



Collection: **Irreplaceable** in the AI Era™

"Because leadership begins with you"

This is not just another ebook.

It's a practical guide for leaders who—amid the relentless advance of technology and artificial intelligence—seek to ensure that their leadership, decisions, and results remain relevant and sustainable.

It was conceived and written from a place of deep conviction—combining strategic clarity with the genuine love for positive impact, the personal power that comes from lived experience, and the essence of leading with integrity. Every concept, framework, and tool included here has been chosen with a single purpose: to deliver real value that can tangibly transform the way you lead and generate results.

Experience shows that most failed transformations don't fall short because of technical limitations, but because of invisible factors that silently erode performance: internal resistance, cultural misalignment, loss of strategic focus, or lack of team commitment. These rarely appear in the metrics—yet they determine the success or failure of any initiative.

In this guide, you'll find actionable tools and frameworks to help you:

- Identify and anticipate risks that can slow or derail your strategy.
- Protect and strengthen your leadership capacity in high-disruption environments.
- Use technology—including AI—as a multiplier of results, not as a replacement.
- Stay competitive without compromising your team's cohesion or your organization's future.

This resource is available in PDF format for quick reference. If you prefer the editable version, you'll find a link to the download center at the end, where you can get it in Word format and adapt it to your needs. A new ebook will be added to the collection every week—until all 25 are complete. Simply visit the download center to see what's new each week.

If these words have reached you, it's likely not by chance. You are in the right position, at the right time, and in the right circumstances for this information to make a real difference. And as you put it into practice, you may discover it could also spark transformation in others.

Because in today's era, real value lies not just in the technology you use—but in your ability to lead with vision, precision, and purpose.

Central Theme of the Ebook

Analyze the Target Market

Focus

Five subtopics to build a market view that is evidence-based, comparable across time, and directly connected to product, go-to-market, and investment choices:

1. **Market size and segmentation**
 2. **Customer needs and preferences**
 3. **Growth trends**
 4. **Competition and positioning**
 5. **Expansion opportunities**
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Getting Started

Why this topic matters now

- You avoid **waste** by aligning investment to segments with verifiable demand.
- You reduce **risk** by sizing uncertainty and testing early.
- You create **speed** by installing common definitions, templates, and review cadences.
- You build **focus** by connecting market evidence to product roadmaps and revenue targets.

Five objectives of this guide

1. Install a **Market Learning System** that runs quarterly.
2. Make market size and segmentation **auditable**.
3. Turn needs and preferences into **jobs, pains, gains**, and testable hypotheses.
4. Build a **living map** of trends and competitive moves.
5. Decide **where to expand** using clear thresholds and scenarios.

How to use this guide

Read linearly to install the full system, or jump to the subtopics you need. Run each exercise as a **workshop-in-a-box**. Store outputs in your StrategyOS (Notion/Confluence/SharePoint) and review them in the **Quarterly Market Council**.

Module — Analyze the Target Market

1) Market Size and Segmentation

Definition

A transparent estimate of **how many potential buyers exist, how much they can spend, and how they cluster** into distinct segments you can reach and serve profitably.

Practical Framework — TAM → SAM → SOM, then JTBD Segmentation

1. **TAM (Total Addressable Market):** Demand if you had 100% share in all relevant use cases.
2. **SAM (Serviceable Available Market):** The portion your current solution and model can serve (geography, channels, compliance).
3. **SOM (Serviceable Obtainable Market):** Share you can realistically win over 24–36 months given capabilities and constraints.
4. **Segmentation by Jobs-To-Be-Done:** Group customers by **problems/jobs**, not demographics alone; add firmographics and behavior.
5. **Evidence Levels:** Tag each estimate with confidence (Low/Medium/High) and sources (internal telemetry, surveys, expert panels, third-party datasets).
6. **Unit Economics Link:** For each segment, connect to **ARPU/ACV, CAC, payback, margin**, and capacity.

Applied Example (*hypothetical*)

A B2B SaaS firm estimates TAM at USD 6.2B (global), SAM at USD 1.1B (LATAM + regulated sectors), SOM at USD 120M (focus countries + two verticals). JTBD segmentation reveals three clusters: **Compliance Automation, Operational Reporting, and AI Readiness**. The first two have **lower CAC and faster payback**; the third is aspirational with lower confidence. The firm prioritizes the first two for the next 18 months.

