

# ***LEADBeyond***

## **Advisory Support for Customer Support Operating Model & Knowledge Management**

Response to Request for Proposal | ZEISS Vision Care

including

**WORKSTREAM A: Operating Model**

**WORKSTREAM B: Knowledge & Training**



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# LEADBeyond brings the hands-on experience needed to design and scale ZEISS' knowledge-intensive support organization from day one

We propose for both **Workstream A (Operating Model)** and **Workstream B (Knowledge Management & Training)** — delivered by one integrated senior team.

## We've built this before

- **reneo/LIVINGS:** Customer Excellence Center from scratch — NPS +52, -75% escalations, Average Handling time from 39 days to 48hs.
- **Same challenge:** prescription-based products, knowledge-intensive support, scaling from zero
- **Hands-on:** we designed the operating model, KM system, SLAs, and trained the team

## Both workstreams, one team

- **Operating model + knowledge management** are two sides of the same coin — we deliver both
- **No handoff risk:** the same people who design the model also build the knowledge architecture
- **11 integrated modules** across WS-A and WS-B with clear deliverables per phase

## Senior top-tier strategy consulting, zero delegation

- **Frederic Rupprecht:** ex-McKinsey AP, Harvard MPP — commercial excellence & service ops
- **Jonathan Günak:** ex-Roland Berger Principal, LSE — digital transformation & operating models
- **Every session partner-led.** Expert network on tap (Apple, Amazon, N26, Vattenfall)

## Real impact from day zero

- **AI chatbot prototype** for ZEISS Vision Care customer self-service — built, not theorized
- **Service monitoring dashboard** with decision-grade KPIs (Resolution Quality, Knowledge Reuse)
- **Knowledge hub mockup** (e.g. Guru-based) showing how agents access verified answers in seconds



**Top-tier advisory at senior level — at a fraction of Big 4 cost.**

**Indicative engagement:** €83–86k for both workstreams over 16 weeks. **Modular:** start with Phase 1 possible only, decide based on results.



**Our cultural fit to ZEISS brand attributes:** **Leading** — we set the standard with best-in-class frameworks, not templates.

**Inspiring** — we challenge conventions with expert-centric models. **Open** — we work transparently with shared deliverables and validation checkpoints.

# AGENDA

01

## Company Profile, Team & Credentials

LEADBeyond GmbH – who we are, our team, and why we fit

02

## Understanding ZEISS Vision Care

Context, brand understanding, benchmarks and our challenge to ZEISS

03

## Workstream A: Operating Model Advisory

Target setup, role model, governance, KPIs, sourcing

04

## Workstream B: Knowledge Mgmt & Training

Concept, onboarding, training paths, chatbot, tools

05

## Methodology & Approach

Phase model, deliverables, timeline, advisory formats

06

## Benchmarks, References & Expert Pool

Industry insights, case studies, contactable references

07

## Pricing

Rate card, effort model, cost corridor

08

## Company Profile & Senior Profiles / CVs

Detailed backgrounds of core team member

ZEISS

We've built an interactive proposal landing page incl. chatbot & analytics mockups to make key components tangible upfront

👉 Click here: <https://zeiss.leadbeyond.de/>

👉 Password: "stronger together"

01

# COMPANY PROFILE, TEAM & CREDENTIALS

# Why we are the perfect partner for ZEISS



**Frederic  
Rupprecht**

McKinsey  
& Company





**Jonathan  
Günak**

Roland  
Berger



## SERVICE & ORGANISATION EXCELLENCE

with a proven track record

- Development of scalable business and service models in early, uncertain market phases
- End-to-end thinking from go-to-market through to service operations



## Our Promise: HANDS-ON & COST-EFFICIENT

- **Pragmatic, customer-oriented approach** with a focus on real impact
- **Top-tier consulting at partner level** – at the price of juniors from McKinsey or Roland Berger



## Deep Expertise in BUSINESS MODELS & NICHE MARKETS

- **Experience in complex, technology- and knowledge-intensive niches**  
Service models where domain expertise (e.g., prescriptions, product variants) is critical to success
- **Scaling through structure and expertise rather than pure headcount growth**  
Expert-centric approaches, modular service logics, and targeted use of automation

# Our proven track record in building customer service excellence aligned with ZEISS requirements

Domain	Our Expertise	Clients we created impact for	Relevant For ZEISS
 <b>Customer Service Strategy &amp; Planning</b>	Launch readiness, forecasting, hypercare, capacity planning under uncertainty, channel & segmentation design, TOM & governance	   	✓
 <b>Service Execution &amp; Enablement</b>	Operating model redesign, tech backbone, KPI & performance management, knowledge management from scratch, BPO steering	  	✓
 <b>Knowledge Mgmt &amp; Training</b>	Structured onboarding & ramp-up programs for support teams, skill-based training paths per role, knowledge-from-case learning loops, micro-training design, competency assessments & certification frameworks	  	✓
 <b>AI, Chatbots &amp; Dashboards</b>	AI-powered sales automation (Hasenkopf), service monitoring dashboards (Quartierkraft), chatbot development for customer-facing use cases	 	✓
 <b>IT &amp; Automation (Tool-Agnostic)</b>	CRM/ticketing/WFM target architecture, self-service/AI strategies, platform comparison (Cognigy, Zendesk, Parloa, etc.)	  	✓

# We transformed the Customer Service with Measurable Impact for Europe's fastest growing asset manager within 9 months

## About the client



- **One of Europe's fastest-growing decarbonization asset managers** focused on large-scale residential real estate transformation
- Backed by **€600M debt platform (incl. Goldman Sachs and top-tier investors)**
- **€200M+ invested in 2024**, including large-scale portfolio acquisitions across Germany

**-37 days**

Average Handling Time  
39.1 days → <48hs  
(May 2024 – March 2025)

## Our impact

Dimension	Before	After / Our Impact
<b>Customer Experience</b>	Low satisfaction, high friction, 1-star level	<b>NPS +52, significantly improved CX, 4-5 star level</b>
<b>Escalation Logic</b>	Person-dependent problem solving, high escalation rate	<b>-75% escalations, knowledge-based resolution</b>
<b>Process &amp; Digitalization</b>	Manual processing, no end-to-end ticketing	<b>&gt;90% digitized processes, central ticket &amp; case management</b>
<b>Response Time</b>	No SLAs, low transparency, slow reactions	<b>&lt;4h response time, clear SLAs &amp; real-time transparency</b>
<b>Backlog &amp; Scalability</b>	Growing backlogs, linear scaling via headcount	<b>-866 net open tickets monthly (Q1'25 vs Q4'24), scaling without linear cost increase</b>

### Relevance for ZEISS Vision Care

**Same challenge:** scaling a knowledge-intensive service organization from scratch. Prescription-based products requiring deep domain expertise – directly comparable to ZEISS Vision Care Optical Solutions.

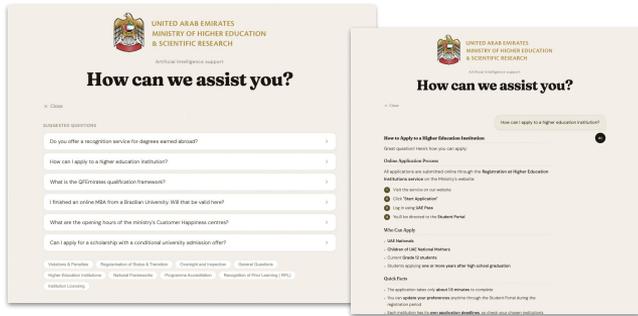
### Your reference upon request



**Lennart Boerner**  
Co-Founder & CEO @ Reneo Group  
(incl. Livings)

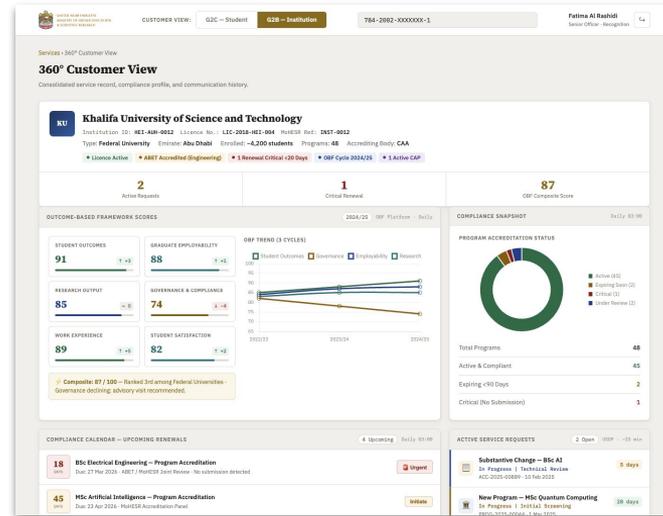
# From national-scale AI platforms to high-performance customer support for the Dubai Ministry in 2025 — we bring proven, build-ready capabilities to ZEISS

## AI-powered Student Lifecycle Chat Assistant



- **End-to-end digital student journey via AI:** From admission to graduation — fully managed through an intelligent conversational interface
- **Hyper-personalized, self-learning assistant:** Continuously improves based on user behavior, policies, and real-time data inputs
- **Seamless omnichannel self-service at scale:** Serving ~50,000+ students across web, mobile, and institutional platforms

## 360° Customer Intelligence & Institutional Dashboard



- **Full transparency across institutions and programs:** Real-time visibility on performance, compliance, satisfaction, and lifecycle metrics
- **Outcome-based monitoring & predictive insights:** Track KPIs, detect risks early, and trigger interventions across accreditation cycles
- **Actionable intelligence for decision-makers:** From operational dashboards to strategic steering (e.g., onboarding, accreditation, student flows)

**Relevance for ZEISS Vision Care**  
**Scalable, AI-enabled support architecture:** Building a knowledge-driven support system at scale. AI-powered, self-service-first architecture with complex user journeys — directly transferable to ZEISS' XR support setup.

