



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

Deep Diagnosis of Digital Maturity

A practical guide for leaders to assess where you are, what matters next, and how to mobilize people and budgets with confidence.

Getting Started

Why this topic matters now

Organizations often chase tools before truth. Without a clear maturity baseline, investments scatter, culture resists, and dashboards grow—but outcomes stall. A disciplined diagnosis **prioritizes a few moves that move the needle**, clarifies ownership, and exposes human-process bottlenecks that technology alone cannot fix.

Purpose of this guide — five objectives

1. **Compare** your context against **international maturity models** (e.g., well-known industry frameworks) to ground ambition.
2. **Assess** infrastructure and processes with **explicit criteria** and role clarity.
3. **Expose** the **gaps to AI-readiness** across data, platforms, ways of working, and governance.
4. **Instrument** your journey with **tools and metrics** that leaders can trust.
5. **Interpret** results strategically to **sequence initiatives**, de-risk change, and accelerate value.

How to use this guide

- Do one subtopic per week with cross-functional leaders.
 - Run the **exercise** exactly as written; capture outputs in the **templates**.
 - Use **checklists** before publishing any diagnosis report.
 - Revisit the **self-assessment** monthly; evolve your KPI board as evidence grows.
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Module — Five Building Blocks of a Robust Digital Maturity Diagnosis

Each subtopic includes: **Definition** → **Practical framework** → **Hypothetical example** → **Exercise (roles, inputs, timing, deliverables)** → **Template (example + blank row)** → **Checklist** → **Suggested KPIs**. Topic-specific templates are also provided to reinforce adoption.

1) International digital maturity models (e.g., MIT, Gartner)

Definition

Global maturity models summarize how capable an organization is at **creating value through digital technology, data, and modern ways of working**. They typically cover strategy, customer experience, operations, technology, data/AI, and culture/people. Use them as a **reference lens**, not as dogma: adapt to your strategy and constraints.

Practical framework — COMPARE-ADAPT

- **COMPARE**: map your current capabilities to common domains: *Strategy & Governance; Customer & Product; Data & AI; Platforms & Architecture; Delivery & Ways of Working; Talent & Culture; Risk & Compliance.*
- **ADAPT**: customize two things—**language** (use plain, local terms) and **weighting** (what matters most for your next 12–18 months).
- **Levels** (illustrative):
L1 Initiating (ad-hoc), **L2 Emerging** (repeatable), **L3 Scaling** (cross-org), **L4 Optimizing** (data-informed), **L5 Compounding** (autonomous/AI-augmented).
(Levels are indicative; adjust labels and criteria to your context.)

What not to do

- Don't rate everything; **rate what you'll fund**.
- Don't copy terms you cannot explain to frontline teams.
- Don't publish scores without **owners and next moves**.

Example applied (*hypothetical*)

A regional bank compares itself to a well-known model: **Data & AI** and **Delivery** lag the most. Instead of chasing dozens of initiatives, leadership adapts the model to three must-win domains (Risk-aware Data Platform, Customer Journeys, Delivery Speed). They

assign weights (40/35/25), publish L2→L3 target states, and fund only what advances those.

Exercise (75 minutes)

- **Roles:** COO (sponsor), Strategy (facilitator), CIO/CTO, CDO/Analytics, CHRO, Risk/Legal, Business Unit heads.
- **Inputs:** your strategy, portfolio roadmap, org chart, current KPIs.
- **Timing:** 20' compare → 35' adapt (language & weights) → 20' publish draft.
- **Steps:**
 1. Select **6–7 domains** (see list above).
 2. Write **plain-English** criteria for **L1–L5** per domain (bulleted).
 3. Assign domain **weights** totaling **100**; set **12–18m target level** per domain.
- **Deliverables:** Maturity Model (adapted) + weighting table.

