

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.

2. Central Theme – Creating Innovative Business Models

Innovative business models are not about copying the latest trend; they are about **reconfiguring how you create, deliver and capture value**.

Three recurring patterns appear in organizations that succeed at this:

1. **They treat the business model as a living hypothesis.**
   It is continuously tested and adjusted based on evidence.
2. **They connect different logics of value creation.**
   Subscription + data + collaboration + sustainability are combined intelligently, not added blindly.
3. **They build organizational routines for experimentation.**
   Teams know how to design prototypes, run pilots and scale what works.

This ebook is structured to support those patterns in a practical way.

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3. Initial Sections

3.1. Why Business Model Innovation Matters Now

In a world where technologies can be imitated quickly, **how** you make money and **how** you share value often becomes more strategic than **what** you sell.

Innovative business models can:

- Generate recurring, predictable revenue.
- Unlock new segments that were previously unprofitable.
- Reduce waste and environmental impact while improving margins.
- Turn competitors into collaborators in shared platforms.

At the same time, innovation without discipline can create confusion, internal resistance and financial risk. This guide is designed to help you balance **vision and rigor**.

3.2. Purpose of This Guide – Five Objectives

This guide has five concrete purposes:

1. **Clarify** the main types of innovative business models relevant today.
2. **Provide tools** to analyze which options fit your context.
3. **Illustrate** ideas with realistic examples (*casos hipotéticos*).
4. **Equip you** with exercises and templates to design pilots with your team.
5. **Inspire** a mindset of continuous exploration, without losing focus on execution.

3.3. How to Use This Guide

You can use this ebook as:

- A **strategic workbook** in leadership retreats or board conversations.
- A **toolkit for entrepreneurs** designing or refining their ventures.
- A **training resource** for innovation, product or business development teams.

Recommended use:

1. Read the overview of all five subtopics.
2. Identify which one is most urgent or promising for your reality.
3. Work through the exercise and templates of that subtopic with your team.
4. Define a 90-day plan using the global tools at the end.
5. Revisit the self-assessment periodically to track your evolution.

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4. Subtopic 1 – Subscription-Based Platforms

4.1. Definition

A subscription-based platform is a business model in which customers pay a recurring fee—monthly, quarterly or annually—to access a bundle of products, services or experiences.

Instead of one-off transactions, value is created through **ongoing relationships**:

- Subscription to digital services (software, content, communities).
- Hybrid subscription, combining physical products with services.
- Access-based models, where clients pay for access rather than ownership.

The goal is to align revenue with **long-term customer success**, not only with initial sales.

4.2. Practical Framework – The S.U.B.S.C.R.I.P.T. Model

Use the S.U.B.S.C.R.I.P.T. model to design or refine your subscription platform:

1. **Segment** – Who are your ideal subscribers, and what problem are you solving repeatedly for them?
2. **Usage** – How often and in what situations do they interact with your solution?
3. **Bundle** – What combination of features, services or content will feel "worth it" every period?
4. **Switching costs** – How difficult is it for customers to leave? Are these costs fair and transparent?
5. **Communication** – How do you explain the value of the subscription clearly and simply?
6. **Retention** – What mechanisms help subscribers stay and grow with you?
7. **Pricing** – Which tiers, discounts and contractual terms support both value and sustainability?
8. **Technology** – What tools support billing, analytics and customer experience?

4.3. Applied Example (*caso hipotético*)

Imagine a mid-size manufacturing company that currently sells industrial equipment as one-time deals. Revenue is irregular and dependent on economic cycles. The leadership team explores a shift towards a subscription-like model: **"equipment-as-a-service"**.

Applying S.U.B.S.C.R.I.P.T.:

- They **segment** clients with high maintenance needs and limited capital.
- They analyze **usage** patterns and discover that uptime and predictability are more valuable than ownership.

