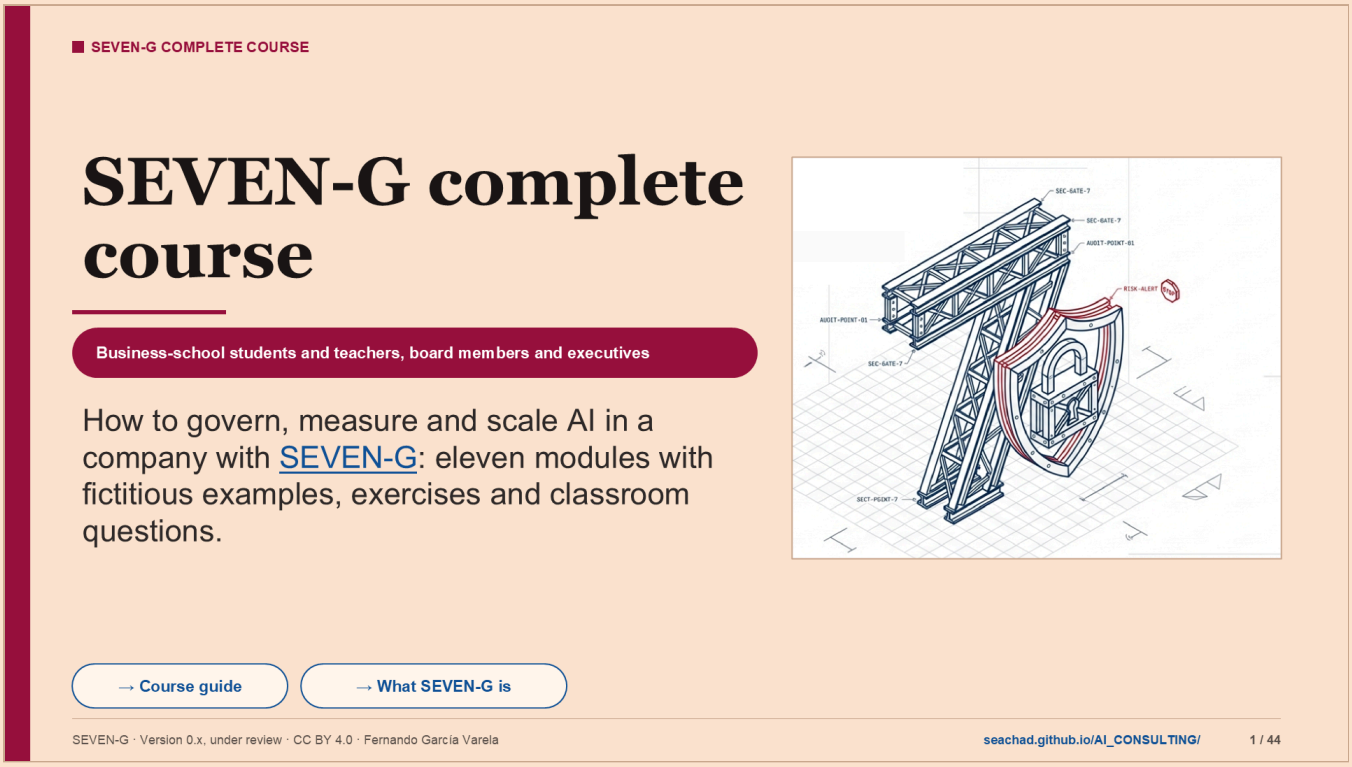


Notes

This course presents SEVEN-G in one full classroom session. SEVEN-G is an open, free framework to govern, measure and scale artificial intelligence in a company. Its author is Fernando García Varela. The content is licensed under CC BY 4.0 and the code under the MIT licence.

The course has eleven modules and a final slide with cases for discussion. Each module starts with its objective and ends with an exercise or a self-check. The answers are in the notes.

All examples use the fictitious company in the use case register (T01). The names, figures and cases are illustrative. They do not describe any real company.

Why it matters: most companies already use AI, but few know what value they get, what risk they take and who can stop a case. The course gives a common language so that management, the board and the teams decide with the same data.

Question to open the session: in your company, who knows how many AI systems are in use today?

TERMS ON THIS SLIDE

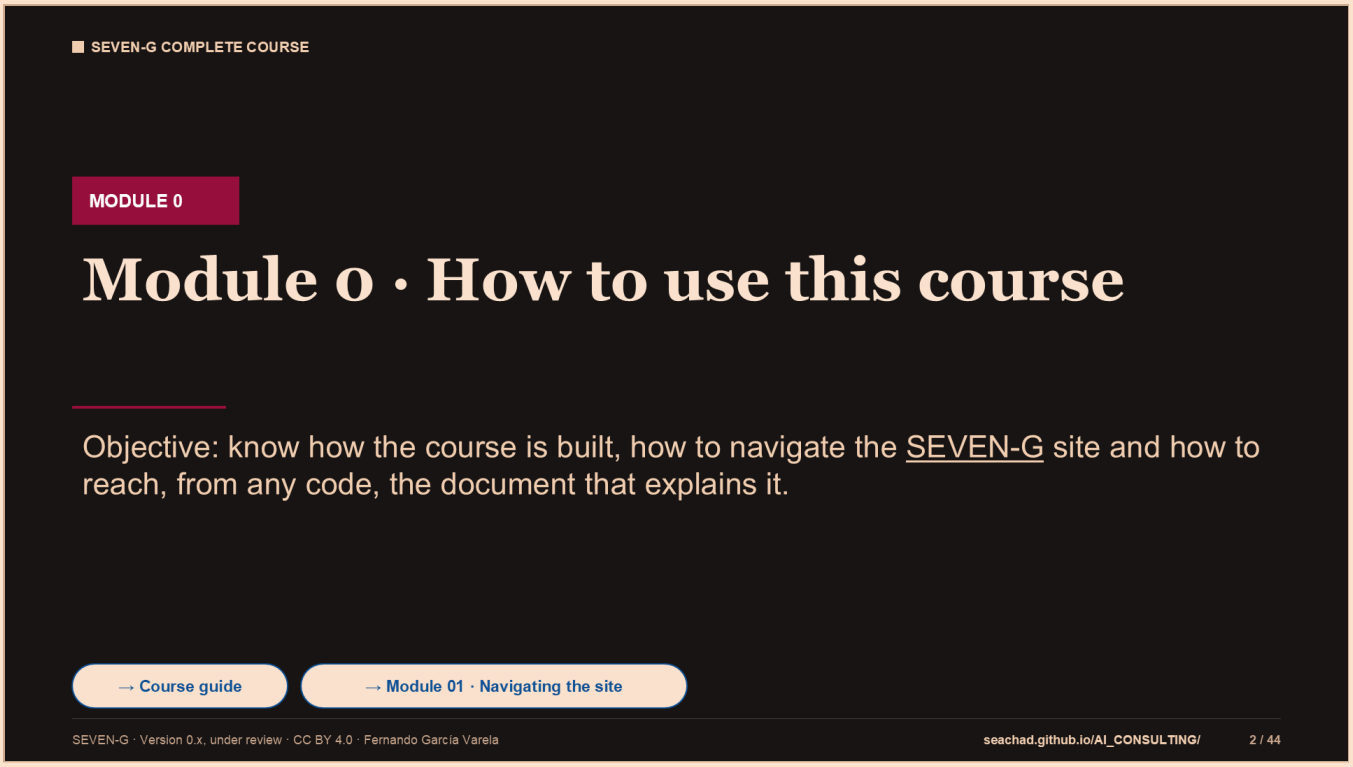
- **SEVEN-G**: SEVEN-G (Seven-phase Enterprise Value & Governance) is an open framework for a company to implement, govern and measure AI, and to know whether it is transforming or only gaining efficiency. It treats each use case as an investment with decision gates and gives the board figures it can trust. Management, the AI office, risk and the board use it. The link opens its entry page, with the story, the questions and the examples. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html

SOURCES AND LINKS

- **Course · Course guide (M00)** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M00_SEVEN-G_Curso_Guia_del_curso.html
- **Document 00 · What SEVEN-G is and what it is for** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html
- **Document 93 · Licence, use and citation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/93_SEVEN-G_Licencia_uso_y_citacion.html

SEVEN-G COMPLETE COURSE

- **Course guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M00_SEVEN-G_Curso_Guia_del_curso.html



Notes

This module prepares the session. Explain three things before you go into the framework.

First, the course does not define rules. Each module summarises and links to the SEVEN-G documents. If the course and a document say different things, the document prevails.

Second, the site uses codes: documents (00 to 96), templates (P01 to P74), tools (T01 to T23), gates (G0 to G7) and phases (0 to 7). The writing rule is «name first, code after»: for example, the feasibility gate (G3) or the use case register (T01).

Third, the global search in the bar of every page takes you from a code or a title to the section that explains it.

Why it matters: the framework is broad. If the students can navigate, every classroom question is answered on the site itself in a few seconds, without depending on the teacher.

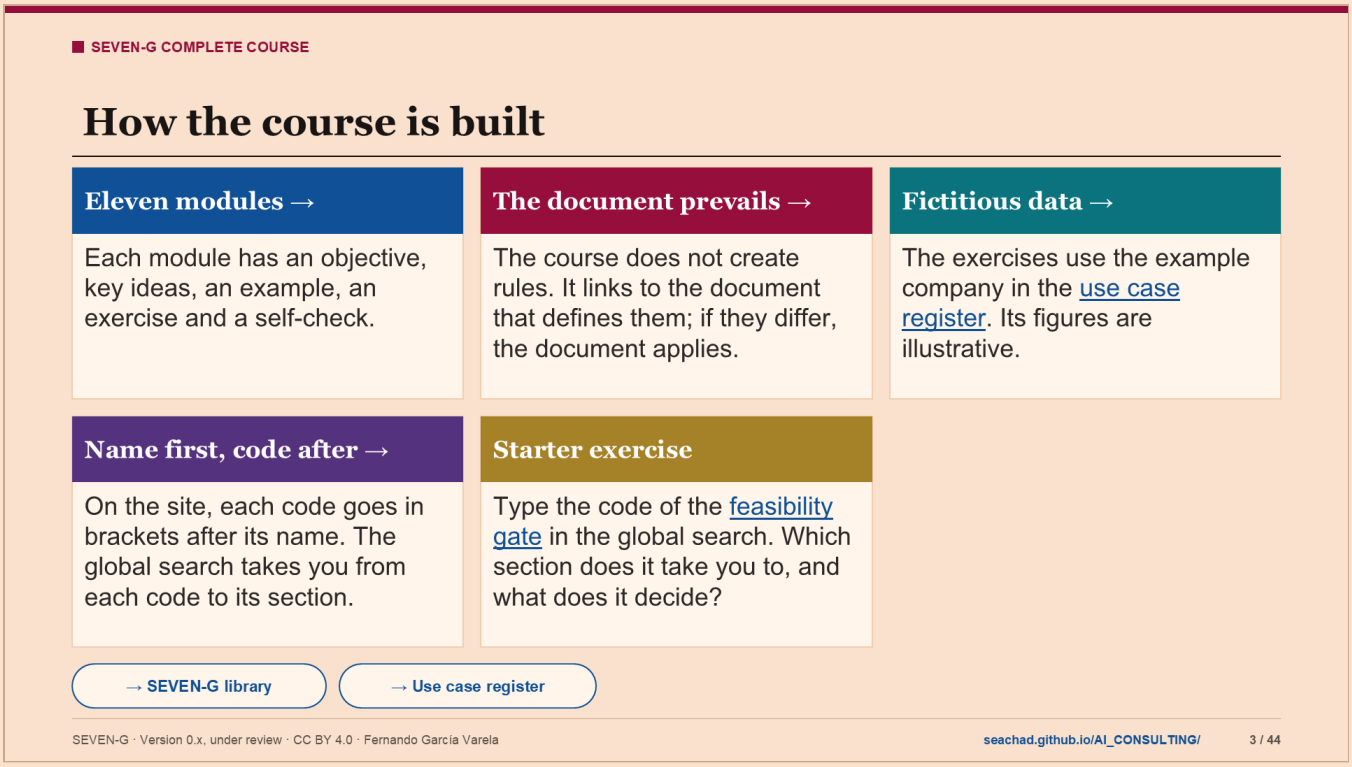
Question for the classroom: which code would you look up first to know when a use case can be stopped?

