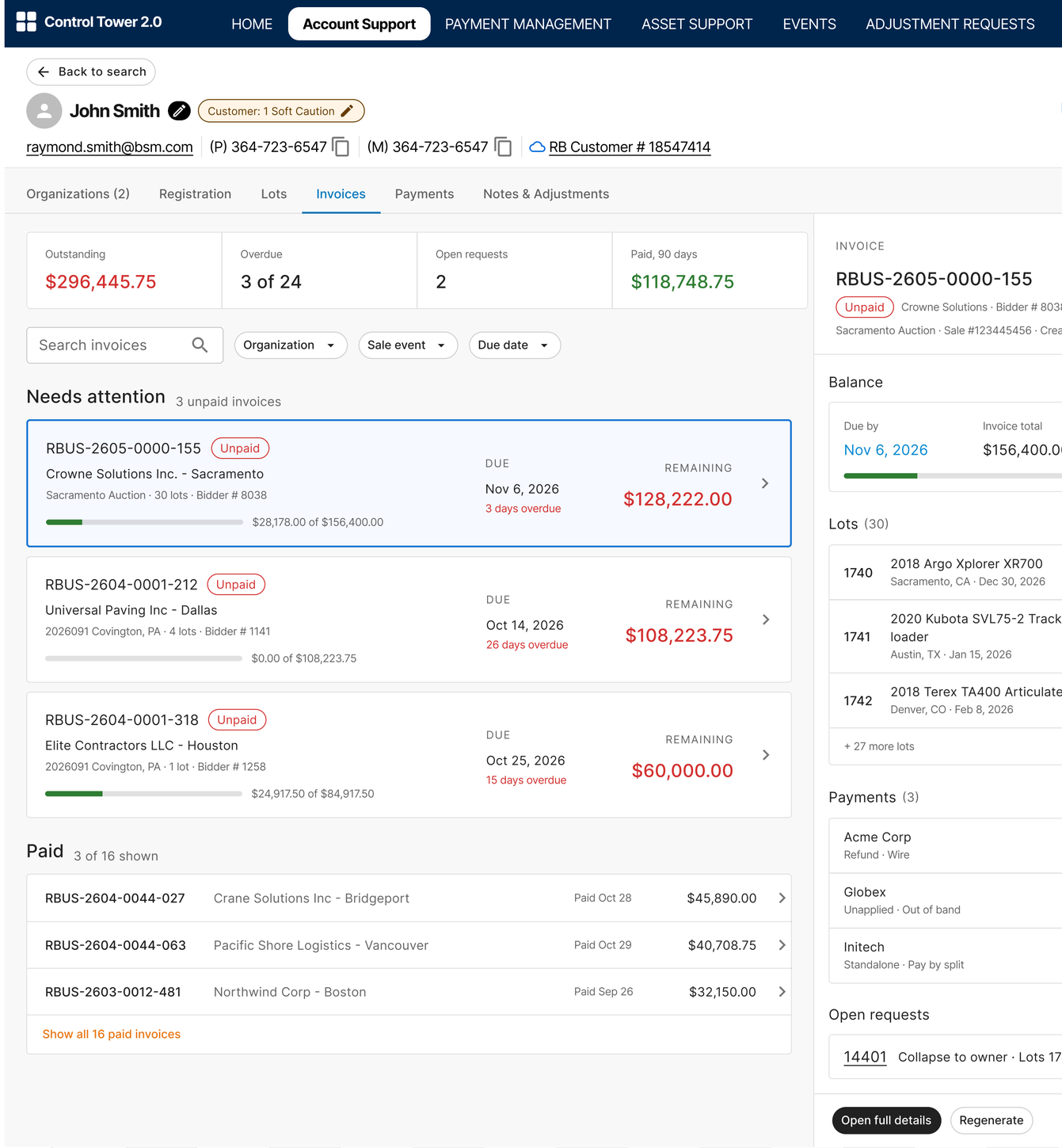
Project Highlight

Streamlining Customer Support through Strategic Design Leadership

Company: Ritchie Brothers Auctioneers



Ritchie Brothers: Empowering Global Auctions with the Control Tower Support Platform

