



## 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 – Expansion of Social Impact

The central question of this ebook is:

**How can People & Culture leaders expand the social impact of their organizations in a way that is scalable, measurable and deeply human, in an era shaped by AI and constant disruption?**

We will work through five key dimensions:

1. Scaling corporate social responsibility programs.
  2. Creating projects that benefit external communities.
  3. Collaborating with NGOs and international bodies.
  4. Measuring and communicating social impact.
  5. Inspiring sector movements towards more human change.
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## 3. Initial Sections

### 3.1 Importance of the topic in a transforming world

Expanding social impact is not a side project. It is connected to:

- **Talent attraction and retention.** People want to belong to organizations with a clear, lived purpose.
- **Brand and trust.** Social contribution builds credibility that cannot be bought through advertising.
- **Innovation.** Working with communities and NGOs exposes your company to new perspectives and needs.
- **Risk management.** Ignoring social and environmental impact increases reputational and regulatory risks.

When social impact is integrated into strategy, **everyone wins**: employees, communities, clients, shareholders and the planet.

### 3.2 Purpose of this guide – Five objectives

This guide has five practical objectives:

1. **Clarify** what “social impact expansion” means for your organization.
2. Provide **tools and frameworks** to design, scale and integrate CSR programs.
3. Offer **hypothetical cases** that bring the concepts to life.
4. Deliver **templates and checklists** you can adapt immediately.
5. Inspire you to **lead movements**, not only isolated initiatives.

### 3.3 How to use this guide with others

- Invite key stakeholders (HR, Sustainability, Communications, Business Units) to read selected sections.
  - Use the exercises as workshop agendas.
  - Convert the templates into working documents in your preferred tools (spreadsheets, collaboration platforms, project software).
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## 4. Subtopic 1 – Scaling Corporate Social Responsibility Programs

### 4.1 Definition

Scaling CSR programs means **moving from isolated, one-off activities to a coherent portfolio of initiatives** with clear objectives, governance, resources and measurable outcomes.

For People & Culture leaders, scaling CSR is about:

- Connecting social programs with employee development and engagement.
- Ensuring consistency across regions and business units.
- Protecting authenticity while increasing reach.

### 4.2 Practical framework – The SCALE Model

Use the **SCALE** model to expand CSR in a structured way:

- **S – Strategy Alignment.** Clarify how social programs support your business strategy and people agenda.
- **C – Coherence & Portfolio Design.** Integrate initiatives into a clear map with themes, criteria and priorities.
- **A – Architecture & Governance.** Define roles, processes and decision-making rights.
- **L – Learning & Iteration.** Capture lessons and improve programs over time.
- **E – Expansion & Replication.** Adapt and roll out successful pilots to other regions or segments.

#### Strategy Alignment

Key questions:

- Which social themes are most connected to our purpose and capabilities (education, inclusion, climate, mental health, etc.)?
- How do CSR objectives link to talent, brand and innovation goals?

#### Coherence & Portfolio Design

Avoid scattered actions by:

- Defining 2–4 strategic themes.
- Mapping all existing initiatives under those themes.
- Identifying overlaps, gaps and low-value activities.

## Architecture & Governance

Decide:

- Who sponsors the portfolio at executive level.
- Which committees or roles coordinate initiatives.
- How local teams can propose new projects and access resources.

## Learning & Iteration

Establish mechanisms to:

- Capture quantitative and qualitative results.
- Document what works and what does not.
- Share learning stories internally.

## Expansion & Replication

When a pilot proves effective:

- Create a **playbook** describing objectives, steps, resources and risks.
- Adapt to new contexts instead of copying blindly.
- Provide mentoring to new teams implementing the program.

## 4.3 Hypothetical case

### *Caso hipotético*

A financial services company has many CSR actions: volunteering days, donations, scholarships, environmental campaigns. Employees feel proud but confused; leaders find it difficult to evaluate impact.