TERMS ON THIS SLIDE

- **SEVEN-G**: SEVEN-G (Seven-phase Enterprise Value & Governance) is an open framework for a company to implement, govern and measure AI, and to know whether it is transforming or only gaining efficiency. It treats each use case as an investment with decision gates and gives the board figures it can trust. Management, the AI office, risk and the board use it. The link opens its entry page, with the story, the questions and the examples. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html

SOURCES AND LINKS

- **Course · Module 01 · Navigating the site** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M01_SEVEN-G_Curso_Navegar_por_el_sitio.html
- **Document 94 · Three reading layers** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/94_SEVEN-G_Matriz_de_obligatoriedad_y_lectura_por_capas.html#2-1-three-reading-layers
- **Course guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M00_SEVEN-G_Curso_Guia_del_curso.html
- **Module 01 · Navigating the site** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M01_SEVEN-G_Curso_Navegar_por_el_sitio.html



Notes

Present the five cards as the rules of the session.

Eleven modules: from 0 to 10. Module 1 tells the story of AI in a company; modules 2 to 8 explain the framework; module 9 covers organisation and module 10, how to implement it.

The document prevails: the course is learning material. The rules are in the numbered documents of the library.

Fictitious data: the example company has fifteen use cases in its register (T01), from IA-2025-001 to IA-2026-008. None of them is real.

Name first, code after: this is how the whole site is written. Codes help to search; the name helps to understand.

Starter exercise: ask the students to type G3 in the global search. It takes them to the criteria of the feasibility gate (document 21). Answer: G3 decides whether the use case is feasible before the large construction spend. It is the main stop gate.

Why it matters: a student who knows how to search can check every statement of the course alone.

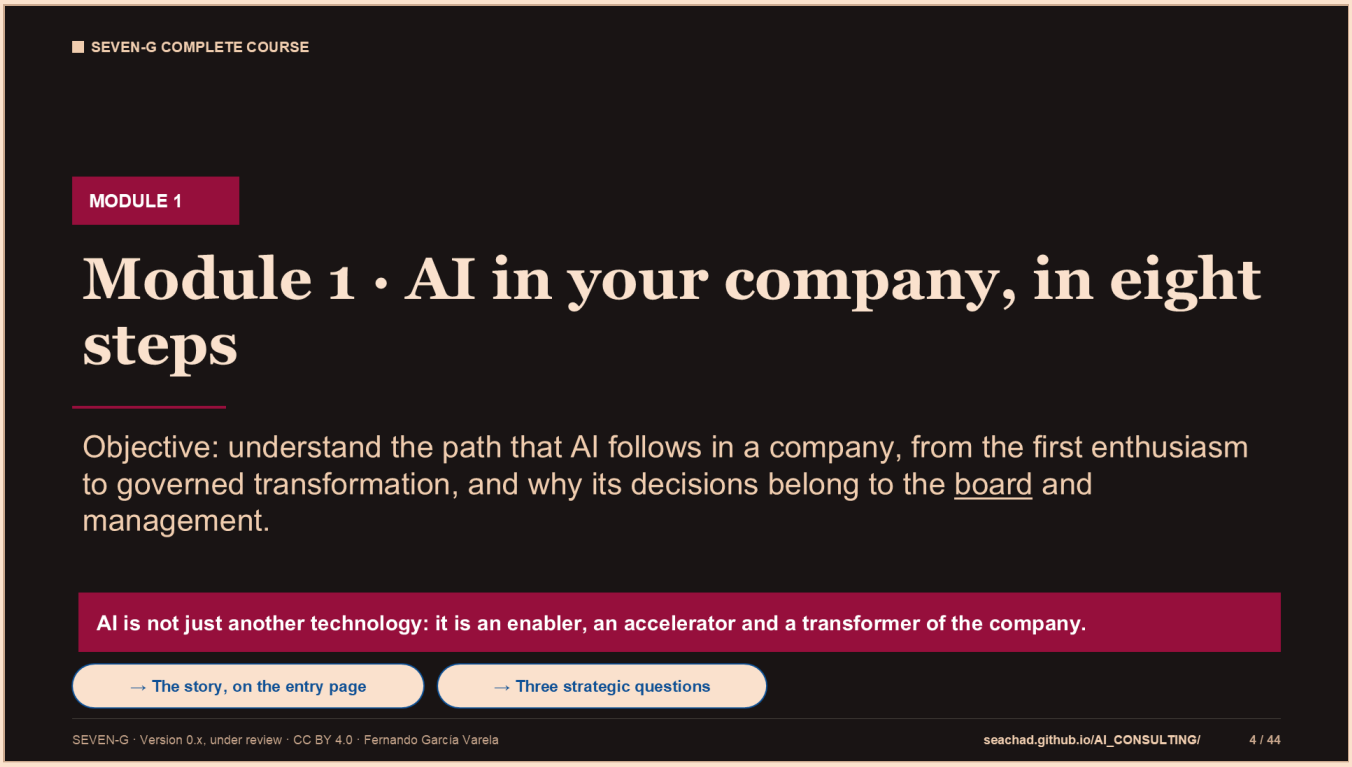
TERMS ON THIS SLIDE

- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in

document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility

SOURCES AND LINKS

- **Course · Course guide (M00)** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M00_SEVEN-G_Curso_Guia_del_curso.html
- **SEVEN-G library** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/index.html



Notes

This module is the story that connects the whole course. It comes from the SEVEN-G entry page.

The central message is this: AI is not just another technology or product. It is an enabler, an accelerator and a transformer of the company. That is why it is a strategic asset, and its decisions belong to the board, the chief executive and the finance function, not only to the technology area.

SEVEN-G answers three strategic questions from management: where to invest, how to scale and how to prove the value.

Example: a company buys licences of an AI assistant for all staff. It looks like a technology decision. In practice it changes processes, roles, risks and recurring costs. If nobody measures use and value, the board cannot know whether it was a good investment.

Why it matters: if AI is treated as a technology project, the company does not see its effect on the income statement or on risk.

Question for the classroom: who decided the last AI spend in your organisation, and with what figures?

TERMS ON THIS SLIDE

- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors

SOURCES AND LINKS

- **SEVEN-G entry page · The story in eight steps** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#historia
- **Document 13 · AI thesis, ambition and risk appetite** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html
- **The story, on the entry page** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#historia
- **Three strategic questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#para-que



Notes

Go through the eight steps from left to right. There are two acts.

Act I, understand where you stand. Step 01: AI arrives with enthusiasm, with assistants and pilots that nobody governs or measures. Step 02: the board starts to ask whether there is progress, whether it is profitable and whether risk is under control. Step 03: to answer, the company must first know what it has: an inventory of all AI systems and a first maturity reading. Step 04: you look at what the sector does and decide how much ambition and how much risk to accept.

Act II, govern and grow. Step 05: the portfolio starts to move like a funnel; this is where the method starts. Step 06: the board receives figures it can believe. Step 07: the gates are proportionate to the risk, and stopping in time is also a good outcome. Step 08: with the house in order, the company can scale and transform.

Why it matters: you do not reach step 08 without serious governance. Each company starts at a different point, but the destination is the same.

Question for the classroom: at which step is your organisation today?

TERMS ON THIS SLIDE

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- **AI system inventory** (T02): A list of all the company's AI systems: its own, third-party AI embedded in processes, the assistants employees use and any unauthorised use detected. Each system has an owner, a regulatory classification, an intensity and an autonomy level. It comes first, because you cannot govern what you do not know. It is a view of the use case register: open the link and choose «Inventory» (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html

- **Portfolio funnel**: A way of seeing all use cases as a sales funnel: mandatory stages (proposed, value hypothesis, test, development) until they reach use, with the use cases that did not pass each stage and why. It shows how much is stopped, where, and what is learned. The link opens the example funnel on the SEVEN-G entry page (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#embudo
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates
- **Board dashboard** (T17): A supervision dashboard generated from the use case register. It shows the board cost, validated versus declared value, the funnel, risks, incidents, adoption, maturity and what holds back scaling, with a «?» help on each card. It is for deciding, not just for informing. The link opens the example dashboard with fictitious data; the interface is in Spanish and the help texts are in both languages. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html

SOURCES AND LINKS

- **SEVEN-G entry page · The story in eight steps** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#historia
- **Document 96 · Starting points and implementation path** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/96_SEVEN-G_Puntos_de_partida_y_recorrido_de_implantacion.html
- **The full story** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#historia
- **Where does your company start?** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#partida



Notes

This is the closing exercise of module 1. Each card links to a page on the site that answers that question in three ideas and says where to see it.

Instruction: in groups of three or four, each group marks the questions that its company (or a company it knows) can answer today with data. Then it explains which data it lacks to answer the others. Time: ten minutes.

Expected reading: almost all groups answer «am I making progress?» with the number of pilots or licences. That is activity, not progress. Progress shows in how many cases reach production, how much validated value they generate and how governance maturity rises.

The question that is usually missing is «do I know when to stop?». Many companies do not have a formal moment in which the decision to stop a case is taken.

Why it matters: these six questions are the ones the board really asks. The whole course explains how to answer them.

Self-check: what is the difference between activity and progress? Answer: activity counts pilots; progress counts cases in use with validated value.

TERMS ON THIS SLIDE

- **Board questions**: Six questions a board asks about AI: are we making progress?, are the use cases profitable?, can the company do more?, are we transforming or only gaining efficiency?, do we know when to stop?, and is risk under control? Each one has its own page with the answer and where to see it. The link opens the questions on the SEVEN-G entry page. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#preguntas
- **Portfolio funnel**: A way of seeing all use cases as a sales funnel: mandatory stages (proposed, value hypothesis, test, development) until they reach use, with the use cases that did not pass each stage and why. It shows how much is stopped, where, and what is learned. The link opens the example funnel on the SEVEN-G entry page (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#embudo

- **Management control**: The finance function that validates the value of use cases (or, instead, internal or external audit). It only validates value realised in a closed period, with a formula, a measured baseline and traceable data. The area that benefits from the figure or the use case team never validates it. The link opens what the validator checks in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#4-2-what-the-validator-checks
- **Impact map** (T16): Component A of SEVEN-G: where and with what ambition AI acts. It is read as a grid of the portfolio, with the spheres in rows and Optimise, Augment and Transform in columns. Each cell shows use cases, investment, cost and value, and flags the gap against the ambition the board approved. It answers «where is the impact?». In the example board dashboard, look for the «Where the impact is» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility

SOURCES AND LINKS

- **Document 61 · Frequent difficult questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#frequent-difficult-questions



Notes

Open the module with the diagnosis made in document 00. The problems of AI in companies are almost never about technology. They are about governance and measurement: nobody knows how many cases there are, what they really cost, what value they give or who can stop them.

SEVEN-G stands for Seven-phase Enterprise Value & Governance. «Seven» are the seven value phases plus an enabling phase 0; the G is governance, which runs across all of them.

The framework provides four things: a map of where the impact is, a governance model, value measurement rules and tools to apply it. It can be adopted in full or by components, and it works together with the governance, risk or transformation frameworks that the company already has.

Why it matters: students often expect a technical method. Make it clear from the start that it is a decision framework for management.

Question for the classroom: which of these symptoms do you recognise: pilots that do not reach production, savings figures that nobody validates, or AI systems that nobody knows exist?