**The client**  
**Ministry of Higher Education and Scientific Research (MoHESR), UAE** - The national authority responsible for the higher education ecosystem in the United Arab Emirates — overseeing universities, accreditation, student services, and educational outcomes at country scale.

A decorative graphic consisting of a vertical yellow line at the top left, a horizontal yellow line extending from the left edge, and a circular yellow outline containing the number "02".

**02**

# **UNDERSTANDING ZEISS VISION CARE**

# Why this matters now — ZEISS Vision Care is launching into a uniquely complex service environment

## The situation

**ZEISS Vision Care is expanding its product portfolio** (including new categories like XR Optical Inserts for devices such as Apple Vision Pro) — a new product category at the intersection of medical precision, consumer tech, and retail.

**Customer support is the front line of brand experience.** Service quality directly impacts product adoption, customer satisfaction, and ZEISS's premium brand perception.

**The support organization needs to be built from scratch** — scalable, knowledge-driven, and operational from day one.

## What makes this hard

**Capacity under uncertainty** — Volume and contact reasons are hard to predict pre-launch

**Deep domain knowledge required** — Prescription optics, product variants, fitting — agents need specialized expertise fast

**B2B2C complexity** — End-users, opticians, retail partners, Apple — each with different service needs

**Operational pressure in ramp-up** — Structural mistakes during setup directly impact quality and brand trust

## Scalable setup



Build a support organization that can grow with ZEISS's global ambitions — flexible, structured, and quality-driven from day one.

## Operational readiness



Define service models, team structures, quality standards, and workflows that work in practice, not just on paper.

## Knowledge as a foundation



Establish a knowledge management system that enables fast onboarding, consistent answers, and continuous learning across all agents.

**Our approach:** practical, experience-based advisory — not a +200-page strategy deck, but tangible modules, proven frameworks, and hands-on sparring to accelerate setup decisions.

# What ZEISS is asking for — and how we will deliver it

## Workstream A: Operating Model Advisory

**RFP:** Target setup of scalable support org

→ **Target Operating Model incl. roles, channels, governance**

**RFP:** Service model design & team structure

→ **Expert-centric role model (not tier logic)**

**RFP:** Benchmarks & lessons learned

→ **Industry insights + curated expert interviews**

**RFP:** Risk identification & success factors

→ **Early warning framework + ramp-up playbook**

**RFP:** Review & challenge of internal concepts

→ **Validation checkpoints at defined milestones**

## Workstream B: Knowledge Mgmt & Training

**RFP:** Knowledge structure & documentation framework

→ **7-dimension KM architecture (see Slide 25)**

**RFP:** Onboarding & ramp-up concept

→ **Structured learning paths + skill profiles per role**

**RFP:** Self-learning & continuous development

→ **Micro-trainings + knowledge-from-case loops**

**RFP:** Tools & modern knowledge access

→ **AI-powered KB (Guru), self-service portal, tool map**

**RFP:** Ownership & quality assurance

→ **Knowledge Owner role + content governance lifecycle**

**ZEISS is not looking for a project delivery partner — but for an experienced advisor and thought partner. That is exactly what LEADBeyond delivers: senior-level sparring, practical frameworks, and targeted guidance at key decision points.**



**Frederic  
Rupprecht**  
McKinsey  
& Company



**Jonathan  
Günak**



# Customer service rarely fails because of tools — it fails because of structural decisions made too late

## Patterns from comparable setups

**Classic tier models collapse** under high complexity — escalation adds no value

**Experts get burned operationally** instead of being used to scale knowledge

**KPIs measure volume, not resolution** — AHT and ticket count mask real problems

**Governance grows only after** costs have already exploded

**Training effort stays high** without measurable impact on agent performance

## Early warning signals

Rising escalation rates without clear root causes

Non-transparent expert utilization and capacity gaps

High training investment with no measurable skill uplift

Reactive capacity decisions instead of data-driven steering

Negative customer reviews citing slow or missing responses

**ZEISS**

**Virtoxnx** · vor 1 Jahr  
I have the same issue. Apple couldn't help and told me to uninstall the beta, which I chose not to do.  
I emailed Zeiss three weeks ago but haven't heard back.  
From what I understand, this might be related to astigmatism prescriptions. Do you have it as well?  
↑ 1 ↓  
3 weitere Antworten ▾

**businessmench** · vor 2 Jahren  
I spent a crap load on zeiss last year. Only real noticeable difference for me has been how often I have to clean them (literally 6x a day).  
This year will just grab a regular pair of lenses since I can't justify the price of the zeiss. Maybe when I have both improvements will be clear  
↑ 4 ↓  
5 weitere Antworten ▾

**Wonderful\_Home\_3301** · vor 2 Jahren  
These glasses are worst in prescription category. My 15 year old titan glasses are still much much better than zeiss. Clarity of the lens is too bad.i have given back my lenses and waiting for the refund for the pat 2 months  
↑ 1 ↓

## So what for ZEISS Vision Care

These are not hypothetical risks — we have seen and fixed them in comparable setups (e.g., reneo/LIVINGS). Early signals at ZEISS are already visible. Addressing structure, knowledge, and governance now — before scale — is far more effective than reacting later.





03

# WORKSTREAM A: OPERATING MODEL ADVISORY & SETUP SUPPORT

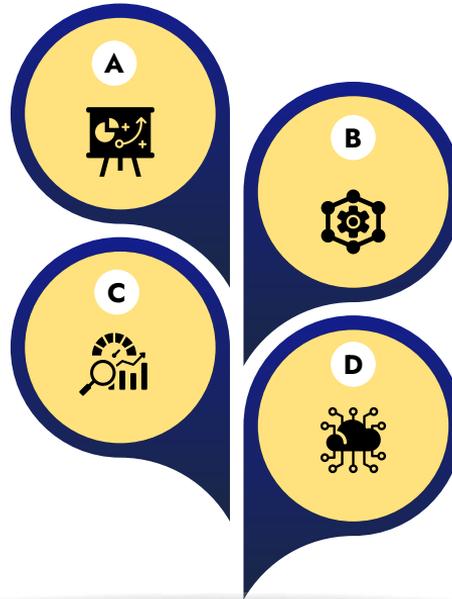
# ZEISS Vision Care Service Requires an Integrated Steering System

## Strategic Target Model

Role of service in Vision Care business model. Without it: service optimizes operationally, not strategically.

## Steering & KPIs

Decision-grade metrics, not reporting. Without it: management reacts instead of steering.



## Operating Model

Expert logic, processes, roles, governance. Without it: experts become the bottleneck.

## Enablement & IT

Knowledge, automation, tool landscape. Without it: scaling remains linear via headcount.