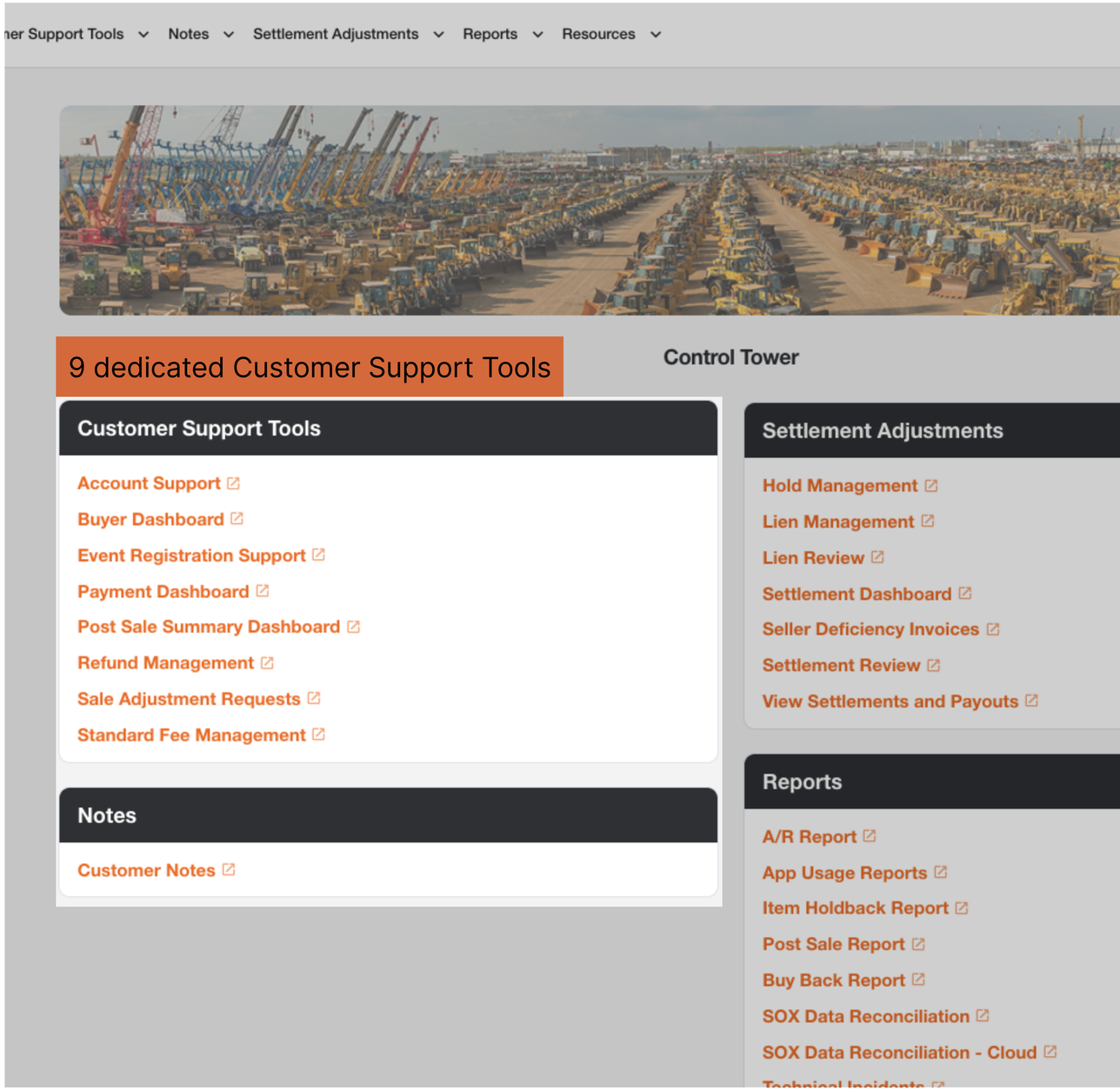
Company:

- Ritchie Brothers facilitates a **global marketplace for large assets**, such as construction and farming equipment, primarily through auctions.

