



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

Expand the Customer Base

Focus

A step-by-step playbook to:

1. Build modern, data-driven **prospecting**.
 2. Run **targeted marketing and advertising** that converts.
 3. Launch **referral programs** people trust.
 4. Leverage **events and networking** to accelerate trust.
 5. Create and scale **strategic partnerships**.
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Getting Started

Why expanding the base matters now

- Growth is increasingly **non-linear**: a single channel saturates quickly.
- The most resilient companies **blend channels**, track real economics (LTV/CAC), and iterate fast.
- Trust compounds: **referrals and partnerships** reduce cost of acquisition and increase win rates.

Five objectives of this guide

1. Clarify **who to serve** and where to find them.
2. Provide tools to **prioritize** initiatives by impact and effort.
3. Enable **cross-functional execution** (Marketing + Sales + Product + Ops).
4. Measure what matters with **clean KPIs** and decision thresholds.
5. Create a **repeatable rhythm** for continuous improvement.

How to use this guide

Run one subtopic per week as a focused sprint. Publish outputs in your knowledge base. Reassess monthly; refresh quarterly.

Module — Expand the Customer Base

1) Prospecting Strategies

Definition

A disciplined, data-driven method to **create qualified conversations** with the right organizations and buyer roles, at the right time, through ethical outreach that respects attention.

Practical Framework — ICP × JTBD Prospecting Pyramid

1. **ICP (Ideal Customer Profile):** firmographics (industry, size, geo), technographics, compliance needs, purchasing maturity.
2. **JTBD (Jobs-to-be-Done):** concrete problems they're trying to solve, desired outcomes, constraints.
3. **Signals & Triggers:** hiring, funding, technology changes, regulatory deadlines, product launches.
4. **Lists & Enrichment:** verified contacts, multi-role mapping (economic buyer, user, influencer).
5. **Sequences:** multi-channel (email, LinkedIn, phone, video, direct mail) with value stories and micro-offers.
6. **Consent & Respect:** opt-out honor, data privacy, no scraping of sensitive sources.
7. **Review Cadence:** weekly learning loop (reply quality, meeting quality, disqualification reasons).

Design rules

- Write **one message per problem**; never pitch everything.
- Sequence length 6–9 touches across 14–21 days; personalize with **specific triggers**.
- Track **conversation quality**, not just volume.

Applied Example (*caso hipotético*)

A B2B analytics startup targets mid-market retailers. Triggers: new POS rollout, store expansion, inventory write-offs. Outreach offers a **15-minute diagnostic** with a benchmark one-pager. Sequences mix short emails, a 45-second video, and one insight from a publicly available store review dataset.

Team Exercise — Prospect Sprint (120 minutes)

- **Objective:** Produce a prioritized, enriched list with first sequence drafts.
- **Roles:** Growth lead (facilitator), SDR manager, AE, Marketing ops, Data analyst, Legal (15-min review).
- **Inputs:** ICP canvas, JTBD notes, intent data, enrichment tool, messaging library.
- **Steps:**
 1. Define 2 ICP segments and top 3 triggers each.
 2. Pull 200 accounts/segment; map 3 roles/account.
 3. Draft 2 sequences/segment (9 touches).
 4. QA consent/opt-out flows; schedule weekly review.
- **Deliverables:** Enriched list, messaging set, QA checklist, first cohort ready.

Template — Prospecting Plan

Segment	Trigger	Buyer role	Problem statement	Micro-offer	Channel mix	Start date
Mid-market retail	New POS rollout	Ops Director	“Stockouts ↑, shrinkage unclear across stores.”	15-min diagnostic + benchmark sheet	Email + LI + video + call	12/04

Checklist

- ☐ ICP and JTBD validated with **customer language**.
- ☐ Triggers are **detectable** and recent.
- ☐ Multi-role mapping done (buyer, user, influencer).
- ☐ Sequences respect **opt-out** and privacy.
- ☐ Weekly review agenda scheduled.

Suggested KPIs

Lead Velocity Rate (LVR); reply rate (positive vs. neutral vs. negative); meeting rate by trigger; SQL rate; cost per SQL; disqualification reasons (top 5).

2) Targeted Marketing & Advertising

Definition

Orchestrated campaigns that **match message, audience, and moment**, blending paid, owned, and earned channels to produce **measurable pipeline**.

Practical Framework — AIM-LAB

Audience • Insight • Message • Loop (experiments) • Assets • Budget

1. **Audience:** build micro-segments by role, pain, stage.
2. **Insight:** 3 truths: pain, barrier, desired gain.
3. **Message:** one claim + one proof + one call to action.
4. **Loop:** A/B hypotheses; pre-define stop/go thresholds.
5. **Assets:** landing pages, one-pagers, calculators, video explainers.
6. **Budget:** allocate by expected **marginal CAC** and saturation risk.