The People & Culture leader applies the SCALE model:

- Aligns with strategy: the company's purpose is to support financial wellbeing.
- Reorganises initiatives into three themes: financial education, social mobility and environmental sustainability.
- Creates a governance architecture: executive sponsor, CSR steering committee, local champions.
- Establishes learning routines: quarterly reviews of metrics and stories.
- Documents a successful scholarship program and replicates it to new regions with local adaptations.

Within two years, the company has fewer but stronger initiatives, higher employee participation and clearer impact data.

## 4.4 Exercise – Building Your CSR Scaling Map

### Objective

Create a first version of a strategic map to scale your CSR programs.

### Duration

90–120 minutes.

### Roles

- People & Culture leader (facilitator).
- Sustainability/CSR lead.
- Communications lead.
- Representatives from 1–2 business units.

### Inputs

- List of current CSR initiatives (brief description, budget, owner, main beneficiaries).
- Organizational strategy and values.

### Steps

1. **Inventory (30 minutes)**
  - Place all current initiatives on a board or spreadsheet, including informal ones.
2. **Theme clustering (30 minutes)**
  - Group initiatives into 2–4 strategic themes.
3. **Impact vs Effort prioritisation (30 minutes)**
  - Use the Impact × Effort rubric to classify initiatives as “Scale”, “Transform”, “Maintain” or “Close”.
4. **Governance sketch (20–30 minutes)**
  - Define who sponsors, coordinates and evaluates each theme.

### Deliverable

“CSR Scaling Map – Version 1”, including themes, priorities and governance draft.

## 4.5 Template – CSR Scaling Portfolio

| Initiative                                            | Strategic theme                  | Impact (1–5)                                             | Effort (1–5)                                                   | Priority | Executive sponsor     | Program owner | Next scaling step                                                                 |
|-------------------------------------------------------|----------------------------------|----------------------------------------------------------|----------------------------------------------------------------|----------|-----------------------|---------------|-----------------------------------------------------------------------------------|
| Financial literacy workshops for low-income families. | Financial education & inclusion. | 5 – High benefits for participants and strong brand fit. | 3 – Requires content, facilitators and community partnerships. | High     | Chief People Officer. | CSR Manager.  | Document methodology and create facilitator training to expand to two new cities. |

## 4.6 Checklist – Scaling CSR with Integrity

- ☐ Our CSR themes are clearly connected to purpose, strategy and values.
- ☐ All initiatives are mapped in a portfolio; we know why each one exists.
- ☐ There is an executive sponsor and a clear governance structure.
- ☐ We evaluate initiatives using both quantitative indicators and human stories.
- ☐ Scaling decisions consider local context, not just central directives.

## 4.7 Suggested KPIs – CSR Scaling

- Number of CSR initiatives by strategic theme.
  - Percentage of initiatives with documented objectives, metrics and governance.
  - Employee participation rate in CSR activities.
  - Number of regions or units where flagship programs are replicated.
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## 5. Subtopic 2 – Creating Projects that Benefit External Communities

### 5.1 Definition

Creating projects that benefit external communities means **designing and implementing initiatives where the primary beneficiaries are people outside your organization**, while still aligning with your capabilities and purpose.

These projects go beyond donations; they build **long-term relationships** with specific communities.

### 5.2 Practical framework – The COMMUNITY Canvas

Use the **COMMUNITY** canvas:

- **C – Context.** Understand the reality of the community.
- **O – Objectives (shared).** Agree on what success means for them and for your organization.
- **M – Mutual value.** Identify benefits for both sides.
- **M – Methods.** Choose approaches that respect local knowledge and dynamics.
- **U – Understanding constraints.** Recognise time, resources and cultural limits.
- **N – Network.** Involve local actors: leaders, schools, health centres, NGOs.
- **I – Implementation roadmap.** Design phases, responsibilities and timelines.
- **T – Tracking impact.** Define indicators and feedback channels.
- **Y – Your commitment.** Clarify how long and in what way your organization will stay involved.

#### Context

Before designing, listen:

- Community members' stories, needs and aspirations.
- Existing initiatives and sensitivities.

Use interviews, focus groups and participatory methods.