- They design a **bundle** including equipment, preventive maintenance, spare parts and remote monitoring.
- They create fair **switching costs** via long-term contracts with performance guarantees.
- They refine **communication** to emphasize risk transfer and cash-flow stability rather than technical specs.
- They define **retention** practices: quarterly performance reviews, improvement plans and loyalty rewards.
- They test **pricing** with pilots and adjust based on realized savings for clients.
- They implement **technology** for remote monitoring, predictive maintenance and automated billing.

The result is a new business model where revenue becomes more predictable and relationships deeper, while clients reduce unexpected downtime.

4.4. Exercise – Designing Your Subscription Hypothesis

Objective
Create a first subscription concept for one of your current or future offerings.

Roles

- Sponsor: CEO, founder or business unit leader.
- Business model lead: product or strategy owner.
- Finance representative.
- Customer success or operations representative.

Inputs

- Current pricing models and margins.
- Customer feedback and churn reasons.
- Cost structure and delivery capabilities.

Time

- 1 working day divided into two sessions.

Step-by-step

1. Identify a product or service that solves a recurring problem for clients.
2. List all value components you already deliver (support, maintenance, updates, knowledge).
3. Design at least two subscription bundles (for example, basic and premium).
4. Estimate financial impact: recurring revenue, costs, break-even points.
5. Define criteria to select initial pilot customers.
6. Prepare a simple one-page proposal to test in conversations with 3–5 clients.

Deliverables

- One-page subscription concept per bundle.
- Short list of potential pilot customers and next actions.

4.5. Template – Subscription Concept Canvas

Element (example)	Description
Value promise	"We guarantee 98% uptime of your equipment with predictable monthly costs."

4.6. Checklist – Subscription-Based Platforms

- ☐ The subscription solves a recurring, high-value problem.
- ☐ Customers clearly understand what they get every period.
- ☐ Pricing tiers reflect different levels of value and cost-to-serve.
- ☐ Systems for billing, renewals and support are robust.
- ☐ Churn reasons are monitored and addressed proactively.
- ☐ Success metrics include both revenue and customer outcomes.

4.7. Suggested KPIs – Subscription

- Monthly Recurring Revenue (MRR) and Annual Recurring Revenue (ARR).
- Churn rate and retention rate.
- Customer Lifetime Value (CLV).
- Net revenue retention (including expansions and downgrades).
- Usage frequency or engagement index.

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5. Subtopic 2 – Data Monetization

5.1. Definition

Data monetization is the process of generating measurable economic value from data assets—directly (selling or licensing data products) or indirectly (using data to improve pricing, efficiency or customer experience).

Responsible data monetization respects:

- Consent and privacy.
- Regulatory frameworks.
- Ethical boundaries and societal expectations.

The ambition is to transform data into **insight, decisions and services** that create value for all stakeholders.

5.2. Practical Framework – The V.A.L.U.E. Data Model

Use the V.A.L.U.E. model to structure your efforts:

1. **Vision** – What role should data play in your business model? Complement, core, or product?
2. **Assets** – What data do you own or can access (operational, behavioral, contextual)?
3. **Leverage** – How can data improve revenue, cost, risk and experience?
4. **Usage rules** – What policies and guardrails ensure responsible use?
5. **Ecosystem** – With whom can you collaborate to enrich, analyze or distribute data-driven services?

5.3. Applied Example (*caso hipotético*)

A logistics company collects detailed information on delivery times, routes and local traffic conditions. For years, these data are used only to solve internal problems. Leadership wonders if there is a way to transform them into a new revenue stream.

Using the V.A.L.U.E. model:

- **Vision** – They choose to treat data as a complementary revenue stream, not the core business.
- **Assets** – They catalog historical and real-time data, ensuring they anonymize any customer-identifiable information.
- **Leverage** – They create predictive dashboards for internal routing optimization and dynamic pricing. Indirectly, this increases profitability.
- They also design an external **data service** for urban planners and retailers, offering aggregated insights.
- **Usage rules** – They establish strict privacy policies and governance.

- **Ecosystem** – They partner with analytics firms to develop models and with municipalities to validate use cases.

The company thus generates **new sources of value** while improving its core operations.