TERMS ON THIS SLIDE

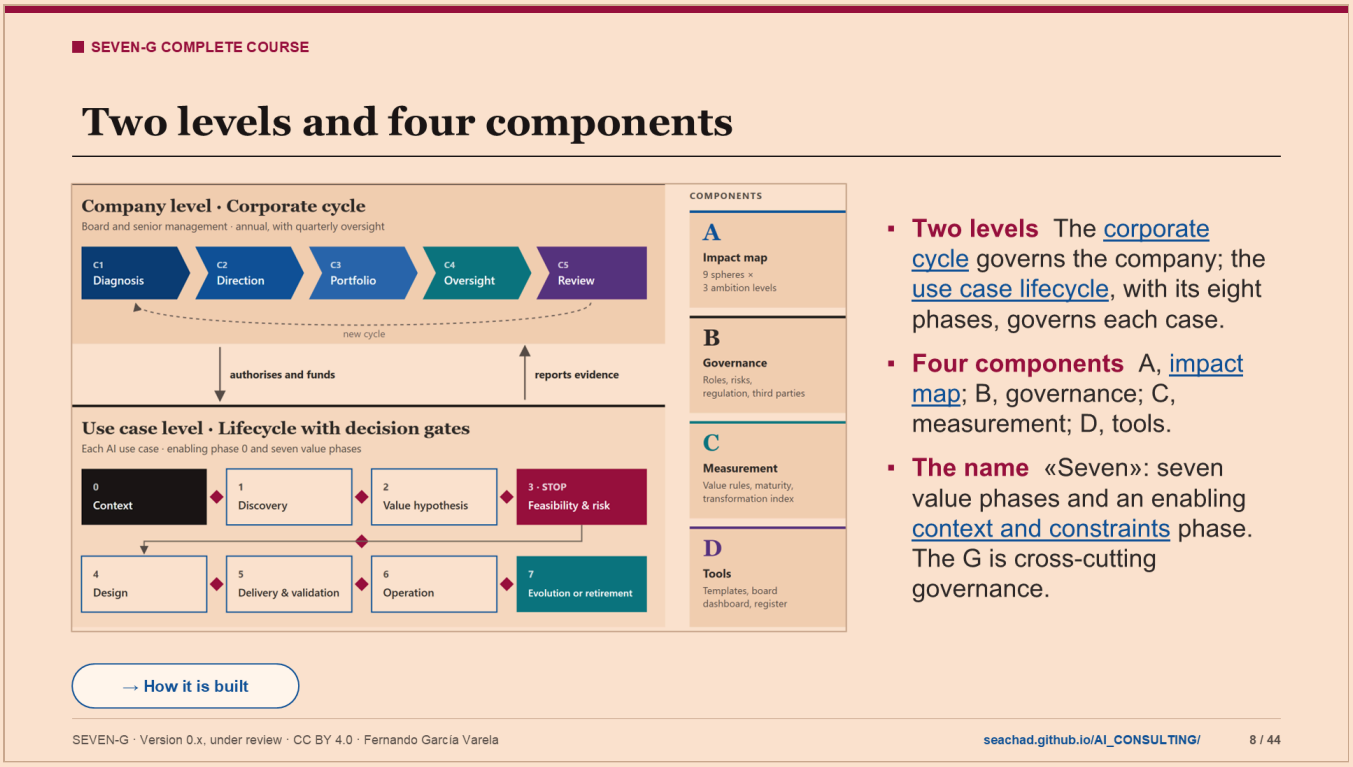
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SOURCES AND LINKS

- **Document 00 · The problem it solves** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#the-problem-it-solves
- **Document 04 · What it corrects in the usual approaches** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html#2-2-what-it-corrects-in-the-usual-approaches-to-ai-adoption

SEVEN-G COMPLETE COURSE

- **Course module 02** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M02_SEVEN-G_Curso_Que_es_y_que_resuelve.html
- **The problem it solves** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#the-problem-it-solves



Notes

Use the image to explain the architecture of the framework.

Company level: the corporate cycle has five moments. C1 is the diagnosis (what exists and with what maturity). C2 is the board decision on the AI thesis, the ambition per sphere and the risk appetite. C3 is the portfolio plan. C4 is continuous oversight. C5 is the annual review and the learning.

Use case level: each use case goes through phases 0 to 7, with a decision gate at the end of each phase.

The four components: the impact map (A) says where the value can be; governance (B) says who decides and who controls; measurement (C) says how cost and value are counted; the tools (D) let you apply it without starting from zero.

Why it matters: the two levels avoid a common mistake. Without the company level, each case is decided in isolation. Without the use case level, the strategy does not reach execution.

Question for the classroom: which moment of the corporate cycle do you think is most often missing in the companies you know?

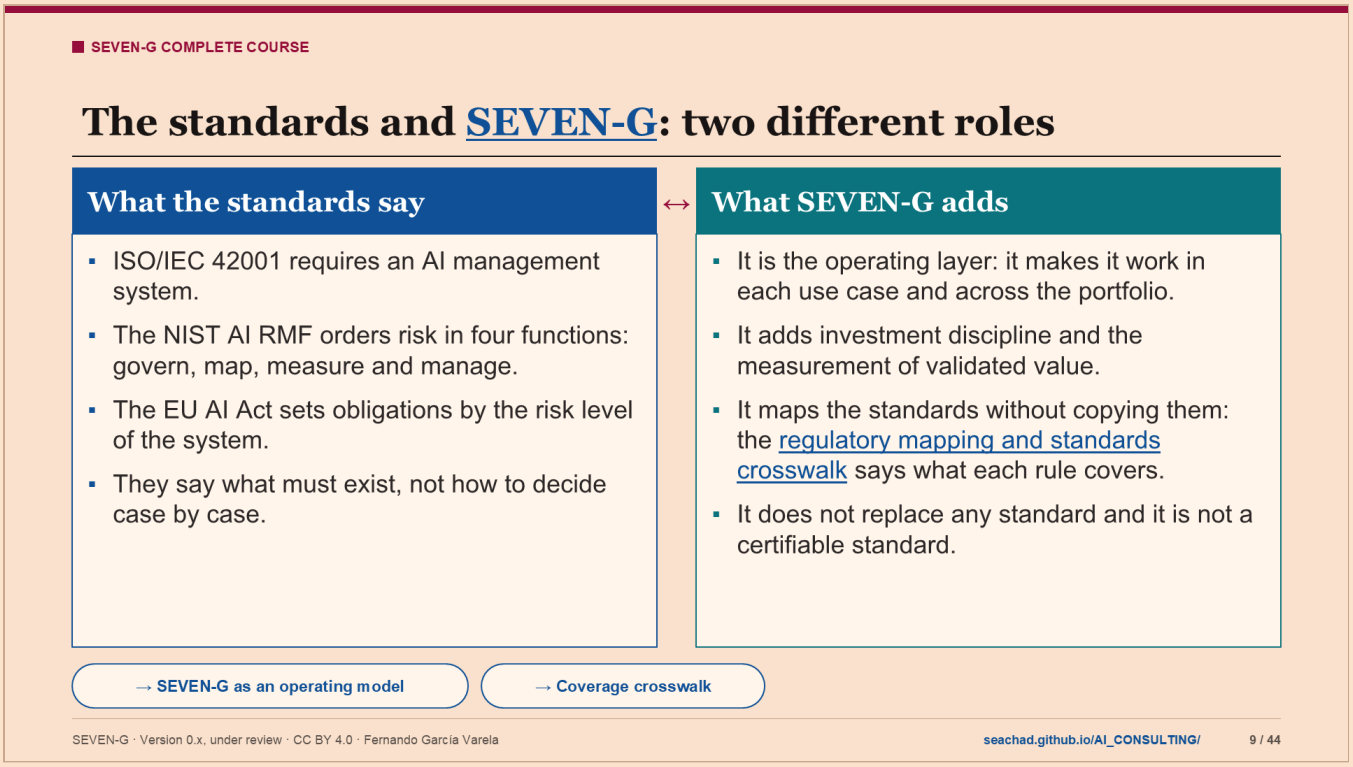
TERMS ON THIS SLIDE

- **Corporate cycle** (C1–C5): The company level of SEVEN-G: five stages repeated every year. Diagnosis (C1), direction with thesis and risk appetite (C2), portfolio (C3), quarterly oversight (C4) and annual review (C5). Senior management and the board lead it. It sets the frame each use case lives in: how much is wanted, how much risk is accepted and how it is overseen. The link opens its explanation in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#company-level-corporate-cycle
- **Use case lifecycle**: The path of each AI use case: eight phases (0 to 7), from context to evolution or retirement, with a decision gate at the end of each phase. No phase or gate is skipped; depending on intensity, some are grouped. The use case team and its sponsor go through it; the governance bodies decide. The link opens its explanation in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#use-case-level-lifecycle

- **Impact map** (T16): Component A of SEVEN-G: where and with what ambition AI acts. It is read as a grid of the portfolio, with the spheres in rows and Optimise, Augment and Transform in columns. Each cell shows use cases, investment, cost and value, and flags the gap against the ambition the board approved. It answers «where is the impact?». In the example board dashboard, look for the «Where the impact is» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Context and constraints** (fase 0): The enabling phase of the lifecycle. Before talking about value, the use case sets its context: sponsor, roles, governance intensity, inventory entry and limits (data, rules, budget). The authorisation gate (G0) closes it. It avoids starting a use case without an owner or rules. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-0-context-and-constraints

SOURCES AND LINKS

- **Document 00 · How the framework is built** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#how-the-framework-is-built
- **Document 01 · Foundational methodology** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html
- **How it is built** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#how-the-framework-is-built



Notes

This comparison answers a question that always comes up in the classroom: why another framework, if standards already exist?

Standards and regulation say what must exist. ISO/IEC 42001 requires an AI management system. The NIST risk framework (AI RMF) organises risk in four functions. The EU AI Act sets obligations according to the risk of each system.

SEVEN-G is the operating layer that makes all of that work in practice: what is decided at each gate, with what evidence, who signs and how value is measured. The principle is «it maps, it does not embed»: document 34 relates each standard to the rules of the framework in a coverage table, without reproducing its text.

Warning: SEVEN-G gives no accreditation. If a company wants to be certified in ISO/IEC 42001, an accredited body issues it. Document 93 explains this.

Why it matters: an executive must know that adopting SEVEN-G helps to comply, but does not release the company from checking which regulation applies to it.

Question for the classroom: which part of a standard seems hardest to you to bring into a daily decision?