#### Objectives and mutual value

Good projects answer two questions:

- What changes will the community see?
- What learning, reputation or innovation benefits will your organization gain?

## Methods and constraints

Design interventions **with** the community, not only **for** it. Respect:

- Local rhythms and decision processes.
- Cultural practices and knowledge.

## 5.3 Hypothetical case

### *Caso hipotético*

A tech company wants to support digital education in a rural region. Instead of arriving with a pre-designed program, the People & Culture leader applies the COMMUNITY canvas:

- Spends time understanding context with local teachers and families.
- Co-defines objectives: improve digital literacy in students and offer career guidance.
- Identifies mutual value: students gain skills; the company builds a talent pipeline and fulfills its purpose.
- Involves local schools, municipal authorities and an existing NGO.
- Designs a three-year roadmap, with small pilots, feedback loops and clear commitments.

The project evolves from a simple donation of equipment to a long-term partnership with co-created content and mentorship.

## 5.4 Exercise – Designing a Community Partnership Project

### Objective

Outline a community-focused project that aligns with your organization's strengths.

### Duration

2–3 hours.

### Roles

- People & Culture leader.
- CSR/Sustainability representative.
- Community partners or representatives (if available).

### Inputs

- Information about potential communities (location, demographics, main challenges).
- Examples of previous or existing projects.

## Steps

1. **Select a focus community (30 minutes)**
  - o Choose one community where you already have some relation (operations, clients, suppliers).
2. **Fill the COMMUNITY canvas (60–90 minutes)**
  - o Work through the elements: context, objectives, mutual value, network, roadmap.
3. **Define a 12-month pilot (30–40 minutes)**
  - o Specify activities, roles and success criteria.

## Deliverable

“Community Partnership Concept Note”.

## 5.5 Template – Community Project Design Table

| Community                                   | Main need or opportunity                                            | Shared objective                                                              | Key partners                                        | Planned activities (pilot)                                                                 | Expected benefits for community                                                 | Expected benefits for organization                                             |
|---------------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------------|-----------------------------------------------------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Rural municipality near main logistics hub. | Limited access to digital skills and career guidance for teenagers. | Increase digital literacy and career awareness for 150 students in 12 months. | Local school, municipal youth office, regional NGO. | Equip computer lab, monthly workshops led by volunteers, mentoring circles with employees. | Improved skills and confidence; better prospects for further education or jobs. | Stronger community relationships, future talent pipeline, employee engagement. |

## 5.6 Checklist – Community-Centred Projects

- ☐ Community members were involved from the early design stages.
- ☐ We understand the local context, including existing initiatives.
- ☐ Objectives reflect both community needs and organizational strengths.
- ☐ There is a realistic timeline and resource plan.
- ☐ We have agreed on feedback mechanisms and ways to adapt the project.

## 5.7 Suggested KPIs – Community Projects

- Number of community partners and initiatives.
- Number of direct and indirect beneficiaries (with clear definitions).
- Satisfaction levels among community stakeholders.
- Evidence of sustained change (skills, behaviours, access, opportunities) over time.

## 6. Subtopic 3 – Collaborating with NGOs and International Organizations

### 6.1 Definition

Collaboration with NGOs and international organizations means creating **structured partnerships** where each party contributes complementary strengths to achieve social impact that none could reach alone.

For People & Culture leaders, these partnerships are opportunities to:

- Learn from specialized actors.
- Give employees meaningful volunteering and co-creation spaces.
- Scale projects beyond local boundaries.

### 6.2 Practical framework – The PARTNER Blueprint

Use the **PARTNER** blueprint:

- **P – Purpose fit.** Ensure alignment between your organization's purpose and the NGO's mission.
- **A – Added value.** Clarify what each party brings (funding, expertise, volunteers, networks).
- **R – Roles & responsibilities.** Document who does what.
- **T – Transparency & trust.** Define governance, communication and reporting.
- **N – Non-negotiables.** Agree on ethical boundaries and red lines.
- **E – Evaluation.** Set indicators, evaluation cycles and learning spaces.
- **R – Renewal or closure.** Decide how and when to renew, scale or end the partnership.