Template — Adapted Maturity Model (excerpt)

Domain	Level today (L1–L5)	Target (12–18m)	Weight	Owner	Notes
[Example] Data & AI	L2	L3	40	CDO	Governed product analytics, ML ops baseline

Topic-specific template — Digital Readiness Radar (MVPPrep)

Area	Perceived level (1–5)	Real level (1–5)	Gap	Action
[Example] Event data quality	4	2	2	Define schema + QA owners

Checklist

- ☐ Domains reflect **your** strategy; jargon removed.
- ☐ Clear **criteria** distinguish L1–L5; no “hand-wavy” labels.
- ☐ Weighting totals **100**; owners named.
- ☐ Targets limited to **12–18 months**; funding tied to targets.

Suggested KPIs

- % domains with owners and written criteria; **weighted maturity score**; delta to target per domain; **funded vs. unfunded** gap.

2) Assess your infrastructure and processes with clear criteria

Definition

Assessment means turning fuzzy impressions into **observable, auditable statements** about **platforms, data flows, security, delivery, and business processes** that create or block value. The goal is to learn **which constraints matter now** and who must act.

Practical framework — CRITERIA-FIRST ASSESSMENT

- **Scope:** Infrastructure (cloud, network, security), Data (ingest, model, quality), Delivery (CI/CD, testing), Business Processes (sales, ops, service), and **Integration** (APIs, events).
- **Criteria:** each area gets **yes/no** or **1–5** statements that are **testable** (e.g., “95% of events validated nightly”).
- **Evidence:** logs, tickets, uptime, incident post-mortems, audit trails.
- **Owners:** RACI per area; one accountable per criterion set.

Walkthrough pattern

- Pick **one critical journey** (e.g., digital onboarding).
- Follow the data path: capture → transform → store → access → decision.
- For each handoff, record **risk, latency, and failure modes**.

Example applied (*hypothetical*)

An insurer audits “quote-to-bind.” CI/CD exists but lacks automated rollback; event schema varies by channel; pricing rules live in spreadsheets. By writing simple, testable criteria, teams identify two high-ROI fixes: **event schema standardization** and **canary releases**. Quote speed improves, and incidents drop.

Exercise (60–90 minutes)

- **Roles:** CTO (sponsor), Platform Lead, Data Engineering, Security, Product Ops, Business Process Owners, QA.
- **Inputs:** architecture diagrams, process maps, incident logs, current SLAs.
- **Timing:** 20’ scope → 40’ criteria & evidence → 20’ owners & dates.
- **Deliverables:** **Assessment Criteria Sheet + evidence repository**.

Template — Assessment Criteria Sheet (excerpt)

Area	Criterion	Scale	Baseline	Target	Owner	Evidence
[Example] Event data	95% events pass schema validation nightly	%	72%	95%	Data Eng Lead	QA report

Topic-specific template — Technical–Business Alignment Matrix

Dimension	Technical perspective	Business perspective	Alignment (1–5)	Action
[Example] Quote-to-bind journey KPIs	Need latency & error traces	Need conversion & churn	3	Build joined KPI view

Checklist

- ☐ Criteria are **testable**, not slogans.
- ☐ Evidence is **stored and linkable** (logs, tickets, dashboards).
- ☐ One **Accountable** per area; RACI published.
- ☐ Assess at least **one end-to-end journey**.

Suggested KPIs

- % criteria with owners & evidence; **journey latency/error rate**; SLA adherence; time to fix top blockers.

3) Gaps between current capabilities and what AI requires

Definition

AI-readiness is the intersection of **data quality & governance**, **computing & MLOps**, **use-case discipline**, **risk & ethics**, and **human enablement**. A gap is any **missing prerequisite** that makes AI unreliable, unsafe, slow, or too expensive to run.

Practical framework — GAP-to-AI (Five Lenses)

1. **Data** — availability, lineage, privacy, bias management.
2. **Model Ops** — feature store, experiment tracking, deployment, monitoring.
3. **Use-Case Value** — problem fit, reversibility, KPI linkage, payback.
4. **Risk & Compliance** — model risk management, testing, human-in-the-loop.
5. **People & Ways of Working** — skills, roles, incentives, change adoption.

Sequencing rule

- Don't start with "AI everywhere." Start with **two reversible use cases** with clean data paths and clear KPIs. Use them to **earn trust** and **fund the platform**.