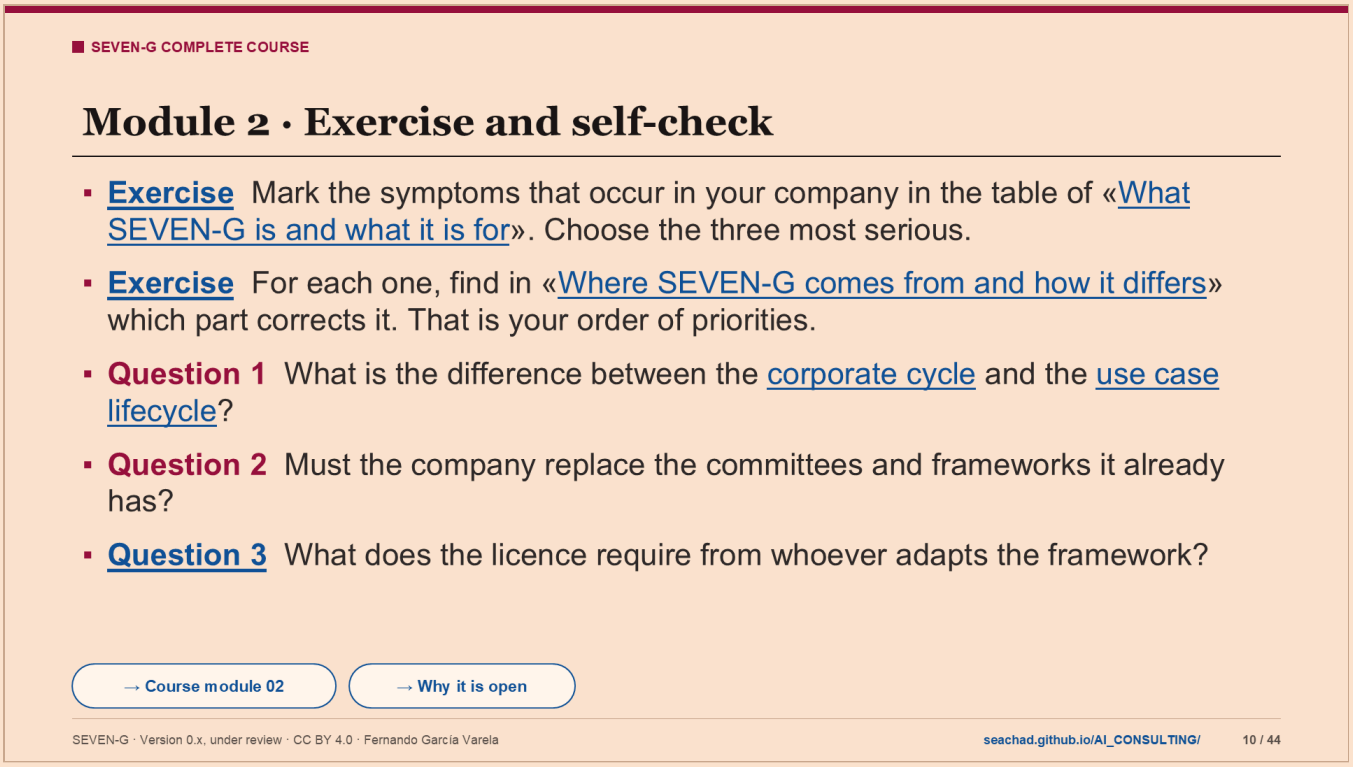
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- **Regulatory mapping and standards crosswalk** (documento 34): It relates SEVEN-G to regulation and standards (European AI Act, ISO/IEC 42001, NIST AI RMF, NIST CSF and others). Its crosswalk table says, row by row, what the framework covers, where and with which evidence, and what needs an external control. It does

not replace the standard or an adviser. The link opens the table in document 34. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/34_SEVEN-G_Mapeo_regulatorio.html#9-1-coverage-crosswalk-standards-and-regulation-seven-g

SOURCES AND LINKS

- **Document 34 · Principle: SEVEN-G maps, it does not embed** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/34_SEVEN-G_Mapeo_regulatorio.html#1-1-principle-seven-g-maps-it-does-not-embed
- **Document 93 · There is no official certification** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/93_SEVEN-G_Licencia_uso_y_citacion.html#7-3-there-is-no-official-certification
- **ISO/IEC 42001 · AI management system** https://www.iso.org/standard/42001
- **NIST AI RMF 1.0** https://www.nist.gov/publications/artificial-intelligence-risk-management-framework-ai-rmf-10
- **Regulation (EU) 2024/1689 on Artificial Intelligence** https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- **SEVEN-G as an operating model** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html#5-1-compared-with-the-standards-seven-g-as-an-ai-operating-model



Notes

Exercise (fifteen minutes). Each student marks in the symptom table of document 00 the symptoms they recognise in their company or in one they know. Then they choose the three most serious and look in document 04 (section 2.2) for the part of the framework that answers each one. The result is an argument to adopt the framework and an order of priorities.

Ask two or three students to read their list. Three symptoms usually repeat: many pilots and few cases in production, declared value that nobody validates, and nobody with the authority to stop a project.

Self-check answers:

- Question 1: the corporate cycle belongs to the company (diagnosis, direction, portfolio, oversight and review). The lifecycle is the path of each case, from phase 0 to 7.
- Question 2: no. The framework is compatible and modular, and it fits into the bodies that already exist.
- Question 3: credit the author, link the licence and state the changes. Using the framework is free of charge.

Why it matters: a framework that forces the company to rebuild its existing committees is not adopted. SEVEN-G was designed to fit into what already exists.

TERMS ON THIS SLIDE

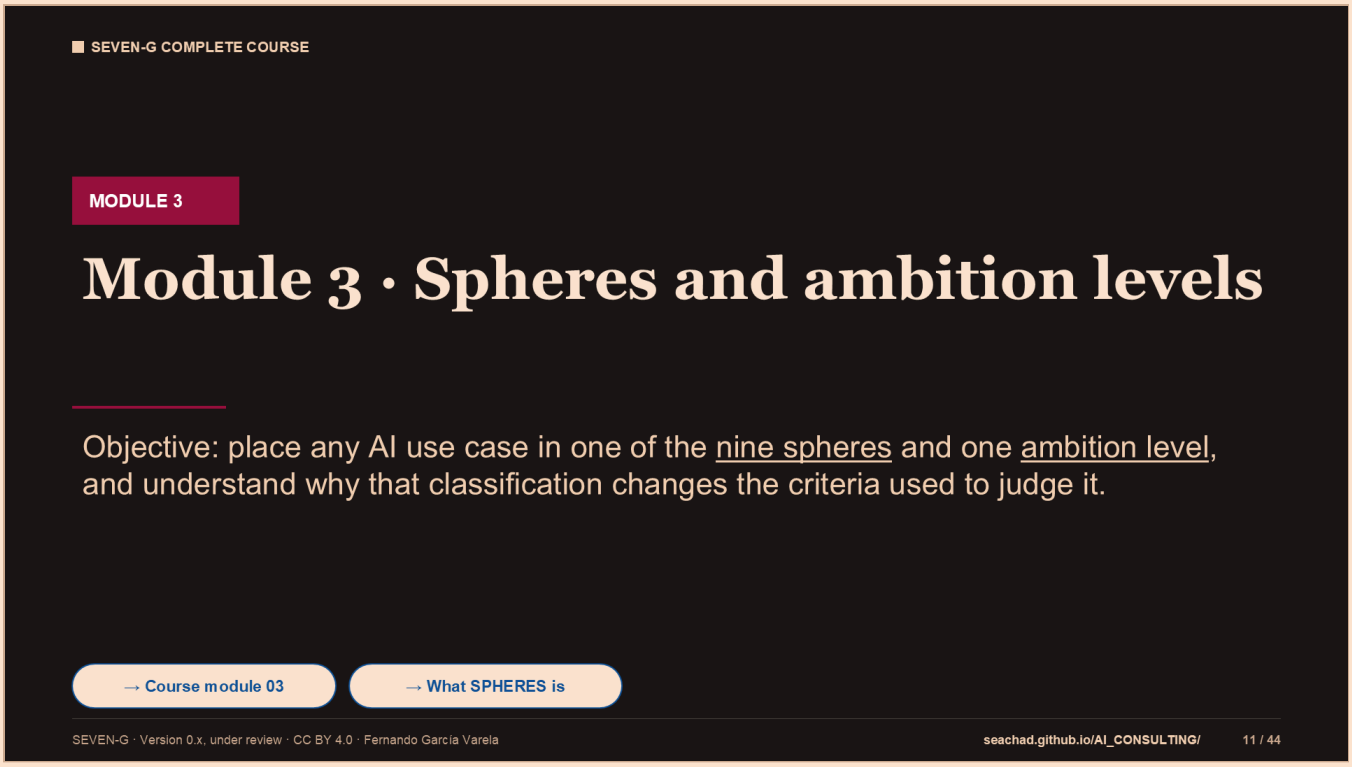
- **What SEVEN-G is and what it is for** (documento 00): The framework's presentation document. It opens with a quick start to decide in a few minutes whether it fits, explains the two levels (company and use case), the phases, the gates, governance and measurement, and shows the usage map with everything linked. It is the entry door for anyone who will work with the framework. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html
- **Where SEVEN-G comes from and how it differs** (documento 04): A document explaining where the framework comes from, how it differs from common practice and from standards (standards say what must exist; SEVEN-G makes it work use case by use case), how it has evolved and why it is open. It adds no rules. The link

opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html

- **Corporate cycle** (C1–C5): The company level of SEVEN-G: five stages repeated every year. Diagnosis (C1), direction with thesis and risk appetite (C2), portfolio (C3), quarterly oversight (C4) and annual review (C5). Senior management and the board lead it. It sets the frame each use case lives in: how much is wanted, how much risk is accepted and how it is overseen. The link opens its explanation in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#company-level-corporate-cycle
- **Use case lifecycle**: The path of each AI use case: eight phases (0 to 7), from context to evolution or retirement, with a decision gate at the end of each phase. No phase or gate is skipped; depending on intensity, some are grouped. The use case team and its sponsor go through it; the governance bodies decide. The link opens its explanation in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#use-case-level-lifecycle

SOURCES AND LINKS

- **Course · Module 02 · What it is and what it solves** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M02_SEVEN-G_Curso_Que_es_y_que_resuelve.html
- **Document 93 · Licence, use and citation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/93_SEVEN-G_Licencia_uso_y_citacion.html#summary
- **Creative Commons BY 4.0 licence** https://creativecommons.org/licenses/by/4.0/deed.en
- **MIT licence** https://opensource.org/license/mit
- **Course module 02** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M02_SEVEN-G_Curso_Que_es_y_que_resuelve.html
- **Why it is open** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html#6-1-the-reason



Notes

This module explains component A of SEVEN-G: the impact map. It answers two questions: where the value of AI can be in the company, and what type of bet each use case is.

The map has nine spheres and three ambition levels. SPHERES is the methodology that develops this part in more detail: it explains each sphere with examples and with the questions the board should ask. SPHERES answers three questions: where do we play, with what ambition and what do we ask. The classification rules, on the other hand, are in SEVEN-G (document 10).

Why it matters: without classification, all use cases are judged with the same criterion, almost always the short-term return. That kills transformation bets and lets efficiency projects through without real value. Classifying well is the basis to compare and prioritise the portfolio.

Question for the classroom: if your company only approves projects with a return in twelve months, which type of use case will it never see?