Team Exercise — Segmentation Sprint (120 minutes)

- **Objective:** Produce an auditable TAM/SAM/SOM and a first segmentation map.
- **Roles:** Strategy (facilitator), Finance, Product, Sales Ops, Data, Legal/Regulatory, Country Leads.
- **Inputs:** Billing/CRM, pipeline, usage telemetry, pricing, external benchmarks, regulatory filters.
- **Steps:**
 1. Define market boundaries and use cases (in-scope/out-of-scope).
 2. Build TAM using bottom-up (accounts × price) and cross-check with top-down proxies.

3. Apply serviceability filters (SAM), then capability/coverage constraints (SOM).
 4. Cluster accounts by **job-to-be-done** and **buying triggers**.
 5. Document assumptions, confidence, and unit economics per segment.
- **Deliverables:** TAM/SAM/SOM workbook, segmentation brief, dashboard spec.

Template — TAM/SAM/SOM & Segment Sheet

Segment (JTBD)	TAM (USD)	SAM (USD)	SOM (USD)	ARPU/AC V	CA C (est.)	Payback k (m)	Confidence	Notes
Compliance Automation (regulated LATAM)	420,000,000	180,000,000	36,000,000	24,000	7,800	10	Medium	Strong channel partners

Checklist

- ☐ Boundaries and use cases are explicit.
- ☐ Both **bottom-up** and **top-down** approaches triangulated.
- ☐ Segments defined by **jobs, triggers, and behavior**.
- ☐ Confidence levels documented; assumptions testable.
- ☐ Unit economics attached to each segment.

Suggested KPIs

% revenue from prioritized segments; forecast accuracy vs. actual; payback by segment; win rate by segment; coverage ratio (ICP accounts touched / total ICP).

2) Customer Needs and Preferences

Definition

A structured understanding of **what customers are trying to accomplish, how they measure success, what pains block them, and which experiences they value**—translated into design and GTM choices.

Practical Framework — JOBS CANVAS + Preference Stack

1. **Job Story:** “When ___, I want to ___, so I can ___.”
2. **Outcome Metrics:** How customers define success (time saved, errors avoided, revenue unlocked).
3. **Pain Inventory:** Friction points across the journey (discover → evaluate → onboard → use → expand).
4. **Preference Stack:** Rank what the segment values (speed, accuracy, price, privacy, UX, support, integration).
5. **Adoption Barriers:** Switching costs, compliance, data migration, training.
6. **Proof Hooks:** What evidence reduces risk for the buyer (pilots, benchmarks, references).

Applied Example (*hypothetical*)

For **Operational Reporting**, buyers say: “When month-end arrives, I want to close faster without spreadsheet chaos so we can publish accurate reports for the board.” Priority preferences: **reliability** > **speed** > **price**. Adoption barriers: integration with legacy ERPs and data quality. Proof hooks: **time-to-close** reductions in pilots.

Team Exercise — Needs Discovery Lab (90 minutes)

- **Objective:** Build a validated job canvas and preference stack for two segments.
- **Roles:** Product (facilitator), Research, Sales, CSM, Solutions, 6–8 customers/prospects.
- **Inputs:** Recent deals (won/lost), support tickets, usage analytics, interview notes (with consent).
- **Steps:**
 1. Draft job stories and outcomes.
 2. Map pains and barriers along the journey.
 3. Rank preferences; create 3 hypothesis statements to test in pilots.
- **Deliverables:** Two job canvases, preference stacks, pilot hypothesis log.

Template — Jobs & Preferences Canvas

Job story	Outcomes (KRs)	Top pains	Preference stack (1–5)	Adoption barriers	Proof hooks
“When month-end closes, I want automated reconciliations so I can publish accurate reports in <48h.”	Close time ≤ 48h; error rate < 0.5%	Broken spreadsheets; ERP latency	Reliability 5, Speed 4, UX 3, Price 3, Integration 5	ERP integration; change management	Pilot with close-time baseline

Checklist

- ☐ Job stories captured in customer language.
- ☐ Preferences explicitly ranked and trade-offs accepted.
- ☐ Barriers and proof hooks identified.
- ☐ At least **3 pilot hypotheses** created.
- ☐ Insights linked to **roadmap and messaging**.

Suggested KPIs

Pilot hit rate; time-to-value; NPS/CSAT by segment; value metric adoption (e.g., automated closes per month); content resonance (CTR, demo-to-opportunity).

