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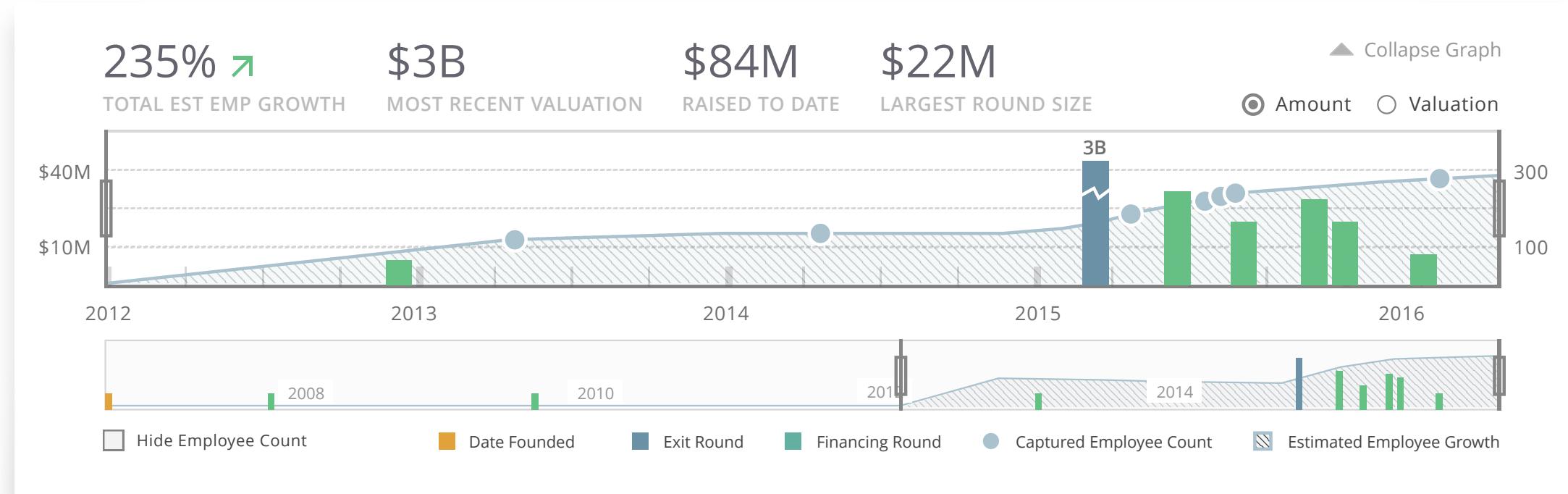
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# Deal History Timeline

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. Conversations with users and stakeholders 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.

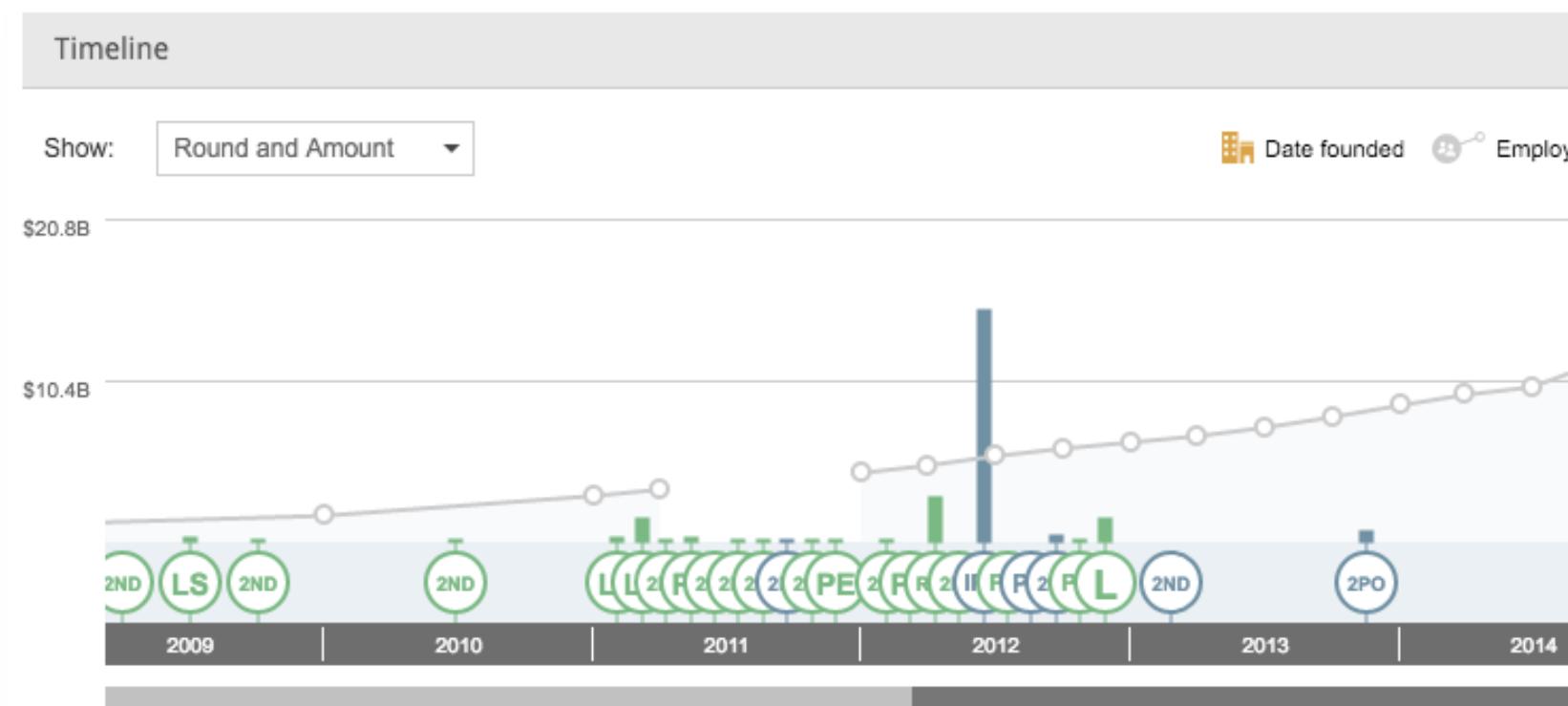
Given a tight deadline, I revamped the timeline over the course of a week to be more glancible and insightful while taking up less vertical space on the profile at the same time.

# 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. Quick usability tests revealed that even when users could see deal codes, users couldn't remember what the deal code abbreviations stood for.