# Who are the relevant recipients of service offerings at ZEISS XR – directly and indirectly?

Focus – details on next page				
End Customers (B2C)	Opticians / Partners (B2B2C)	Retail- & Channel-Partner	Platform & Technology Partners	Internal ZEISS Units
 <p><b>Users of XR optical solutions</b>(e.g., prescription optical lenses)</p>	 <p><b>Opticians</b> within the ZEISS network as the professional interface to end customers</p>	 <p><b>Sales and demonstration partners</b> in the retail environment</p>	 <p><b>Ecosystem partners</b> (e.g., Apple as a platform provider)</p>	 <p><b>Product, Operations, IT, Supply Chain</b></p>
Direct recipients of support, consulting, and customer care	Indirect service recipients with a need for technical clarification and enablement	Need for process, product, and after-sales support	<b>Not direct service recipients</b> , but high indirect relevance	Internal “customers” of the service system
High need for explanation and consultation throughout the usage journey	Require fast, reliable responses and escalation pathways	Focus on enablement, clarity, and escalation logic	Shape user expectations and integration requirements	Need for transparency, feedback, and control information
Service quality directly impacts usage, satisfaction, and acceptance	Service quality indirectly impacts the end-customer experience	Service quality impacts sales success and brand experience	Indirect influence on support volume and reasons for contact	Service acts as input for product and process improvement



# End Customer Service Journey | XR Optical Solutions – Where service quality, knowledge, and operations come together in practice

	Pre-Purchase / Onboarding	Purchase & Order	Delivery & First Use	Issue Resolution (Support)	Returns / Warranty / Care	Stabilization & Continued Usage
<b>Typical Customer Topics</b>	Initial questions on compatibility, usage scenarios, and prescriptions	Clarification of correct visual acuity, specifications, and ordering	Questions on fit, visual quality, and wearing comfort during first use	Clarification of distortions, headaches, or usability issues	Handling of returns, corrections, or warranty cases	Decision on continued usage, renewed need, or recommendation
<b>Service Needs</b>	Orientation & consultation	Error prevention & validation	Explanation & onboarding	Technical problem resolution	Clear processes & decisions	Trust building
<b>Knowledge Requirements</b>	Product & use-case knowledge	Prescriptions & product logic	Product & user knowledge	Deep expert knowledge	Process & product knowledge	Consistent service knowledge
<b>Operational Implications</b>	Reduction of future tickets	Avoidance of rework	Protection of the first-use experience	Fast access to expertise	Operational stability & reputation	Long-term acceptance
<b>Risk if Broken</b>	Mis-purchase / uncertainty	Incorrect order	Frustration at the start	Escalations & dissatisfaction	High costs & reputational damage	Drop-off / low usage
<b>Typical Entry Points</b>	Apple website, ZEISS channels, opticians, ophthalmologists	Online shop, optician ordering	Direct shipment to end customers	Support center (B2C), potentially via optician	Support center / customer care	Direct contact or repurchase

# Strategic Target Vision: 5 key levers and indicative options for building an AI-enabled Customer Center at ZEISS



## 1 Platform Strategy

- **Option 1:**  
**Best-of-Breed** Parloa (Voice) + Ada (Chat) ✓  
Channel-optimized X  
higher integration effort
- **Option 2:**  
**Omnichannel Platform**  
Cognigy, Kore.ai ✓  
unified & scalable X  
sometimes less  
specialized



## 2 Make vs. Buy

- **Buy:** : Established solution (e.g., Cognigy, Zendesk AI) → faster time to launch
- **Make within Buy:**  
Internal AI team for customization & KPI steering
- **Optional BPO:**  
Platform must be multi-tenant and usable externally



## 3 Integration & Scaling

- Integration with CRM / ERP (Salesforce, SAP, Zendesk) is essential
- 80 languages and cloud scalability required
- Data protection: Cloud / Hybrid / On-Prem depending on requirements



## 4 ZEISS-specific Use Cases

- Prescription data, warranty cases, returns
- API-first, clear escalations, handover to agents
- Pilot: e.g., automate “submit eyeglass prescription”



## 5 KPI-based Steering

- Automation rate, CSAT, processing time
- Integration with BI systems
- Regular model maintenance & continuous bot training

# XR Customer Service scales through roles, decision logic, and targeted expert allocation – not through escalation layers

**1 Case Steering: “Right Expert, Right Moment”**

- Intelligent pre-qualification of complex cases
- Direct allocation to the appropriate expertise
- Reduction of unnecessary escalation loops
- Objective: Minimize time to the right expertise – not ticket processing time

**2 Role Logic instead of Tier Logic**

- Core roles**
- **Service Agent (Generalist)**  
Handling of standardized, repeatable cases
  - **Domain / Product Expert**  
Resolution of complex, novel problem cases
  - **Knowledge Owner**  
Systematization, maintenance, and scaling of expert knowledge
  - *Roles are defined by value contribution – not by hierarchical levels*

**3 Separation of Operational Resolution and Structural Improvement**

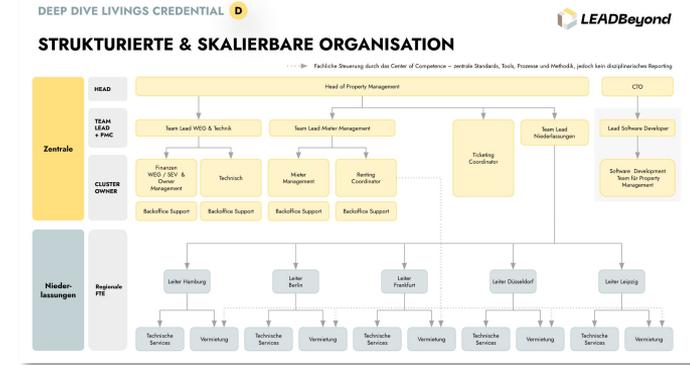
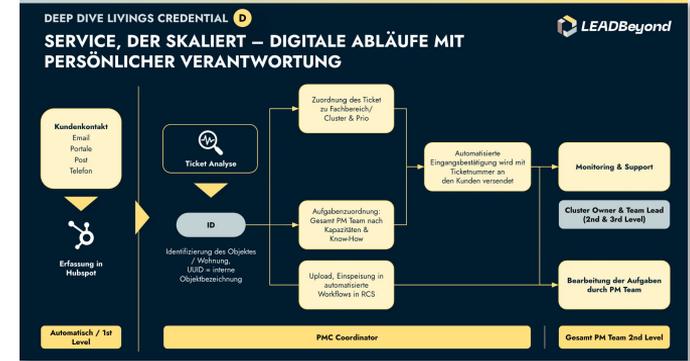
- Experts are not tied to individual cases
- Every expert intervention generates:
  - Root-cause insights
  - Standardization approaches
  - Training and knowledge input
- Every complex case reduces future complexity

**4 Protection and Management of Expert Capacity**

- Clear rules on when experts are engaged
- Defined time windows for:
  - Knowledge work
  - Training
  - Quality improvement
- *Experts are actively managed – not overloaded*

**5 Governance: Clear Decision Rights**

- Who decides:**
- What should be standardized?
  - Which topics are fed back into Product / Engineering?
  - When is sourcing meaningful?
  - Governance replaces implicit escalation



# Steering Metrics That Drive Scalability, Not Just Reporting

## Why Classical KPIs Fall Short

**Average Handling Time (AHT) and ticket volume obscure:**

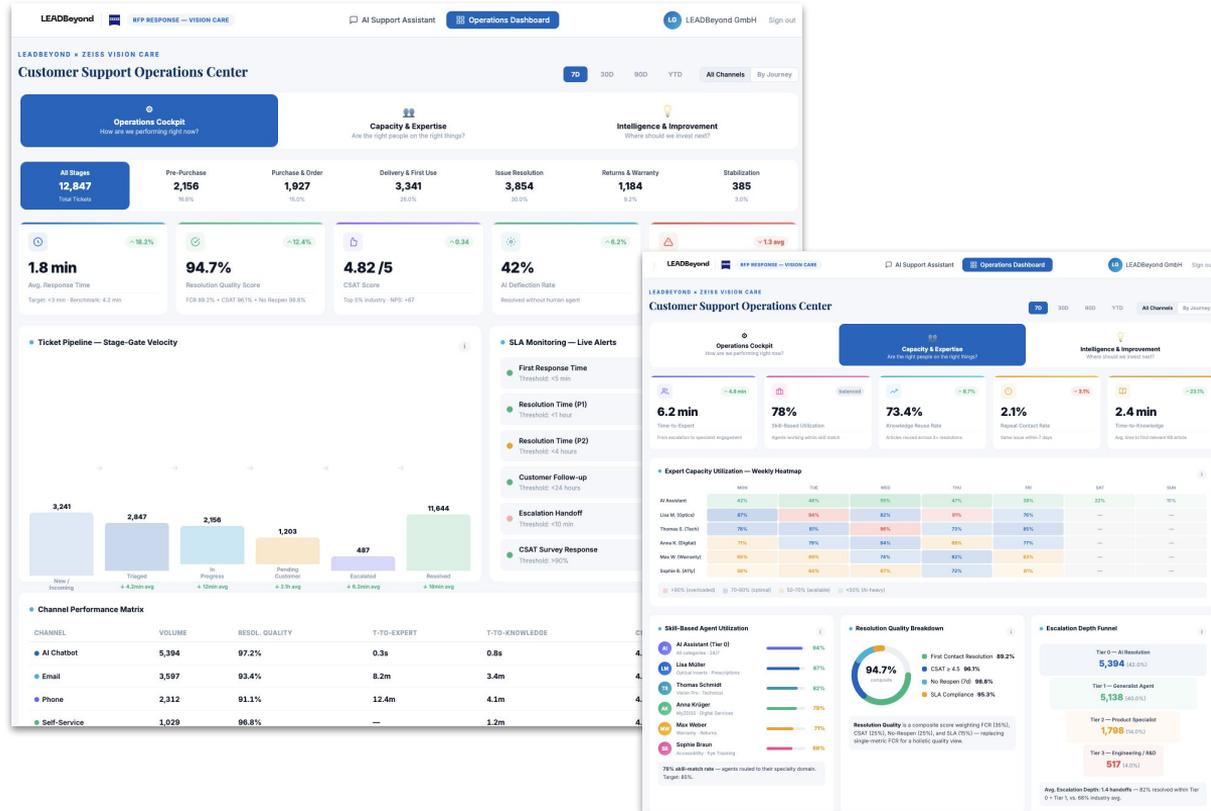
- ✗ Knowledge deficits
- ✗ Escalation dynamics
- ✗ Quality degradation
- ✗ True customer satisfaction