5.4. Exercise – Mapping Your Data Monetization Options

Objective
Identify and prioritize possible ways to monetize your data.

Roles

- Sponsor: CEO, COO or data owner.
- Data / analytics lead.
- Legal or compliance representative.
- Product or service owner.

Inputs

- Inventory of main systems and data sources.
- Current analytics projects.
- Regulatory considerations in your sector.

Time

- 4–6 hours.

Step-by-step

1. Make a list of all relevant data assets (operational, customer, product, sensor, etc.).
2. For each asset, brainstorm how it could:
    - Improve existing processes (indirect monetization).
    - Support new services or insights for clients (direct monetization).
3. Evaluate risks, including privacy, reputation and dependency on third parties.
4. Score opportunities by impact and feasibility.
5. Select 1–3 ideas to develop as business model prototypes (see Subtopic 5).
6. Assign owners and next actions.

Deliverables

- Data monetization opportunity matrix.
- Shortlist of priority initiatives with first experiments defined.

5.5. Template – Data Monetization Opportunity Matrix

Data asset (example)	Potential value use case	Impact (1–5)	Feasibility (1–5)	Priority	Notes
Aggregated delivery time data	Heatmaps for urban planning (*caso hipotético*)	4	3	High	Requires anonymization and legal review

5.6. Checklist – Data Monetization

- ☐ Data assets are inventoried and classified by sensitivity.
- ☐ There is a clear vision for the role of data in the business model.
- ☐ Opportunities are assessed both for revenue potential and ethical implications.
- ☐ Governance and consent mechanisms are robust.
- ☐ Partnerships and capabilities for analytics are defined.
- ☐ Communication to customers and stakeholders is transparent.

5.7. Suggested KPIs – Data Monetization

- Revenue from data-based products or services.
- Cost savings or margin improvements attributed to data insights.
- Number of active data-driven use cases in production.
- Compliance indicators (for example, incidents, audit results).
- Customer trust indicators related to data (survey results, complaints).

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6. Subtopic 3 – Collaborative Models

6.1. Definition

Collaborative business models are structures where value is co-created with partners, customers, communities or even competitors. Examples include:

- Platforms where independent providers offer services under a unified experience.
- Joint ventures or alliances combining complementary capabilities.
- Community-driven innovation programs.

The essence is to **share resources, risks and rewards** to achieve impact that no actor could reach alone.

6.2. Practical Framework – The P.A.R.T.N.E.R. Canvas

Use the P.A.R.T.N.E.R. canvas to design collaborative models:

1. **Purpose** – What shared goal justifies collaboration?
2. **Actors** – Who needs to be involved (partners, customers, regulators)?
3. **Roles** – What does each actor contribute (assets, skills, channels)?
4. **Trust mechanisms** – How will decisions, conflicts and data sharing be managed?
5. **Net value** – How is value created and distributed fairly?
6. **Engagement rules** – What principles guide behavior (transparency, exclusivity, exit options)?
7. **Rhythm** – How often do actors meet, review and adapt the collaboration?

6.3. Applied Example (*caso hipotético*)

A group of small agricultural producers wants to access export markets but lacks individual scale and negotiating power. Instead of competing, they decide to create a **collaborative export platform**.

Using P.A.R.T.N.E.R.:

- **Purpose** – Achieve fair access to international markets with higher margins.
- **Actors** – Producers, logistics providers, financial institutions, quality certifiers.
- **Roles** – Producers focus on quality; the platform manages marketing and negotiations; partners provide logistics and financing.
- **Trust mechanisms** – Shared quality standards, transparent pricing formulas, digital traceability.
- **Net value** – Revenues are distributed according to contribution, with clear fees for the platform.
- **Engagement rules** – Members commit to minimum volumes and shared branding guidelines.
- **Rhythm** – Quarterly assemblies and ongoing data dashboards.

The result is a business model where collective strength generates new opportunities.

6.4. Exercise – Designing a Collaborative Value Network

Objective
Create a first design for a collaborative model around one of your strategic initiatives.

