

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 of the Ebook

Theme: Legacy and Sustainability of Change

Focus: A practical guide for HR, culture and change leaders who want to ensure that transformation becomes a lasting legacy rather than a temporary initiative.

Subtopics:

1. Documenting and preserving best practices.
2. Ensuring succession of leaders committed to the culture.
3. Integrating the human transformation vision into mission and corporate statutes.
4. Securing resources for long-term maintenance of change.
5. Leaving a legacy that transcends current people and generations.

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3. Purpose of the Guide

This guide pursues five concrete objectives:

1. **Clarify the concept of legacy in organizational change** and why it matters for your role.
2. **Provide tools, exercises and templates** to capture best practices and transfer them across teams and generations.
3. **Offer frameworks for succession and governance**, so that the culture you build is not reversed with leadership changes.
4. **Help you design sustainable resource strategies**, integrating change into budgets, structures and decision-making.
5. **Inspire you to think beyond your current position**, shaping a legacy that honours people, communities and future leaders.

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4. How to Work with this Guide

- Read it once to get a complete picture.
- Select one subtopic as a **90-day focus** for your organization.
- Use the exercises in workshops with key stakeholders.
- Adapt the templates to your own formats (spreadsheets, collaboration platforms, HR systems).
- Track progress using the suggested KPIs.

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5. Development of the Theme (Central Module)

5.1 Subtopic 1 – Documenting and Preserving Best Practices

5.1.1 Definition

Best practices are **proven ways of working** that deliver consistent, positive results and align with the culture you want to strengthen.

Documenting and preserving them means:

- Identifying what really works (not just what is popular).
- Capturing the **context, conditions and behaviours** that make it effective.
- Making this knowledge accessible, understandable and reusable by others.

Without documentation, transformation remains **dependent on specific people**. When they leave or change roles, much of the learning disappears.

5.1.2 Practical framework – The LOOP Knowledge Cycle

Use the **LOOP** cycle to manage best practices:

- **L – Locate.** Detect practices that generate exceptional results and positive cultural signals.
- **O – Observe.** Analyse how they work in real life: roles, steps, tools, mindsets.
- **O – Organise.** Capture the practice in a structured format: purpose, step-by-step, do's & don'ts, examples.
- **P – Propagate.** Share, train and adapt the practice in other teams, while updating the documentation based on new feedback.

This cycle ensures that best practices are not static documents but **living assets**.

5.1.3 Example (caso hipotético)

In a service company, one branch achieves extraordinary engagement results after a major change. HR discovers that the local manager holds monthly "learning circles" where employees share improvements, mistakes and client stories.

Applying LOOP:

- **Locate:** engagement surveys and qualitative data identify this branch as an outlier.
- **Observe:** HR visits, participates in circles, interviews staff and notes specific behaviours.
- **Organise:** they document the "Learning Circle Practice": purpose, frequency, agenda, facilitation tips, real examples.
- **Propagate:** the practice is piloted in two other branches with training and support. Documentation is refined with their feedback.

Within a year, several branches use learning circles, and they become part of the standard leadership toolkit.

5.1.4 Exercise – Building Your Best Practices Library

Objective
Create an initial catalogue of best practices that support your transformation and define how to preserve them.

Duration
Half-day workshop (3–4 hours).

Roles

- HR / Culture lead (facilitator).
- Leaders from key areas (operations, sales, IT, finance, etc.).
- Representatives from frontline teams if possible.

Inputs

- Recent success stories and positive deviations in performance.
- Survey and engagement data.

Steps

1. **Collect stories.** Ask participants to bring examples of successful practices linked to the transformation (onboarding, feedback, digital adoption, wellbeing, etc.).
2. **Cluster.** Group stories into themes (e.g., communication rituals, coaching practices, cross-functional collaboration).
3. **Prioritise.** Use the Impact × Effort rubric (see Global Tools) to select 5–10 practices to document first.
4. **Assign owners.** For each practice, name a "practice owner" responsible for documenting and updating it.

5. **Define standards.** Agree on a common documentation template and repository (intranet, wiki, shared drive).