**Leading organizations steer with <15 decision-grade KPIs.**

## Vision Care-Relevant Steering Metrics

- ✓ **Resolution Quality** (not just FCR)
- ✓ **Time-to-Expert** (vs. Time-to-Handle)
- ✓ **Skill-Based Utilization** (expert capacity protection)
- ✓ **Escalation Depth & Root-Cause Clusters**
- ✓ **Time-to-Knowledge** (knowledge creation speed)
- ✓ **Knowledge Reuse Rate** (scalability proxy)

# Vision Care Service Monitoring Dashboard – Built-In from Day One



**Our proposal: Building Service Monitoring Dashboard / Cockpit for strategic and operational alignment early on**

- ➔ Real-time KPI cockpit (Resolution Quality, Time-to-Expert, Knowledge Reuse Rate)
- ➔ Ticket pipeline overview with stage-gate velocity tracking
- ➔ SLA monitoring with alert thresholds
- ➔ Expert capacity utilization heatmap
- ➔ Root-cause cluster analysis for continuous improvement

**Proven approach:** built similar dashboards for Quartierkraft (PM Dashboard with 12-gate tracking, SLA monitoring, performance analytics)

# AI-powered customer service platforms – three realistic options for ZEISS Vision Care

Evaluated against ZEISS-specific requirements: Salesforce/Zendesk integration, B2B2C capability, knowledge base connectivity, multilingual, GDPR/on-prem option

Criteria	COGNIGY	Zendesk Ultimate.	parloa
<b>Best fit for</b>	Full omnichannel control, long-term scaling, complex flows	Fast start with existing Zendesk infrastructure, CRM-native AI	Voice-first channel strategy, DACH compliance focus
<b>ZEISS integration</b>	100+ connectors (Salesforce, Zendesk, Genesys, SAP)	Native Zendesk + Shopify; Salesforce via API	CCaaS (Genesys), Salesforce, Azure ecosystem
<b>Knowledge base</b>	Connects to external KBs; RAG over custom corpora	Built-in Zendesk Guide; content cues + answer bot	Integrates with external KBs; focused on voice flows
<b>Languages</b>	100+ languages	40+ languages	30+ languages (Azure STT/TTS)
<b>Deployment</b>	Cloud, private cloud & on-prem possible	Cloud (Zendesk SaaS) only	Cloud (Azure-based) only
<b>Standout</b>	Enterprise-grade; Gartner Leader; highest scalability	Fastest time-to-value if Zendesk already in use	Voice-first; SOC2 + GDPR; 80%+ call containment

## So what for ZEISS

**Platform choice depends on existing infrastructure:** If ZEISS already runs Zendesk, the AI layer (Ultimate) is the fastest path to value. For a greenfield build with maximum control and scaling ambition, Cognigy is the strongest enterprise option. Parloa adds value specifically if voice is a priority channel.

**Our recommendation:** Start with a focused discovery of ZEISS's current CRM/ticketing stack before selecting. We will assess fit in Advisory Sprint 1 and provide a clear recommendation with migration path.

# ZEISS Vision Care customer service tool landscape — what you need, and what fits

Tool-agnostic assessment: we recommend categories and shortlisted vendors based on ZEISS requirements, not vendor partnerships

## CRM & Ticketing

Central ticket/case management, customer profiles, SLA tracking

Recommended:



→ Core backbone — all channels funnel here. Check if ZEISS already has a CRM contract.

## Conversational AI

Chatbot, voice bot, intent detection, automated resolution

Recommended:



→ First-line deflection for standard XR queries (compatibility, order status, prescriptions).

## Knowledge Management

Internal KB for agents, verified articles, AI search, expert routing

Recommended:



→ The engine of Workstream B. Directly enables agent productivity, onboarding speed, & content governance.

## Self-Service & Help Center

Customer-facing FAQ, troubleshooting guides, community

Recommended:



→ Critical for B2C end-users AND B2B2C optician partners. Reduces ticket volume from day one.

## Analytics & Monitoring

KPI dashboards, SLA alerts, root-cause analysis, agent performance

Recommended:



→ Decision-grade steering: Resolution Quality, Knowledge Reuse, Time-to-Expert, Escalation Depth.

## Training & Enablement

Onboarding paths, micro-learning, skill tracking, certifications

Recommended:



→ Accelerates agent ramp-up. Links directly to Knowledge Architecture (Dimension 1 of our WS-B framework).

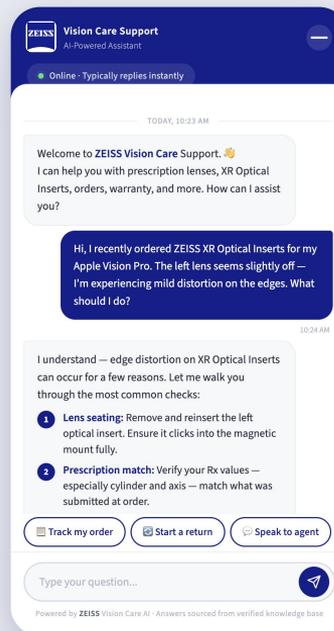
## So what for ZEISS

**ZEISS does not need 10 tools — it needs 3–4 that work together:** a CRM backbone (Salesforce or Zendesk), an AI layer for deflection (Cognigy or native AI), a knowledge platform (Guru or equivalent), and a self-service portal for customers and opticians. We assess the current stack in Sprint 1 and recommend a concrete, integrated tool architecture in Sprint 2.

# Chatbot & Service Monitoring Dashboard – Built-In from Day One

## AI Chatbot for ZEISS Vision Care / XR Support

- **First-line self-service** for common queries (compatibility, prescriptions, order status)
- **Trained on ZEISS Vision Care / XR knowledge base** for accurate, brand-aligned responses
- **Intelligent handover to human agents** when complexity exceeds chatbot capability
- **Multi-language support** (80+ languages via modern LLM architectures)
- **Continuous learning** from ticket data and knowledge base updates
- LEADBeyond has built custom chatbots for client-facing use cases – **we bring proven implementation experience**





**04**

# **WORKSTREAM B – KNOWLEDGE MANAGEMENT & TRAINING**

# Siemens, Amazon and Apple show: AI-powered knowledge management shortens Time-to-Answer and scales support without linear headcount growth

## Siemens

My Learning World



**Platform:** Infosys Wingspan + GenAI (Topaz)

**250,000+ users<sup>5</sup>**

178,000 learning resources |  
216,000 active users<sup>5</sup>

### Key capabilities:

- AI knowledge assistant as learning companion
- Personalized learning paths & recommendations
- AI-assisted content creation (multilingual)
- Real-time chatbot + virtual tutor
- 50,000 external partners use the platform

### So what for ZEISS:

Shows how a global tech corporation unifies KM + learning — exactly what ZEISS needs for onboarding, agent enablement, and optician partner training.

## Amazon

Q in Connect



**Platform:** Amazon Q in Connect (Contact Center AI)

**45% faster onboarding<sup>1</sup>**

Deriv: from 1 month down to 1 week  
(AWS Case Study)

**67% self-service resolution<sup>2</sup>**

Zepz: AI resolves inquiries instantly without agent (AWS)

### Key capabilities:

- Listens to conversation, detects customer intent
- Delivers matching articles automatically to agent
- Personalized by customer history & agent profile

### So what for ZEISS:

Exactly the “Right Expert, Right Moment” principle — agents automatically receive prescription docs, warranty rules and troubleshooting on XR inquiries.