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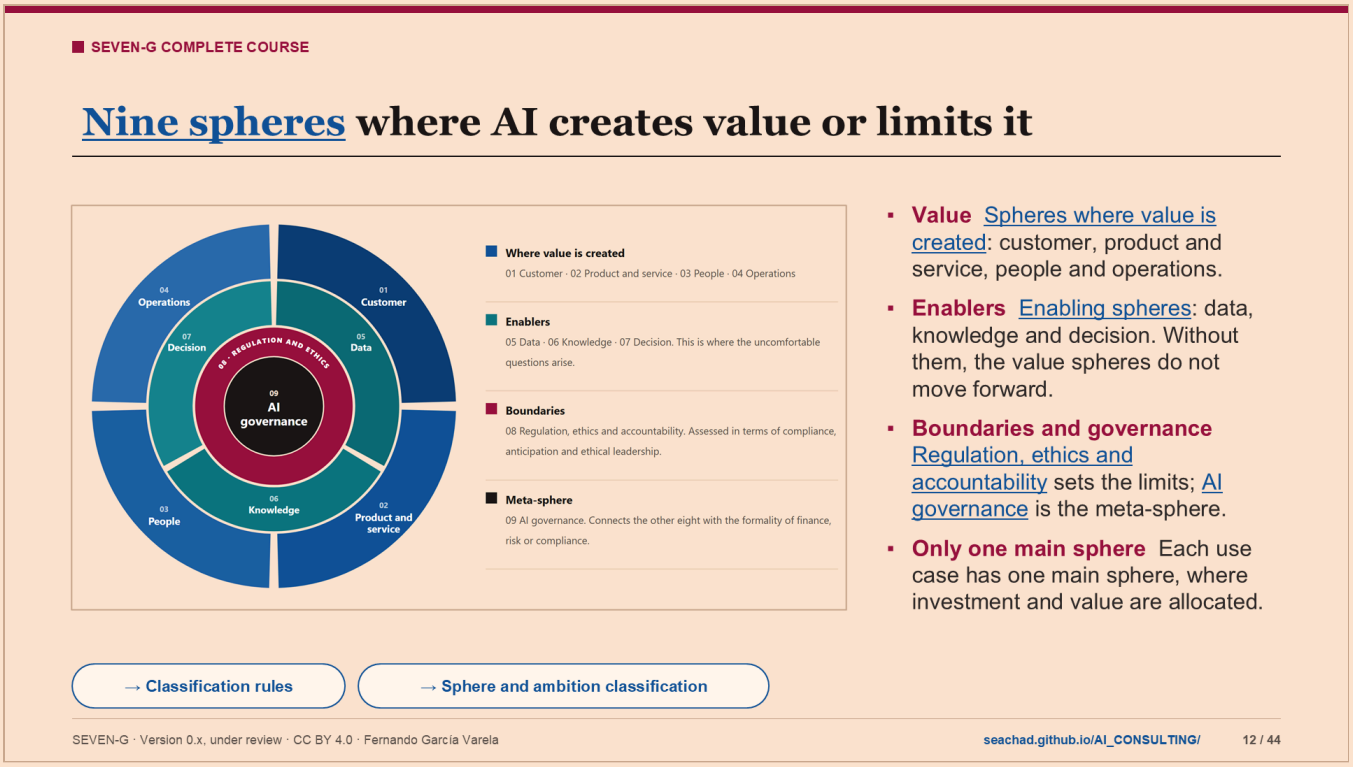
- **The nine spheres** (esferas 01–09): Nine areas where AI acts in a company: four where value is created (01 to 04), three enablers that make it possible (05 to 07), the limits of regulation and ethics (08) and the governance of AI itself (09). Each use case sits in one primary sphere. The link opens the overview in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **Ambition levels**: Three levels stating how much a company wants to change with each use case: Optimise (do the same better), Augment (extend what people can do) and Transform (change the business). Each level is decided, funded and measured differently. The link opens the SPHERES document that explains them with examples. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html

SOURCES AND LINKS

- **Document 10 · The impact map** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-impact-map

SEVEN-G COMPLETE COURSE

- **SPHERES · What it is and what it is for** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Course module 03** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M03_SEVEN-G_Curso_Esferas_y_ambicion.html
- **What SPHERES is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html



Notes

Explain the nine spheres with a board question for each group.

Value spheres (01 to 04): customer, product and service, people and operations. Example question for sphere 04: which processes have a demonstrable short-term return and which need a redesign?

Enabling spheres (05 to 07): data, knowledge and decision. They do not generate value alone, but without them the others do not move forward. Question for sphere 07: what does AI decide on its own, what requires human validation and what is never delegated?

Sphere 08, boundaries: regulation, ethics and accountability. Sphere 09, meta-sphere: AI governance, with the same formality as finance or risk. These two are not assessed with the ambition levels.

Key rule: each use case has only one main sphere, to which investment and value are allocated, and at most one secondary sphere. The value of a platform used by several cases is allocated to the cases, not to the platform.

Why it matters: if a use case counts in two spheres, the portfolio value is counted twice.

Question for the classroom: which sphere has the most cases in your company, and which has none?

TERMS ON THIS SLIDE

- **The nine spheres** (esferas 01–09): Nine areas where AI acts in a company: four where value is created (01 to 04), three enablers that make it possible (05 to 07), the limits of regulation and ethics (08) and the governance of AI itself (09). Each use case sits in one primary sphere. The link opens the overview in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **Spheres where value is created** (esferas 01–04): The four spheres in which AI creates direct business value, such as the customer relationship, operations or the product. For each one, the document gives examples by ambition level, why it matters and what to ask. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html

- **Enabling spheres** (esferas 05–07): The three spheres that do not create value on their own but make it possible, such as data, technology and people. Without them, use cases in the value spheres stay as pilots. The document explains each one with examples and questions. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html
- **Regulation, ethics and accountability** (esfera 08): The sphere of limits: what regulation requires, what the company considers acceptable and who answers for what AI does. It produces no direct value, but without it value is not sustainable. It is assessed with four grades. The link opens the sphere in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#sphere-08-regulation-ethics-and-accountability
- **AI governance** (esfera 09): The meta-sphere: how the company governs its own AI, that is, who decides, how it is measured and how the other spheres are controlled. It is the one SEVEN-G develops in detail. It is assessed with four grades. The link opens the sphere in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#sphere-09-ai-governance

SOURCES AND LINKS

- **Document 10 · Classification rules on the map** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#classification-rules-on-the-map
- **Document 00 · Component A: nine spheres and three levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-1-component-a-impact-map-nine-spheres-and-three-ambition-levels
- **SPHERES · What it is and what it is for** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Classification rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#classification-rules-on-the-map
- **Sphere and ambition classification** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P07_SEVEN-G_Clasificacion_de_esfera_y_ambicion.html

SEVEN-G COMPLETE COURSE

Three ambition levels: three types of bet

They are not a ladder: each level has its own cost, risk, timeframe and decision-maker.

Level	What it means	Where the value lies	Who decides
Optimise	Doing the same thing faster, cheaper or with fewer errors.	Mainly efficiencies (avoided cost).	Management of the business area, within the portfolio framework.
Augment	People do what they could not do before. The role changes, not the business.	Combined: cost and performance (productivity, quality, conversion).	Senior management, with visibility for the AI committee.
Transform	Changes what is offered, how the company competes or how it is organised.	Mainly return: revenue, new services, competitive position.	Board or senior management: hypothesis gate and, if it scales, scale or retire gate.

→ The three levels → Criteria by ambition

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Notes

The three levels are not a ladder. They are three types of bet with different cost, risk, timeframe and resistance in the organisation.

Optimise: doing the same thing better. Fictitious example: automatic invoice classification (IA-2025-001). The value is in avoided cost and the management of the area decides.

Augment: people do what they could not do before. Example: an assistant that prepares the information on each customer for a manager before a meeting. The role changes, not the business.

Transform: it changes what is offered or how the company competes. Fictitious example: predictive maintenance sold as a service to industrial customers (IA-2026-002). The board or senior management decides.

The classification has consequences. A Transform bet always has Enterprise intensity, and the board approves it at the hypothesis gate (G2) and, if it scales, at the scale gate (G7). In exchange, it is not asked for the immediate return of an efficiency project: its gate criteria are different.

Why it matters: the ambition is proposed in phase 1, confirmed in phase 2 and checked against what happens in production. Classification follows rules, not enthusiasm.

Question for the classroom: why could a team want to classify as Transform something that only optimises?

TERMS ON THIS SLIDE

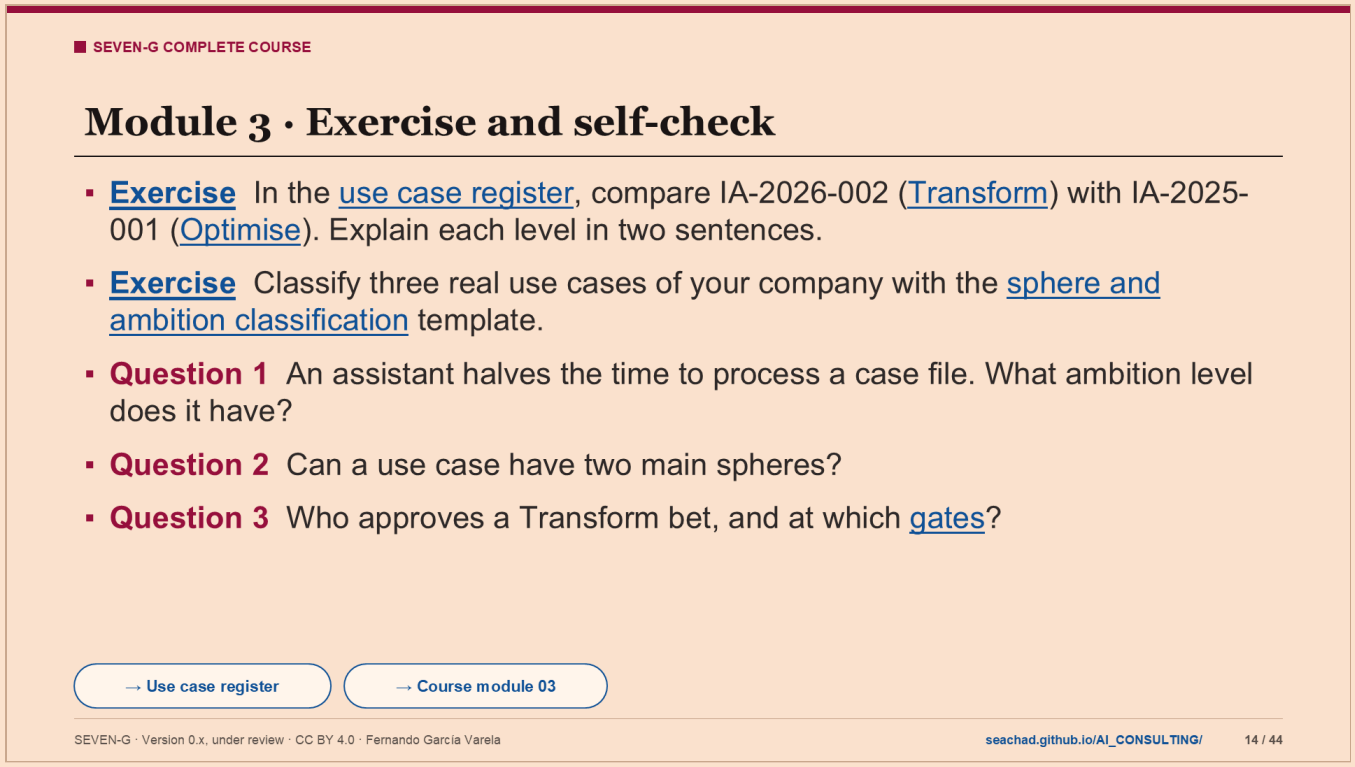
- **Optimise**: The first ambition level: AI makes what the company already does cheaper or faster, without changing the process. Its value is measured in savings and time and must be shown early. It is the most frequent level and the one that transforms least. The link opens its explanation in the spheres methodology. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#optimise
- **Augment**: The second ambition level: AI extends what people can do, with better decisions, higher quality or new capabilities in the process. Its value combines efficiency and better results. It requires changing how work is done,

not just installing a tool. The link opens its explanation in the spheres methodology. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#augment

- **AI committee**: A management body that decides the portfolio and the gates at its level, allocates budget and escalates to the board what belongs there. It brings together business, technology, finance and risk, and follows rules of procedure (P38). It matters because it turns scattered decisions into a single portfolio. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-3-ai-committee
- **Transform**: The third ambition level: AI changes the business model, the product or the way of competing. Its value takes longer and is more uncertain, so it is funded in stages and approved by the board (at the hypothesis gate and when scaling). The quick-return criteria of Optimise are not applied to it. The link opens its explanation in the spheres methodology. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#transform
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **Hypothesis gate** (G2): The gate that approves the value hypothesis: how much is expected, how it will be measured, against which baseline and when it will be stopped. Transform bets are approved here by the board. Without an approved hypothesis the feasibility test is not funded. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-3-g2-hypothesis
- **Scale or retire gate** (G7): The final gate of the lifecycle. With the value actually measured, it decides to scale the use case (which starts a new cycle), iterate it or retire it with an orderly plan. Scaling a Transform bet is approved by the board. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire

SOURCES AND LINKS

- **Document 10 · The three ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-three-ambition-levels
- **Document 01 · Criteria differentiated by ambition level** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-6-criteria-differentiated-by-ambition-level
- **The three levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-three-ambition-levels
- **Criteria by ambition** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-6-criteria-differentiated-by-ambition-level



Notes

Exercise (fifteen minutes). Open the example register (T01). Remind the students that the company and its data are fictitious.