3) Growth Trends

Definition

A disciplined read of **where demand is moving and why**, separating durable signals from noise and translating them into portfolio bets.

Practical Framework — STEER the Market

1. **Sectors:** Which verticals are expanding or consolidating?
2. **Technology:** Which enabling tech lowers cost/increases willingness to pay?
3. **Economics:** Macro indicators affecting budgets (rates, FX, input costs).
4. **Ecosystem:** Partners, regulations, standards shaping adoption.
5. **Risks:** Scenario triggers that can accelerate or decelerate demand.

Build a **Quarterly Signals Review**: collect internal telemetry (search, trials, feature usage), partner intel, and curated external indicators. Classify signals as **leading, coincident, lagging**.

Applied Example (*hypothetical*)

Internal telemetry shows rising searches for “audit trail” and “external sharing”. A regulation (planned) would require such capabilities within 12 months. The team creates a **Regulatory Readiness** initiative and capacity buffers in two countries.

Team Exercise — Signals to Bets (75 minutes)

- **Objective:** Convert five strong signals into two portfolio bets.
- **Roles:** Strategy (facilitator), Product, Finance, Regional Leads, Legal, Partner Manager.
- **Inputs:** Telemetry dashboard, pipeline analysis, partner reports, regulatory calendar.
- **Steps:**
 1. List top signals; rate strength and relevance.
 2. Build two scenarios (optimistic, conservative).
 3. Define portfolio bets with budgets and decision gates.
- **Deliverables:** Two bet charters with metrics and owners.

Template — Quarterly Signals Register

Signal	Type (L/C/La)	Strength (1–5)	Relevance (1–5)	Hypothesis	Bet / Action	Owner
Surge in “audit trail” queries + upcoming regulation	Leading	5	5	Demand shift to compliant sharing	Build & market Regulatory Readiness pack	Product + Legal

Checklist

- ☐ Signals classified and scored.
- ☐ Scenarios documented with triggers.
- ☐ Bets have **owners, budgets, and gates**.
- ☐ Risks and capacity buffers identified.
- ☐ Review cadence added to QBR.

Suggested KPIs

% revenue from trend-aligned offers; hit rate of signals→bets; time from signal to launched initiative; bet ROI; forecast error by vertical.

4) Competition and Positioning

Definition

A dynamic view of **who competes for your customer's job** (direct and indirect) and a **positioning system** that clarifies why you are the obvious choice for a specific segment and use case.

Practical Framework — COMPASS

1. **Category Frame:** Name the space in customer language.
2. **Options Set:** Direct rivals, substitutes, in-house builds, “do nothing”.
3. **Message Map:** Value pillars per segment; breakaway proof; risk removal.
4. **Playbook:** Counter-moves for common objections; partner/alliances.
5. **Scorecard:** Track share of voice, win/loss, feature parity, time-to-proof.
6. **Sustain:** Update quarterly; feed insights back to roadmap and pricing.

Applied Example (*hypothetical*)

Against a lower-priced rival, the team reframes the category as “**compliant collaboration**”, not just “file sharing”. They anchor on **audit-grade controls + fastest deployment** and provide a 30-day **Regulatory Readiness** guarantee. Win rate in regulated segments rises from 31% to 49%.

Team Exercise — Competitive Truths (90 minutes)

- **Objective:** Build a segment-specific positioning and objection handling.
- **Roles:** Product Marketing (facilitator), Sales Enablement, Solutions, Legal, CS, Partners.
- **Inputs:** Win/loss interviews, call transcripts, analyst notes, security questionnaires.
- **Steps:**
 1. Map the options set.
 2. Draft the message map and 3 breakaway proofs.
 3. Build objection responses and battlecards.
- **Deliverables:** Positioning brief, battlecards, enablement plan.

Template — Positioning Message Map

Segment	Category frame	Value pillars	Breakaway proofs	Risk removal	Tagline (internal)
Regulated collaboration	“Compliant collaboration”	Audit-grade controls; Fastest deployment; Seamless ERP integration	Deployment < 15 days (<i>pilot</i>); Passes 3rd-party audit; Integration gallery	30-day readiness guarantee	“Proof in weeks, compliance for years.”