Design rules

- Optimize **for pipeline, not clicks**.
- Use **consistent UTMs** and a single source of truth.
- Map content to **stage** (problem, solution, choice).

Applied Example (*caso hipotético*)

A cybersecurity vendor runs three micro-segments: healthcare, fintech, e-commerce. Messages reflect sector-specific regulations and breach costs. Ads push to calculators estimating breach exposure. Stop/go rules: if CPL > target by 30% for 7 days, rotate creative; if MQL→SQL < 15%, refresh offer.

Team Exercise — Targeting Lab (150 minutes)

- **Objective:** Launch two targeted campaigns with measurement guardrails.
- **Roles:** Marketing lead, Performance manager, Content lead, Designer, Sales counterpart, RevOps.
- **Inputs:** ICPs, historical performance, creative variants, tracking plan.
- **Steps:**
 1. Select two micro-segments; write AIM-LAB card each.
 2. Draft 3 creatives/segment; build landing pages.
 3. Define UTMs, events, dashboards; set stop/go rules.
 4. Align with Sales on follow-up SLAs and talk tracks.
- **Deliverables:** Campaign briefs, assets, tracking sheet, SLA doc.

Template — Targeting & Message Matrix

Micro-segment	Pain insight	Core message	Proof/asset	CTA	Budget (US\$)	Stop/Go rule
Fintech compliance leads	Audit failures delay launches	“Ship faster without audit surprises.”	Compliance checklist + case sheet	Book 20-min review	8,000	Pause if CPL > \$250 for 7 days

Checklist

- ☐ Audience split into **micro-segments** with distinct pains.
- ☐ One **claim–proof–CTA** per asset.
- ☐ UTMs consistent; dashboards ready pre-launch.
- ☐ Sales **SLA** on follow-up time and talk track.
- ☐ Stop/go rules agreed and enforced.

Suggested KPIs

CPL, MQL→SQL conversion, opps created, pipeline \$, ROAS, CAC payback months, creative fatigue rate, time-to-first-touch→meeting.

3) Referral Programs

Definition

A transparent, fair, and secure mechanism to **turn satisfied customers and allies into a predictable growth channel**.

Practical Framework — REWARD

Reach • Eligibility • Win-win offer • Activation • Remind & recognize • Detect & defend

1. **Reach:** who can refer (customers, partners, community).
2. **Eligibility:** clear rules (fit, deal size, new vs. existing).
3. **Win-win:** incentives aligned to value (cash, credits, donations, access).
4. **Activation:** simple submit flow; pre-built messages.
5. **Remind & Recognize:** periodic prompts; public appreciation.
6. **Detect & Defend:** fraud checks, duplicate detection, privacy safeguards.

Design rules

- Reward **on value events** (qualified meeting / closed-won), not clicks.
- Keep **payout timelines** explicit.
- Offer **non-monetary** options for regulated sectors.

Applied Example (*caso hipotético*)

A SaaS platform offers: \$200 credit for qualified meetings; 10% of first-year subscription on close; or donation to a named cause. Referrers receive a dashboard; nominees get a white-glove onboarding call.

Team Exercise — Referral Canvas (90 minutes)

- **Objective:** Launch a beta referral program with clear rules and tracking.
- **Roles:** Growth lead, CS lead, Finance, Legal, Ops, Community manager.
- **Inputs:** LTV/CAC data, customer list by health score, CRM workflows.
- **Steps:**
 1. Define eligibility and reward structure.
 2. Draft the referral page/email; build CRM automation.
 3. Pilot with top 50 advocates; publish recognition plan.
- **Deliverables:** Referral terms, assets, automation flow, pilot cohort.

Template — Referral Program Canvas

Source group	Eligibility	Reward	Submission flow	Tracking	Payout timing	Owner
Customer advocates (NPS $\geq$ 9)	New logo, ACV $\geq$ \$15k	\$200 meeting / 10% close-won / charity	Form + unique link	CRM + referral IDs	Meeting: 7 days; Close-won: 30 days	CS Ops

Checklist

- ☐ Clear eligibility & compliance reviewed.
- ☐ Rewards **match value** and are easy to claim.
- ☐ Submission takes < **2 minutes**.
- ☐ Recognition is visible and frequent.
- ☐ Fraud/duplicate controls in place.

Suggested KPIs

Referral share of pipeline & revenue; k-factor; time to payout; acceptance rate of referred meetings; NPS of referrers; fraud rate.

4) Events & Networking

Definition

Deliberately designed **moments of high trust**—physical or virtual—where value is experienced, not just described.