IA-2026-002 is predictive maintenance sold as a service to industrial customers. It is classified as Transform because it creates a new offer: the company sells something it did not sell before. IA-2025-001 is invoice classification. It is classified as Optimise because it does the same thing with less effort.

Then each student classifies three real use cases with the sphere and ambition template (P07). If they hesitate between two spheres, they must choose a main one and justify it.

Self-check answers:

- Question 1: Optimise. It does the same thing with less effort.
- Question 2: no. It has one main sphere, to which investment and value are allocated, and at most one secondary sphere.
- Question 3: the board or its delegated committee, at the hypothesis gate (G2) and, if it scales, at the scale gate (G7).

Why it matters: the exercise shows that the same technology can be Optimise in one case and Transform in another. What decides the level is the effect on the business, not the technique.

TERMS ON THIS SLIDE

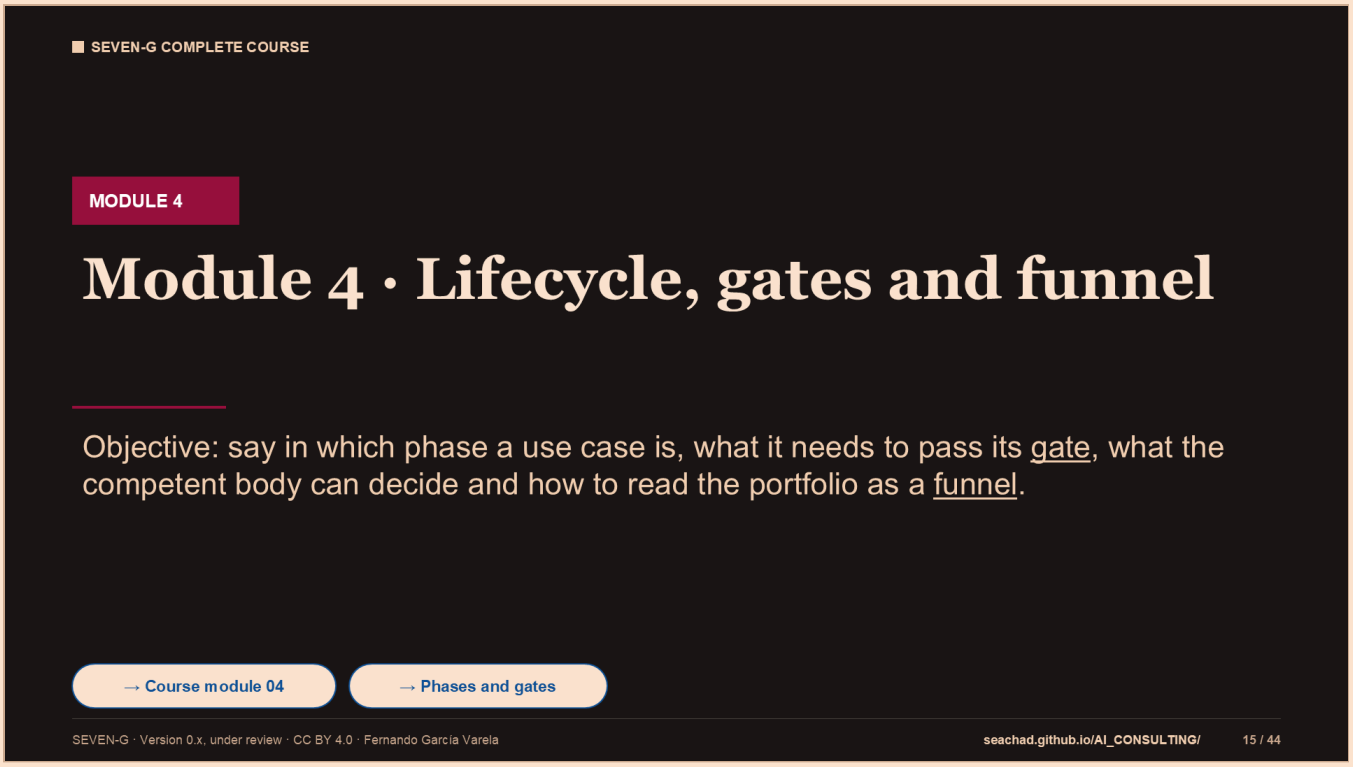
- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Transform**: The third ambition level: AI changes the business model, the product or the way of competing. Its value takes longer and is more uncertain, so it is funded in stages and approved by the board (at the hypothesis

gate and when scaling). The quick-return criteria of Optimise are not applied to it. The link opens its explanation in the spheres methodology. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#transform

- **Optimise**: The first ambition level: AI makes what the company already does cheaper or faster, without changing the process. Its value is measured in savings and time and must be shown early. It is the most frequent level and the one that transforms least. The link opens its explanation in the spheres methodology. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#optimise
- **Sphere and ambition classification** (P07): A template that places each use case in its primary sphere and at one ambition level (Optimise, Augment or Transform) using five questions. Ambition is proposed in phase 1, confirmed at the hypothesis gate and checked in production. It matters because each level is decided and measured with different criteria. The use case register includes the same classifier. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P07_SEVEN-G_Clasificacion_de_esfera_y_ambicion.html
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates

SOURCES AND LINKS

- **Course · Module 03 · Spheres and ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M03_SEVEN-G_Curso_Esferas_y_ambicion.html
- **Course module 03** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M03_SEVEN-G_Curso_Esferas_y_ambicion.html



Notes

This module explains the operational heart of the framework: how a use case moves forward.

There are eight phases, from 0 to 7, and a decision gate at the end of each one. In phase 6, operation, the gate is not a single event: it is a periodic continuity review (R6).

A gate is a formal moment in which a body with authority looks at the evidence and decides. Without verified evidence there is no decision. This is dual validation: the result (what the data or the tests show) and the documentation (that the evidence exists, is valid and is verified) are checked at the same time.

The module ends with the idea of the funnel: the AI portfolio is managed like a sales funnel. Stages, times, requirements and loss reasons are recorded. Unlike sales, the aim is not to convert more, but to decide well.

Why it matters: without gates, AI projects move forward by inertia. A pilot becomes production without anyone deciding it, and nobody knows when to stop it.

Question for the classroom: in your organisation, who can say «we stop this project», and with what criterion?

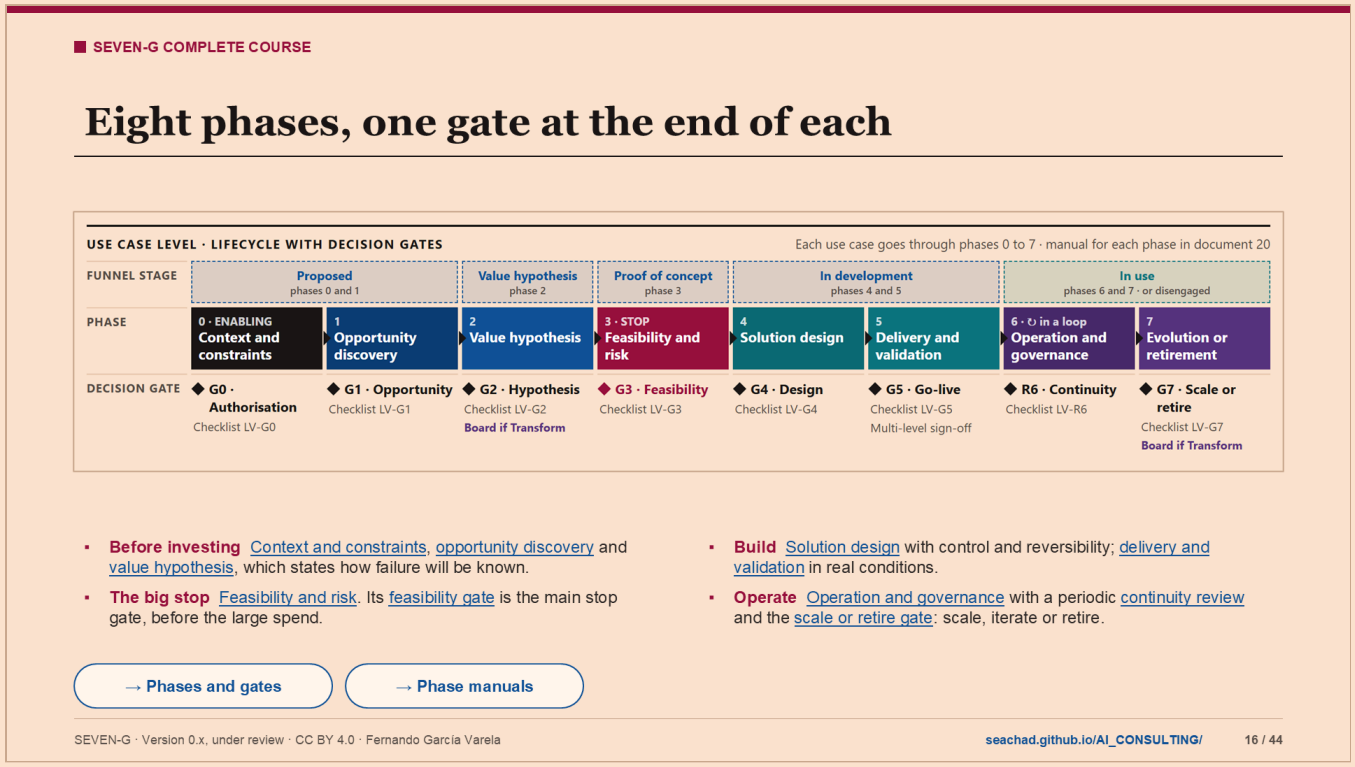
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- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates
- **Portfolio funnel**: A way of seeing all use cases as a sales funnel: mandatory stages (proposed, value hypothesis, test, development) until they reach use, with the use cases that did not pass each stage and why. It shows how much is stopped, where, and what is learned. The link opens the example funnel on the SEVEN-G entry page (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#embudo

SOURCES AND LINKS

SEVEN-G COMPLETE COURSE

- **Document 01 · Dual validation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-2-dual-validation
- **Document 00 · Lifecycle with decision gates** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates
- **Course module 04** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M04_SEVEN-G_Curso_Ciclo_de_vida_puertas_y_embudo.html
- **Phases and gates** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#6-1-summary-of-phases-and-gates



Notes

Go through the cycle with the question that each phase answers.

Phase 0, context and constraints: is the use case authorised, and within what framework? Gate G0, authorisation. Without an approved G0, the use case cannot spend budget or touch production data.

Phase 1, discovery: is there a business opportunity that needs AI? Gate G1, opportunity.

Phase 2, value hypothesis: what value do we expect, how will we measure it and how will we know it has failed? Gate G2, hypothesis.

Phase 3, feasibility and risk: is it technically, economically, regulatorily and organisationally feasible, with an acceptable risk? Gate G3, feasibility. It is the main stop gate.

Phase 4, design: how is it built with control, human oversight and reversibility? Gate G4, design. Phase 5, delivery and validation: does it work and add value in real conditions? Gate G5, go-live.

Phase 6, operation: does it keep working, adding value and staying under control? Periodic review R6. Phase 7: do we scale, iterate or retire? Gate G7, scale.

Why it matters: G3 comes before the large spend. Stopping there costs little; stopping after building costs a lot.

Question for the classroom: in which phase do the pilots of your company usually get stuck?