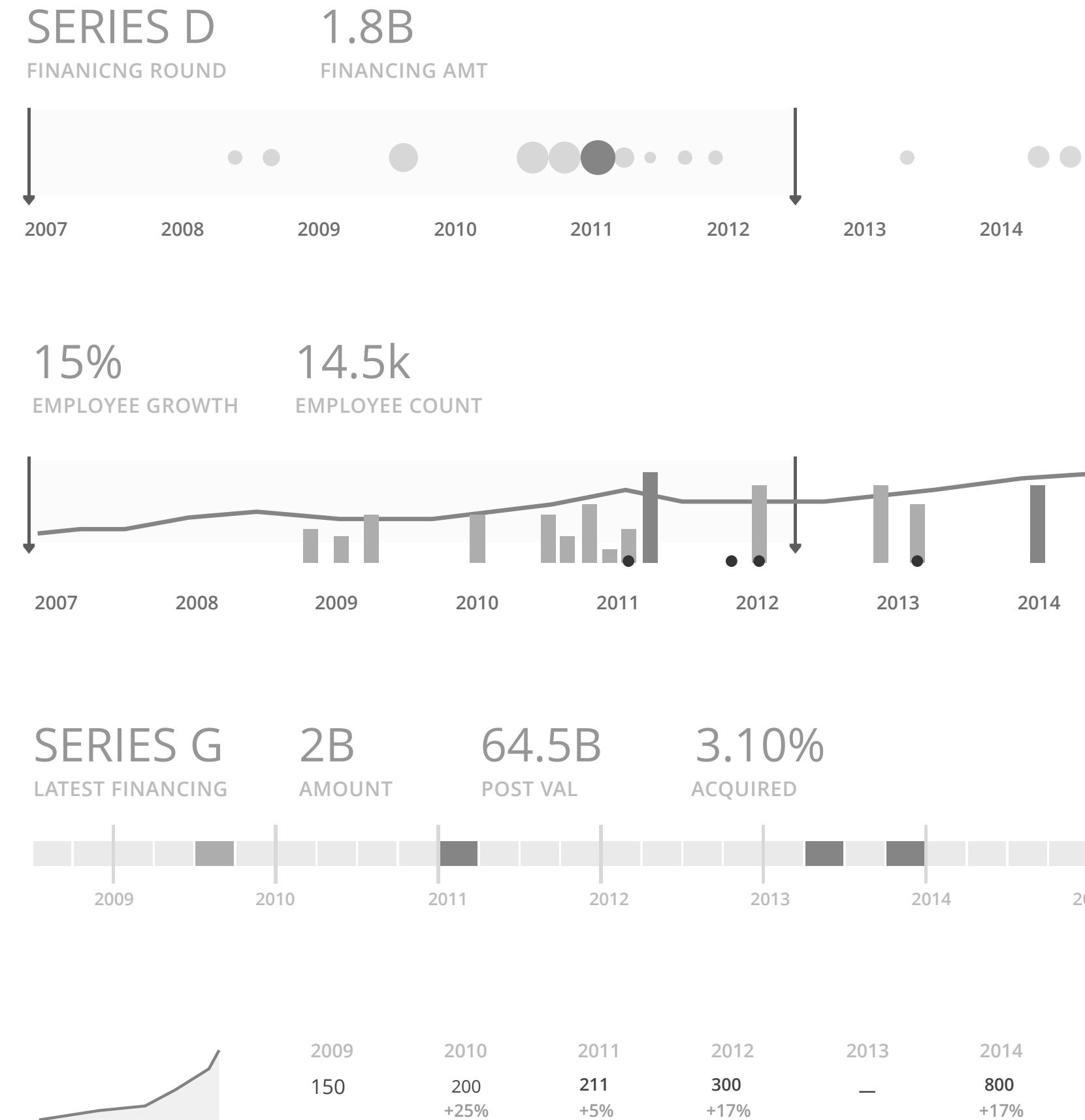


# Ideation

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.

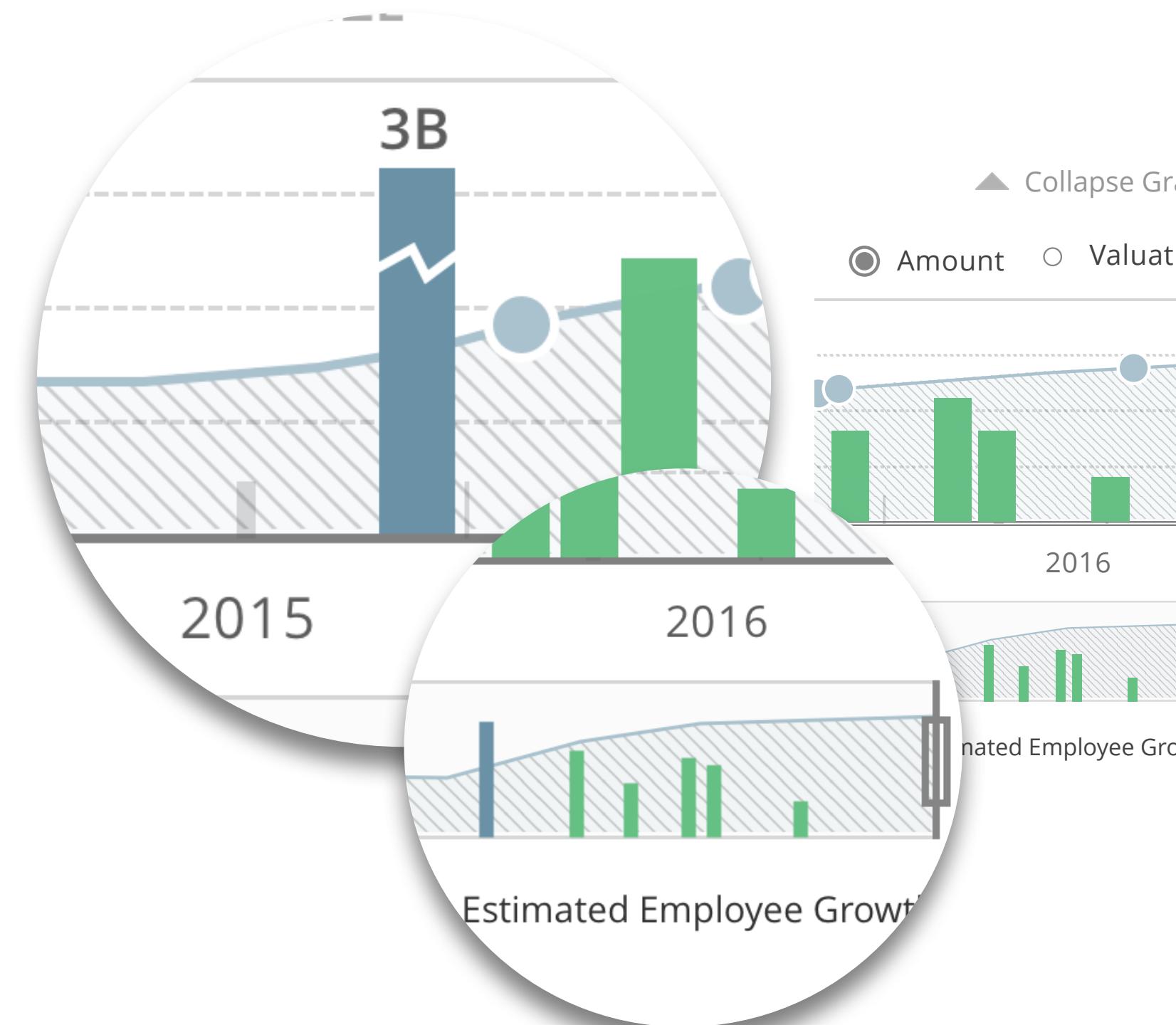
Keeping bars and lines also made the visualizations more useful in the future, should we add functionality to export these graphs to excel for a user to place in a presentation.