Example applied (*hypothetical*)

A retailer wants demand forecasting and personalized promotions. Data gaps (SKU hierarchy, stockouts) and MLOps gaps (no monitoring) appear. The team starts with **forecasting in two categories**, fixes data lineage, adds drift alerts, and defines a stop rule. After two cycles, they scale.

Exercise (75 minutes)

- **Roles:** CDO/Analytics (facilitator), Platform/MLOps, Security & Legal, BU owners, HR/Enablement.
- **Inputs:** prioritized use-case list, current data catalog, risk register, training plan.
- **Timing:** 25' map gaps → 30' choose two reversible use cases → 20' 90-day plan.
- **Deliverables:** AI-Readiness Gap Map + 90-day enablement plan.

Template — AI-Readiness Gap Map

Lens	Gap	Risk	Impact	Mitigation	Owner	Date
[Example] Model Ops	No drift monitoring	High	Bad recommendations	Add drift alerts & rollback	MLOps Lead	11/15

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Topic-specific template — Digital Readiness by Role (MVPprep)

Role/Area	Perceived level (1–5)	Real level (1–5)	Gap	Action
[Example] Category managers	4	2	2	Coach on interpreting model output

Checklist

- ☐ Two **reversible** use cases with clear KPIs and stop rules.
- ☐ Data lineage & privacy controls defined for those use cases.
- ☐ Monitoring: performance, drift, bias; **rollback path** exists.
- ☐ Enablement plan for the human workflows affected.

Suggested KPIs

- Time from **use-case brief** to live test; % models with monitoring & rollback; forecast vs. actual impact; adoption of AI recommendations by role.
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4) Tools and metrics to measure digital maturity

Definition

Measurement turns diagnosis into decisions. Tools must be **lightweight, auditable, and tied to action**. Metrics must have **clear definitions, owners, and review cadence**, or they won't influence behavior.

Practical framework — MEASURE-TO-DECIDE

- **Metric dictionary**: one page per KPI—definition, owner, freshness, source, QA.
- **Portfolio dashboard**: show **domains vs. levels vs. targets** with weights.
- **Journey dashboards**: latency, error, conversion by cohort and channel.
- **Change dashboard**: adoption, training, enablement, and sentiment.
- **Cadence**: weekly evidence reviews (ops), monthly steering (strategy), quarterly external narrative (progress & gaps).

Design rules

- Prefer **few, relevant** KPIs over long lists.
- Build **snapshot links**: every decision ties to **the data used** at that time.
- Avoid vanity totals; use **cohorts** and **segments**.

Example applied (*hypothetical*)

An energy company tracks dozens of KPIs but none tie to decision dates. After MEASURE-TO-DECIDE, it introduces a **weighted maturity score**, a **journey latency** board, and a **training adoption** board. Decisions speed up; funding shifts to the three highest-leverage constraints.

Exercise (60 minutes)

- **Roles**: CFO (co-owner), Data/BI, PMO, Product/Ops leaders, HR/Enablement.
- **Inputs**: current dashboards, decision calendar, maturity targets.
- **Timing**: 20' select KPIs → 20' design dictionary → 20' set cadence & owners.
- **Deliverables**: **Metric Dictionary + Portfolio & Journey Boards**.

Template — KPI Dictionary (excerpt)

KPI	Definition	Target	Baseline	Frequency	Owner	Data source
[Example] Weighted maturity score	$\Sigma (\text{domain level} \times \text{weight})/100$	3.2	2.6	Monthly	Strategy	Portfolio board

Topic-specific template — Pulse Survey (Measurement Adoption)

Item	Scale (1–5)	Observations
[Example] “We trust the maturity dashboard for decisions.”	3	Need snapshots per decision

Checklist

- ☐ Every KPI has **owner, definition, freshness, QA**.
- ☐ Boards show **cohorts/segments**; vanity totals removed.
- ☐ **Decision snapshots** are linked in the log.
- ☐ Cadence mixes weekly ops, monthly strategy, quarterly narrative.