Product: Control Tower

- A **central customer support platform** designed to manage key interactions including inquiries, invoices, and payments.

BEFORE



Project Overview & Goal

Centralizing Support: Unifying Brand & Optimizing Operations with Control Tower Redesign

Ritchie Brothers, a global leader in auctioning large assets, embarked on a journey to **unify its brand and enhance operational capabilities.** Central to this transformation were **2 pivotal initiatives:**

- **Unified Back Office:** Focused on **consolidating internal tools** to improve efficiency and strengthen support operations.
- **Control Tower Redesign:** Key to **solidifying Control Tower as the central hub for support and finance roles**, enhancing operational efficiency and optimizing user experience.

As the **Experience Design Lead**, I l**ed the redesign efforts**, ensuring alignment with the "Unified Backoffice" initiative. I also **developed strategic plans to consolidate tools**, streamline processes, and elevate customer support.

Project Timeline: 1 Year

- **Initiation:** Project kicked off in early 2026.
- **Milestone 1:** Research and development phase completed by mid-2026.
- **Milestone 2:** First redesign launched by end of 2026 as part of the OKR Q4 initiative.

Team and Collaboration

- **1 Product Manager**: Worked closely with the PM to align on project goals and timelines.
- **Loads of Internal Stakeholders**: Customer Care Group Leads, Customer Service Managers,
- **Engineering Team**: Collaborated with engineers to implement designs and optimize the user experience.
- **Product Leadership**: Coordinated with leadership to align project outcomes with strategic goals.

Merging 6 Tools into One Unified Customer Record

Repeated customer lookup → 1 search

Helping a customer with one or more requests used to take an average of 3+ of RB's 8 support tools, with a separate customer search in each. The **UCR narrows this to one tool and one search.**

Increase speed in task completion

Streamlined support processes, reducing task completion times by consolidating tools & minimizing repetitive searches, allowing users to resolve customer inquiries quicker.

Process

Timeline 2026

Phase 1

Understand the Fragmented Workflow

Leverage Claude to

- Generate role specific task flows
- Identify themes from SOP documentation: customer, financial, & assets

Phase 2

Redesigning Information Architecture

Identified the UCR **(Unified Customer Record) as highest impact area through stakeholder interviews**

Created **wireframes in Figma** exploring navigational structures and prototypes

Phase 3

Prototyping and Validating the Unified Customer View

- Led the design and implementation of the **Control Tower 2.0 prototype** generated through Claude.
- Designed and conducted **six moderated testing sessions,** to gather valuable user feedback.

Phase 4

Adapting Implementation to Resource Constraints

- Created a **rollout plan** with multiple development options.
- Recommended aligning **new features with an updated UI** to enhance user experience.

Incremental Feature Updates: Successfully updated features within existing tools to match the future state. This strategy facilitated a **smoother user transition by supporting change management before fully centralizing functionalities.**

Leveraging SOP Documentation and AI for Enhanced Operational Efficiency

Utilizing Standard Operating Procedure (SOP) documentation, I conducted an **in-depth analysis to streamline support processes.** By leveraging Claude, I uploaded these documents and generated detailed task flows. This process allowed for grouping actions based on role and identifying action types. I mapped these actions across sale phases to enhance operational efficiency and support strategic decision-making. **Key findings included:**