Deliverable
Version 1 of the "Best Practices Library".

5.1.5 Template – Best Practices Library Entry

Practice name	Description	Evidence of effectiveness	Risk if lost	Impact area	Immediate action
Monthly Learning Circles (caso hipotético).	90-minute sessions where teams share successes, mistakes and improvement ideas using a structured agenda.	Branch X engagement +15 points; reduced turnover by 20% in 12 months.	New managers might cancel the circles, losing trust and continuous improvement habits.	Engagement, learning culture, psychological safety.	Include circles as mandatory ritual in local leadership role profile; create facilitation guide.

5.1.6 Checklist – Are you preserving what works?

- ☐ You can name at least five specific practices that clearly support your transformation.
- ☐ These practices are documented in a standard, accessible format.
- ☐ Each practice has a clear owner responsible for updating it.
- ☐ New leaders can easily find and learn these practices during onboarding.
- ☐ Best practices are periodically reviewed to incorporate new learning.

5.1.7 Suggested KPIs

- Number of documented best practices related to transformation.
- Percentage of critical roles trained in key practices.
- Usage metrics: visits/downloads to practice documentation.
- Impact indicators: correlation between adoption of practices and engagement, performance or retention.

5.2 Subtopic 2 – Ensuring Succession of Leaders Committed to the Culture

5.2.1 Definition

Succession is more than filling positions; it is ensuring that **future leaders embody the mindset and behaviours** that sustain the transformation.

A robust succession approach:

- Identifies strategic roles for cultural continuity.
- Develops internal talent aligned with values and transformation principles.
- Ensures that selection and promotion decisions consider culture, not only technical or financial results.

Without this, culture becomes fragile: a single leadership change can undo years of work.

5.2.2 Practical framework – The PATH Succession Model

Use **PATH** to build culture-aligned succession:

- **P – Prioritise roles.** Identify which positions are critical for maintaining the transformation (e.g., plant managers, HRBPs, product leads).
- **A – Assess alignment.** Evaluate potential successors on both capabilities and cultural alignment.
- **T – Talent pathways.** Design development journeys (projects, rotations, mentoring) to prepare successors.
- **H – Handover rituals.** Create intentional transition processes that transfer not only tasks but also stories, relationships and unwritten rules.

5.2.3 Example (caso hipotético)

A company has invested heavily in building a collaborative culture between sales and operations. The current operations director is a key role model. HR is concerned that, if he leaves, the culture might regress.

Using PATH:

- **Prioritise roles:** operations director identified as “culture-critical”.
- **Assess alignment:** three internal candidates evaluated on collaboration behaviours, people leadership and openness to learning.

- **Talent pathways:** they receive cross-functional projects, mentoring from the current director, and training on conflict facilitation.
- **Handover rituals:** when succession occurs, there is a 3-month overlap including joint meetings, storytelling sessions and explicit commitments on cultural expectations.

The result is a smoother transition and continuity of collaborative behaviours.

5.2.4 Exercise – Culture-Critical Succession Map

Objective
Identify key roles for cultural sustainability and define succession strategies.

Duration
2–3 hours workshop.

Roles

- HR / Talent leader (facilitator).
- CEO or general manager.
- Heads of main business units.

Inputs

- Current org chart.
- Leadership competency model and culture/values statements.

Steps

1. **Map roles.** Mark roles where a change of person could significantly affect culture (e.g., area heads, plant managers, HRBPs).
2. **Rate risk.** For each, assess vacancy risk (likelihood of turnover) and cultural risk (impact on transformation).
3. **Identify successors.** List potential internal successors (1–3 per role) and their readiness level.
4. **Define development actions.** Using PATH, design practical next steps for each potential successor.
5. **Plan handovers.** For roles with near-term transitions, design specific handover rituals.

Deliverable
"Culture-Critical Succession Map" with actions for the next 12–24 months.