# 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.

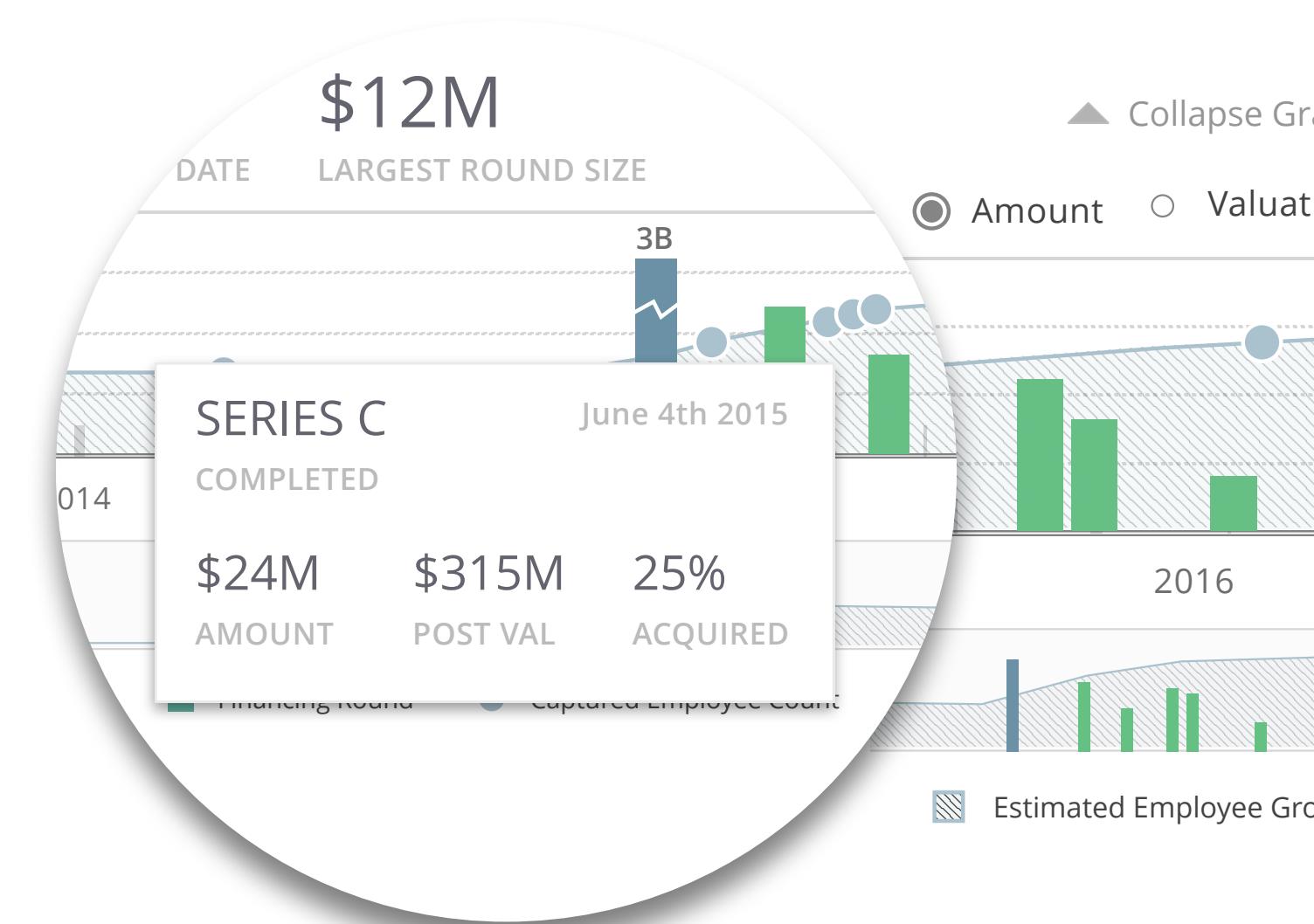
The graph scrubber solves for companies who have a large number of rounds in quick succession. Users can zoom into specific ranges. This also solves for the opposite problem: when a company has only a few data points spread apart over a long time period. In this case, we can default the timeline to only 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 that could show either a single data point or a summary of a time period when scrubbing 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.

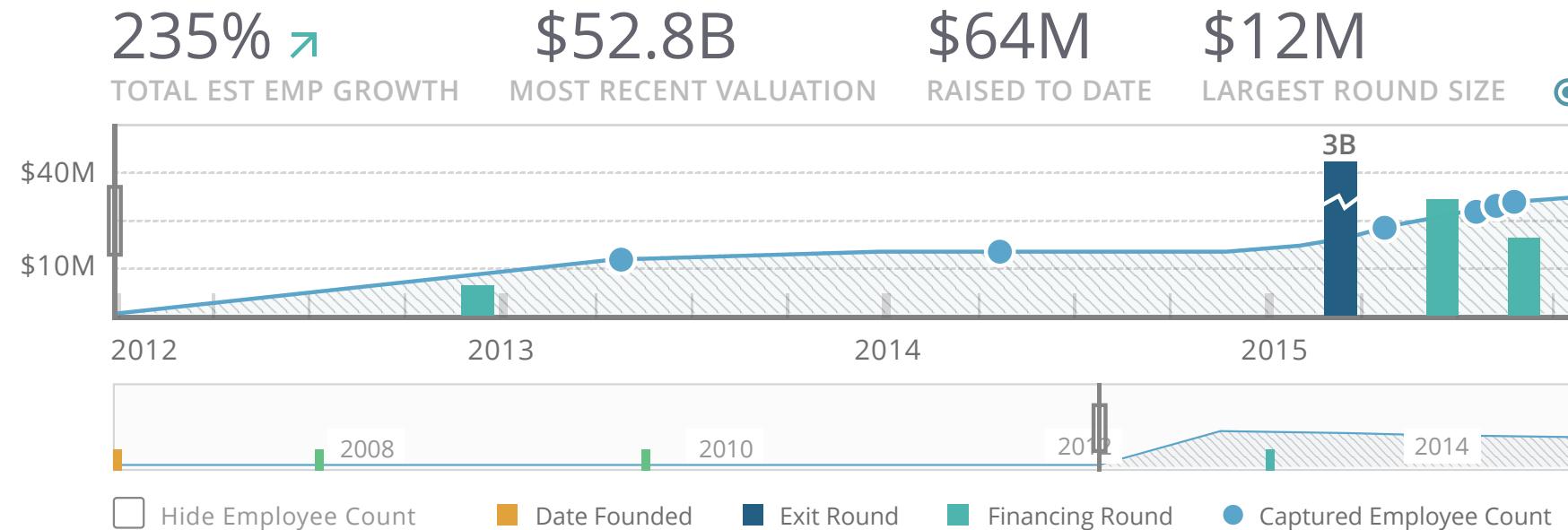
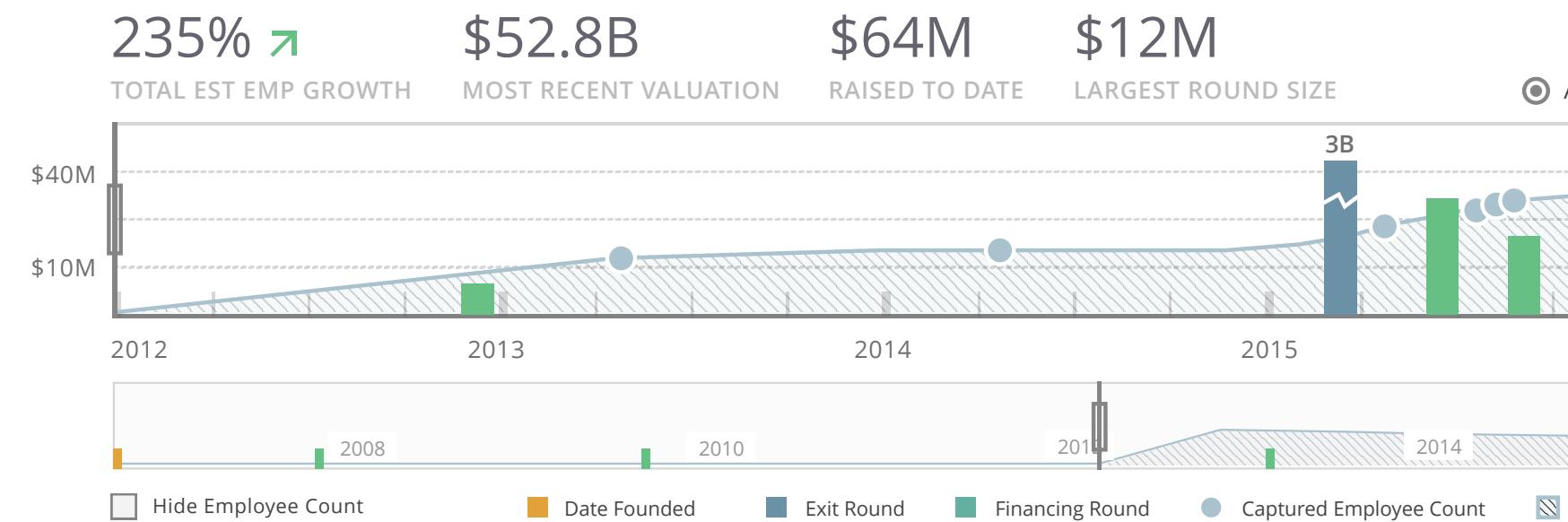
Allowing the graph to collapse made it easy for a user to reclaim vertical space in their browser. Collapsing the graph hides the deal trend and leaves only the scrubber and summary metrics in view. This is ideal for the user who wants to use the timeline to get a general visual understanding of activity,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