TERMS ON THIS SLIDE

- **Context and constraints** (fase 0): The enabling phase of the lifecycle. Before talking about value, the use case sets its context: sponsor, roles, governance intensity, inventory entry and limits (data, rules, budget). The authorisation gate (G0) closes it. It avoids starting a use case without an owner or rules. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-0-context-and-constraints

- **Opportunity discovery** (fase 1): The phase in which the business problem AI could solve is found and screened, placed in a sphere and given a proposed ambition level. It ends at the opportunity gate (G1). It ensures the portfolio fills with real problems, not solutions looking for a problem. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-1-opportunity-discovery
- **Value hypothesis** (fase 2): The phase in which the use case writes down how much value it expects, how it will measure it, against which baseline and with which stop criterion. It ends at the hypothesis gate (G2). It matters because, without a measurable hypothesis, nobody will ever know whether the use case worked. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-2-value-hypothesis
- **Feasibility and risk** (fase 3): The phase in which a limited test checks whether the use case is technically and economically feasible, it is classified under regulation and its risks are recorded. It ends at the feasibility gate (G3), the main stop gate before the big spend. It is where stopping in time saves the most money. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-3-feasibility-and-risk
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- **Solution design** (fase 4): The phase in which the full solution is designed: architecture, data, security, human oversight, rollback plan and adoption plan. It ends at the design gate (G4). It ensures controls are designed before building, not added later when they cost more. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-4-solution-design
- **Delivery and validation** (fase 5): The phase in which the solution is built, tested with real data, piloted and validated to show it delivers what was promised without breaking any constraint. It ends at the go-live gate (G5), with multi-level sign-off. Nothing reaches production without verified evidence. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-5-delivery-and-validation
- **Operation and governance** (fase 6): The phase in which the use case is in production. Its quality, drift, cost and incidents are monitored, and the value actually obtained is measured. Periodically it goes through a continuity review (R6). It matters because an AI system changes even if nobody touches it. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-6-operation-and-governance
- **Continuity review** (R6): A periodic review of a use case in production: quarterly in Enterprise, half-yearly in Lite and yearly in Express. It checks whether value is still arriving and whether there is drift, incidents or regulatory change. A deviation brings forward the scale or retire decision (G7). It is prepared with pack P65. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-7-r6-continuity-review
- **Scale or retire gate** (G7): The final gate of the lifecycle. With the value actually measured, it decides to scale the use case (which starts a new cycle), iterate it or retire it with an orderly plan. Scaling a Transform bet is approved by the board. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire

LINKS IN THE CHART

- Proposed · phases 0 and 1: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates
- Value hypothesis · phase 2: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates

- Proof of concept · phase 3: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates
- In development · phases 4 and 5: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates
- In use · phases 6 and 7 · or disengaged: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#4-3-use-case-level-lifecycle-with-decision-gates
- Phase 0 · Context and constraints: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-0-context-and-constraints
- Phase 1 · Opportunity discovery: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-1-opportunity-discovery
- Phase 2 · Value hypothesis: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-2-value-hypothesis
- Phase 3 · Feasibility and risk: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-3-feasibility-and-risk
- Phase 4 · Solution design: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-4-solution-design
- Phase 5 · Delivery and validation: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-5-delivery-and-validation
- Phase 6 · Operation and governance: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-6-operation-and-governance
- Phase 7 · Evolution or retirement: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-7-evolution-or-retirement
- G0 · Authorisation: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-1-g0-authorisation
- Checklist LV-G0: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g0-authorisation
- G1 · Opportunity: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-2-g1-opportunity
- Checklist LV-G1: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g1-opportunity
- G2 · Hypothesis: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-3-g2-hypothesis
- Checklist LV-G2: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g2-hypothesis
- G3 · Feasibility: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- Checklist LV-G3: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g3-feasibility
- G4 · Design: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-5-g4-design
- Checklist LV-G4: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g4-design
- G5 · Go-live: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live
- Checklist LV-G5: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g5-go-live

- Multi-level sign-off: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#multi-level-go-live-sign-off-g5
- R6 · Continuity: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-7-r6-continuity-review
- Checklist LV-R6: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-r6-continuity-review
- G7 · Scale or retire: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire
- Checklist LV-G7: https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/22_SEVEN-G_Listas_de_verificacion_por_gate.html#lv-g7-scale-or-retire

SOURCES AND LINKS

- **Document 01 · Summary of phases and gates** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#6-1-summary-of-phases-and-gates
- **Document 20 · Phase manuals** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html
- **Phases and gates** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#6-1-summary-of-phases-and-gates
- **Phase manuals** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html

SEVEN-G COMPLETE COURSE

What a gate can decide

Outcome	When it applies	Consequence
Proceed	All criteria are met and the evidence is verified.	It moves to the next phase.
Proceed with conditions	The essentials are met and non-critical points remain.	It moves on with a condition, deadline and owner. Never for security, law or human oversight.
Iterate	Results are insufficient, but the hypothesis is still plausible.	It repeats the phase. After two iterations, the higher body decides.
Pivot	The hypothesis fails but another is reasonable. Only at opportunity, hypothesis or feasibility.	It returns to the value hypothesis phase with a new hypothesis.
Stop	No plausible value, feasibility not shown, or the risk is unacceptable.	It closes, lessons are recorded and resources are released.
At the scale or retire gate: scale, iterate or retire	According to the value proven and the risk in production.	Scaling opens a new case from context and constraints; retiring is a planned exit.

A well-founded stop is a good outcome: avoiding a bad investment also creates value.

→ Possible outcomes → Decision rules

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Notes

A gate is not a yes or a no. It has five possible outcomes, and at the scale gate (G7) three more: scale, iterate or retire.

Proceed with conditions lets the use case move on with non-critical points pending, always with a condition, a deadline and an owner. It is never accepted for critical controls of security, legal compliance or human oversight. The criteria marked «Yes ◆» in document 21 never pass as a condition.

Iterate means repeating the work of the phase because the result does not reach the criterion, but the idea is still valid. Example: in phase 2, the measured saving is below the target, but a specific adjustment could close the gap. The limit is two iterations; the third decision is taken by the higher body. This avoids repeating a deep problem without end.

Pivot means returning to phase 2 with a different hypothesis. Stop means closing the use case and recording what was learnt.

Why it matters: a framework that can only say yes does not govern. A 100 % conversion rate at every gate is not a good sign: it shows soft gates or a portfolio that only admits safe bets.

Question for the classroom: why do you think many companies do not record the reasons why they stop a project?

TERMS ON THIS SLIDE

- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates
- **Human oversight** (P17): The design of who reviews, corrects or stops what an AI system does, when, and with what information. It is decided in the design phase with template P17 and is mandatory when the system decides

about people or acts. It prevents a situation where nobody can step in when AI gets it wrong. The link opens the template. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P17_SEVEN-G_Diseno_de_gobierno_y_supervision_humana.html

- **Value hypothesis** (fase 2): The phase in which the use case writes down how much value it expects, how it will measure it, against which baseline and with which stop criterion. It ends at the hypothesis gate (G2). It matters because, without a measurable hypothesis, nobody will ever know whether the use case worked. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-2-value-hypothesis
- **Scale or retire gate** (G7): The final gate of the lifecycle. With the value actually measured, it decides to scale the use case (which starts a new cycle), iterate it or retire it with an orderly plan. Scaling a Transform bet is approved by the board. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire
- **Context and constraints** (fase 0): The enabling phase of the lifecycle. Before talking about value, the use case sets its context: sponsor, roles, governance intensity, inventory entry and limits (data, rules, budget). The authorisation gate (G0) closes it. It avoids starting a use case without an owner or rules. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-0-context-and-constraints

SOURCES AND LINKS

- **Document 01 · Possible outcomes** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-3-possible-outcomes
- **Document 20 · Stop** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#11-3-stop
- **Template P29 · Gate decision record** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P29_SEVEN-G_Registro_de_decision_de_gate.html
- **Possible outcomes** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-3-possible-outcomes
- **Decision rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#7-4-decision-rules

SEVEN-G COMPLETE COURSE

Three intensities: the same path, different effort

Intensity belongs to each use case. It changes what is assessed at each gate, not which gates exist.

Aspect	Express	Lite	Enterprise
Criteria	Reduced list: every «Yes ◆» that applies and those that support the core.	Lite column of gate and audit criteria.	All of them.
Gates	Three decisions: entry, the feasibility gate on its own, and go-live.	Entry and go-live can be grouped; feasibility always separately.	All separately.
Verification	AI office.	AI office; AI auditor by sampling.	AI auditor at every gate.
Decision	Sponsor, with risk clearance from feasibility to the go-live gate.	Sponsor, with risk clearance from feasibility to the go-live gate.	AI committee; the board for Transform.
Continuity review	Annual.	Every six months.	Quarterly.

→ What changes between intensities | → Express intensity | → Enterprise criteria

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Notes

Intensity answers a frequent objection: «this is too much bureaucracy for a small project». That is why the framework has three intensities, decided for each use case in phase 0.

Enterprise: one criterion is enough. For example, high risk under the EU AI Act, decisions about people, direct exposure to customers, agents that act on their own (autonomy A2, supervised action, or A3, autonomous action) on third parties, money or systems, protected data, a critical function, a Transform bet or an investment above the company threshold.

Express: for small, internal and reversible use cases. It must be internal use, reversible in days, with autonomy A0 or A1 (AI informs or proposes and a person decides), without sensitive data and below the Express threshold. The risk function confirms eligibility, never the sponsor alone. Any trigger takes it out of Express.

Lite is the intermediate case.

What never changes: no phase or gate is skipped, and the feasibility gate (G3) is always decided separately. Fictitious example: the review of contract clauses (IA-2026-006) runs at Express intensity.

Why it matters: proportionality makes the framework applicable. Without it, teams avoid it.

Question for the classroom: why can the sponsor not confirm Express eligibility?

TERMS ON THIS SLIDE

- **Application intensity**: How much governance each use case needs: Express, Lite or Enterprise. It is decided per use case, not per company. The gates are always the same; what changes is how many criteria are assessed, which sessions are grouped and who verifies. It makes the framework proportionate: an internal assistant does not carry the same load as an agent deciding about customers. The link opens the definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#application-intensity-express-lite-and-enterprise

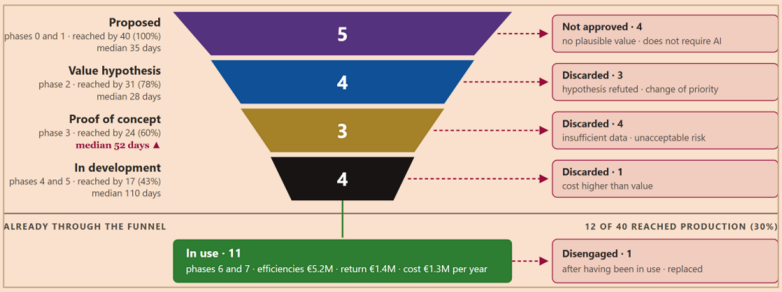
- **«Yes ◆» criterion** (Sí ◆): A mandatory gate criterion that is also a critical control for security, legal compliance or human oversight. It is never accepted as a condition: if it is not met, the use case does not advance, whoever decides. At Enterprise go-live it grounds the veto. The link opens the mandatory nature of the criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#2-2-mandatory-nature
- **SEVEN-G core** (N-01–N-14): The fourteen rules that always apply, in any company, intensity and size: inventory, register, gates without skipping, the feasibility gate on its own, separation of duties, dual validation, value hypothesis, risks, rollback, board thesis, measurement and nonconformities. They are never lowered. A company declares that it applies SEVEN-G against this core. The link opens its definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#14-1-the-seven-g-core
- **Gate and audit criteria** (documento 21): The list of criteria assessed at each gate, with their code, the evidence that substantiates them, whether they are mandatory and how they are verified; also the reduced Express list and when evidence the company already has can be used without redoing it. It is what verifiers and deciders use. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- **AI office**: The team that coordinates the method: it keeps the use case register and the inventory, prepares the gates and the board pack, and verifies the gates in Lite use cases. It neither decides nor builds the use cases. In a small company it can be one or two people. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-4-ai-office
- **AI auditor**: An independent person who verifies gate evidence in Enterprise-intensity use cases (in Lite the AI office does it). They do not build, sponsor or decide the use case they verify. They give the board assurance that figures and controls are not signed only by those who defend them. The link opens their independence and competences in document 38. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/38_SEVEN-G_Marco_de_auditoria_de_IA.html#independence-and-competences-of-the-ai-auditor
- **Use case sponsor**: The business person who asks for the use case, answers for its value and defends its budget. Without a sponsor, the use case does not pass the authorisation gate. They cannot verify or audit their own use case. It matters because AI without a business owner stays a pilot. The link opens the roles in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles
- **Go-live gate** (G5): The gate that authorises using the AI system with real users, customers or data. It requires validation and pilot passed, a tested rollback plan and multi-level sign-off (business, technology, risk). Nothing goes into production without this sign-off. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live

SOURCES AND LINKS

- **Document 01 · Enterprise criteria** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#9-2-enterprise-criteria
- **Document 01 · Express intensity** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#9-4-express-intensity
- **Document 21 · Criteria at Express intensity** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#2-5-criteria-at-express-intensity
- **What changes between intensities** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#9-3-what-changes-between-intensities
- **Express intensity** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#9-4-express-intensity
- **Enterprise criteria** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#9-2-enterprise-criteria

SEVEN-G COMPLETE COURSE

Exercise: the portfolio as a funnel



- **Stages** Proposed, value hypothesis, proof of concept, in development and in use: each stage groups phases of the use case lifecycle.
- **Exercise 1** In the use case register, open IA-2025-004. At which gate was it stopped, why, and what was learnt?
- **Exercise 2** Open IA-2025-005. It was not stopped: it was retired after being in use. Why?