5.2.5 Template – Culture-Critical Succession Table

Role	Cultural relevance	Potential successor	Readiness (1–5)	Key development action	Planned handover date
Operations Director – Region North (caso hipotético).	Key role model for collaboration and safety culture.	Plant Manager A.	3 – Strong technical skills, needs exposure to cross-functional negotiation.	Assign to lead cross-regional improvement project and join executive meetings as observer.	Q2 20XX (tentative).

5.2.6 Checklist – Is your succession culture-proof?

- ☐ You have a clear list of culture-critical roles.
- ☐ Potential successors are evaluated on values and behaviours, not only results.
- ☐ Development plans include real assignments where successors can practice leading change.
- ☐ Leadership transitions include structured handover rituals.
- ☐ The board or top team regularly reviews succession from a cultural perspective.

5.2.7 Suggested KPIs

- Percentage of culture-critical roles with at least one identified successor.
- Percentage of successors with active development plans.
- Internal promotion rate versus external hiring for key roles.
- Post-transition culture indicators (e.g., engagement, cross-team collaboration) in areas with recent leadership changes.

5.3 Subtopic 3 – Integrating the Human Transformation Vision into Mission and Corporate Statutes

5.3.1 Definition

A transformation vision expresses **how the organization wants to relate to people, technology and its broader ecosystem**.

Integrating this vision into mission statements, policies and statutes means:

- Making it part of the **official identity** of the company.
- Embedding it in governance documents that outlive individual leaders.
- Providing a clear reference when making strategic, ethical and investment decisions.

When the vision is only a slide deck, it is fragile. When it is part of the mission and statutes, it becomes a **commitment**.

5.3.2 Practical framework – The ANCHOR Approach

Use **ANCHOR** to embed your human-centred transformation vision:

- **A – Articulate.** Translate the vision into simple, powerful language.
- **N – Navigate alignment.** Compare current mission, values and statutes with the vision and identify gaps.
- **C – Co-create.** Involve board members, leaders and representatives from different levels to refine wording.
- **H – Harmonise policies.** Adjust HR, ethics, digital and ESG policies to reflect the vision.
- **O – Operationalise.** Define concrete decision criteria and practices that embody the vision.
- **R – Review & renew.** Periodically check if the mission and statutes still reflect lived reality and aspirations.

5.3.3 Example (caso hipotético)

A company aspires to be a reference in human-centred digital transformation. The vision emphasises dignity, learning and shared value. Yet its existing mission focuses mainly on growth and efficiency.

Using ANCHOR:

- **Articulate:** they craft a concise statement describing how technology should enhance human potential, not replace it.
- **Navigate alignment:** they see that some policies reward individual competition over collaboration.
- **Co-create:** they hold workshops with board members, executives and employee representatives to refine mission and values.
- **Harmonise policies:** they adjust performance and recognition systems to value mentoring, cross-team collaboration and ethical use of AI.
- **Operationalise:** they create an "impact lens" used in investment and product decisions, asking: *How does this initiative affect human wellbeing and learning?*
- **Review & renew:** the board includes an annual check of mission and vision alignment in its agenda.

5.3.4 Exercise – Mission and Statutes Alignment Lab

Objective
Ensure that mission, values and key policies reflect the human transformation vision.

Duration
One-day working session.

Roles

- HR / Culture leader (co-facilitator).
- CEO or general manager.
- Board representatives and legal counsel.
- Representatives from different business units.

Inputs

- Current mission, vision, values and statutes.
- Transformation vision statement and principles.

Steps

1. **Articulate vision.** Begin with a short narrative of the transformation vision, including why it matters for people and business.
2. **Gap analysis.** In small groups, compare the vision with mission, values and selected policies. Mark inconsistencies and opportunities.
3. **Draft enhancements.** Write concrete proposals to adjust language and policies.
4. **Prioritise changes.** Use the Impact × Effort rubric to identify quick wins and longer-term legal/statutory changes.
5. **Define governance path.** Agree on approval processes, timelines and communication plan.

Deliverable
"Mission & Governance Alignment Plan" with actions, owners and dates.