## Apple

Self-Service Knowledge



**Approach:** Product-centric self-service architecture

**NPS +14 points (58 → 72)<sup>3</sup>**

Stable top scores since 2017 (HubSpot Blog)

**69% self-service preference<sup>4</sup>**

Customers prefer solving problems on their own (Zendesk)

### What sets it apart:

- One knowledge base per product category
- Consistent knowledge structure across all channels
- New product = new KB section, not new team
- Community forums as knowledge multiplier

### So what for ZEISS:

ZEISS is launching XR as a new product category — as Apple shows, self-service knowledge scales better than adding agents. Opticians as “community.”

**Modern knowledge management is not an IT project — it is the key scaling lever for service excellence.**

1. AWS Case Study: Deriv (2025) | 2. AWS: Amazon Connect AI Agents — Zepz customer quote | 3. HubSpot Blog: Knowledge Management Systems (hubspot.com/knowledge-management-systems) | 4. Zendesk CX Trends Report | 5. Infosys/Siemens Press Release (PR Newswire, Jan 2025)

# 7 design principles we recommend to adhere to for modern knowledge management in ZEISS Vision Care Customer Support

## 1 Knowledge Architecture & Taxonomy



Knowledge structure, metadata (product, channel, complexity, doc type), clear categorization and navigation.

## 2 Content Governance & Lifecycle



Knowledge Owner role, quality gates, review cycles, decay rules, verification workflows.

## 3 Onboarding & Ramp-Up



Structured onboarding paths, candidate profiles, tiered competency building, skill requirements.

## 4 Continuous Learning & Training



Self-learning approaches, micro-trainings, knowledge-from-case (every case reduces future complexity).

## 5 AI-Powered Knowledge Access



Context-aware knowledge delivery in-workflow, semantic search, answer-centric not document-centric.

## 6 Workflow Integration & Tools



Seamless embedding in CRM/ticketing (Salesforce, Zendesk), zero media breaks, in-flow access.



## 7 Measurement & Knowledge-ROI



Knowledge Reuse Rate, Time-to-Competence, Resolution Quality, Search Success Rate, Freshness Index.

# 7

## design principles

Each dimension addresses a concrete requirement from the ZEISS RFP — pragmatic, not theoretical.

# Our vision: ZEISS Vision Care resolves support inquiries in minutes, not hours — with AI-powered knowledge management as the engine

## Answer-ready in the workflow

Agent asks → receives sourced, verified answer in seconds.

## Onboarding in weeks, not months

Structured learning paths + contextual knowledge cut time-to-competence for new agents.

## Every resolved case builds knowledge

Solved tickets automatically feed back into the KB — each case reduces future complexity.

## Single source of truth

One governed knowledge base across all channels, products and support teams.

**Example**

**GURU**  
e.g., powered by Guru one of the leading AI platforms for knowledge work

## Expert routing when it matters

Auto-escalation to domain/product experts when AI confidence is low.

## Self-service for customers & opticians

B2C end-users and B2B2C partners find answers without agent contact.

## Scales with new product launches

New XR products add KB sections, not new support teams.

## Measurable knowledge ROI

Track reuse rate, resolution quality, time-to-competence, content freshness.

## Supported by specialized ZEISS Vision Care Knowledge Agents

### Prescription Expert



Finds, summarizes and cites Vision Care / XR optical documentation.

### Troubleshooting Agent



Diagnoses issues, suggests SOPs, escalates when needed.

### Warranty & Returns



Checks warranty claims, explains processes, initiates returns.

### Optician Enablement



Answers partner questions, delivers product knowledge & training.

**05**

# **OUR METHODOLOGY & APPROACH**

## Our Engagement Format & Governance

### Sparring Sessions



(Bi)-weekly 90-min advisory sessions with senior consultants to challenge thinking, provide input, and align on decisions. Each session is structured with a pre-read and clear agenda.

### Expert Workshops

Details see page 43



Half-day deep-dives on specific topics (e.g., tiering design, KM taxonomy). Facilitated with external benchmarks and structured working templates for the ZEISS team.

### Deliverable Reviews



Written deliverables at each module gate: concept papers, decision frameworks, blueprints. Each reviewed collaboratively before sign-off and next-step planning.

### Reference Exchanges



Curated practitioner exchanges: connect ZEISS leaders with peers who have built comparable support organizations. Guided format with pre-defined question sets.

**Fully adaptable to ZEISS needs as the engagement evolves**

# Operating Model Advisory — Module A Overview



# Workstream A — Modules 1 & 2

## M1 — Current-State Assessment & Benchmarking



### Stakeholder Mapping & Interviews

- Structured interviews with key stakeholders to understand current pain points, volumes, and expectations

### As-Is Process Documentation

- Map existing support touchpoints, escalation paths, and channel landscape

### External Benchmarking

- Compare against best-in-class support setups in med-tech and B2B environments

### Gap & Opportunity Analysis

- Identify structural gaps and quick wins for the target setup

## M2 — Target Operating Model Design



### Operating Model Canvas

- Define the support organization's purpose, scope, governance, and key interfaces within ZEISS

### Insource / Outsource Assessment

- Evaluate make-or-buy decisions for L1/L2/L3 support tiers with clear criteria framework

### Channel Strategy Design

- Define omni-channel approach: phone, email, chat, self-service portal, and escalation routing

### Scalability Architecture

- Build a model that grows from initial pilot to full international rollout in phases

**Advisory scope:** The outlined modules and activities represent the key dimensions ZEISS will need to address in building its support organization. As experienced advisor and thought partner, LEADBeyond contributes practical expertise and targeted guidance on each of these dimensions — rather than taking over end-to-end ownership of the implementation. All activities are advisory in nature: we provide frameworks, benchmarks, templates, and targeted recommendations to accelerate ZEISS's internal decision-making — not implementation-ready deliverables. Deliverable depth is calibrated to the agreed effort corridor per phase. Implementation ownership remains with ZEISS. Scope, priorities, and level of detail will be jointly refined with ZEISS upon project confirmation. We remain flexible to adapt to ZEISS's specific needs and evolving requirements.

## Workstream A — Modules 3 & 4

### M3 — Service Model & Tiering Architecture



#### Support Tier Definition (L0–L3)

- ➔ Design clear tier boundaries: self-service (L0), front-line (L1), specialist (L2), engineering/product (L3)

#### Service Catalogue Design

- ➔ Define the catalogue of support services with SLAs, response times, and resolution targets per tier

#### Escalation & Routing Logic

- ➔ Build decision trees and routing rules for ticket classification, prioritization, and handoff

#### SLA & OLA Framework

- ➔ Operational Level Agreements between support and internal teams (product, logistics, lab operations)

### M4 — Workforce Design & Role Framework



#### Role Profiles & Competency Matrix

- ➔ Define agent profiles per tier: required skills, product knowledge depth, language capabilities

#### Staffing Model & Capacity Planning

- ➔ Volume-based forecasting model for FTE sizing across tiers, channels, and geographies

#### Recruiting Blueprint

- ➔ Candidate profile specifications, interview frameworks, and assessment criteria for support roles

#### Org Chart & Reporting Lines

- ➔ Recommended organizational structure with team leads, quality coaches, and management layers

**Advisory scope:** The outlined modules and activities represent the key dimensions ZEISS will need to address in building its support organization. As experienced advisor and thought partner, LEADBeyond contributes practical expertise and targeted guidance on each of these dimensions — rather than taking over end-to-end ownership of the implementation. All activities are advisory in nature: we provide frameworks, benchmarks, templates, and targeted recommendations to accelerate ZEISS's internal decision-making — not implementation-ready deliverables. Deliverable depth is calibrated to the agreed effort corridor per phase. Implementation ownership remains with ZEISS. Scope, priorities, and level of detail will be jointly refined with ZEISS upon project confirmation. We remain flexible to adapt to ZEISS's specific needs and evolving requirements.