Roles

- Sponsor: founder, business line leader or partnership head.
- Strategy or innovation lead.
- Representative from at least one potential partner.
- Legal / governance advisor.

Inputs

- Current partnership portfolio.
- Strategic objectives (markets, capabilities, impact).
- Existing community or user base.

Time

- 1–2 days, ideally in workshop format.

Step-by-step

1. Define the shared purpose of collaboration in one sentence.
2. Map all actors who would need to participate.
3. For each actor, list assets and expectations.
4. Sketch possible value flows (products, data, money, reputation).
5. Identify potential conflicts and design trust mechanisms.
6. Draft a collaboration charter summarizing principles and rules.
7. Plan a small pilot project to test collaboration dynamics.

Deliverables

- Collaborative value network map.
- Draft collaboration charter.
- Pilot project description.

6.5. Template – Collaboration Mapping Table

Actor (example)	Contribution / assets	Expectations	Risks / concerns	Actions to build trust
Local producers cooperative	High-quality products, local knowledge	Fair prices, stable demand	Power imbalance, late payments	Transparent contracts, shared KPIs

6.6. Checklist – Collaborative Models

- ☐ The collaboration has a clearly articulated shared purpose.
- ☐ Roles and contributions are explicit and balanced.
- ☐ Agreements cover decision-making, conflict resolution and exit options.
- ☐ Data sharing and intellectual property are governed fairly.
- ☐ There is a simple structure for monitoring results.
- ☐ Trust is nurtured through consistent communication and transparency.

6.7. Suggested KPIs – Collaboration

- Number and quality of active strategic partnerships.
- Revenue or cost savings generated through collaborations.
- Partner satisfaction scores.
- Time from idea to joint pilot launch.
- Percentage of collaborative projects that move beyond pilot stage.

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7. Subtopic 4 – Circular and Sustainable Economy

7.1. Definition

Circular and sustainable business models aim to **decouple growth from resource consumption and waste**. Instead of a linear "take–make–dispose" logic, they focus on:

- Designing out waste and pollution.
- Keeping products and materials in use as long as possible.
- Regenerating natural and social systems.

Such models can include remanufacturing, reuse, repair services, product-as-a-service, and more.

7.2. Practical Framework – The C.I.R.C.L.E. Loop

Apply the C.I.R.C.L.E. loop:

1. **Capture** – Identify where value is lost in your current value chain (waste, idle assets, unused capacity).
2. **Innovate** – Explore ways to redesign products, services and processes to reduce that loss.
3. **Return** – Design mechanisms for products, components or materials to come back.
4. **Circulate** – Create systems to reuse, remanufacture or recycle.
5. **Link** – Integrate partners (suppliers, customers, recyclers, communities).
6. **Evolve** – Monitor impact and continuously improve.

7.3. Applied Example (*caso hipotético*)

A consumer electronics company faces increasing regulatory pressure regarding electronic waste. Customers change devices frequently, and old products end up in landfills.

Using C.I.R.C.L.E.:

- **Capture** – The company realizes that devices often retain significant value in components.
- **Innovate** – They redesign certain products to be more modular and easier to repair.
- **Return** – They create a trade-in program where customers send back old devices in exchange for discounts.
- **Circulate** – Returned devices are refurbished for secondary markets or disassembled for parts.
- **Link** – Partnerships with recycling firms and social enterprises expand the model.
- **Evolve** – They track environmental and financial indicators, iterating design and processes.

Over time, the company differentiates itself as a **responsible brand**, reduces material costs and opens new markets.

7.4. Exercise – Mapping Circular Opportunities in Your Business

Objective
Identify where circular principles can be integrated into your business model.

Roles

- Sponsor: sustainability lead, COO or founder.
- Product design representative.
- Operations / supply chain leader.
- Finance and risk representatives.

Inputs

- Product life-cycle data (where available).
- Waste, returns and warranty reports.
- Regulatory and customer expectations.

Time

- 1 day workshop plus follow-up analysis.