#### Purpose fit and added value

Ask:

- Does this partner work on causes genuinely connected to who we are?
- Are we adding more than money (e.g., skills, technology, visibility)?

#### Roles, transparency and non-negotiables

Create a simple but clear partnership agreement that includes:

- Objectives, deliverables and timelines.
- Financial and non-financial contributions.
- Ethical standards and communication rules.

## 6.3 Hypothetical case

### *Caso hipotético*

A global manufacturing company wants to support youth employment. It identifies an international NGO with a strong track record in vocational training.

Using the PARTNER blueprint, they:

- Confirm purpose fit: both focus on skills for the future of work.
- Define added value: the NGO runs training; the company offers mentors, equipment and internships.
- Agree on roles: the NGO coordinates field operations; the company manages volunteers and internal processes.
- Establish transparency: quarterly joint reviews and public reports.
- Define non-negotiables: no discriminatory practices, safe working conditions, no political campaigning.
- Evaluate outcomes: completion rates, job placement, satisfaction.
- After two years, decide to expand the partnership to new regions.

## 6.4 Exercise – Partnership Opportunity Assessment

### **Objective**

Evaluate and prioritise potential NGO or international partners.

### **Duration**

60–90 minutes.

### **Roles**

- People & Culture leader.
- CSR/Sustainability.
- Legal and Compliance representative (for due diligence).

### **Inputs**

- List of current or potential NGOs and international organizations.
- Basic information about their mission, track record, governance.

### **Steps**

1. **Initial screening (20–30 minutes)**
  - Remove organizations that clearly misalign with your values or compliance rules.
2. **Purpose and value assessment (30 minutes)**
  - For each remaining partner, score purpose fit and potential added value.

### 3. Prioritisation (20–30 minutes)

- o Select 2–3 partners for deeper exploration.

#### Deliverable

“Partnership Prioritisation Matrix”.

## 6.5 Template – Partnership Evaluation Table

| Organization                                       | Mission & focus area                                      | Purpose fit (1–5)                                          | Potential added value for both sides                                                                                 | Main risks or concerns                                        | Decision / next step                                      |
|----------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|-----------------------------------------------------------|
| Global Youth Skills Initiative (hypothetical NGO). | Vocational training and soft skills for vulnerable youth. | 5 – Directly aligned with our commitment to future skills. | NGO: corporate mentors, infrastructure, visibility.<br>Company: talent pipeline, employee engagement, social impact. | Need to verify governance quality and financial transparency. | Conduct due diligence; design pilot partnership proposal. |

## 6.6 Checklist – Healthy NGO & International Partnerships

- ☐ Missions and values are clearly aligned.
- ☐ Partnership agreements are documented and accessible.
- ☐ There are mechanisms to handle conflicts and reputational risks.
- ☐ Partners are treated with respect and as equals, not as suppliers.
- ☐ Joint impact is evaluated and decisions are made collaboratively.

## 6.7 Suggested KPIs – NGO & International Collaboration

- Number of active strategic partnerships.
- Percentage of CSR budget managed through partnerships.
- Results achieved jointly (beneficiaries, policy changes, systemic effects).
- Satisfaction of partners (through feedback surveys or interviews).

## 7. Subtopic 4 – Measuring and Communicating Social Impact

### 7.1 Definition

Measuring and communicating social impact means **capturing, interpreting and sharing evidence** of the changes your initiatives generate, both for people and systems.

Done well, it:

- Guides decisions on where to invest.
- Builds trust with stakeholders.
- Prevents “impact washing”.

### 7.2 Practical framework – The IMPACT Cycle

Use the **IMPACT** cycle:

- **I – Intent.** Define what you want to change and for whom.
- **M – Metrics & methods.** Choose indicators and data collection methods.
- **P – Participation.** Involve beneficiaries and partners in defining and interpreting data.
- **A – Analysis.** Translate numbers and stories into insight.
- **C – Communication.** Share results with different audiences honestly.
- **T – Transformation.** Use learning to improve programs and decisions.