## Workstream A — Modules 5 & 6

### M5 — Quality Framework & KPIs



#### KPI Dashboard Blueprint

- ➔ Design a measurement framework: CSAT, FCR, AHT, NPS, escalation rate, resolution time — with targets per tier

#### Quality Monitoring Program

- ➔ Ticket sampling methodology, call/chat review cadence, quality scorecards for agent evaluation

#### Continuous Improvement Cycle

- ➔ Feedback loops from quality reviews back into training, knowledge base updates, and process refinement

#### Voice of Customer Integration

- ➔ Systematic capture of customer feedback and root cause analysis to drive structural improvements

### M6 — Validation & Go-Live Readiness



#### Setup Review & Stress Test

- ➔ Challenge the proposed operating model against real scenarios: peak volumes, multi-market complexity, edge cases

#### Risk & Mitigation Assessment

- ➔ Identify operational risks (single points of failure, knowledge gaps, vendor dependencies) with countermeasures

#### Go-Live Readiness Scorecard

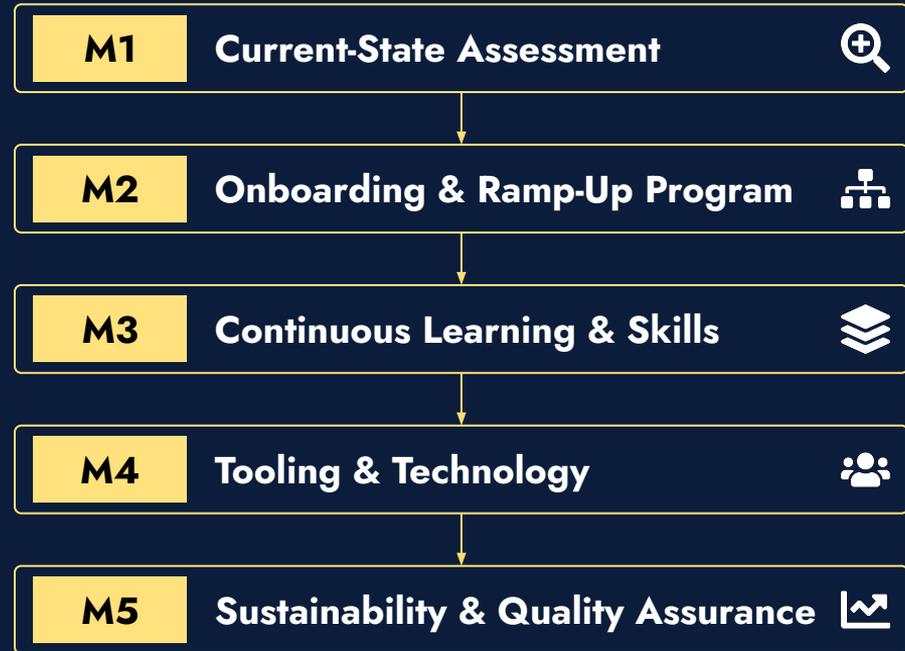
- ➔ Structured checklist covering people, process, technology, and knowledge readiness before launch

#### Post-Launch Advisory Sessions

- ➔ Scheduled check-ins at 30 / 60 / 90 days to validate performance and course-correct early

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# Knowledge Management & Training Concept — Module B Overview



## Workstream B — Modules 1 & 2

### M1 — Current-State Assessment & Benchmarking



#### Knowledge Taxonomy Design

- Multi-level content taxonomy: product families, issue types, process categories, market-specific variants

#### Documentation Framework

- Templates for SOPs, troubleshooting guides, FAQ articles, decision trees — standardized across all content

#### Content Governance Model

- Ownership matrix per content domain; roles for authors, reviewers, approvers; publishing workflow

#### Lifecycle & Versioning Rules

- Scheduled review cycles, expiry/archival policies, version control standards for all knowledge assets

### M2 — Onboarding & Ramp-Up Program



#### Onboarding Journey Map

- Week-by-week ramp-up plan: company orientation, product training, system training, shadowing, first solo tickets

#### Certification Milestones

- Tiered certification model — agents must pass knowledge checks before handling tickets at each support level

#### Buddy & Mentoring System

- Pair new agents with experienced mentors; structured feedback loops during first 90 days

#### Ramp-Up KPIs & Dashboards

- Track time-to-competency, first-call quality scores, knowledge test results per cohort

**Advisory scope:** The outlined modules and activities represent the key dimensions ZEISS will need to address in building its support organization. As experienced advisor and thought partner, LEADBeyond contributes practical expertise and targeted guidance on each of these dimensions — rather than taking over end-to-end ownership of the implementation. All activities are advisory in nature: we provide frameworks, benchmarks, templates, and targeted recommendations to accelerate ZEISS's internal decision-making — not implementation-ready deliverables. Deliverable depth is calibrated to the agreed effort corridor per phase. Implementation ownership remains with ZEISS. Scope, priorities, and level of detail will be jointly refined with ZEISS upon project confirmation. We remain flexible to adapt to ZEISS's specific needs and evolving requirements.

## Workstream B – Modules 3, 4 & 5

### M3 – Continuous Learning & Skills



- Skill matrix per role with proficiency levels
- Micro-learning modules: 10-min product & process refreshers
- Quarterly skill assessments with gap-based learning paths
- Coaching cycles: regular 1:1 sessions with quality leads

### M4 – Tooling & Technology



- Knowledge base platform evaluation (e.g. Guru, Zendesk Guide, etc.)
- AI-assisted search & answer suggestions for agents
- LMS recommendation for structured training delivery
- Authoring & collaboration tools for content creation

### M5 – Sustainability & Quality Assurance

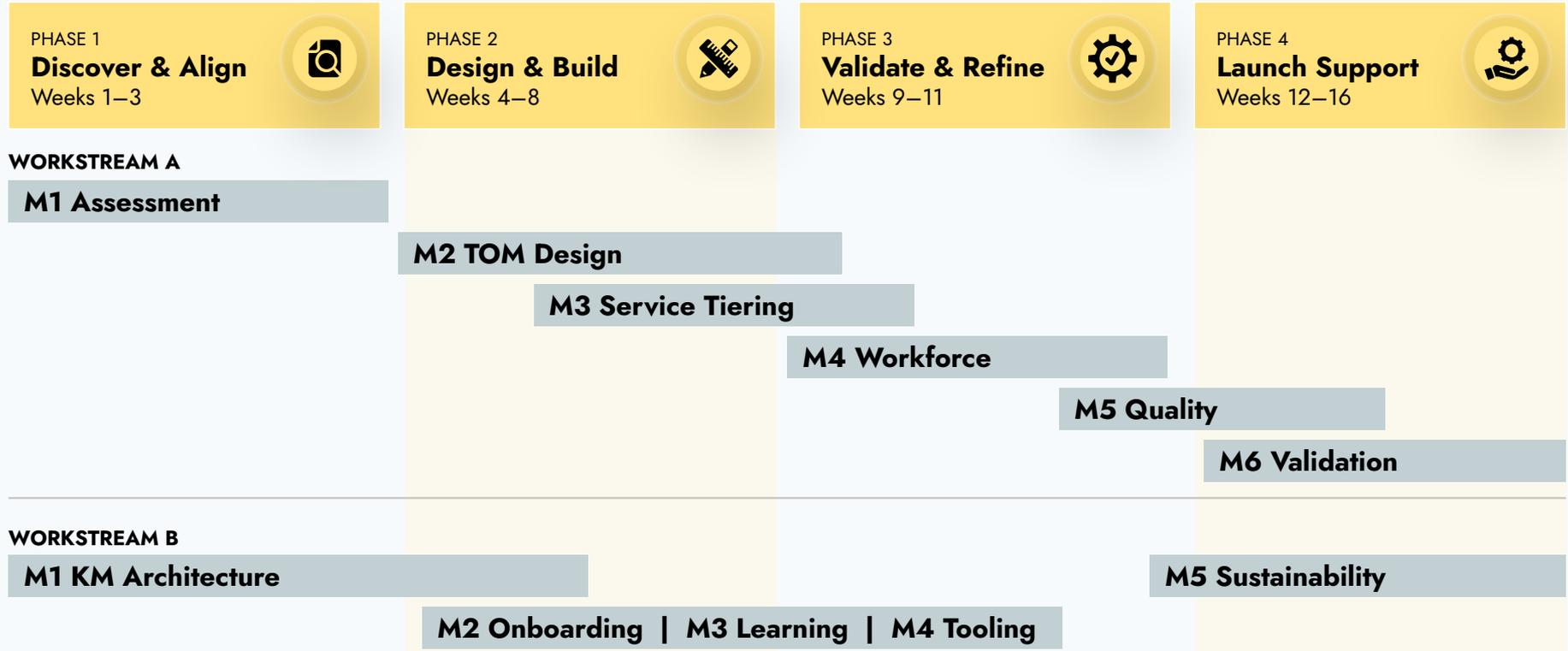


- Content freshness scoring and automated review alerts
- KM health dashboard: usage analytics, search success rate, gaps
- Feedback loop from agents and customers into content updates
- Annual KM maturity assessment against industry benchmarks

**Advisory scope:** The outlined modules and activities represent the key dimensions ZEISS will need to address in building its support organization. As experienced advisor and thought partner, LEADBeyond contributes practical expertise and targeted guidance on each of these dimensions — rather than taking over end-to-end ownership of the implementation. All activities are advisory in nature: we provide frameworks, benchmarks, templates, and targeted recommendations to accelerate ZEISS's internal decision-making — not implementation-ready deliverables. Deliverable depth is calibrated to the agreed effort corridor per phase. Implementation ownership remains with ZEISS. Scope, priorities, and level of detail will be jointly refined with ZEISS upon project confirmation. We remain flexible to adapt to ZEISS's specific needs and evolving requirements.