Step-by-step

1. Map your product or service life-cycle from input sourcing to end-of-life.
2. Identify where resources, value or customer trust are currently being lost.
3. Brainstorm circular strategies (reuse, repair, remanufacturing, sharing models).
4. Estimate potential impact on cost, revenue and environmental footprint.
5. Prioritize 1–2 initiatives for prototyping (see Subtopic 5).
6. Define partners needed to make them viable.

Deliverables

- Circular opportunity map.
- Shortlist of initiatives with initial assumptions and metrics.

7.5. Template – Circular Initiative Assessment

Initiative (example)	Potential impact on revenue / cost	Environmental / social impact	Partners required	Next step
Device trade-in and refurbishment	New revenue from refurbished	Reduced e-waste; affordable devices access	Logistics providers, refurbishers	Pilot in one region for 6 months

Initiative (example)	Potential impact on revenue / cost	Environmental / social impact	Partners required	Next step
	devices; lower costs			

7.6. Checklist – Circular and Sustainable Models

- ☐ Life-cycle impacts of products or services are understood.
- ☐ Circular strategies are evaluated for both impact and feasibility.
- ☐ Business cases include environmental, social and financial metrics.
- ☐ Partnerships with suppliers and recyclers are explored.
- ☐ Customer communication highlights sustainable choices honestly.
- ☐ Progress is tracked and reported regularly.

7.7. Suggested KPIs – Circular Economy

- Percentage of revenue from circular offerings.
- Amount of waste reduced or materials recovered.
- Product return or refurbishment rates.
- Energy or water savings associated with new models (where measurable).
- Customer and stakeholder perception regarding sustainability.

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8. Subtopic 5 – Experimentation with Business Model Prototypes

8.1. Definition

Business model experimentation is the disciplined practice of designing, testing and refining **prototypes of how your business creates and captures value**, before committing major resources.

A prototype can be:

- A small pilot with selected customers.
- A limited-time offer with special terms.
- A simulated environment to test pricing or channel strategies.

The goal is to **learn fast, at low cost and with controlled risk**.

8.2. Practical Framework – The L.E.A.R.N. Experiment Cycle

Use the L.E.A.R.N. cycle:

1. **Lean hypothesis** – Formulate clear assumptions about customers, value, revenue and cost.
2. **Experiment design** – Plan how to test those assumptions with minimal investment.
3. **Action** – Run the experiment, documenting what is done and who participates.
4. **Review** – Analyze outcomes qualitatively and quantitatively.
5. **Next decision** – Decide whether to scale, refine, pivot or stop.

8.3. Applied Example (*caso hipotético*)

An education startup considers adding a subscription-based mentor platform combined with data-driven recommendations. Instead of redesigning the whole company around this idea, they choose to prototype.

Following L.E.A.R.N.:

- **Lean hypothesis** – "If we offer a monthly mentor subscription including two sessions and personalized content recommendations, at least 20% of current students will sign up, and churn will decrease."
- **Experiment design** – They select 50 existing students, prepare a simple landing page and use manual scheduling tools.
- **Action** – Over eight weeks, they run the new service, collect feedback and track upgrades, cancellations and satisfaction.
- **Review** – Results show 30% adoption and strong qualitative appreciation, but also operational overload.

- **Next decision** – They decide to invest in better scheduling tools and expand the pilot gradually while refining pricing.

The experiment prevents premature scaling while building evidence for investors and internal stakeholders.

8.4. Exercise – Designing Your Next Business Model Experiment

Objective
Define and plan at least one business model experiment aligned with previous subtopics.

Roles

- Sponsor: founder, innovation or strategy head.
- Experiment owner.
- Finance / risk advisor.
- Customer-facing representative (sales, success, service).

Inputs

- Insights from earlier subtopics (subscriptions, data, collaboration, circular ideas).
- Capacity and budget constraints.
- Existing feedback or hypotheses.

Time

- 1 day to design; 4–12 weeks to run.