Suggested KPIs

- % KPIs with owners & QA; decision lead time; % steering actions tied to dashboard insights; adoption of training/enablement per role.
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5) Strategic interpretation of diagnosis results

Definition

Interpretation converts scores into **sequenced, funded moves**. It integrates **value, risk, effort, reversibility, and human impact** to choose what to do now, next, and later.

Practical framework — SEQUENCE-FOR-VALUE

1. **Value Map**: quantify business outcomes per domain (revenue, cost, risk).
2. **Feasibility & Reversibility**: rank by effort and ability to test safely.
3. **Human Impact**: identify roles affected; plan enablement early.
4. **Guardrails & Risk**: security, ethics, compliance.
5. **90-Day Proof**: select a few bets to prove momentum and refine plan.

Funding rule

- Fund **fewer, bigger** moves with explicit stop rules; sunset low-impact work.

Example applied (*hypothetical*)

A telco's diagnosis shows low delivery speed and fragmented data. Instead of launching 12 projects, leaders sequence three: **event schema & catalog, customer-journey squad model, ML monitoring**. They fund 90-day proofs; after success, they scale with confidence.

Exercise (60–75 minutes)

- **Roles**: CEO/COO (sponsors), CFO, Strategy, CTO/CDO, CHRO, BU Heads, Risk.
- **Inputs**: adapted maturity model, KPI boards, resource envelope, risk register.
- **Timing**: 20' value map → 25' feasibility & human impact → 20' 90-day plan.
- **Deliverables**: **Sequenced Portfolio (Now/Next/Later) + 90-day proof plan**.

Template — Sequenced Portfolio (Now / Next / Later)

Initiative	Value (H/M/L)	Effort (H/M/L)	Reversibility	Owner	Next milestone	Date
[Example] Event schema + catalog	High	Medium	Reversible	CDO	Schema approved	11/05

Topic-specific template — Human Impact Map

Project	Impact on people	Emotional risk	Support strategy	Responsible
[Example] Shift to journey squads	New roles & rituals	Medium	Manager coaching + playbooks	HR + PMO

Checklist

- ☐ Portfolio shows **Now/Next/Later** with owners and milestones.
- ☐ Reversibility and stop rules documented for big bets.
- ☐ Human-impact plan (enablement, comms, incentives) is funded.
- ☐ Sunset list exists; we stop doing low-value work.

Suggested KPIs

- % funded initiatives with 90-day proofs; **portfolio value realization**; enablement completion %; variance vs. plan on milestones.
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Global Templates & Tools (use across all subtopics)

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
[Example] Event schema + validation	5	3	High	Data Eng Lead	Schema signed	09/25

B) RACI Matrix (Contract/Project)

Activity	R	A	C	I	Deliverable	Date
[Example] Define maturity criteria	Strategy	COO	CIO, CDO, CHRO	BU Heads	Criteria doc	09/06

C) KPI Board

KPI	Definition	Target	Baseline	Frequency	Owner	Data source
[Example] Journey latency (quote→bind)	p95 time from quote to bind	–25%	p95 = 11m	Weekly	Ops Lead	Traces

D) Human–Cultural Risk Map

Risk	Probability (H/M/L)	Impact (H/M/L)	Mitigation	Owner	Status
[Example] Mid-management resistance	High	High	Listening + co-design	HR	In progress

E) 30–60–90 Plan (by role)

Horizon	Objective	Actions	Owner	Indicators	Deliverable
[Example] 30 days	Agree criteria & weights	Workshops + memo	Strategy + Leads	Criteria signed	One-pager

Horizon	Objective	Actions	Owner	Indicators	Deliverable
60 days	Instrument journeys	Implement events + QA	Product Analytics	% events validated	QA report
90 days	Prove value	2 reversible use cases	BU Heads	Δ conversion/latency	Q review

Recommended digital tools

- **Whiteboarding / Mapping:** Miro, FigJam.
 - **Work management:** Notion, Trello, Jira.
 - **Data / BI:** Power BI, Looker.
 - **Documentation / Decision log:** Confluence, Google Drive.
 - **Incident / Reliability:** PagerDuty, Statuspage.
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Summary & Next Steps

What you now have

- An **adapted maturity model** aligned to your strategy and time horizon.
- A **criteria-first assessment** playbook with owners and evidence.
- A clear view of **AI-readiness gaps** and how to start reversibly.
- **Boards and metrics** that support weekly and monthly decisions.
- A method to **sequence** initiatives into a fundable, human-aware plan.