#### Intent

Start by clarifying:

- What problem are we addressing?
- What outcomes do we expect in the short, medium and long term?

#### Metrics & methods

Combine:

- **Output indicators** (trainings delivered, trees planted, hours volunteered).
- **Outcome indicators** (skills gained, behavioural changes, income improvements).
- **Qualitative data** (stories, testimonials, observations).

#### Participation and analysis

Invite community representatives, NGOs and employees to interpret results with you. This reduces bias and increases ownership.

## 7.3 Hypothetical case

### *Caso hipotético*

A company runs a digital skills program for adults. After one year, the People & Culture team wants to understand its real effect.

Applying the IMPACT cycle, they:

- Clarify intent: help participants access better jobs or entrepreneurial opportunities.
- Define metrics: number of participants completing the course, self-reported confidence, job placement after 6 and 12 months.
- Use surveys, interviews and focus groups with participants and partners.
- Analyse data with them, identifying strengths and gaps.
- Communicate findings through an honest report combining statistics and narratives.
- Decide to adjust curriculum and add career coaching to increase employment outcomes.

## 7.4 Exercise – Designing an Impact Measurement Plan

### **Objective**

Create a practical impact measurement and communication plan for one key initiative.

### **Duration**

90 minutes.

### **Roles**

- People & Culture leader.
- CSR/Sustainability.
- Data/Analytics representative (if available).
- Representative from community or NGO partner.

### **Inputs**

- Description of the initiative (objectives, activities, beneficiaries).

### **Steps**

1. **Clarify intent and outcomes (20 minutes)**
  - List short-term outputs and medium/long-term outcomes.
2. **Select indicators and methods (40 minutes)**
  - Choose 5–8 key indicators and decide how to collect them.
3. **Define communication audiences and channels (20 minutes)**
  - Internal (employees, leadership, board).
  - External (communities, partners, clients, regulators).

#### 4. Agree roles and timeline (10 minutes)

##### Deliverable

“Impact Measurement and Communication Plan”.

### 7.5 Template – Social Impact Dashboard

| Initiative                         | Outcome indicator                           | Definition                                                                              | Target | Baseline            | Frequency | Data owner        | Main communication channel                          |
|------------------------------------|---------------------------------------------|-----------------------------------------------------------------------------------------|--------|---------------------|-----------|-------------------|-----------------------------------------------------|
| Digital Skills for Adults Program. | Employment rate 12 months after completion. | % of participants who report being employed or self-employed 12 months after finishing. | 60%    | 35% (pilot cohort). | Annual.   | CSR Data Analyst. | Annual Social Impact Report and community meetings. |

### 7.6 Checklist – Measuring and Communicating with Credibility

- ☐ We have a clear theory of change for each major initiative.
- ☐ Indicators reflect both outputs and outcomes.
- ☐ Beneficiaries and partners help define and interpret metrics.
- ☐ Reports include successes, challenges and limitations.
- ☐ Communication is adapted to each audience and avoids technical jargon when not needed.

### 7.7 Suggested KPIs – Social Impact Measurement & Communication

- Percentage of key initiatives with defined impact frameworks and indicators.
- Timeliness and quality of social impact reporting.
- Stakeholder trust levels (surveys, sentiment analysis).
- Number of decisions (continuation, scaling, redesign) made based on impact evidence.

## 8. Subtopic 5 – Inspiring Sector Movements towards More Human Change

### 8.1 Definition

Inspiring sector movements means going beyond individual projects to **catalyse broader changes** in mindsets, norms and practices across your industry or ecosystem, especially towards more human-centred and ethical approaches to technology and work.

People & Culture leaders can become key voices in:

- Redefining what “success” means in the sector.
- Promoting responsible AI and automation.
- Encouraging collaboration instead of zero-sum competition on social issues.

### 8.2 Practical framework – The WAVE Approach

Use the **WAVE** approach to inspire movements:

- **W – Why narrative.** Craft a compelling story about why change is needed.
- **A – Allies.** Identify and nurture relationships with leaders and organizations that share your vision.
- **V – Visible actions.** Demonstrate commitment through concrete initiatives others can see and join.
- **E – Ecosystem platforms.** Use existing platforms or create new ones to sustain the movement.