5.3.5 Template – Vision Integration Mapping Table

Element reviewed	Current wording / policy	Gap vs. human transformation vision	Proposed change	Owner
Mission statement (caso hipotético).	"To maximise shareholder value through operational excellence in logistics."	Ignores human impact, learning and sustainability; purely financial.	"To create sustainable value by connecting people and goods with excellence, developing our teams and caring for communities and the environment."	CEO & Board committee.

5.3.6 Checklist – Is your vision protected in governance?

- ☐ The mission clearly expresses human and societal impact, not only financial goals.
- ☐ Values and codes of conduct are consistent with the transformation vision.
- ☐ Policies (HR, digital, ethics, sustainability) embody the same principles.
- ☐ There is a formal process to review mission and statutes when strategic changes occur.
- ☐ Board agendas include regular reflection on culture and human impact.

5.3.7 Suggested KPIs

- Number of governance documents updated to reflect the vision.
- Board and executive perception of alignment between vision and actual decisions.
- Presence of human impact criteria in investment and risk frameworks.
- External recognition or certifications related to culture, people or responsible innovation.

5.4 Subtopic 4 – Securing Resources for Long-Term Maintenance of Change

5.4.1 Definition

Sustaining change requires **time, money, attention and structural support**.

Securing resources means:

- Integrating transformation efforts into regular budgets and planning cycles.
- Clarifying ownership and accountability.
- Protecting key initiatives from being cut at the first sign of financial stress, while still acting responsibly.

When resources are unstable, transformation is perceived as a **temporary campaign** instead of a strategic priority.

5.4.2 Practical framework – The FUND Model

Use **FUND** to design sustainable resourcing:

- **F – Forecast and frame.** Estimate the long-term resources needed and frame them as investment, not cost.
- **U – Use business cases.** Connect change initiatives to tangible value (risk reduction, productivity, retention, innovation).
- **N – Normalize in budgets.** Integrate transformation line items into regular budgets and multi-year planning.
- **D – Diversify sources.** Combine internal budgets, savings, external partnerships and, when relevant, grants or co-investments.

5.4.3 Example (caso hipotético)

A company launches a multi-year transformation program focused on digital skills and leadership. The first year is funded by a special budget. In year two, financial pressure appears and some executives propose cutting the program.

Applying FUND:

- **Forecast and frame:** HR had previously modelled a three-year investment with clear milestones.

- **Use business cases:** they present data showing improved retention among participants, faster digital project implementation and fewer rework incidents.
- **Normalize in budgets:** part of the program becomes embedded in the regular L&D budget; another part is integrated into IT project budgets.
- **Diversify sources:** they partner with a local university for co-designed modules and negotiate supplier contributions as part of long-term contracts.

The program survives the budget cut and continues creating value.

5.4.4 Exercise – Long-Term Transformation Resource Plan

Objective
Design a realistic, multi-year resource plan for key change initiatives.

Duration
2–3 sessions of 2 hours each.

Roles

- HR / Transformation leader.
- Finance director.
- Representatives from main business units.

Inputs

- List of current and planned transformation initiatives.
- Financial projections and constraints.

Steps

1. **Identify strategic initiatives** that must be sustained for at least 3–5 years (e.g., leadership development, digital adoption, culture programs).
2. **Estimate resources** per initiative (budget, FTEs, technology, external partners).
3. **Build business cases** using a mix of tangible and intangible benefits (productivity, retention, risk reduction, brand).
4. **Integrate into financial planning**, assigning budgets to departments and defining shared funding models where appropriate.
5. **Define monitoring mechanisms**, including KPIs and periodic reviews with finance and top management.

Deliverable
“Long-Term Transformation Resource Plan”.

5.4.5 Template – Resource Sustainability Plan

Initiative	Investment required (annual)	Expected value / benefits	Funding source(s)	Risk if unfunded	Next action
Human-centred leadership program (caso hipotético).	USD 250,000 (training, coaching, internal time).	Improved engagement, lower turnover of key talent, better cross-functional collaboration.	L&D budget (60%), business units (30%), vendor co-funding (10%).	Leadership regress to old behaviours; increased burnout and attrition.	Present updated business case to executive committee; secure 3-year commitment.