# Integrated Timeline & Phasing

Workstreams may start in parallel or sequentially. Workstream B will follow a staggered start but progress through the same phases as Workstream A



The indicated timeline is subject to the availability of ZEISS key stakeholders and project team members. Absences due to vacation or other commitments are not included in the proposed timeline and will be aligned jointly at the project start. The outlined modules and activities represent an initial indication based on the information currently available. Scope, priorities, and level of detail will be jointly refined with ZEISS upon project confirmation. We remain flexible to adapt to ZEISS' specific needs and evolving requirements.

## Key Deliverables at a Glance

Module	Key Deliverable	Format (Proposal)
<b>A-M1</b>	As-Is Assessment Report & Benchmark Analysis	Document + Workshop
<b>A-M2</b>	Target Operating Model Blueprint	Concept Paper
<b>A-M3</b>	Service Catalogue & Tiering Architecture	Framework + Decision Tree
<b>A-M4</b>	Workforce Blueprint & Recruiting Profiles	Role Profiles + Staffing Model
<b>A-M5</b>	KPI Dashboard Design & Quality Scorecard	Dashboard Blueprint
<b>A-M6</b>	Go-Live Readiness Scorecard	Checklist + Advisory Session
<b>B-M1</b>	Knowledge Architecture & Governance Model	Taxonomy + Governance Doc
<b>B-M2</b>	Onboarding Journey & Certification Framework	Program Design + Templates
<b>B-M3</b>	Skill Development Roadmap & Learning Paths	Learning Framework
<b>B-M4</b>	Tool Landscape Evaluation & Recommendation	Evaluation Matrix
<b>B-M5</b>	KM Sustainability & Quality Assurance Model	Process + KPI Framework

## First Steps

**01** **Align on scope**

Confirm which modules are priority and where to start

**02** **Kick-off workshop**

Deep briefing on ZEISS context, stakeholder mapping, and current state

**03** **Mobilize advisory team**

Assign named consultants and schedule first sparring sessions

**04** **Establish cadence**

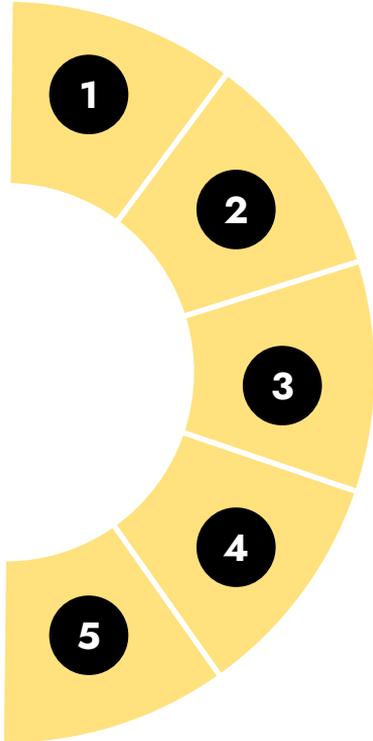
Bi-weekly rhythm with clear decision gates per module

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**06**

# **BENCHMARKS & INDUSTRY INSIGHTS**

# What Strong Service Organizations Do Differently in Complex Technology Environments



**Complexity follows a power-law distribution.**

In complex hardware–software systems, fewer than 20% of issues account for more than 60% of service complexity.

**Benchmark Insight:** High performers identify these issues early and deliberately design their service models around them

**Escalations are typically a structural issue, not a skills issue.**

In mature tech service environments, the majority of escalations add no additional technical value.

**Benchmark Insight:** Leading organizations shorten escalation chains in favor of direct expert allocation

**Expert time is the scarcest production factor.**

In many setups, experts spend more than 40% of their time on recurring or avoidable issues.

**Benchmark Insight:** High performers systematically protect expert time and use it primarily to scale knowledge.

**Knowledge reuse correlates more strongly with service quality than headcount.**

Organizations with high levels of knowledge reuse achieve significantly better resolution rates and customer satisfaction outcomes.

**Benchmark Insight:** Knowledge is actively measured, curated, and managed—not merely documented.

**KPI reduction improves manageability.**

Leading service organizations manage operations with fewer than 15 decision-relevant KPIs.

**Benchmark Insight:** Fewer metrics increase clarity, speed, and management effectiveness..

# Targeted access to decision-makers facing comparable challenges — we provide access to the following experts for ZEISS

Name	Current Role	Company	Notes
 <a href="#">Laura Cristaldi</a>	Head of Business Domain   Customer Service & Ops Enablement		End-to-end responsibility for Customer Service, Operations, and AI transformation, including CRM, BPO, and vendors.
 <a href="#">Holger Boehmer</a>	Managing Director N26 Operations GmbH		Director Operations, Director of Customer Operations
 <a href="#">Karen Kennes</a>	Head of Customer Care Ops Excellence		End-to-end responsibility for Customer Care Operations Excellence in a high-volume environment.
 <a href="#">Bernard Steenbergen</a>	Director Customer Service BiC	VATTENFALL 	8 years at Vattenfall Customer Service, leading end-to-end B2C operations, scaling, and governance in a regulated environment.
 <a href="#">Florian Letourneau</a>	Head of Global BPO Management - Customer Care	BackMarket	2 years at Back Market, preceded by 15 years as Senior Manager EMEA Customer Service Operations at Amazon.
 <a href="#">Marcus Koodie</a>	WW Retail Online- Conversational AI Systems Engineering Manager		Global AI and Service Leader (Apple, Microsoft), specializing in conversational AI and partner operations.
 <a href="#">Jana R.</a>	Sr. Customer Experience Manager		10 years at Amazon, including 2 years in Devices & Alexa Services (EU expansion), brand.
 <a href="#">Delphine Yirdaw</a>	Director Global Operations Excellence Customer Service		Responsible for the standardisation and harmonisation of all Customer Services Processes
 <a href="#">Javier Cárdenas</a>	Customer Excellence Performance Manager	TRADE REPUBLIC 	Very strong fit: 1 year at TR, with 9–10 years of experience in chatbots, AI-driven solutions, and customer service.
 <a href="#">Clément Marchand Le Poittevin</a>	Customer Operations Manager	TRADE REPUBLIC 	Strong fit: Customer Service tooling and CRM implementation, as well as LLM and AI projects in customer service.



## Format

- 1–2 focused interviews
- 45–60 minutes
- Confidential and practice-oriented

# Selected LEADBeyond Project References for ZEISS

Case Study	reneo / Livings	Quartierkraft	Bundeskanzler Helmut Schmidt Stiftung
<b>Context</b>	Customer Excellence Center build for PropTech platform	Service operations scaling in energy project business	Knowledge management transformation in foundation
<b>What we did</b>	Built Customer Excellence Center from scratch: operating model, knowledge mgmt., ticketing & SLA framework, training	Designed KPI cockpit: pipeline, SLA tracking, partner performance, cost-to-serve; integrated HubSpot ticketing & service monitoring	Transformed >100k legacy documents into structured knowledge system; defined governance & ownership; implemented M365 + Copilot
<b>Impact</b>	<b>NPS +52, -75% escalations, -37 days resolution time, &gt;90% digital processes</b>	<b>Full transparency &amp; steering across 12 project gates;</b> scalable service monitoring & decision-making	<b>AI-ready, answer-based knowledge system;</b> significantly improved access, consistency, and productivity
<b>Scale / Credibility</b>	Part of <b>€600M platform (incl. Goldman Sachs &amp; top-tier investors)</b>	Multi-stakeholder energy projects with complex partner ecosystem	Large-scale knowledge base with fragmented legacy systems
<b>Relevance for ZEISS</b>	Proven blueprint for building scalable, knowledge-driven support under complexity & growth pressure	Direct experience in KPI-based service steering and operational transparency	Strong expertise in scalable knowledge management & training for complex environments
<b>Reference Contact</b> (available upon request)	<p><b>Lennart Boerner</b> Co-Founder &amp; CEO @ Reneo Group (incl. Livings)</p>	<p><b>Henrik Westermann</b> Founder and CEO</p>	<p><b>Dr. Meik Woyke</b> CEO</p>

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**07**

# PRICING

# Rate card & indicative effort model

## Rate card (EUR, excl. VAT)

Role	Daily rate	Hourly rate
Partner / Senior Advisor	€ 2,500	€ 312.50
Senior Consultant	€ 1,500	€ 187.50
Industry Expert (per interview)	€ 500–800	per 60 min

**Payment terms:** 60 days.

Prices valid for 60 days from submission.

## Flexible engagement model

**Modular pricing:** Each phase is independently scoped and priced. ZEISS can start with Phase 1 only and decide on subsequent phases based on results. No long-term commitment required.