# Future Facing

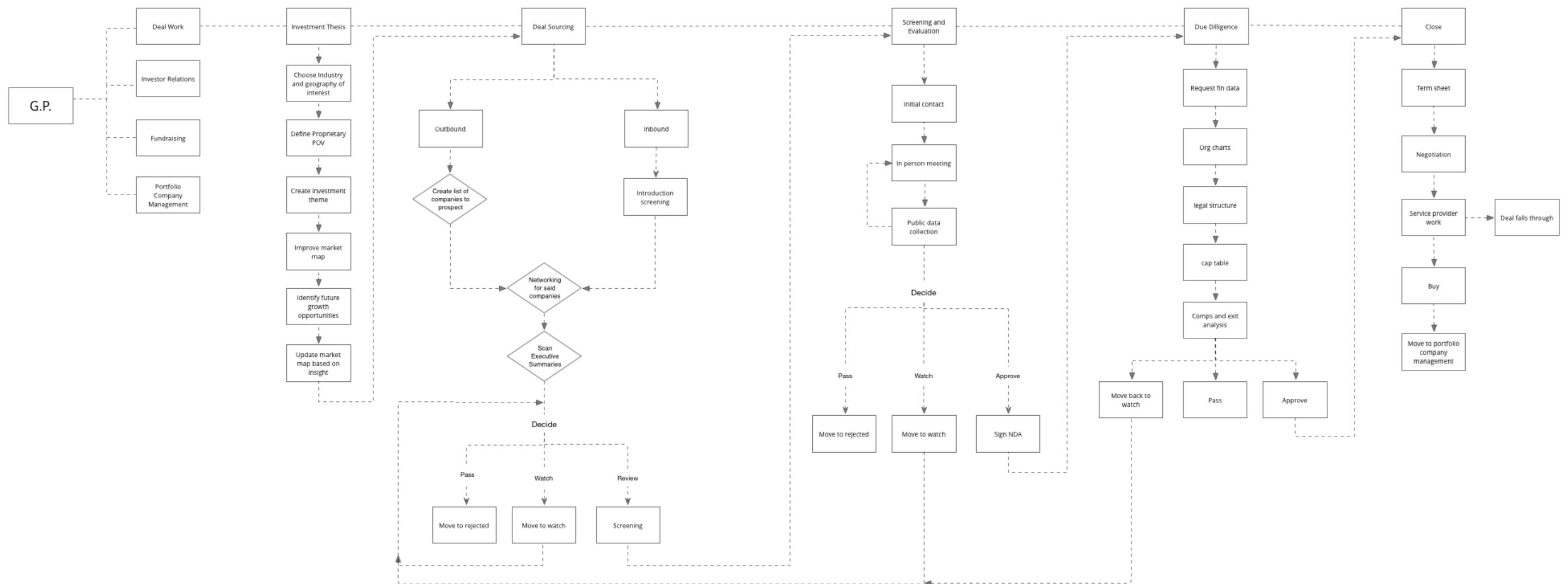
The new timeline would need to be released just prior to a platform redesign. When it came to visual design, I made sure to develop a visual language for the new timeline that could live in both the existing platform and the new release without the need to greatly alter the visual design.

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.

Along with this competitive research I also looked into previous work that had been done on this project years ago. It was important to understand the effort that had already been undertaken in this kind of a legacy project.

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

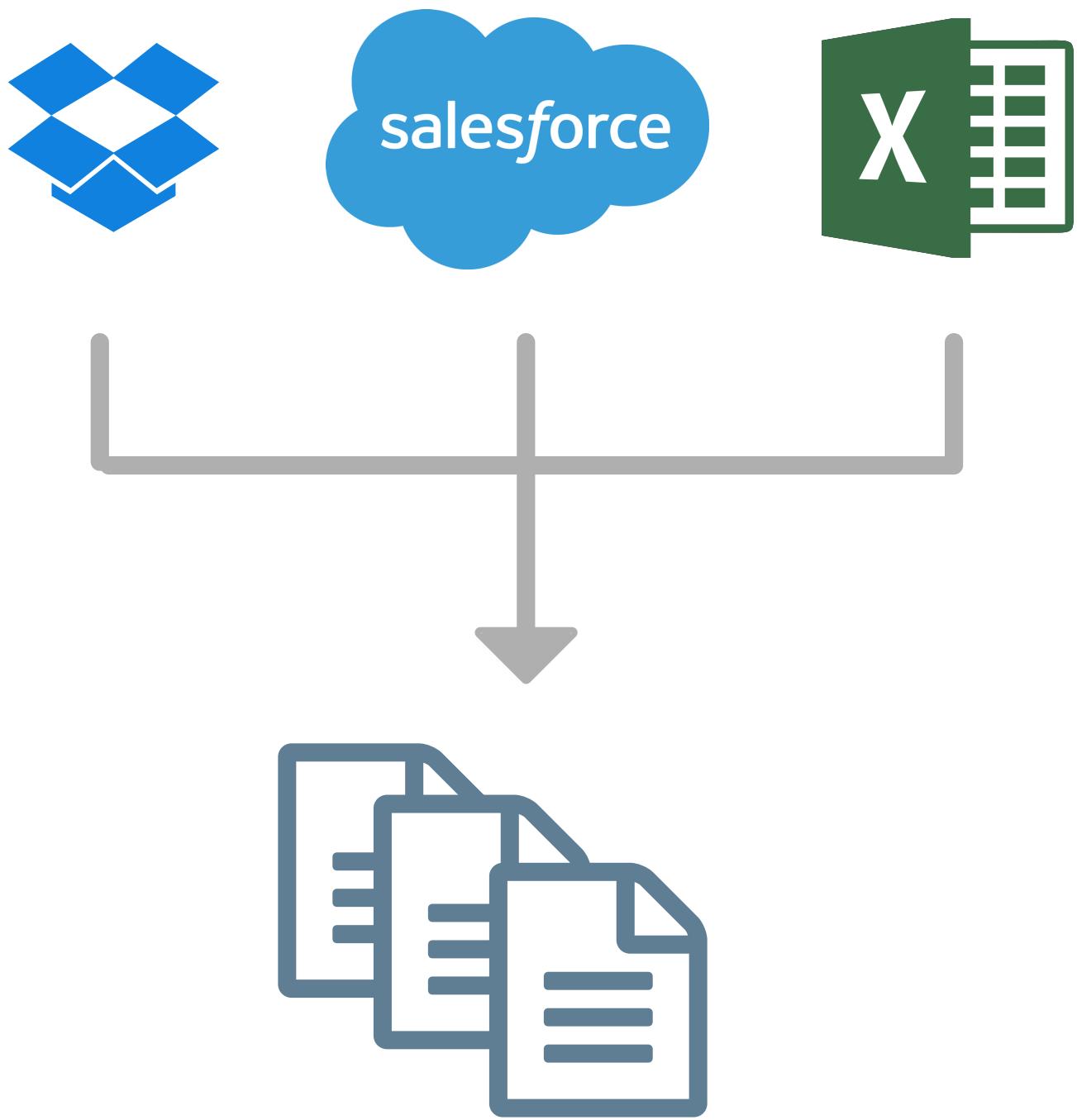
An Excel doc comparing functionality between different competitor solutions to relationship management