5.4.6 Checklist – Are resources aligned with your ambitions?

- ☐ Key transformation initiatives have multi-year funding plans.
- ☐ Finance and HR work together as partners, not adversaries.
- ☐ Business cases include both financial and human impact.
- ☐ Budget reviews consider the risk of stopping or underfunding change initiatives.
- ☐ There is transparency on how resources are used and what value they generate.

5.4.7 Suggested KPIs

- Percentage of strategic initiatives with confirmed funding for at least 2–3 years.
- Ratio of transformation investment to overall operating budget.
- Measured ROI/VOI (value of investment) for key programs.
- Number of critical initiatives delayed or cancelled due to lack of resources.

5.5 Subtopic 5 – Leaving a Legacy that Transcends Current People and Generations

5.5.1 Definition

Legacy is the **enduring impact** your organization leaves on people, communities, the environment and your industry.

In the context of transformation, legacy asks:

- What will remain when current leaders and teams are gone?
- Which stories will be told about how you used technology, power and resources?
- How will your decisions affect future generations?

Thinking about legacy expands the horizon beyond current KPIs and helps align day-to-day actions with deeper meaning.

5.5.2 Practical framework – The LENS Legacy Model

Use **LENS** to shape a lasting legacy:

- **L – Long view.** Extend your planning horizon beyond 3–5 years to 10–20 years or more.
- **E – Ecosystem impact.** Consider effects on employees, families, communities, suppliers, environment and future talent.
- **N – Narrative.** Articulate the story you want people to tell about your transformation.
- **S – Structures.** Create institutions, practices and agreements that protect that legacy (foundations, scholarships, community projects, permanent councils, etc.).

5.5.3 Example (caso hipotético)

A manufacturing company is automating several plants. Instead of seeing this only as a cost reduction project, leaders ask what legacy they want to leave in their region.

Using LENS:

- **Long view:** they imagine what the region should look like in 15 years: diversified economy, skilled workforce, healthy environment.
- **Ecosystem impact:** automation may reduce certain jobs but can create new ones in maintenance, programming and services.

- **Narrative:** they define a story around “transforming work without leaving people behind”.
- **Structures:** they create a long-term partnership with local schools and technical institutes, fund scholarships and design reskilling programs. They also set environmental goals beyond legal requirements.

Years later, the company is recognised not only for efficiency but for its contribution to regional development.

5.5.4 Exercise – Legacy Canvas for Change Leaders

Objective
Clarify the legacy you want your current transformation to leave and identify structural actions.

Duration
Half-day workshop.

Roles

- HR / Culture leader (facilitator).
- Senior leadership team.
- Representatives from next-generation leaders if possible.

Inputs

- Current transformation roadmap.
- Stakeholder maps.

Steps

1. **Long view.** Ask participants to imagine themselves 15–20 years in the future. What positive outcomes do they want to see in people, communities and the organization?
2. **Ecosystem mapping.** Identify key stakeholders and how the transformation could affect them positively or negatively.
3. **Narrative creation.** Write a short narrative from the perspective of a future employee, partner or community member describing the company’s legacy.
4. **Structural actions.** Identify concrete structures that should be created now to support that legacy (programs, funds, agreements, governance bodies).
5. **Prioritise and assign.** Use the Impact × Effort rubric to choose 3–5 structural actions for the next 2–3 years.

Deliverable
“Legacy and Sustainability Canvas” with commitments.

5.5.5 Template – Legacy Impact Map

Project / initiative	Impact on people and communities	Intergenerational risk if poorly managed	Long-term support structure	Responsible
Automation and digitalisation of plants (caso hipotético).	New technical jobs, safer workplaces, potential job displacement for low-skilled workers.	Generational unemployment, loss of trust, community resentment.	Reskilling academy, scholarship program, community advisory board.	COO & HR director.

