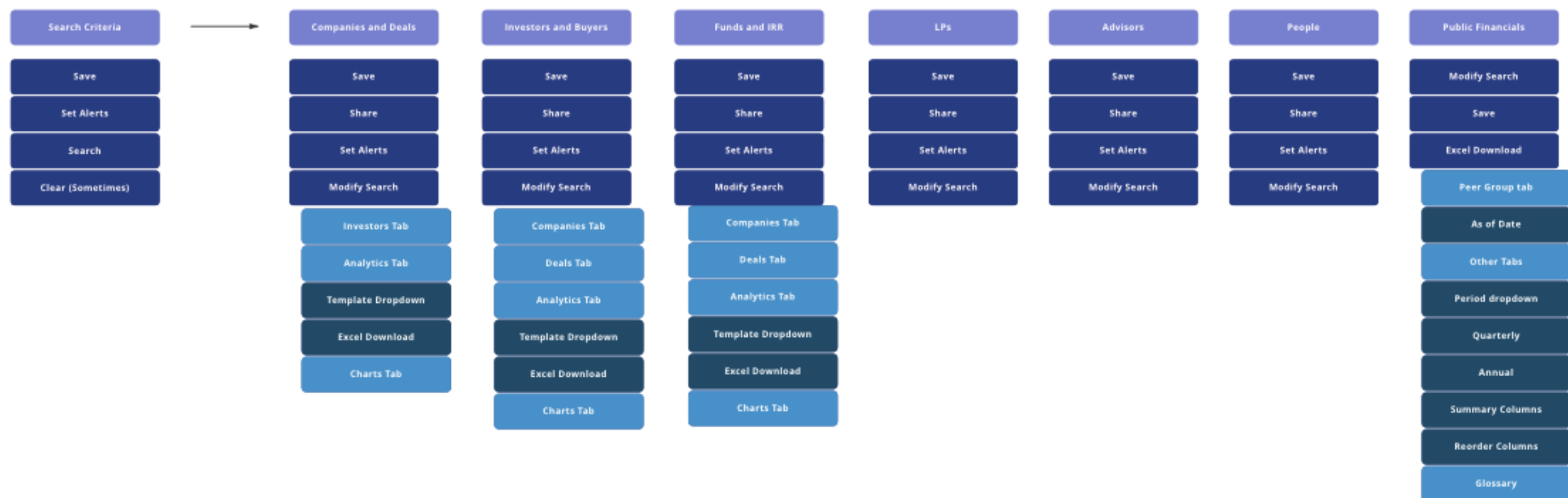


Right

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

Proposal

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



Above

The proposed new action button map

COMPANIES & DEALS

Facebook (NYS: FB)

Public Company ▼

Following

Dashboards

ProfilePublic CompsPrivate CompsFinancialsSignalsLinkedIn

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Seattle, WA 98101

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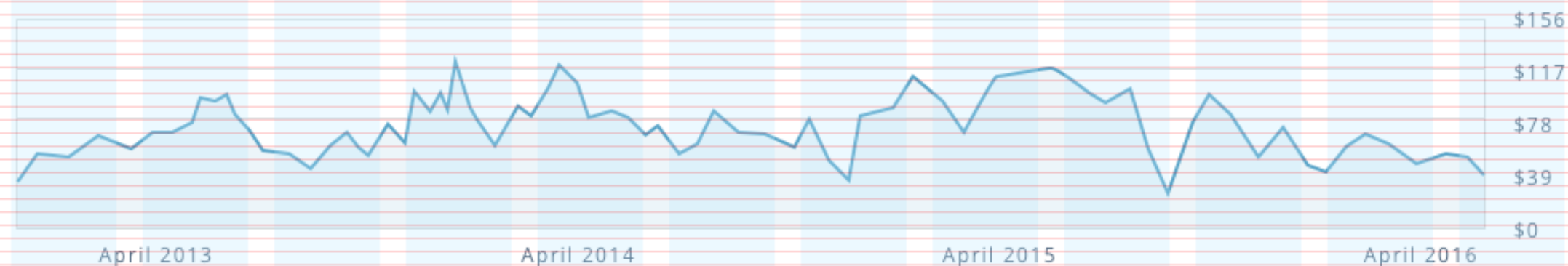
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