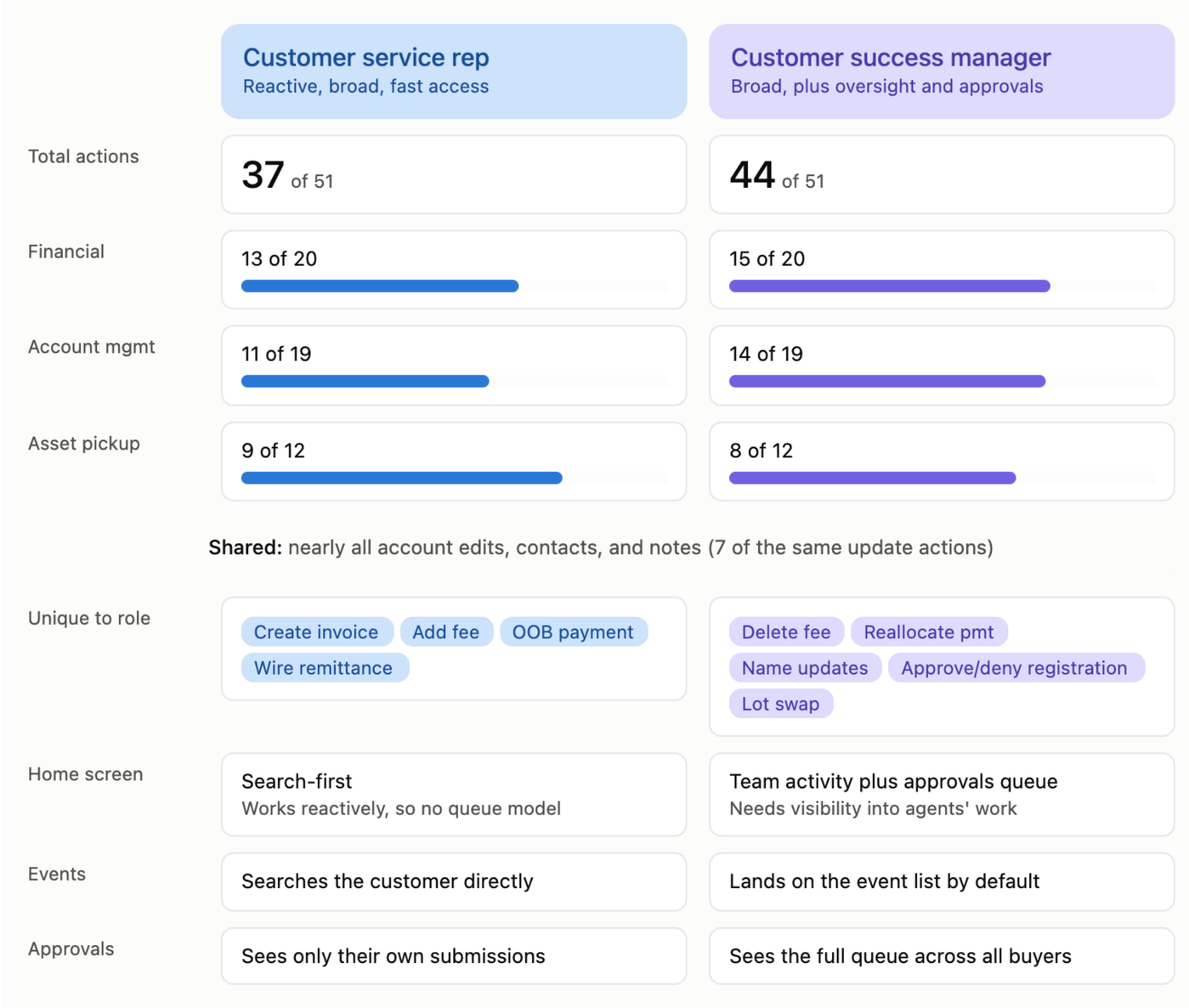
- Action Inventory: **Categorization of 51 actions** across financial transactions, account management, and asset support.
- Action Taxonomy: **Definition of four action types**—view/read, create/update, decide/approve, and coordinate/handoff.
- Lifecycle Mapping: **Visualization of these actions across sale phases**, highlighting high-density in the post-sale phase.