#### Why narrative

Your narrative should:

- Connect data with human stories.
- Highlight risks of inaction and possibilities of change.
- Be honest about your own organization’s journey.

#### Allies, visible actions and ecosystem platforms

Allies may include:

- Other companies (including competitors).
- NGOs, academia, media, policymakers.

Visible actions can be:

- Joint declarations or principles.

- Shared projects or pilots.
- Open toolkits or playbooks.

Ecosystem platforms include conferences, working groups, digital communities or coalitions.

### 8.3 Hypothetical case

#### *Caso hipotético*

A group of companies in a sector heavily affected by automation are concerned about job displacement. A People & Culture leader in one company develops a narrative about “responsible automation with human development at the centre”.

Using the WAVE approach, they:

- Articulate a clear story about reskilling and dignified transitions.
- Identify allies in other companies, unions, NGOs and universities.
- Launch visible actions: a joint reskilling initiative and a public commitment to avoid mass layoffs without transition plans.
- Create an ecosystem platform: a sector roundtable that meets twice a year and publishes shared learnings.

Over time, this movement influences norms and expectations, attracting talent and recognition.

### 8.4 Exercise – Designing Your Sector Movement Contribution

#### **Objective**

Define how your organization can contribute to a sector or ecosystem movement towards more human change.

#### **Duration**

90–120 minutes.

#### **Roles**

- People & Culture leader.
- Strategy/Innovation lead.
- Communications representative.

#### **Inputs**

- Key challenges and debates in your sector related to people, technology and social impact.

## Steps

1. **Identify a movement theme (30 minutes)**
  - o Example: ethical AI, mental health in workplaces, inclusive hiring.
2. **Build the WHY narrative (30 minutes)**
  - o Draft key messages connecting data, stories and your organization's journey.
3. **Map allies and platforms (30 minutes)**
  - o List possible partners and spaces where the movement can live.
4. **Design 2–3 visible actions (20–30 minutes)**
  - o Small but symbolic steps you can take in the next 6–12 months.

## Deliverable

“Sector Movement Contribution Plan”.

## 8.5 Template – Sector Movement Action Planner

| Movement theme                                             | Core narrative (one sentence)                                                               | Key allies                                                                   | First visible action                                                                    | Platform or event                                      | Internal sponsor      |
|------------------------------------------------------------|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|--------------------------------------------------------|-----------------------|
| Responsible automation and human-centred AI in our sector. | Technology should amplify human dignity and capabilities, not replace them without support. | Peer companies, labour unions, universities, NGOs focused on digital rights. | Publish a joint statement and launch a reskilling pilot for workers in high-risk roles. | Annual sector conference + dedicated online community. | Chief People Officer. |

## 8.6 Checklist – Inspiring Human-Centred Sector Movements

- ☐ Our narrative is honest and rooted in both data and human experience.
- ☐ We collaborate with allies instead of acting alone.
- ☐ We show our commitment through concrete actions, not only words.
- ☐ We use platforms that allow ongoing dialogue and learning.
- ☐ We remain humble, acknowledging that we are also learning and evolving.

## 8.7 Suggested KPIs – Sector Movement Influence

- Number of sector initiatives or coalitions where your organization plays an active role.
- Joint commitments or principles signed by multiple actors.
- Policy changes, guidelines or sector standards influenced.
- Visibility of your leaders in debates (speaking invitations, media references).