Next-steps checklist

Next step	Owner	Deadline	Status	Notes
Publish adapted maturity model & weights	Strategy	10/10	Planned	Share in all-hands
Complete criteria-first assessment (2 journeys)	CTO + Ops	10/20	Planned	Evidence repo live
Prioritize 2 reversible AI use cases	CDO + BU Heads	10/25	Planned	Stop rules defined
Launch portfolio & journey boards	CFO + BI	10/30	Planned	Dictionary approved
Run 90-day proof & review	CEO + ExCom	01/31	Planned	Scale with evidence

Self-Assessment (15 questions)

Rate 1 (No/Weak) to 5 (Yes/Strong). Your score = average of the 15 items.

1. Our maturity **domains and criteria** are written in plain language and reflect strategy.
2. Each domain has a **named owner**, weight, and **12–18m target**.
3. We assessed at least **one end-to-end journey** with testable criteria and evidence.
4. Evidence (logs, tickets, dashboards) is **stored and linkable**.
5. We have a **weighted maturity score** and per-domain deltas to target.
6. We identified **AI-readiness gaps** across the five lenses and chose **two reversible** use cases.
7. Data lineage, privacy, and monitoring (drift/bias) are defined for active models.
8. We maintain a **metric dictionary** with owners, QA, and freshness.
9. Boards use **cohorts/segments** and link to decision **snapshots**.
10. Weekly ops and monthly strategy reviews are **on cadence** with decisions recorded.
11. A **Human Impact Map** exists for major changes, with enablement funded.
12. RACI clarifies **one Accountable** per initiative and criterion set.
13. We use an **Impact × Effort rubric** and stop rules to focus funding.
14. The portfolio shows **Now/Next/Later**, and we sunset low-value work.
15. We can explain to frontline teams **why** our targets matter and how they will be supported.

Ranges & recommendations

- **4.2–5.0 (High)** — Scale: expand to suppliers/partners; deepen model monitoring and audits; publish a quarterly narrative of progress & gaps.
 - **3.2–4.1 (Medium)** — Focus: instrument two journeys, finalize dictionary, and run two reversible AI use cases.
 - **≤3.1 (Low)** — Start: adapt the model, complete criteria for one journey, and stand up the KPI boards.
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Glossary (15 terms)

1. **Digital maturity** — The organization's ability to turn technology, data, and ways of working into outcomes.
 2. **Domain weighting** — Relative importance assigned to maturity domains (sum = 100).
 3. **Journey** — End-to-end path (e.g., onboarding) spanning multiple systems and teams.
 4. **Criteria-first** — Assessment method using testable statements with evidence.
 5. **Data lineage** — Trace of where data comes from and how it changes.
 6. **Drift monitoring** — Detecting changes in model inputs/outputs affecting reliability.
 7. **Reversible use case** — Experiment you can roll back safely and cheaply.
 8. **MLOps** — Practices to develop, deploy, monitor, and govern machine-learning models.
 9. **Guardrails** — Measurable constraints (risk, privacy, ethics) that bound decisions.
 10. **Metric dictionary** — Canonical KPI definitions with owners, QA, and freshness.
 11. **Decision snapshot** — A capture of the exact data used when making a decision.
 12. **Portfolio board** — View of domain levels, targets, weights, and progress.
 13. **Journey dashboard** — Latency, error, and conversion for a specific flow by cohort.
 14. **Human Impact Map** — Assessment of how a change affects roles and emotions, plus support.
 15. **Sequenced portfolio** — Now/Next/Later plan with milestones, reversibility, and owners.
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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™

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