Step-by-step

1. Choose one promising idea from previous work (for example, a subscription, data service or niche collaboration).
2. State the hypothesis in terms of customer behavior and business impact.
3. Define success metrics and thresholds (what would "good enough to scale" look like?).
4. Decide sample size, duration and scope of the experiment.
5. Identify risks and mitigation actions.
6. Plan communication with participants and internal stakeholders.
7. After running, document learnings and recommendations.

Deliverables

- One-page experiment charter.
- Experiment report with results and decision.

8.5. Template – Business Model Experiment Charter

Item (example)	Description
Hypothesis	"If we pilot a basic subscription for maintenance services, 15% of clients will adopt within 3 months."

8.6. Checklist – Business Model Experimentation

- ☐ Hypotheses are explicit and testable.
- ☐ Experiments are small enough to be reversible, but realistic.
- ☐ Success metrics and thresholds are defined in advance.
- ☐ Risks are analyzed and mitigated.
- ☐ Learning is documented and shared across the organization.
- ☐ Decisions after experiments are timely and transparent.

8.7. Suggested KPIs – Experimentation

- Number of business model experiments run per year.
- Percentage of experiments that lead to scaled initiatives.
- Average time from idea to first experiment.
- Learning documentation rate (experiments with written reports).
- Portfolio balance between core improvements and disruptive ideas.

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9. Global Templates and Tools for Business Model Innovation

9.1. Impact × Effort Prioritization Rubric

Use this rubric to prioritize your initiatives across all five subtopics.

Initiative (example)	Impact (1–5)	Effort (1–5)	Priority	Responsible	Next milestone	Date
Pilot subscription model for maintenance services	5	3	High	Business unit leader	Sign agreement with 3 pilot customers	30/09

9.2. RACI Matrix for Business Model Innovation Program

Activity (example)	R	A	C	I	Deliverable	Date
Approve portfolio of business model experiments	Program lead	CEO / founder	Finance, Legal, Product, Sales	Board / advisors	Annual experiment roadmap	15/10

9.3. Business Model Innovation KPI Board

KPI (example)	Definition / notes	Target	Baseline	Frequency	Owner	Data source
Innovation revenue ratio	% of revenue from models launched in last 3 years	25%	10%	Quarterly	CFO + strategy lead	Financial reports, product analytics

9.4. Human–Cultural Risk Map

Risk (example)	Probability (H/M/L)	Impact (H/M/L)	Mitigation actions	Owner	Status
Internal resistance to new revenue models	H	H	Involve teams early, communicate rationale, training	HR + leadership	In progress

9.5. 30–60–90 Day Plan for Business Model Innovation

Horizon	Objective (example)	Actions	Responsible	Indicators	Deliverable
30 days	Build shared understanding of business model opportunities	Run workshops using this ebook; map existing and potential models	Strategy team lead	Workshops completed; opportunities list created	Business model opportunity map
60 days	Launch first wave of experiments	Select 3–5 ideas; design charters; secure approvals	Innovation manager	Number of experiments launched	Experiment charters and calendar
90 days	Evaluate pilots and define scaling roadmap	Review results; prioritize scaling; adjust KPIs and resources	Executive committee	Decisions taken on each pilot	90-day review report and updated roadmap

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10. Summary and Next Steps

10.1. Integrated View of the Five Subtopics

Creating innovative business models is not a one-time workshop; it is an ongoing practice. Throughout this guide you have explored:

1. **Subscription-based platforms** – Turning transactions into relationships.
2. **Data monetization** – Converting information into insight, services and value.
3. **Collaborative models** – Building ecosystems that amplify capabilities.
4. **Circular and sustainable economy** – Aligning growth with responsibility.
5. **Experimentation with prototypes** – Learning fast and reducing risk.

Together, these dimensions form a **toolbox for strategic renewal**. You do not have to implement everything at once. The key is to choose a starting point and create momentum.

10.2. Next Steps Checklist

Next step (example)	Responsible	Deadline	Status	Observations
Complete the self-assessment and discuss results in the team	Leadership team	10/09	Planned	Identify two priority subtopics.
Design at least one subscription or circular initiative	Product / strategy lead	30/09	Planned	Use S.U.B.S.C.R.I.P.T. or C.I.R.C.L.E. frameworks.
Map data monetization opportunities	Data / analytics lead	31/10	Planned	Include legal and ethical review.
Select and launch 2–3 business model experiments	Innovation manager	30/11	Planned	Apply L.E.A.R.N. cycle and document learnings.