## 9. Global Templates and Tools

### 9.1 Impact × Effort Prioritisation Rubric

Use this rubric to decide which social impact initiatives to scale, transform, maintain or close.

| Initiative                                          | Impact (1–5)                                      | Effort (1–5)                                            | Priority      | Responsible        | Next milestone                                | Date       |
|-----------------------------------------------------|---------------------------------------------------|---------------------------------------------------------|---------------|--------------------|-----------------------------------------------|------------|
| Regional youth employment program with NGO partner. | 5 – Strong outcomes and high strategic alignment. | 4 – Requires funding and cross-functional coordination. | High – Scale. | CSR & People team. | Approve multi-year budget and expansion plan. | 30/06/20XX |

### 9.2 RACI Matrix – Social Impact Governance

| Activity                                           | R             | A    | C                                    | I                    | Deliverable                           | Date       |
|----------------------------------------------------|---------------|------|--------------------------------------|----------------------|---------------------------------------|------------|
| Approve overall social impact strategy and themes. | CSR Director. | CEO. | People & Culture, Strategy, Finance. | Board, key partners. | Strategy document and 3-year roadmap. | 31/03/20XX |

### 9.3 KPI Dashboard – Social Impact Overview

| KPI                  | Definition                                                                                   | Target                                     | Baseline  | Frequency  | Owner                   | Data source                               |
|----------------------|----------------------------------------------------------------------------------------------|--------------------------------------------|-----------|------------|-------------------------|-------------------------------------------|
| Social Impact Index. | Composite index of beneficiaries, employee participation, partnerships and sector influence. | Reach index 100 in 3 years (custom scale). | Index 40. | Quarterly. | CSR & People Analytics. | Program reports, surveys, media tracking. |

### 9.4 Human–Cultural Risk Map

| Risk                                                                         | Probability (H/M/L) | Impact (H/M/L) | Mitigation                                                 | Owner             | Status      |
|------------------------------------------------------------------------------|---------------------|----------------|------------------------------------------------------------|-------------------|-------------|
| Employees perceive social impact efforts as marketing rather than authentic. | High                | High           | Involve employees in design, share honest stories, connect | People & Culture. | In progress |

| Risk | Probability<br>(H/M/L) | Impact<br>(H/M/L) | Mitigation                              | Owner | Status |
|------|------------------------|-------------------|-----------------------------------------|-------|--------|
|      |                        |                   | initiatives to core values<br>and work. |       |        |

## 9.5 30–60–90 Day Plan – Expanding Social Impact

| Horizon | Objective                                                | Actions                                                                                               | Responsible                       | Indicators                                  | Deliverable                    |
|---------|----------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|--------------------------------|
| 30 days | Build a clear view of current social impact initiatives. | Map programs, budgets, partners and beneficiaries; run a quick alignment check using the SCALE model. | CSR & People team.                | Map completed and validated by leadership.  | Social Impact Baseline Report. |
| 60 days | Prioritise and design scaling roadmap.                   | Use Impact × Effort rubric; select flagship initiatives; draft scaling and partnership plans.         | Social Impact Steering Committee. | Prioritised portfolio and draft roadmap.    | Social Impact Portfolio v1.    |
| 90 days | Launch first wave of expanded initiatives.               | Implement 1–2 scaled programs, start impact measurement and communication plan.                       | Program owners.                   | Initiatives launched; first data collected. | 90-Day Implementation Report.  |

## 10. Summary and Next Steps

### 10.1 Key insights

Throughout this ebook, you have explored how to **expand social impact** strategically:

1. **Scaling CSR programs** transforms scattered actions into a coherent, governable portfolio.
2. **Creating community projects** builds long-term, mutual relationships beyond the company's walls.
3. **Collaborating with NGOs and international organizations** multiplies your capacity for change.
4. **Measuring and communicating impact** turns good intentions into evidence-driven strategies.
5. **Inspiring sector movements** extends your influence beyond individual projects towards new norms and cultures.

Your role as a People & Culture leader is not only to care for internal wellbeing; it is also to **connect the inner life of the organization with the wellbeing of society**.