# Prospecting

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

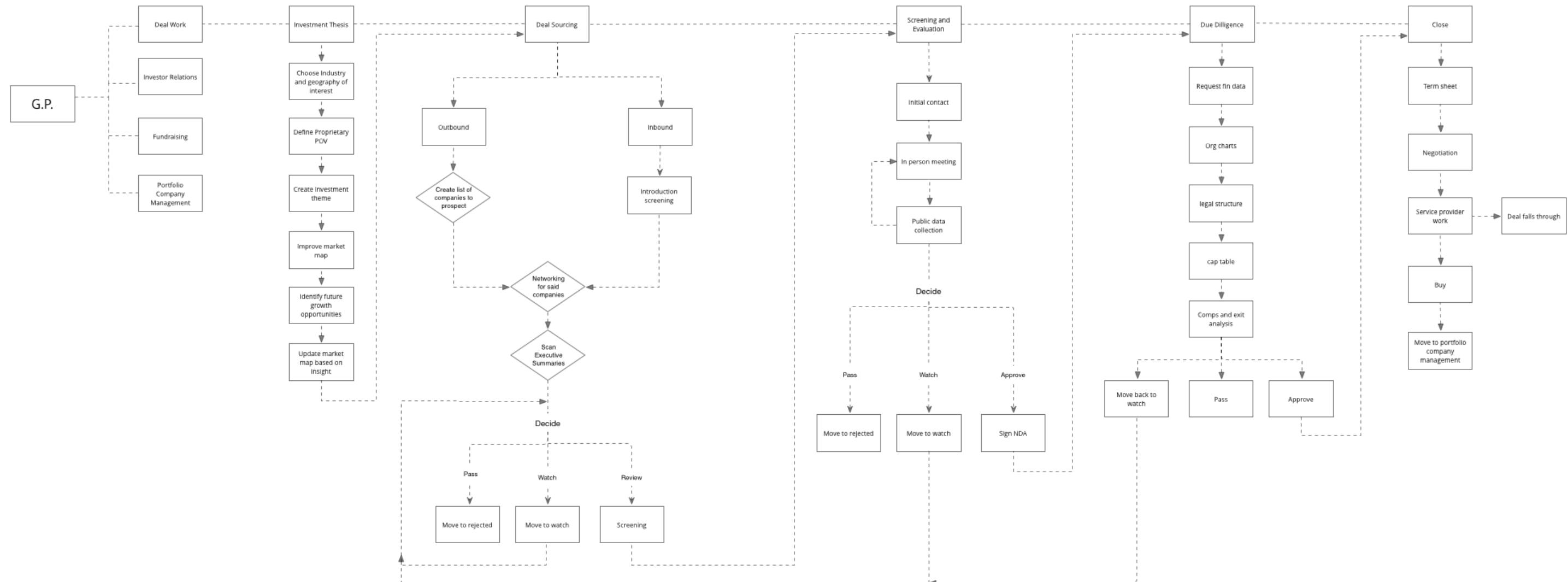
We set up phone calls with users in the venture capital, private equity, and investment banking space. We knew that analysts were the target audience for this feature, so we concentrated on speaking with them to understand how they organized their data and workflow.

What we 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 and execute.



# 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. We 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 design had three goals:

1. Our system needed to be **either** a central phone book for users **or** a companion to other systems.
2. We need to help our users **capture** and **fascilitate** their findings.
3. We needed to marry the **content** to the **workflow**

If we could help users focus less on managing all their data between multiple systems, they could be more effective and succinct in the work they were tasked with doing.

**PROBLEM**



**OBSTRUCTIONS**

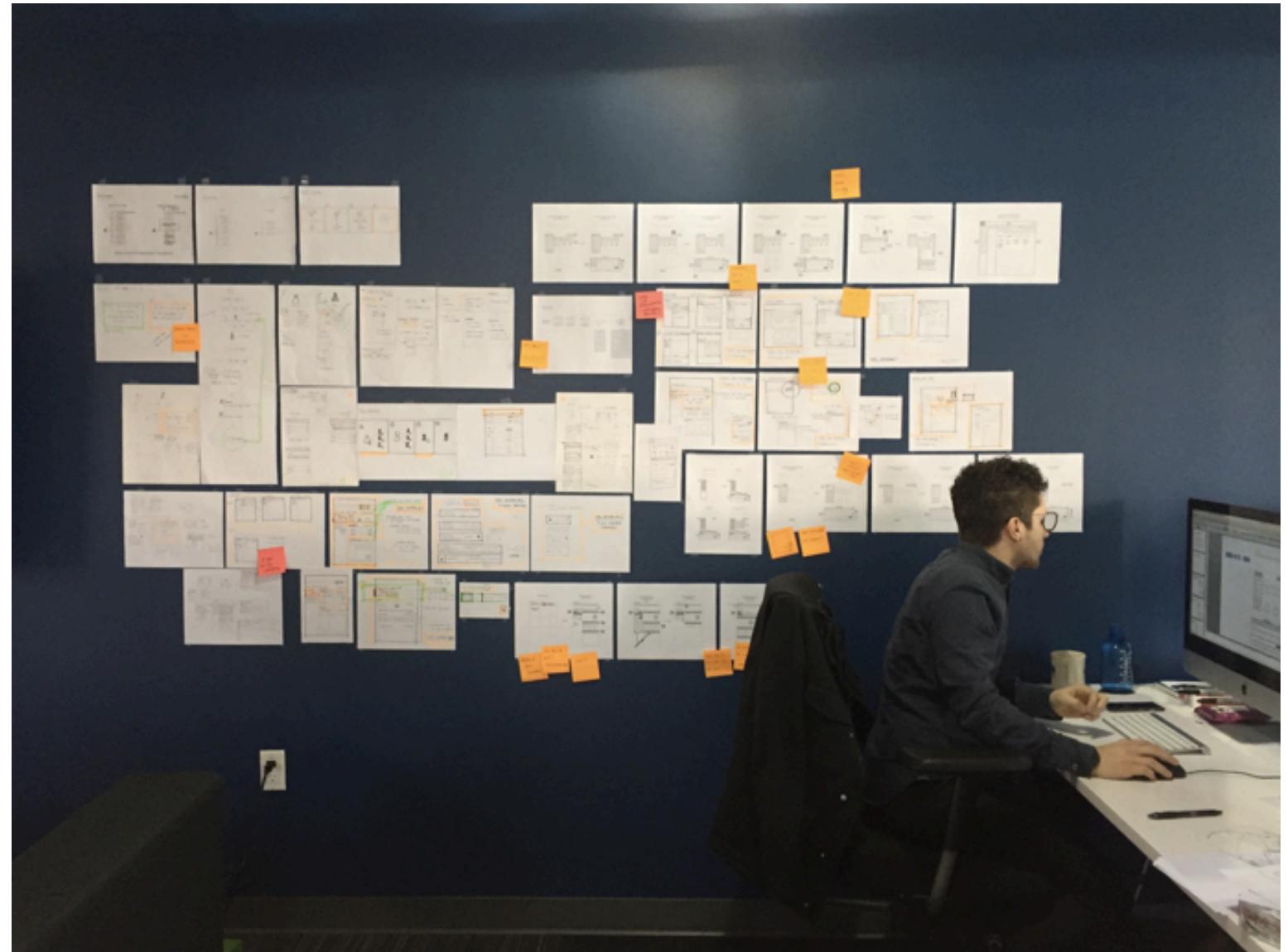
**END RESULT**

# Ideation

We started thinking about how we could marry content to workflow by a few days of sketching.

We came out with six different solutions to start to socialize with stakeholders. We 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 to help distribute the workload throughout the firm.



Above

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

# Ideation

The 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.

This directly addressed the user's need to have the object by which he documented findings directly attached to the system that displayed those findings.



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. We wanted to let users organize information in ways that were personally meaningful to them, rather than forcing them 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 wireframe illustrates a directory-structured list management system integrated into a dashboard. The sidebar provides a navigation menu with options like Dashboard, Projects, Analytics, Library, News, and Recently Viewed. The main content area displays a specific project's details, including its assigned team members and a descriptive text box.

## Above

Directory structured list management for users as "Projects" with a contextual dashboard for each project. \*\* I didn't create this particular wireframe.