Practical Framework — EVENTOS

Engage theme • Venue/virtual • Enable speakers/customers • Network design • Touchpoints • Offers • Score leads

1. **Engage theme:** a single, compelling question your audience cares about.
2. **Venue/virtual:** logistics optimized for participation and recording.
3. **Enable speakers/customers:** prep, run of show, story coaching.
4. **Network design:** purposeful matchmaking, roundtables, small rooms.
5. **Touchpoints:** invitations, reminders, follow-ups, content drops.
6. **Offers:** diagnostic sessions, exclusive trials, co-creation labs.
7. **Score leads:** behavior + fit; pass to sales with context.

Design rules

- Content $\geq$ 70% **practical**; reduce pitch time.
- Always **record**; repurpose into clips and one-pagers.
- Follow-up **within 24 hours**; include notes and next actions.

Applied Example (*caso hipotético*)

A data platform runs a “Metrics that Move Boards” breakfast: 30 execs, two customer panels, facilitated roundtables. Follow-ups include a curated benchmark report and a 30-minute metrics review offer.

Team Exercise — Event Playbook (180 minutes)

- **Objective:** Plan one event that generates qualified opportunities.
- **Roles:** Field marketing, Sales lead, CS, Product, Operations, Speaker coach.
- **Inputs:** Target accounts, venue/virtual options, speaker list, budget, calendar.
- **Steps:**
 1. Define theme and target list; secure 2 customer speakers.
 2. Map touchpoints; write the run of show.
 3. Prepare assets and lead scoring rules; assign note-takers.
- **Deliverables:** Event brief, timeline, speaker packs, follow-up kit.

Template — Event Plan

Event	Theme	Audience	Format	Offer	Lead score rule	Owner	Date
Breakfast: “Metrics that Move Boards”	Board-ready KPI design	CFO/COO/VP Data	In-person + livestream	30-min metrics review	Fit + activity $\geq$ 70	Field Mktg	22/05

Checklist

- ☐ Single, compelling theme.
- ☐ Speakers prepped; stories tied to outcomes.
- ☐ Networking designed, not left to chance.
- ☐ Follow-ups drafted before the event.
- ☐ Lead scoring rules agreed with Sales.

Suggested KPIs

Registrations; attendance rate; MQLs per event; cost/MQL; pipeline generated; content assets produced; meeting set rate within 7 days.

5) Leverage Strategic Partnerships

Definition

Structured collaborations that **open trusted access** to ideal customers through shared value, not just logo swaps.

Practical Framework — PARTNER-FIT

1. **Problem overlap:** customers' pain addressed together.
2. **Audience access:** reach, credibility, channel strength.
3. **Reciprocity:** balanced value (co-marketing, co-selling, product bundling).
4. **Terms:** clear rules, data handling, deal registration.
5. **Enablement:** playbooks, talk tracks, certification.
6. **Revenue model:** sourced vs. influenced; margins; payouts.
7. **FIT Score:** quantify strategic and operational fit (0–100).

Design rules

- Start narrow: **one offer, one segment, one motion**.
- Build a **joint success plan** with milestones.
- Measure both **sourced pipeline** and **influenced velocity**.

Applied Example (*caso hipotético*)

A workflow SaaS partners with a consulting firm specializing in ERP rollouts. Offer: a pre-configured package for a vertical; co-marketing webinar; joint trial. Revenue share 20%; SLA for lead sharing within 48 hours; shared success stories.

Team Exercise — Partner Scoring & Launch (120 minutes)

- **Objective:** Select two partners and launch a 90-day pilot.
- **Roles:** Partnerships lead, Product marketing, Sales ops, Legal, Finance, two AEs.
- **Inputs:** Partner list, customer overlaps, legal template, enablement hub.
- **Steps:**
 1. Score top 5 using PARTNER-FIT.
 2. Draft a joint success plan for the top 2.
 3. Build enablement kit; schedule co-marketing and first 10 target accounts.
- **Deliverables:** FIT scores, signed pilot terms, launch calendar.

Template — Partnership Scorecard

Partner	Problem overlap (0–20)	Audience access (0–20)	Reciprocity (0–20)	Enablement (0–20)	Terms & model (0–20)	FIT score	Decision
ERP Consulting Co.	18	16	15	14	16	79	Pilot

Checklist

- ☐ Narrow joint offer + ICP.
- ☐ Clear **deal registration** path.
- ☐ Enablement materials published.
- ☐ Quarterly business review (QBR) scheduled.
- ☐ Shared success stories created.

Suggested KPIs

active partners; sourced pipeline & revenue; influenced win rate; time-to-first-deal; partner NPS; enablement completion rate.

Global Templates & Tools (copy-ready)

Each table includes one example row + one blank row ready for duplication.