Process Step 1 (Personas)

Role Dynamics in Control Tower: Comparing CSR & CSM Utilization for Optimized Support

This analysis compares how two closely related support roles, Customer Service Representatives and Customer Success Managers, utilize Control Tower.

- **Both roles share responsibilities** in account management, such as managing edits, contacts, and notes.
- However, **CSMs are tasked with higher-stakes decisions**, including approving registrations, updating names, deleting fees, and reallocating payments.
- **CSRs, operating reactively,** primarily use search tools. **In contrast, CSMs require broader visibility** across team activities, starting their navigation from team activity dashboards, approval queues, and event lists.



The new site architecture transforms how users interact with the platform by **organizing tasks within theme groups, aligning with the core business operations.** This approach **shifts from a task-based to a theme-focused structure,** enabling seamless access to holistic customer and event data and enhancing user efficiency.

Agents think in terms of *"who is this buyer, what sale is this, where is the asset, what do they owe," not "which tool do I open."*

How each theme formed

Theme	What discovery showed	Architecture response
Customer	Account management actions were split across Account Support, Buyer Dashboard, and Customer Notes, with duplicate entry points to the same workflows. Roles overlapped heavily on look-up and update work.	**Unified customer record.** One record with six tabs and a persistent header (name, balance, pending count), and the anchor for all support work. Buyer-specific actions live here inline.
Events	The lifecycle layer showed work clustering by sale phase. Support happens pre-sale and post-sale, and each role works in a different window.	**Events.** A new first-class section where agents browse events, see all buyers in an event, and open a buyer record in event context. Search stays as a shortcut.
Assets	Coordinate/handoff actions clustered around pickup and MARS. Agents tab-switched constantly to answer whether a buyer could pick up.	**Asset support.** Payment, release form, yard, and lien status appear inline on the lot row, read-only. "Open in MARS" is a contextual handoff, and hold management moved here.
Financial	The densest area (20 actions), with approval-dependent flows, duplicated Fin Ops and Support workflows, and three separate payment tools.	**Payment management** (a shared Fin Ops and Support workspace) and **Adjustment requests**, where fee and credit changes are routed to the right approver.

Streamlining Efficiency: Transitioning from Task-Based to Theme-Based Architecture

Before
Separate **task specific tools** to assist buyers & sellers throughout their purchasing process

After
Group tasks by **business theme: customer, events, assets, and financials**

TODAY **Separate tools, each with its own search**

Account Support — OWN SEARCH

Search by: Name/Company | First name: JOHN | Last name: SMITH | Company: Enter value | Search

↓ Open the next tool, search for the same customer again

Buyer Dashboard — OWN SEARCH

Invoice Search By: Buyer Email | Buyer Email: cat1@mailinator.com | Search

↓ ...and again in each of the other tools

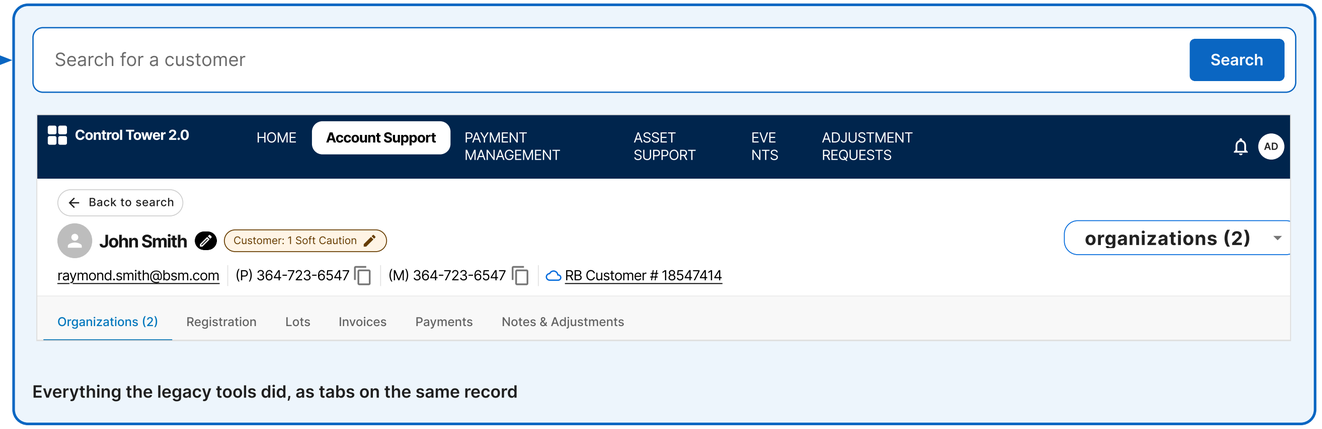
Control Tower · Customer Support Tools — 6 ENTRY POINTS