# 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

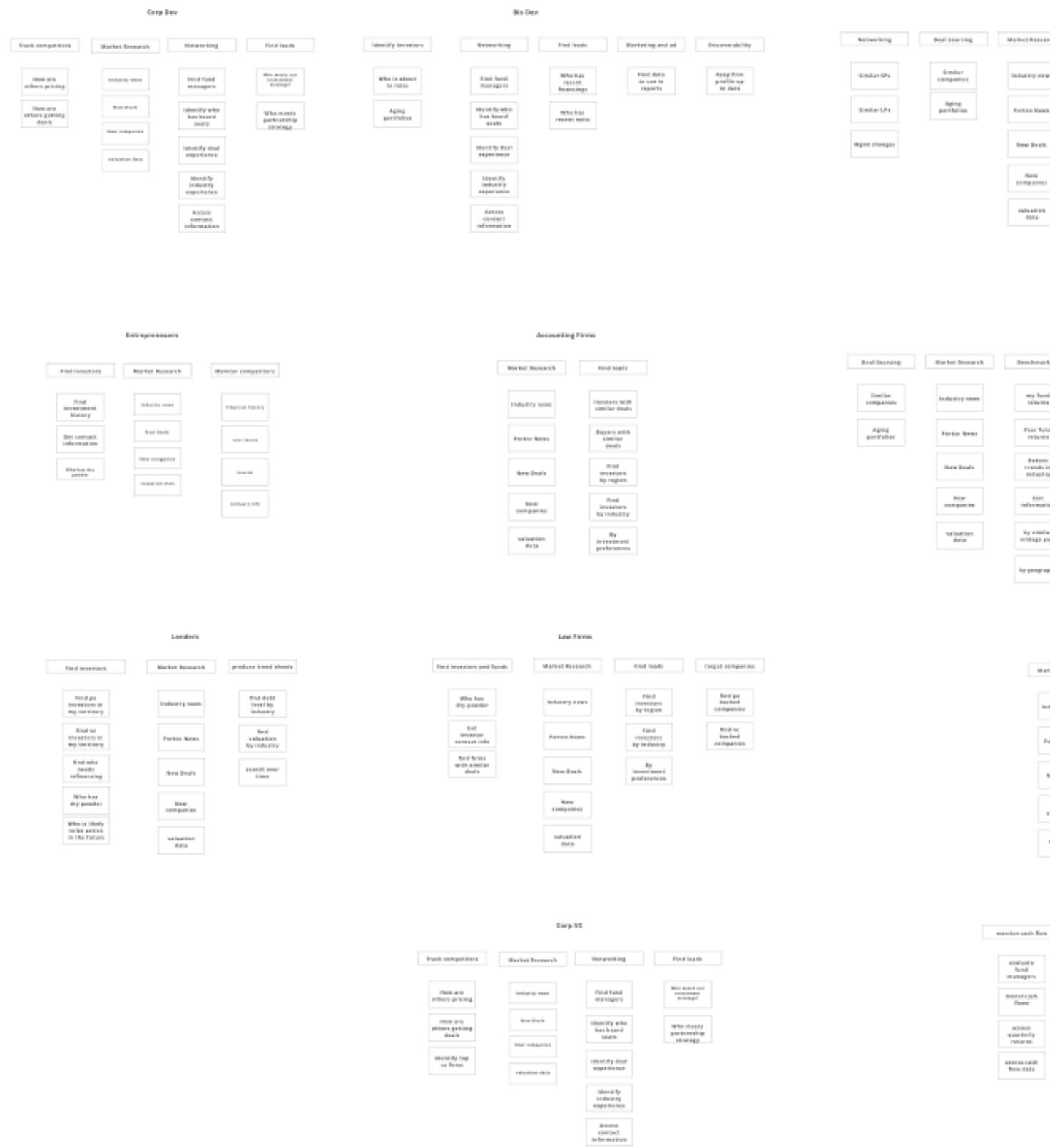
Operator of a social networking platform. The company's online platform enables users to create personal profiles, share multimedia content including photos, videos and links.

# 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

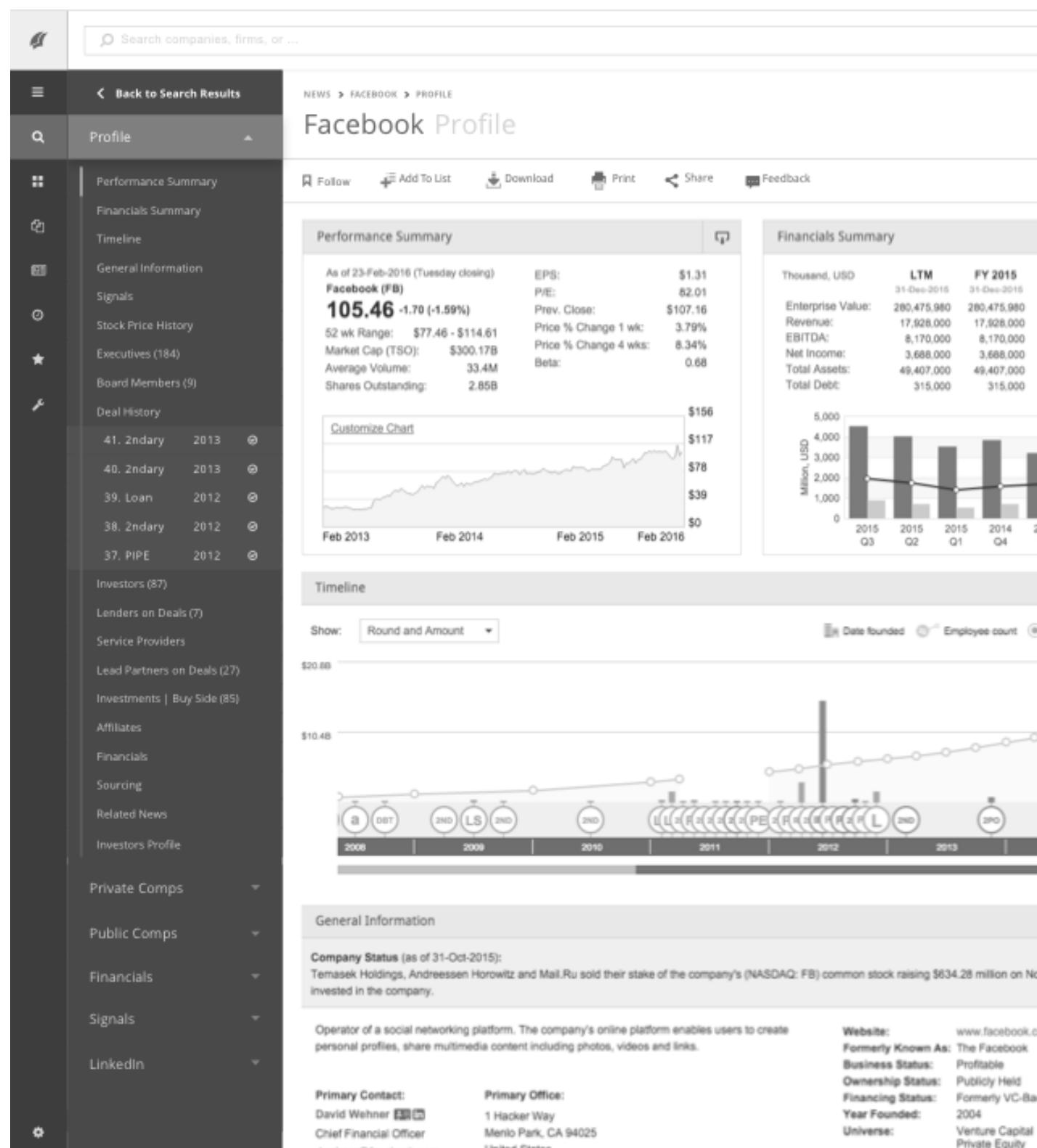
Affinity diagrams of user's needs grouped by user type