5.5.6 Checklist – Are you thinking and acting with legacy in mind?

- ☐ The question "what legacy are we leaving?" appears in strategic discussions.
- ☐ You consider long-term human and environmental impact in major decisions.
- ☐ There are concrete programs that benefit future generations (education, development, sustainability).
- ☐ Stories about the transformation emphasise dignity, learning and shared value.
- ☐ You feel that your work contributes to something that will outlive your current role.

5.5.7 Suggested KPIs

- Number of long-term, legacy-related programs (education, community, sustainability).
- Duration and continuity of such programs across leadership changes.
- External perceptions of the company's contribution to people and communities.
- Internal sense of pride and meaning related to the transformation (survey items).

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6. Global Templates and Tools

6.1 Impact × Effort Prioritisation Rubric

Use it to decide which legacy and sustainability initiatives to implement first.

Initiative	Impact (1–5)	Effort (1–5)	Priority	Responsible	Próximo hito	Fecha
Create a central Best Practices Library with governance and owners (caso hipotético).	5 – Protects key knowledge and accelerates learning across units.	3 – Requires design, tooling and facilitation.	Alta.	HR / Knowledge management lead.	Design template and pilot with two business units.	30/09/20XX

6.2 RACI Matrix – Legacy & Sustainability Program

Activity	R	A	C	I	Entregable	Fecha
Define and approve the "Legacy and Sustainability of Change" roadmap.	HR / Culture leader.	CEO.	Executive team, Finance director, Legal.	Board, key stakeholders.	Roadmap with initiatives on documentation, succession, governance, resources and legacy programs.	31/12/20XX

6.3 Legacy & Sustainability KPI Dashboard

KPI	Definition	Meta	Línea base	Frecuencia	Propietario	Fuente de datos
Coverage of documented best practices.	# of documented critical practices / total identified.	90% in 3 years.	To be defined.	Quarterly.	Knowledge management leader.	Best Practices Library records.

6.4 Human–Cultural Risk Map (Legacy Focus)

Riesgo	Probabilidad (A/M/B)	Impacto (A/M/B)	Mitigación	Dueño	Estado
Loss of cultural progress after leadership turnover (caso hipotético).	Alta.	Alto.	Implement PATH succession model, integrate vision into mission and statutes, strengthen onboarding for new leaders.	HR director & CEO.	En curso.

6.5 30–60–90 Day Plan – Installing Legacy & Sustainability Practices

Horizonte	Objetivo	Acciones	Responsable	Indicadores	Entregable
30 días	Gain clarity and sponsorship for legacy and sustainability priorities.	Share this ebook with CEO and key leaders; run one alignment session; identify quick wins.	HR / Culture leader.	Agreement on 3–5 priorities; named sponsors.	“Legacy & Sustainability Priorities” summary.
60 días	Build structures for documentation and succession.	Launch Best Practices Library pilot; create Culture-Critical Succession Map.	HR & business unit heads.	Number of practices documented; # of roles mapped with successors.	Library v1 and Succession Map v1.
90 días	Integrate vision and resources into governance and budgets.	Mission/statutes alignment lab; design resource plan with Finance; define dashboard KPIs.	CEO, HR, Finance, Legal.	Approved changes in mission/policies; funding commitments; dashboard ready.	“Legacy Governance & Resource Pack”.

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7. Summary and Next Steps

7.1 Integrated view

Legacy and sustainability of change are not abstract ideals; they are the result of **deliberate choices** in five areas:

1. **Documentation** – capturing and preserving best practices so they can be reused and improved.
2. **Succession** – ensuring that future leaders are committed to the culture you are building.
3. **Governance** – embedding your human transformation vision into mission, values and statutes.
4. **Resources** – securing stable funding, time and attention for key initiatives.
5. **Legacy thinking** – taking a long view and designing structures that benefit future generations.

When you work on these areas together, transformation stops being a temporary project and becomes **part of the identity** of your organization.