Segment	Category frame	Value pillars	Breakaway proofs	Risk removal	Tagline (internal)
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Checklist

- ☐ Category framed in **customer terms**.
- ☐ Options include **substitutes and do-nothing**.
- ☐ Proof assets exist; risk removal explicit.
- ☐ Enablement artifacts delivered and used.
- ☐ Quarterly review with **win/loss** data.

Suggested KPIs

Win rate by segment; sales cycle length; proof-to-close conversion; feature parity delta; share of voice.

5) Expansion Opportunities

Definition

Evidence-based paths to **enter new geographies, segments, channels, or products** with disciplined sequencing and learning.

Practical Framework — EXPAND Ladder

1. **Anchor:** Max out core segment/geos with repeatable playbooks.
2. **Adjacency:** Closest next segments (same product, new vertical) or new channel (partners, marketplaces).
3. **New Geo:** Compliance and local path-to-market validated.
4. **New Product:** Only when you have **portable advantage** and customer pull.
5. **Gate Reviews:** Stop/scale rules based on leading/lagging indicators.
6. **Org Readiness:** Capacity, support, finance ops, training, and data.

Applied Example (*hypothetical*)

After saturating two LATAM verticals, the firm enters a third via **specialist partners**. Gate rules: 15 qualified opportunities in 90 days, 3 paid pilots, $CAC < 1.5 \times \text{core}$. If not met, pause and re-invest in core.

Team Exercise — Expansion Design (120 minutes)

- **Objective:** Select one adjacency and one geo with clear gates.
- **Roles:** Strategy (facilitator), GM/Regions, Finance, Legal, Product, Partner Ops, Support.
- **Inputs:** Segment economics, partner landscape, regulatory matrix, support capacity.
- **Steps:**
 1. Score adjacencies on fit and economics.
 2. Define experiment plans (offers, channels, partners).
 3. Set gates, budgets, and exit criteria.
- **Deliverables:** Expansion charter, partner plan, enablement checklist.

Template — Expansion Scoring Matrix

Opportunity	Fit (1–5)	Economics (1–5)	Risk (1–5, reversed)	Score	Gate 1	Gate 2
Healthcare LATAM via specialist partners	5	4	3	6.0	3 paid pilots/90d	$CAC \leq 1.5 \times \text{core}$

Checklist

- ☐ Anchors saturated or near saturation.
- ☐ Gates defined with **leading indicators**.
- ☐ Support and finance ops capacity confirmed.
- ☐ Partner plan + enablement in place.
- ☐ Exit criteria agreed in writing.

Suggested KPIs

Gate attainment; CAC vs. core; payback by adjacency/geo; partner-sourced pipeline; new logo growth; gross margin in new markets.

Global Templates & Tools (copy-ready)

Each table includes one example row and one blank row for immediate use.

A) Prioritization Rubric (Impact × Effort)

Initiative	Impact (1–5)	Effort (1–5)	Priority	Owner	Next milestone	Date
Regulatory Readiness pack for compliant collaboration	5	2	High	Product + Legal	Pilot in 3 accounts	15/04

B) RACI Matrix (Market Learning System)

Activity	R	A	C	I	Deliverable	Date
Quarterly Signals Review	Strategy	CEO/GM	Finance, Product, Sales	All regions	Signals→Bets report	30/06

C) KPI Board (Go-to-Market)

KPI	Definition	Target	Baseline	Frequency	Owner	Source
Win rate (regulated segments)	Won deals / total competitive deals	45%	31%	Monthly	Sales Ops	CRM

D) Human–Cultural Risk Map (for expansion)

Risk	Probability (H/M/L)	Impact (H/M/L)	Mitigation	Owner	Status
Local compliance delays	M	H	Pre-clearance with counsel; buffer timelines	Legal	In progress

E) 30–60–90 Plan (Market Council)

Horizon	Goal	Actions	Owner	Indicators	Deliverable
30 days	Publish TAM/SAM/SOM v1	Segmentation sprint; workbook	Strategy + Finance	Confidence tagged	Workbook v1
60 days	Needs canvases validated	10 interviews; 3 pilots	Product + Research	Pilot hit rate	Canvases + pilot log

Horizon	Goal	Actions	Owner	Indicators	Deliverable
90 days	Approve two bets	Signals review; charters	CEO Council	Bet ROI assumptions	Bet charters

Recommended digital tools

Miro (workshops), Notion/Confluence/SharePoint (StrategyOS), Trello/Jira/Asana (backlog & gates), Power BI/Looker/Tableau (dashboards), CRM + CDP for segmentation, transcription tools with privacy controls, pricing simulation worksheets.