# 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.



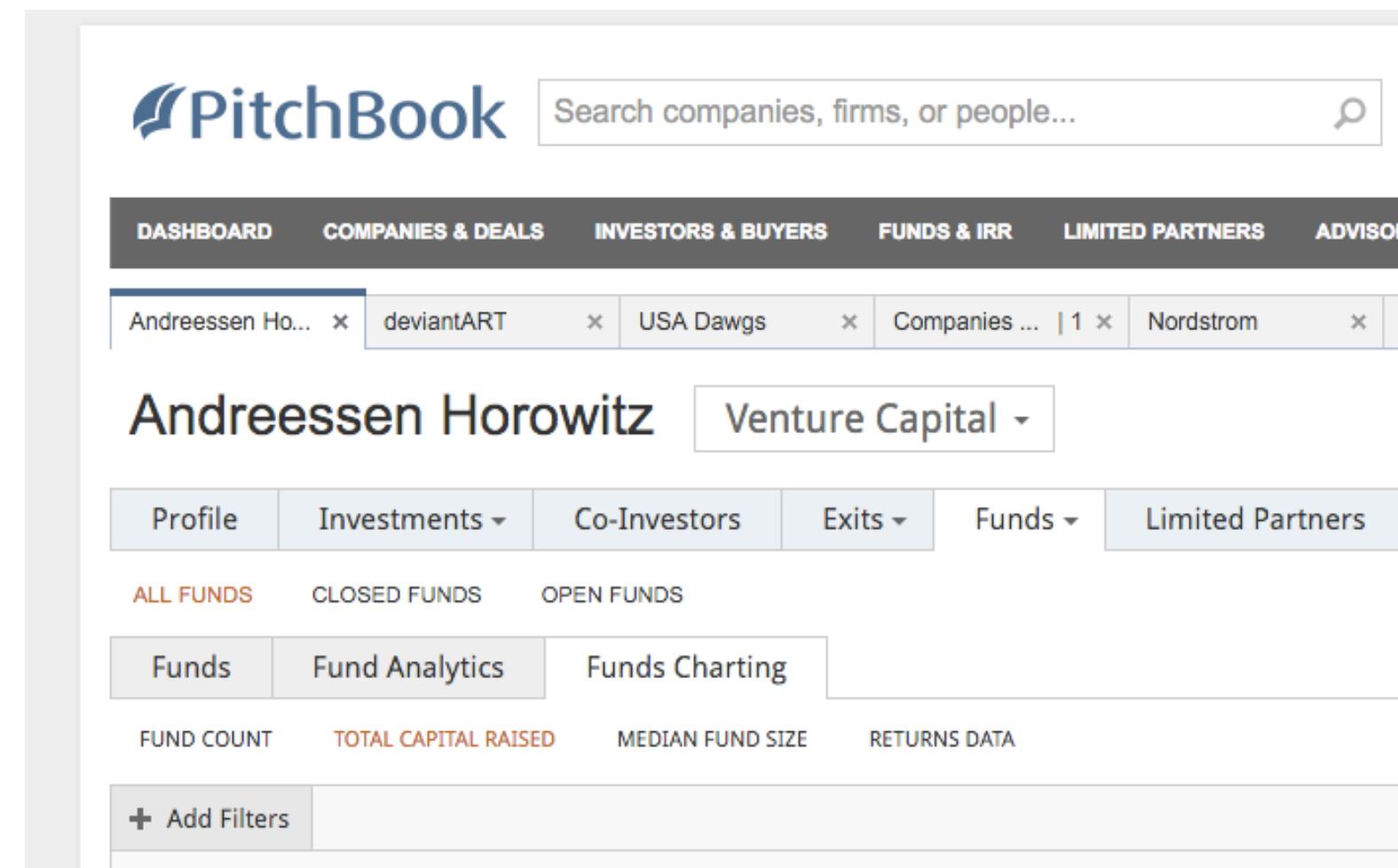
Above

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).

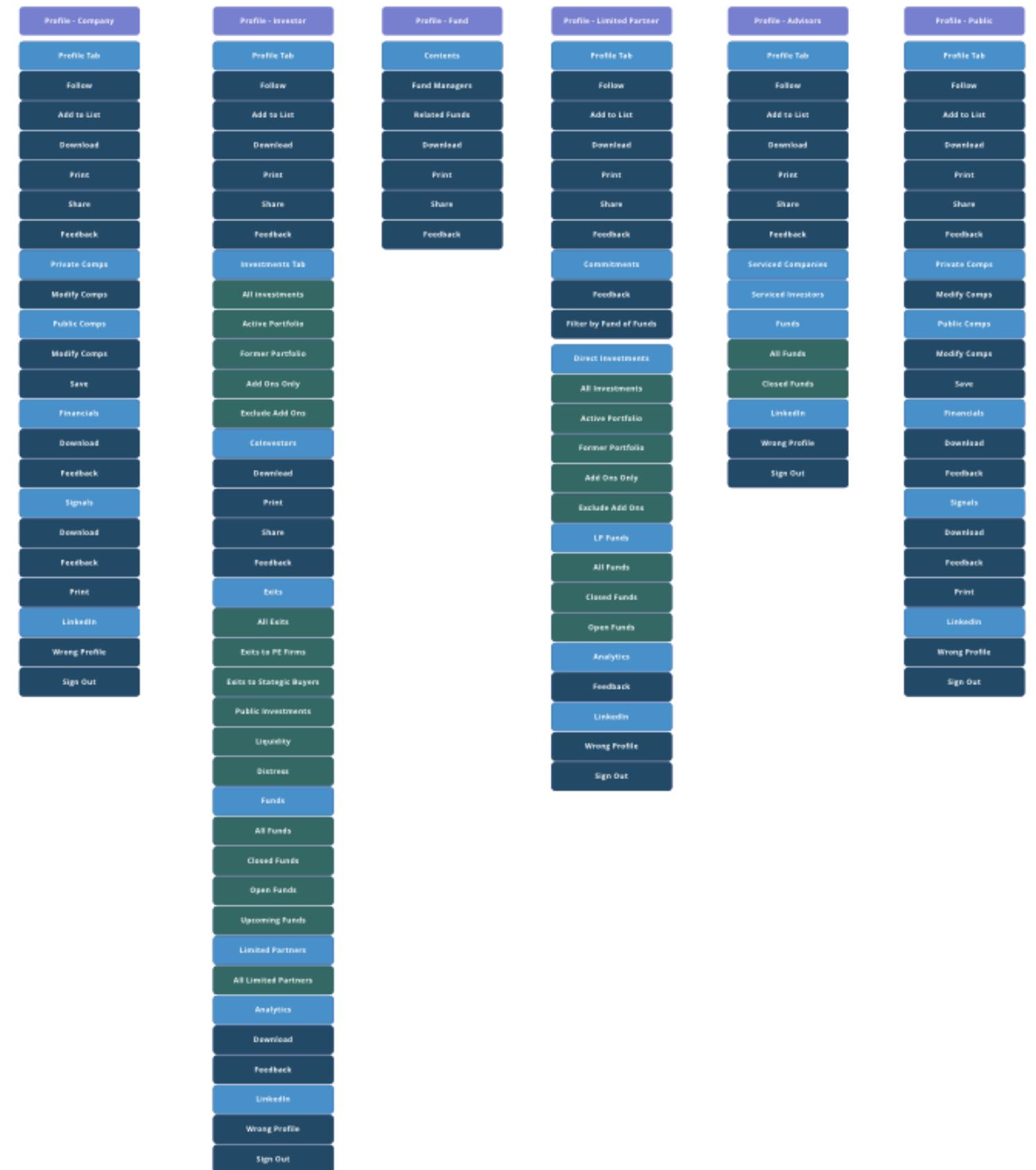


## Above

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

# 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

# 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.

This project is still in progress. At its current stage, we are discussing ways in which to phase development to tighten the budget and release cycle. High-traffic areas of the site are being prioritized and those modules are designed in such a way to be adaptable between different page types with minimal changes.

≡ Hide Sidebar

🔍 Advanced Search

dashboards Dashboards

COMPANIES &amp; DEALS

# Facebook (NYS: FB)

Public Company ▾

▶ Following
[Profile](#) [Public Comps](#) [Private Comps](#) [Financials](#) [Signals](#) [LinkedIn](#)
grid download print link alarm
⌚ 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

## Contents

## 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

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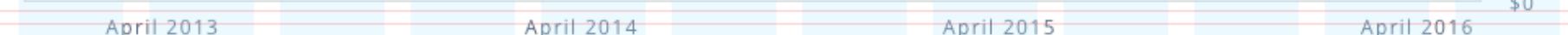
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**PitchBook**

Search for a company Advanced Search Help Chester Wilkerson

COMPANIES & DEALS

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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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<a href="#">VCARD</a> <a href="#">LINKEDIN</a>	EMAIL <a href="mailto:press@fb.com">press@fb.com</a>		