7.2 Next steps checklist – Turning ideas into commitments

Próximo paso	Responsable	Plazo	Estado	Observaciones
Run the Best Practices Library workshop to identify and document initial practices.	HR / Culture leader.	30 días.		Start with one business unit to learn quickly.
Create the Culture-Critical Succession Map with executive team.	HR director & CEO.	60 días.		Focus on roles where culture would be most at risk if the person left.
Conduct the Mission and Statutes Alignment Lab with board and legal.	CEO, HR, Legal.	90 días.		Aim for clear, simple wording that reflects human-centred transformation.
Design the Long-Term Transformation Resource Plan with Finance.	HR & Finance directors.	90 días.		Integrate initiatives into normal budget cycles.
Facilitate a Legacy Canvas workshop with top leadership to define long-term impact and structural programs.	HR / Culture leader.	120 días.		Invite next-generation leaders to participate.

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8. Self-Assessment – Legacy and Sustainability of Change

Rate each statement from **1 (strongly disagree)** to **5 (strongly agree)**.

1. Our organization has identified and documented key practices that support our transformation.
2. New leaders can quickly access and learn best practices through a structured repository.
3. We have a clear list of culture-critical roles.
4. Potential successors for these roles are being developed with both skills and cultural alignment in mind.
5. Our mission and values explicitly reflect a human-centred transformation vision.
6. Policies and governance documents are coherent with that vision.
7. Major change initiatives have multi-year funding plans.
8. Finance and HR collaborate as partners in framing transformation as an investment.
9. We regularly evaluate the human and cultural risks of budget cuts or leadership changes.
10. We consider long-term impact on people, communities and the environment in strategic decisions.
11. There are concrete programs that benefit future generations (education, reskilling, community projects).
12. Stories about our transformation emphasise learning, dignity and shared value.
13. Leaders at different levels talk about legacy, not only short-term results.
14. Employees feel that their work contributes to something that will outlive current teams.
15. As a culture or change leader, you feel personally committed to leaving a positive legacy through this transformation.

8.1 Scoring and interpretation

Add your scores (minimum 15, maximum 75).

- **15–35 – Foundations needed**
  Legacy and sustainability have not yet been translated into concrete structures. Begin with documentation of best practices and mapping culture-critical roles. Use this as leverage to start conversations with leadership.
- **36–55 – Building continuity**
  Several elements are in place (some documentation, some succession planning, some resource commitments), but they may be fragmented. Focus on integrating them into a coherent roadmap and embedding the vision into mission, policies and budgets.
- **56–75 – Legacy in motion**
  Your organization already thinks and acts with long-term impact in mind. The challenge is to maintain momentum, keep updating best practices and ensure that structures remain flexible while protecting core principles.

Repeat this self-assessment annually and track progress.

9. Glossary (15 terms)

1. **Best practice** – A proven method or process that consistently produces positive results and aligns with desired culture.
2. **Knowledge management** – Systematic process of capturing, organising, sharing and using knowledge in an organization.
3. **Culture-critical role** – Position whose occupant significantly influences the lived culture and sustainability of change.
4. **Succession planning** – Structured approach to identifying and developing future leaders for key roles.
5. **Governance** – Framework of policies, rules and decision-making bodies that guide how an organization is directed and controlled.
6. **Human-centred transformation vision** – Description of how an organization aims to use technology and change to enhance human potential and wellbeing.
7. **Mission statement** – Short expression of the fundamental purpose and core contribution of an organization.
8. **Corporate statutes** – Legal documents that define the basic structure, rules and objectives of a company.
9. **Business case** – Justification for an investment, describing expected costs, benefits and risks.
10. **Resource plan** – Document that outlines the financial, human and technological resources required for initiatives over time.
11. **Legacy** – Lasting impact of an organization or leader on people, communities, environment and industry.
12. **Stakeholder** – Any person or group affected by the organization's activities (employees, customers, suppliers, communities, regulators).
13. **Psychological safety** – Climate where individuals feel safe to speak up, admit mistakes and share ideas without fear of negative consequences.
14. **Ecosystem impact** – Broad set of effects an organization has on its surrounding human, social and environmental systems.
15. **Value of investment (VOI)** – Overall value generated by an initiative, including financial returns and intangible benefits such as engagement, learning and reputation.

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™**