- Account Support ↗
- Event Registration Support ↗
- Buyer Dashboard ↗
- Sale Adjustment Requests ↗
- Hold Management ↗
- Customer Notes ↗

Every tool opens on its own page, so the customer is looked up again each time.

SEARCH ONCE

NEXT **One identity header, one record**



Everything the legacy tools did, as tabs on the same record

Proposal: The **theme-based architecture refocuses user interactions around core business themes**, enabling a unified search experience that consolidates all customer data.

The previous task-based architecture **required users to navigate multiple disconnected processes to access customer information**, leading to inefficiencies.

Process Step 2 (Wire framing)

Harnessing All Customer Data to One Search & Implementing Fuzzy Search for Quicker Customer Assistance

Repeated customer lookup → 1 search

Process Step 2 (Wire framing)

One Search, Holistic Customer View: Discovering the Power of the Unified Customer Record

6 customer support tools → one 360 customer view

Process Step 3 (Testing)

User Feedback Highlights Preference for Streamlined Interfaces

“I actually really enjoy this view more than what we’re working with right now.” **(Sierra Wright)**

“There’s just too many buttons to go anywhere [today]... it’s easier on here to go and just toggle through each section.” **(Zindy Perales)**

Sessions
6
Aug 4-6, 2026

Praised single-page view
4 of 6
unprompted

Roles covered
5
phone, counter, lead, SME, CSM mgr

Also worked well

- Type-ahead search
- Bidder number copy after registration
- Hide-columns and saved views
- Inline tax exemption status
- Notes placed on the left

Fix next

- Payments: show why “pending” or “failed,” plus payment-received date
- Event-level 360 view for sale-day work
- Notes: visible beside other tabs, with refund-hold notes

Outlining 3 adaptive rollout strategies for the Control Tower redesign, that align with future company initiatives **while considering current development resources**

Full Release

Comprehensive rollout demands extensive change management.