# On Bounding Design Systems

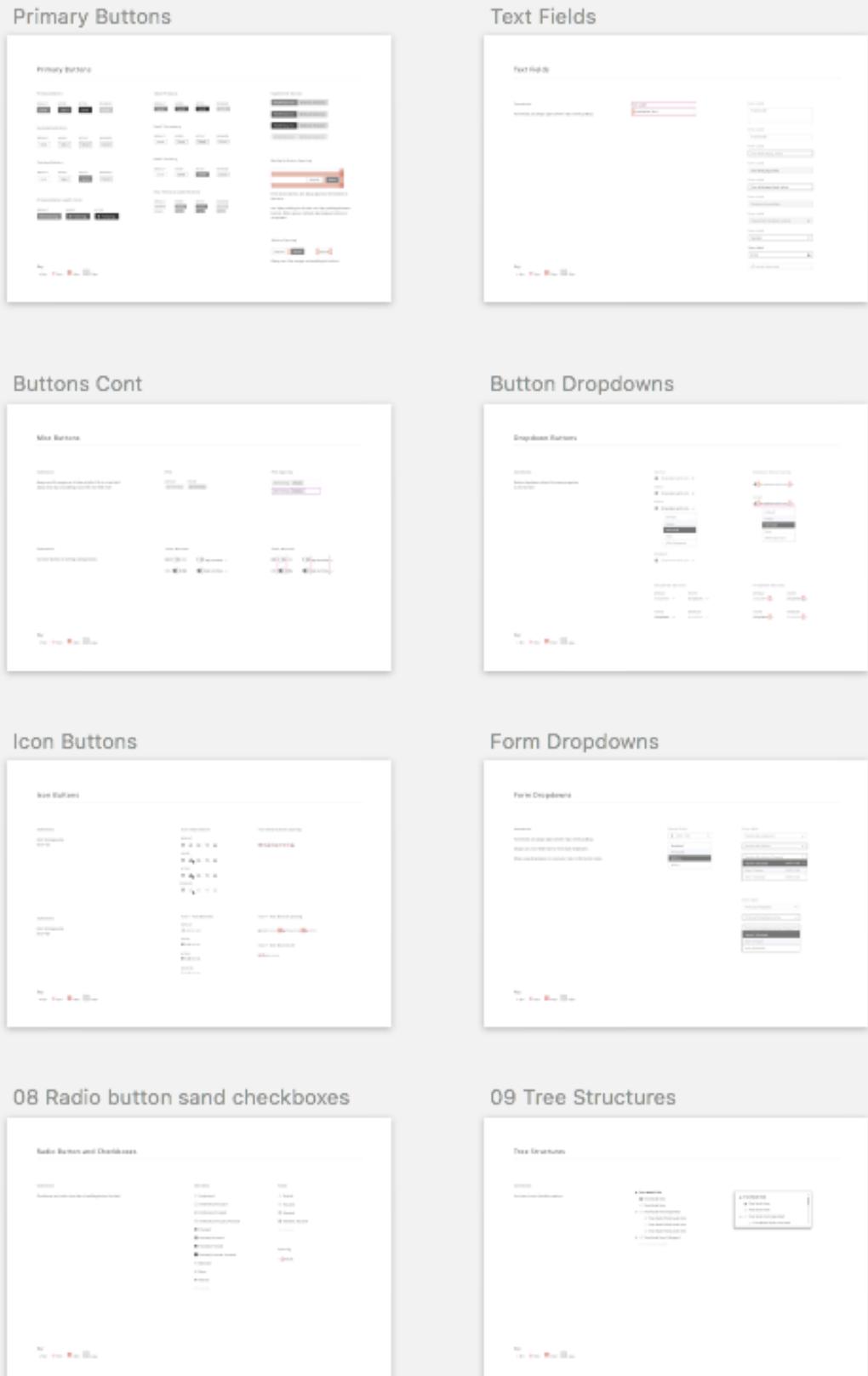
PitchBook Data

Visual Design

After years of developing without a well-defined and maintained 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 new design patterns were introduced with nearly every new feature.

In early 2016 I began working developing a style guide and design system for PitchBook that would refine 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 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

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

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.

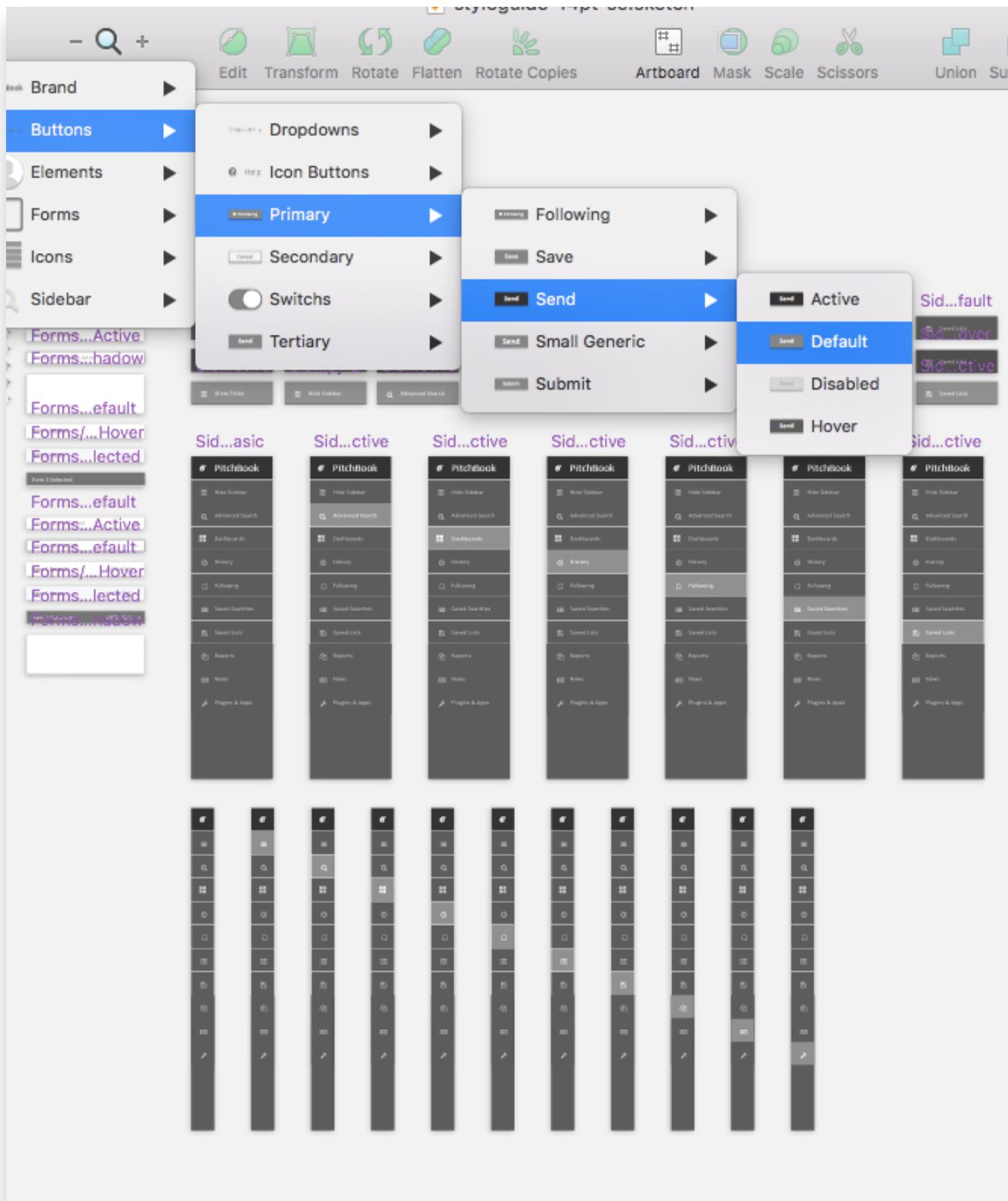
Details		ALSO KNOWN AS
WEBSITE	<a href="http://www.facebook.com">www.facebook.com</a>	The Facebook
OWNERSHIP STATUS	Publically Held	BUSINESS STATUS
UNIVERSE	Venture Capital	Profitable
Private Equity	Publicly Listed	PRIMARY INDUSTRY
Investors (95)		Social/Platform
NAME	INVESTOR TYPE	

# Make it fast

After the system was developed enough to account for generic elements, I took to creating sets for common situations to help designers build layouts faster.

Common elements and actions should always have the same language. To ensure this consistency remained across multiple projects and multiple designers, common elements were converted to symbols so we had the least number of "one off" designs in the platform as possible.

This style guide is a huge step forward for both the design team and the product. I'm really proud to have worked on a product that addresses both customer facing product problems as well as the needs of the UX and development team itself.



# Thank You

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