Summary & Next Steps

What you now have

- An **auditable sizing & segmentation** method.
- A **jobs & preferences** process tied to pilots.
- A **signals**→**bets** operating rhythm for trends.
- A **positioning system** grounded in competitive truths.
- An **expansion ladder** with gates and exit criteria.

Next-Steps Checklist (obligatory table)

Próximo paso	Responsable	Plazo	Estado	Observaciones
Run Segmentation Sprint and publish TAM/SAM/SOM v1	Strategy + Finance	DD/MM	Abierto	Confidence tags required
Launch Needs Discovery Lab (2 segments)	Product + Research	DD/MM	Abierto	10 interviews + 2 focus groups
Hold Quarterly Signals Review	Strategy + Regions	DD/MM	Abierto	Convert 5 signals → 2 bets
Ship Positioning Battlecards	Product Marketing	DD/MM	Abierto	Objections + proofs
Approve Expansion Charter with gates	CEO Council	DD/MM	Abierto	Exit criteria defined

Self-Assessment (15 questions)

Rate 1–5 (1 = Strongly Disagree, 5 = Strongly Agree).

1. Our market boundaries and use cases are explicit and documented.
2. We triangulate TAM/SAM/SOM with bottom-up and top-down methods.
3. Segments are defined by **jobs and behaviors**, not only demographics.
4. Each segment has linked **unit economics** (ARPU, CAC, payback).
5. We maintain validated **job stories** and preference stacks.
6. We run customer discovery interviews with a clear protocol.
7. Pilots translate needs into **testable hypotheses** and decisions.
8. We operate a **Quarterly Signals Review** with scenarios and triggers.
9. Portfolio bets have owners, budgets, and **decision gates**.
10. Competitive positioning is **segment-specific** with proofs and risk removal.
11. Win/loss and share-of-voice insights feed the roadmap and pricing.
12. Expansion follows a **ladder with gates** (anchor → adjacency → geo → product).
13. Support and finance ops capacity is checked before expansion.
14. All artifacts live in a shared **StrategyOS** with versioning.
15. The Market Council reviews outcomes **quarterly** and updates bets.

Scoring (sum 15–75)

- **15–34 (Low):** Start with Segmentation Sprint + Needs Discovery Lab; publish a basic signals register.
 - **35–54 (Medium):** Add Quarterly Signals Review; create battlecards; define one expansion adjacency with gates.
 - **55–75 (High):** Institutionalize the Market Council; automate dashboards; formalize exit criteria and capital allocation rules.
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Glossary (15 terms)

1. **TAM/SAM/SOM** — Total/Serviceable/Obtainable market; layered sizing for focus.
2. **ICP (Ideal Customer Profile)** — Accounts that match your best-fit attributes and triggers.
3. **JTBD (Jobs-To-Be-Done)** — Framework centering on the job customers hire a solution to do.
4. **ARPU/ACV** — Average revenue per user / annual contract value.
5. **CAC** — Customer acquisition cost across channels.
6. **Payback Period** — Months for gross margin to recover CAC.
7. **Preference Stack** — Ranked attributes customers value (e.g., reliability, speed, price).
8. **Leading/lagging indicators** — Early vs. late signals of demand or results.
9. **Share of Voice** — Portion of category mentions or attention you capture.
10. **Battlecard** — Field-ready guide for positioning and objection handling.
11. **Signals→Bets** — Operating rhythm to convert evidence into funded initiatives.
12. **Adjacency** — A near-core market expansion with shared capabilities.
13. **Gate Review** — Decision checkpoint using predefined thresholds.
14. **Exit Criteria** — Pre-agreed conditions to pause, pivot, or stop an initiative.
15. **StrategyOS** — The shared, living repository for strategy artifacts.

Final Note of Gratitude

Thank you for dedicating time and focus to this material. Each concept and tool here was designed to provide clarity and strategic vision.

The fact that you are here—investing in yourself and your organization—is proof of leadership commitment.

Remember: true impact comes not only from learning but from **applying and sharing** it. May this guide support wiser decisions, deeper conversations, and more meaningful transformations.

Reference to the HBT PORTAL™

The place where each week you will find:

-  Practical ebooks.
-  Podcast summaries on Spotify.
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All designed to connect innovation with the human.

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