### 10.2 Next steps checklist

| Próximo paso                                                                                             | Responsable                        | Plazo     | Estado | Observaciones                                                 |
|----------------------------------------------------------------------------------------------------------|------------------------------------|-----------|--------|---------------------------------------------------------------|
| Create an integrated map of current social impact initiatives and themes.                                | People & Culture + CSR.            | 30 days.  |        | Use Impact × Effort rubric to classify initiatives.           |
| Define 2–4 strategic social impact themes aligned with purpose and capabilities.                         | Executive Committee.               | 45 days.  |        | Include voices from employees and partners.                   |
| Select one flagship community project and design a 12-month pilot using the COMMUNITY canvas.            | CSR Program Manager.               | 60 days.  |        | Focus on a community where you already operate.               |
| Formalise at least one strategic partnership with an NGO or international organization.                  | CSR Director + Legal.              | 90 days.  |        | Apply the PARTNER blueprint and Partnership Evaluation Table. |
| Build a social impact dashboard and publish a first concise impact communication (internal or external). | People Analytics + Communications. | 120 days. |        | Use the IMPACT cycle and Social Impact Dashboard template.    |

## 11. Self-Assessment – Social Impact Expansion Readiness

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

1. Our organization has clearly defined social impact themes aligned with our strategy and values.
2. We have an updated map of all CSR and social impact initiatives.
3. There is a governance structure (sponsors, committees, roles) for social impact.
4. Our CSR programs are moving from isolated actions to scalable, coherent portfolios.
5. We design community projects in collaboration with local stakeholders.
6. Our partnerships with NGOs and international organizations are based on documented agreements and shared objectives.
7. Employees actively participate in social impact initiatives and understand their purpose.
8. We have defined impact indicators for our main programs.
9. We systematically collect and analyse data (quantitative and qualitative) on social impact.
10. We communicate results honestly to internal and external audiences.
11. Lessons learned from social initiatives influence business decisions.
12. Leaders in our organization speak publicly about social impact and human-centred change.
13. We participate in sector or ecosystem platforms related to social or environmental issues.
14. Our social impact initiatives are seen as authentic by employees, communities and partners.
15. I feel personally equipped and supported to lead the expansion of social impact in my role.

## 11.1 Scoring and interpretation

Add your scores (minimum 15, maximum 75).

- **15–35 – Emerging Awareness**  
Social impact initiatives exist but are fragmented or reactive. Start with mapping current actions, defining strategic themes and choosing one flagship program to strengthen.
- **36–55 – Active Builder**  
You have several structured initiatives and some partnerships, but measurement, communication or sector influence are still developing. Use the frameworks in this ebook to reinforce governance, metrics and scaling.
- **56–75 – Connected Catalyst**  
Your organization is already a strong social impact actor and sometimes a reference. Focus on deepening measurement quality, sharing your playbooks and contributing to sector movements.

Repeat this self-assessment every year with your team to track progress.

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## 12. Glossary (15 terms)

1. **Corporate Social Responsibility (CSR)** – The set of policies and initiatives through which an organization takes responsibility for its social and environmental impact.
2. **Social impact** – The positive or negative changes experienced by individuals, communities or systems as a result of an organization's actions.
3. **Strategic theme** – A focused area (e.g., education, inclusion, climate) that guides the design of social impact initiatives.
4. **Community partnership** – Long-term collaboration between an organization and a specific community with shared goals and responsibilities.
5. **Theory of change** – Explanation of how specific activities are expected to lead to desired outcomes and impacts.
6. **Outcome indicator** – Measure that reflects changes in behaviour, conditions or capabilities, beyond immediate outputs.
7. **Output indicator** – Measure of activities or direct products of an initiative (events held, participants, materials distributed).
8. **Ecosystem movement** – Collective shift in attitudes, norms and practices among multiple actors in a sector or region.
9. **Stakeholder engagement** – Systematic involvement of people or groups affected by or interested in organizational decisions.
10. **Volunteering program** – Structured opportunities for employees to contribute time and skills to social initiatives.
11. **Flagship initiative** – High-visibility program that embodies an organization's commitment to social impact.
12. **Impact washing** – Practice of exaggerating or misrepresenting social or environmental benefits for reputational gain.
13. **Due diligence (social/partner)** – Process of evaluating a potential partner's governance, ethics and track record before collaboration.
14. **Composite index** – Combined metric that summarises several indicators into a single score.
15. **Sector coalition** – Organized group of companies and other actors that work together on shared challenges within an industry.

## 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.

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## Reference to the HBT PORTAL™

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