Phased Approach

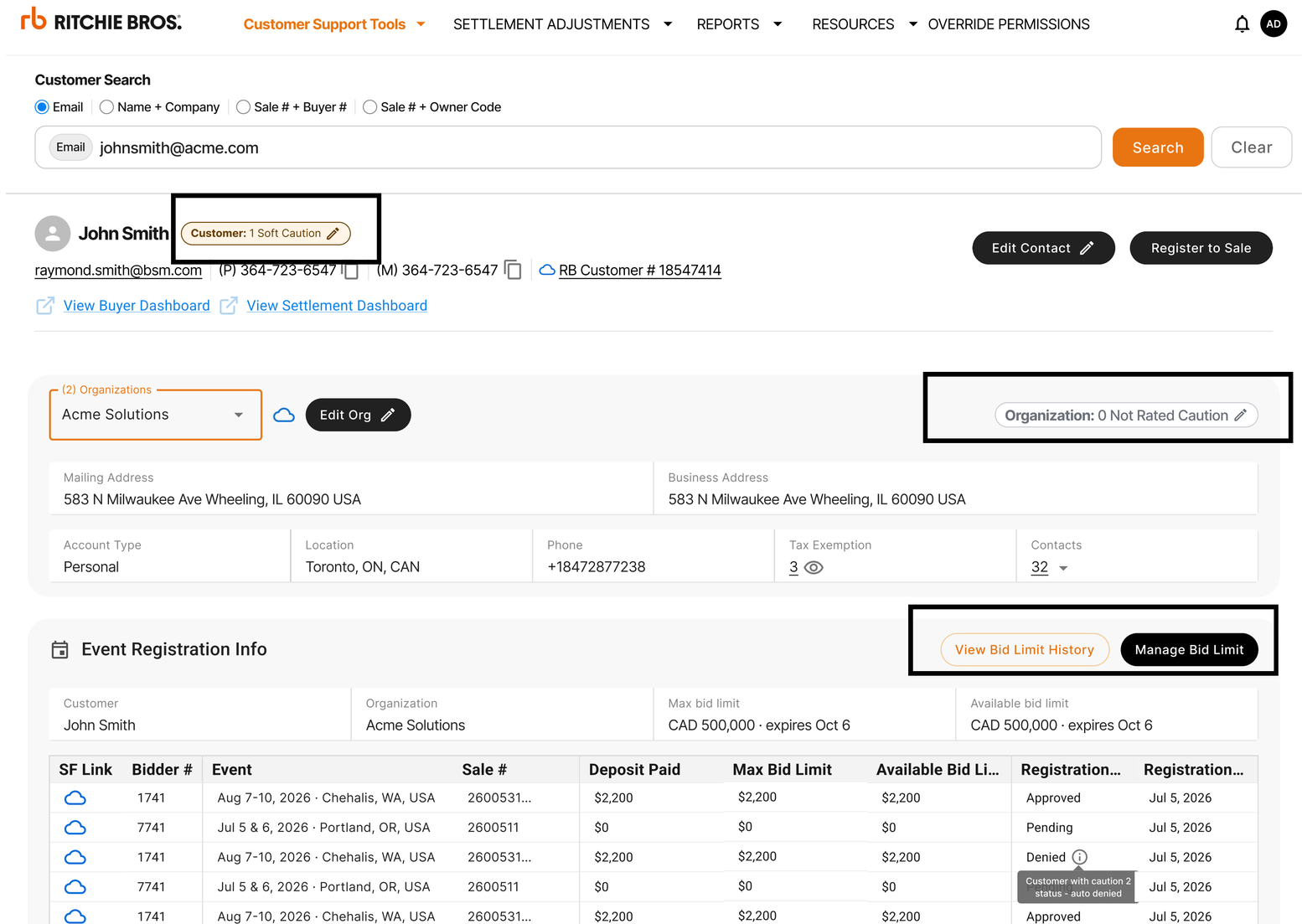
Incremental updates preserve stability and allow gradual integration.

UI Refresh with Strategic Features Introduction:

This scaled-down approach involves

Update the UI of the Account Support app to align with the intended future state.

Does not immediately integrate existing tools but focuses on implementing two new features.



Outcomes

Improved Information Architecture:

The redesign focused on three core themes: customers, financials, and assets. This **clear information architecture led to a more organized and intuitive design**, informing the proposed Control Tower sections and enhancing user navigation.

Establishing New Internal Standards:

The project's approach demonstrated the **value of user testing** and validating experiences before launch, **setting a new standard for internal tool design at RB.** It highlighted the importance of investing in user research upfront, especially with limited design resources, to drive successful design outcomes.

Connected Redesign to Current Work:

Incorporated features like caution status and bid limit management from multiple tools into the Control Tower, ensuring **continuity in development and aligning with future product directions.**

Lessons Learned

Importance of Adaptive Strategy:

The ability to pivot and create adaptive rollout strategies ensured alignment with shifting priorities and company goals.

Cross-Functional Collaboration:

Working closely with various teams enhanced communication and streamlined the integration of new features.