A) Prioritization Rubric (Impact × Effort)

Initiative	Impact (1–5)	Effort (1–5)	Priority	Owner	Next milestone	Date
Launch referral beta with top 50 advocates	5	2	High	CS Lead	Terms + landing page	10/05

B) RACI Matrix (Acquisition Program)

Activity	R	A	C	I	Deliverable	Date
Micro-segment campaign setup	Perf Mktg	CMO	Sales Ops, Legal	Sales team	Two briefs + assets	18/05

C) KPI Board

KPI	Definition	Target	Baseline	Frequency	Owner	Source
SQL→MQL conversion	% MQLs accepted by Sales & qualified	25%	12%	Weekly	RevOps	CRM/BI

D) Human-Cultural Risk Map

Risk	Probability (H/M/L)	Impact (H/M/L)	Mitigation	Owner	Status
SDR burnout from high volume	M	M	Smaller, higher-quality lists + coaching	Sales Mgr	In progress

E) 30–60–90 Plan (per role)

Horizon	Goal	Actions	Owner	Indicators	Deliverable
30 days	Launch 2 ICP sequences	Prospect sprint + QA	SDR Lead	Reply rate ≥ 6%	Sequences live
60 days	Stand up referral beta	Recruit advocates	CS Lead	30 referrals in	Referral hub
90 days	First partner deals	FIT scoring + pilot	Partnerships Lead	\$300k sourced pipeline	QBR pack

Horizon	Goal	Actions	Owner	Indicators	Deliverable
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Recommended digital tools

Whiteboards (Miro/Mural), CRM/Marketing automation, enrichment/intent platforms, webinar/event tools, contract repositories, BI dashboards.

Summary & Next Steps

What you now have

- Prospecting Pyramid to **find and engage** right buyers.
- AIM-LAB to **target and measure** campaigns.
- REWARD to turn **happy customers into growth**.
- EVENTOS to make **trust visible**.
- PARTNER-FIT to **open new routes to market**.

Next-Steps Checklist (obligatory table)

Próximo paso	Responsable	Plazo	Estado	Observaciones
Run Prospect Sprint; ship two sequences	SDR Lead	DD/MM	Abierto	Include triggers & opt-outs
Publish Targeting briefs (2 segments)	Marketing Lead	DD/MM	Abierto	Define stop/go rules
Launch referral beta with 50 advocates	CS Lead	DD/MM	Abierto	Prepare payout ops
Plan and host one flagship event	Field Marketing	DD/MM	Abierto	Lock speakers
Score partners; start 90-day pilot	Partnerships Lead	DD/MM	Abierto	Draft joint plan

Self-Assessment (15 questions)

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

1. Our ICPs and JTBDs are **documented with customer quotes**.
2. We track **trigger events** and use them in outreach.
3. Prospecting sequences are **multi-channel** and respect consent.
4. We measure **conversation quality** (not only volume).
5. Marketing targets **micro-segments** with distinct pains and offers.
6. Every campaign has **UTMs and stop/go rules** defined pre-launch.
7. Sales and Marketing operate with a **clear SLA** for follow-up.
8. Referral program has **clear eligibility** and a simple submission flow.
9. We **recognize referrers** publicly and pay on time.
10. Events include **designed networking** and follow-ups within 24 hours.
11. Lead scoring aligns with **Sales acceptance** and opportunity creation.
12. We have at least **two active partners** with a joint success plan.
13. We track **sourced and influenced** pipeline from partners.
14. Acquisition dashboards show **CAC, LTV, payback**, and cohort views.
15. We run a **monthly learn-and-decide** review and act on the data.

Scoring (sum 15–75)

- **15–34 (Low):** Start with prospecting quality (ICP/JTBD + triggers), a single targeted campaign, and referral beta.
 - **35–54 (Medium):** Add event motion and partner pilot; enforce stop/go rules; strengthen Sales SLA.
 - **55–75 (High):** Scale enablement, automate dashboards, expand partner ecosystem with quarterly reviews.
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Glossary (15 terms)

1. **ICP (Ideal Customer Profile):** Attributes of organizations most likely to win and retain.
2. **JTBD (Jobs-to-be-Done):** Customer tasks, pains, and desired outcomes.
3. **Trigger signal:** Detectable event increasing purchase likelihood.
4. **Sequence:** Planned, multi-touch outreach across channels.
5. **UTM:** Tracking parameters appended to URLs for attribution.
6. **CPL (Cost per Lead):** Spend divided by leads generated.
7. **MQL/SQL:** Marketing- and Sales-qualified lead stages aligned by SLA.
8. **LVR (Lead Velocity Rate):** Month-over-month growth in qualified leads.
9. **CAC (Customer Acquisition Cost):** All acquisition costs per new customer.
10. **LTV (Lifetime Value):** Net value of a customer over time.
11. **ROAS:** Revenue produced per dollar of ad spend.
12. **K-factor:** Viral coefficient indicating referral-driven growth.
13. **Sourced vs. Influenced pipeline:** Initiated by a channel vs. accelerated by it.
14. **QBR (Quarterly Business Review):** Recurring partner performance meeting.
15. **Payback period:** Months to recover CAC from gross margin.

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™](#)