**Scope flexibility:** If ZEISS selects only one workstream, effort and cost reduce proportionally (~55% for WS-A alone, ~45% for WS-B alone).

**Senior-level delivery:** All sessions are led by Frederic Rupprecht and Jonathan Günak personally. No delegation in sessions to junior teams.

Please note: The indicated timeline is subject to the availability of ZEISS key stakeholders and project team members. Absences due to vacation or other commitments are not included in the proposed timeline and will be aligned jointly at the project start. Additional expenses, including travel, flights, and accommodation, are not included in the project fee and will be invoiced separately at cost. All stated prices are exclusive of applicable VAT.

## Indicative effort by phase

Phase & modules	Timeline	Partner	SC	Experts	Cost range
<b>Phase 1: Discover &amp; Align</b> M1 (A) + M1 (B)	Wk 1–3	4d	5d	1–2	€ 18–19k
<b>Phase 2: Design &amp; Build</b> M2–M4 (A) + M2–M4 (B)	Wk 4–8	8d	12d	2–3	€ 39–40k
<b>Phase 3: Validate &amp; Refine</b> M5 (A) + M5 (B)	Wk 9–11	3d	4d	0–1	€ 13–14k
<b>Phase 4: Launch Support</b> M6 (A) + post-launch	Wk 12–16	3d	3d	0–1	€ 12–13k
<b>TOTAL (both workstreams)</b>	<b>16 weeks</b>	<b>18d</b>	<b>24d</b>	<b>3–7</b>	<b>€ 83–86k</b>

**Partner days:** 18 days × €2,500 = €45,000 | **SC days:** 24 days × €1,500 = €36,000 | **Expert interviews:** 3–7 sessions × €500–800 = €1,500–5,600

08

# COMPANY PROFILES & SENIOR PROFILES

# We've proven it: Accelerated growth, strong referrals, and happy clients



- **Legal Name:** LEADBeyond GmbH
- **Entity Type:** German limited liability company (GmbH)
- **Address:** Tölzer Straße 1, 82031 Grünwald, Germany
- **Founded:** 2022
- **Managing Directors:** Frederic Rupprecht, Jonathan Günak
- **Team:** Core team of 2 partners, supported by senior consultants and an extended expert network
- **Optical Industry Experience:** No direct optical account; strong transferable expertise from MedTech, Consumer Tech, and complex, knowledge-intensive service models (see references)



## Iconic Garden & Tools OEM

- Developed channel partner pricing strategy
- Conducted dealer reviews
- Benchmarked sales capabilities for D2C readiness

*"Their **analytical diligence** and **proactive drive** in developing our new distribution strategy for mower models were impressive. The recommendations for local retailers were **spot on.**"*

**Niclas Hurtado, Director Business Development Sales & Services EPAC, Husqvarna Deutschland GmbH**



## Series B Construction Tech Start-Up

- Developed the internationalization and digital business model strategy
- Supported in fundraising of +15m equity and +600m EUR debt financing round

*"Their **entrepreneurial mindset and acumen** were crucial in securing significant financing quickly. They truly did a great job!"*

**Lennart Börner, CEO, Reneo Group GmbH**



## Germany's Largest Solar Startup

- Coordination (incl. route planning) of technician teams
- Optimization of internal CRM processes
- Customer communication

*"Despite the tight project timeline, we received top-quality talent, allowing us to make **selective decisions** and complete the **project in a very short period**. This is crucial for us as a rapidly growing company."*

**Moritz Hubel, Director Venture Development, Enpal B.V.**

### Our client base





# Frederic Rupprecht

Former McKinsey Associate Partner with track record in full-potential diagnostics, optimizing sales operations, growth strategy, and commercial excellence

## Professional experience

Since 2022	LEADBeyond GmbH, Co-Founder & CEO
2016 - 2022	McKinsey & Company – Associate Partner
2012 - 2015	Vine Consulting GmbH betterRe GmbH PwC



## Education

2014 - 2016	Harvard University, MPP, Business Economics
2013 - 2017	University of London, LL.M., Competition Law
2010 - 2013	EBS European Business School & SMU Singapore Management University, BSc in Business Management



## Key projects

### SALES & OPERATING MODEL EXCELLENCE

- **Optimized commercial and service operating models across 40+ international dealer networks**, improving funnel management, conversion, and value capture
- **Designed scalable frontline and support structures**, including bundling of sales & service resources and digitally enabled processes

### PERFORMANCE TRANSFORMATION

- **Led large-scale transformation programs for industrial and automotive players**, redesigning operating models, governance, and performance steering
- **Delivered measurable impact:** cost reduction (>20M), topline growth (>100M), and improved operational efficiency through structured execution models
- **Established KPI-driven management systems and governance frameworks**, enabling transparency and decision-making at scale

### STRATEGY

- **Led go-to-market and operating model design for complex, multi-market setups**, including digital roadmaps and predictive service models
- **Built and scaled DTC and service-driven business models**, integrating commercial, operational, and customer journey perspectives





# Jonathan Günak

Former Roland Berger Principal advising clients globally in advanced industries and the public sector with focus on corporate & growth strategy, digital business innovation, digital transformation



## Professional experience

Since 2022	LEADBeyond GmbH, Co-Founder & CEO
2017 - 2022	Dürr AG – Member of the Technology Board
2015 - 2022	Roland Berger – Principal
2012 - 2015	Vine Consulting GmbH, betterRe GmbH, Deloitte Consulting GmbH
Before 2012	Several years of work experience within the consulting and startup industry



## Education

2014 - 2015	London School of Economics and Political Science MSc in Public Management and Governance
2013	Harvard University, Economics & Public Policy
2010 - 2013	EBS European Business School & SMU Singapore Management University, BSc in Business Management

## Key projects

### STRATEGY

- **Led go-to-market strategy for online marketplace** for industry 4.0 applications of leading manufacturers in machinery incl. long-term vision design and implementation responsibility of alliance for 8 companies
- **Developed D2C and service-driven sales strategies**, including analytics, customer segmentation, and setup of dedicated data & performance functions

### PERFORMANCE TRANSFORMATION

- **Led customer-centric digital transformation** of a major German sports association including the design and development of the digital customer interface using agile working methods incl. design thinking, rapid prototyping, SCRUM and lean startup

### NEW BUSINESS MODEL DEVELOPMENT

- **Designed and implemented customer-centric operating models**, aligning product, service, and IT to enable scalable and efficient service delivery
- **Led modernization of legacy IT and service landscapes**, defining target architectures and enabling faster time-to-market and improved service quality
- **Built integrated operating models for B2B and platform businesses**, ensuring end-to-end control of customer journeys, processes, and service interactions



# Jan Fingerhut

Master's graduate with top-tier education and hands-on customer service experience at Apple, combining firsthand exposure to world-class service operations with proven consulting expertise in customer support operating models, knowledge management, automated workflows, and scalable service architectures.



## Professional experience

Since 2024	LEADBeyond GmbH Project Lead
2023 - 2024	Kripp & Stanjek Search Fund Private Equity Analyst
2022 - 2023	KPMG AG Intern Financial Attestation
2022 - 2022	Daimler AG Intern Corporate Real Estate
2019 - 2021	Apple Retail GmbH Customer Advisory & Service
Before 2019	Several Consulting Projects in Student Consultancies



DAIMLER



## Education

2023 - 2025	Nova School of Business and Economics MSc in Management - Area of Expertise Strategy & Business
2022	Berkeley Haas School of Business, BHGAP Program
2020 - 2023	EBS European Business School, BSc in Business Management



## Key projects

### CUSTOMER SUPPORT OPERATING MODEL

- **Designed and implemented end-to-end customer support operating models** for a property management company (1,000+ units) and a renewable energy project management firm, including IT tool integration, automated workflows, SLA monitoring, and standardized response processes.

### KNOWLEDGE MANAGEMENT & PROCESS AUTOMATION

- **Built knowledge management databases and template libraries** to address team volatility and upskill large, untrained support teams; created extensive Textbaustein and email template libraries for consistent, high-quality customer communication.
- **Designed automated ticket routing and classification systems** for accurate inquiry assignment and categorization into defined clusters; co-led end-to-end process digitalization and automation of complex business processes for significant efficiency gains.

### STRATEGY & BUSINESS DEVELOPMENT

- **Led go-to-market strategy and feasibility study for a German SDAX hidden champion;** supported corporate real estate restructuring for a leading OEM during corporate split-up; conducted detailed analyses of thousands of German family-owned businesses for investment memoranda and LOI preparation.

# Thank You

We look forward to partnering with ZEISS Vision Care to build a world-class Vision Care Customer Support organization.



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