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11. Self-Assessment – Business Model Innovation Readiness

Score each item from **1 to 5**:

- **1** = Strongly disagree
- **2** = Disagree
- **3** = Neither agree nor disagree
- **4** = Agree
- **5** = Strongly agree

1. We have a clear understanding of how our current business model works (value creation, delivery and capture).
2. Our revenue streams are diversified, and we are not overly dependent on a single model.
3. We have explored or implemented at least one subscription-based offering.
4. We systematically use data to improve decisions and design new services.
5. We have identified potential ways to monetize data in a responsible manner.
6. We collaborate with partners to co-create value, not only to outsource tasks.
7. Our organization considers environmental and social impact when evaluating new business models.
8. We have run at least one circular or sustainable initiative with measurable outcomes.
9. Teams are encouraged and supported to propose new business model ideas.
10. We run structured business model experiments with clear hypotheses and metrics.
11. Learning from experiments is documented and shared across the organization.
12. Leadership is willing to adjust strategy based on evidence, even if it challenges assumptions.
13. Our financial and legal teams are involved constructively in innovation efforts.
14. We have a roadmap for evolving our business model in the next 2–3 years.
15. We feel prepared to communicate new models transparently to customers, partners and investors.

11.1. Scoring Method

1. Add all scores to obtain a **total between 15 and 75**.
2. Divide the total by 15 to get an **average score between 1.0 and 5.0**.

11.2. Interpretation and Recommendations

- **1.0 – 2.5: Initial stage**
  - Business model innovation is mostly reactive.
  - Recommendation: focus on mapping your current model, understanding revenue and cost drivers, and running one small experiment (Subtopic 5).
- **2.6 – 3.8: Developing stage**
  - Some initiatives exist, but they are isolated.

    - Recommendation: connect efforts under a clear portfolio, integrate subscription or data opportunities, and involve more functions.
- **3.9 – 5.0: Strategic stage**
    - Innovative business models are an explicit competitive advantage.
    - Recommendation: scale successful models, deepen circular and collaborative initiatives, and institutionalize experimentation as a core capability.

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12. Glossary – 15 Key Terms

1. **Business Model**
   The logic of how an organization creates, delivers and captures value.
2. **Subscription Model**
   Revenue model where customers pay a recurring fee for continued access to products or services.
3. **Recurring Revenue**
   Predictable income that repeats at regular intervals, such as monthly or annually.
4. **Churn**
   Rate at which customers cancel a subscription or stop buying over a given period.
5. **Customer Lifetime Value (CLV)**
   Estimated net profit a company expects to earn from a customer over the entire relationship.
6. **Data Monetization**
   Process of generating economic value from data assets, directly or indirectly.
7. **Indirect Monetization**
   Using data to improve efficiency, pricing or experience, which in turn impacts revenue or costs.
8. **Collaborative Business Model**
   Structure where multiple actors co-create and share value, risk and governance.
9. **Platform**
   System that connects different groups (such as producers and consumers) and facilitates interactions among them.
10. **Circular Economy**
    Economic model focused on minimizing waste and keeping resources in use as long as possible.
11. **Product-as-a-Service**
    Model where customers pay for access or performance of a product rather than owning it.
12. **Business Model Prototype**
    Simplified, testable version of a new business model used in experiments.
13. **Minimum Viable Offer (MVO)**
    The smallest coherent version of an offer that can be tested with real customers.
14. **Ecosystem**
    Network of organizations, technologies and relationships that co-evolve around a shared domain.
15. **Portfolio of Experiments**
    Set of small, diverse tests designed to explore different directions of innovation simultaneously.

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.
- 🎥 Videos on YouTube.

All designed to connect innovation with the human.

🔗 **HBT PORTAL™**