→ Use case register → Where it departs from sales

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Notes

The funnel shows the portfolio like a sales funnel. Use cases in progress go through four stages: proposed, hypothesis, proof of concept and in development. Those that leave each stage are shown beside it, with their reason. At the end are those that reached use and those that were disengaged later.

Exercise (fifteen minutes), with the example register (T01). The data is fictitious.

- Click a bar of the funnel to filter the use cases of that phase. Which one has been longest in its phase?
- Open IA-2025-004, candidate screening. Answer: it was stopped at the feasibility gate (G3) for unacceptable risk, an age bias. The recorded lesson: assess the quality and bias of the historical data already in phase 1.
- Open IA-2025-005. Answer: it was retired because the corporate suite already included an equivalent assistant and its value barely covered the recurring cost.
- Find the two cases in the board dashboard (T17), in the funnel exit cards.

Self-check: what happens if a use case iterates twice at the same gate? Answer: the higher body takes the third decision.

Why it matters: the cases that leave teach as much as those that arrive. Recording the reason avoids repeating the mistake.

TERMS ON THIS SLIDE

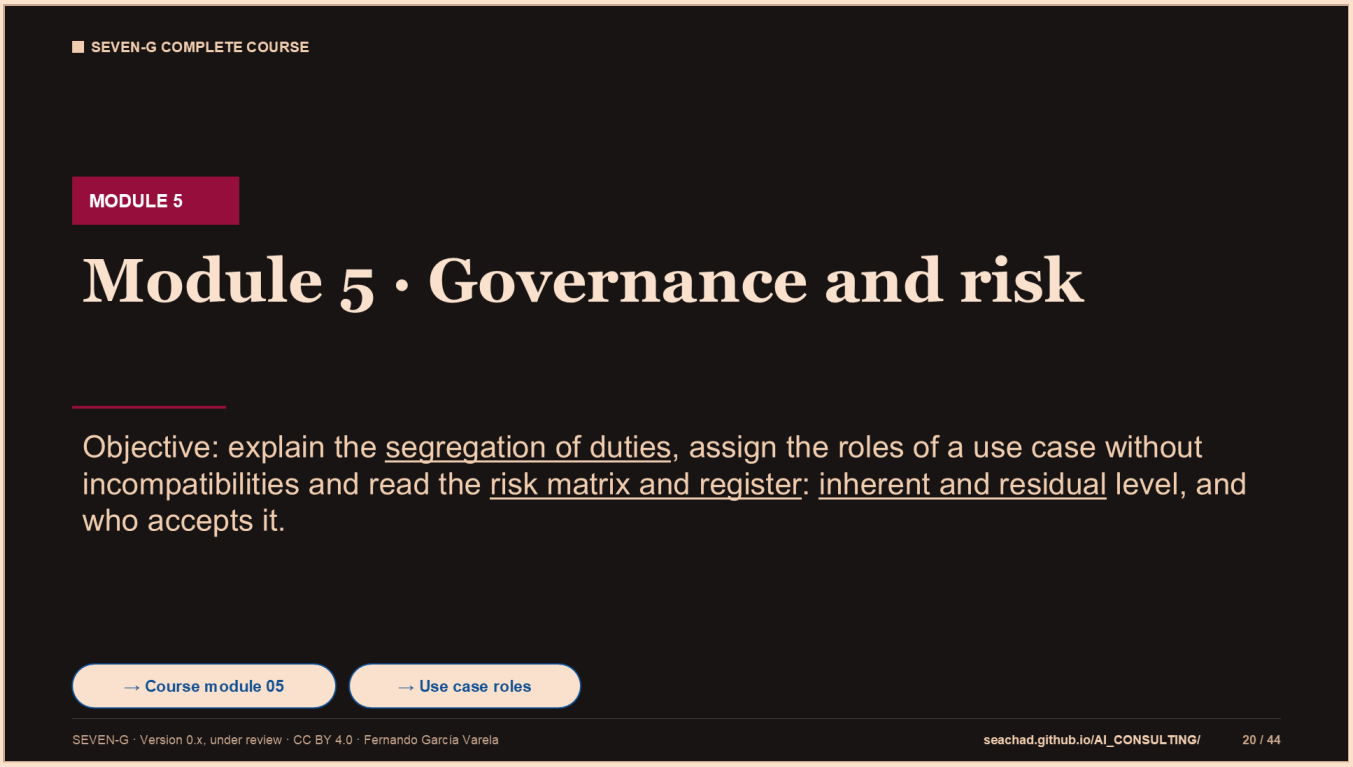
- **Portfolio funnel**: A way of seeing all use cases as a sales funnel: mandatory stages (proposed, value hypothesis, test, development) until they reach use, with the use cases that did not pass each stage and why. It shows how much is stopped, where, and what is learned. The link opens the example funnel on the SEVEN-G entry page (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#embudo
- **Use case lifecycle**: The path of each AI use case: eight phases (0 to 7), from context to evolution or retirement, with a decision gate at the end of each phase. No phase or gate is skipped; depending on intensity, some are grouped. The use case team and its sponsor go through it; the governance bodies decide. The link opens its

explanation in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#use-case-level-lifecycle

- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates

SOURCES AND LINKS

- **Course · Module 04 · Lifecycle, gates and funnel** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M04_SEVEN-G_Curso_Ciclo_de_vida_puertas_y_embudo.html
- **Document 04 · Where it departs from a sales funnel** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html#4-4-where-seven-g-departs-from-a-sales-funnel
- **Tool T17 · Example board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html
- **Where it departs from sales** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/04_SEVEN-G_Origenes_diferencias_y_por_que_es_abierto.html#4-4-where-seven-g-departs-from-a-sales-funnel



Notes

This module covers two guarantees of the framework: who decides and how risk is controlled.

The underlying idea is simple: nobody approves their own work. Whoever builds does not verify or decide on their own work. Risk clearance is independent of the team. The board approves the direction and the risk appetite.

No new bodies are needed. In a medium-sized company, the management committee with a monthly AI item, an AI Office of one person and an independent auditor for Enterprise use cases are enough. Document 30 explains the adaptation to small organisations.

Risk is measured with one rule: probability times impact, from 1 to 25, in four levels. It is assessed before the controls (inherent risk) and after them (residual risk). Each residual level has its own accepting body.

Why it matters: in many AI projects, the same team proposes, builds, measures and says that the risk is low. The board then receives figures it cannot believe.

Question for the classroom: in a project you know, who said that the risk was acceptable? Was that person part of the team?

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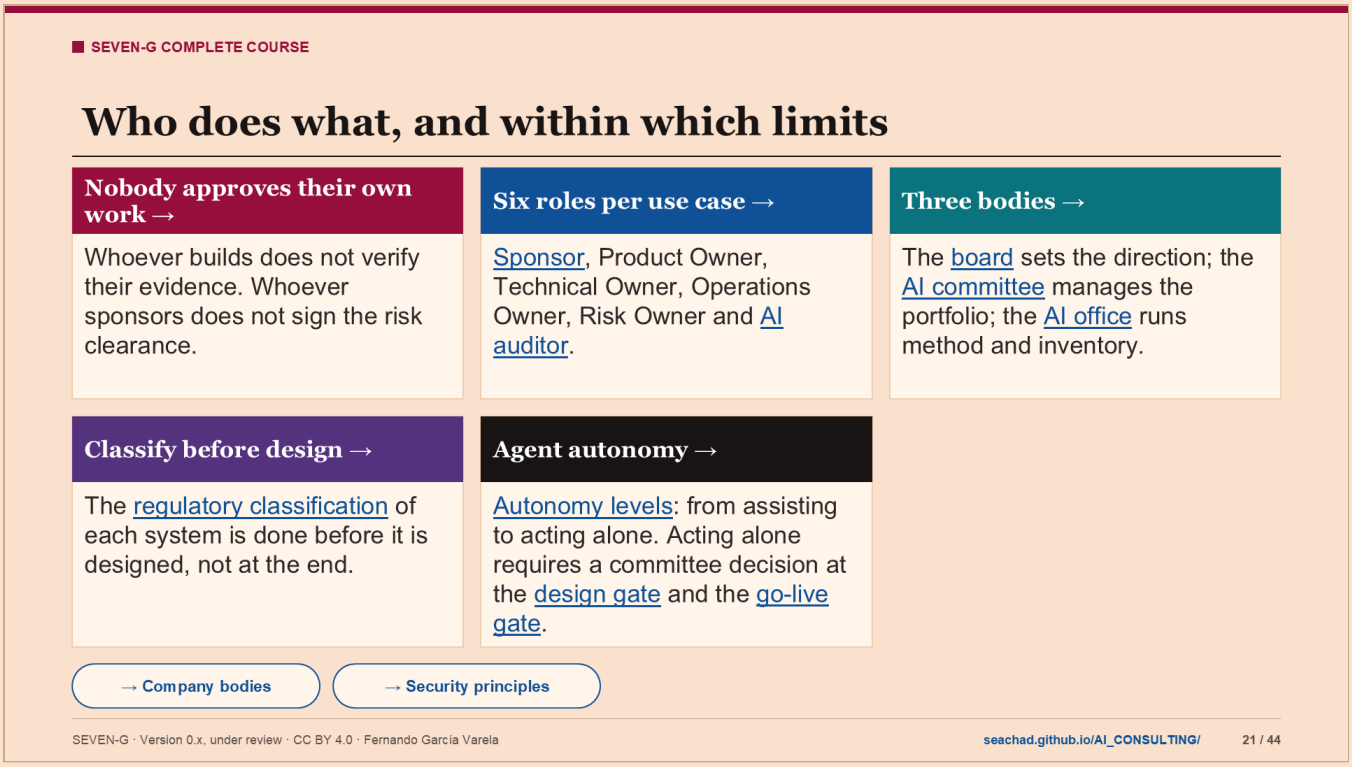
- **Segregation of duties**: The principle whereby whoever builds does not control and nobody approves their own work: whoever provides the evidence neither verifies it nor decides, and incompatible roles do not fall to the same person. It is one of the core rules that are never lowered. It assures the board that a figure or a control is not signed only by whoever defends it. The link opens the roles and incompatibilities in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#roles-bodies-and-segregation-of-duties
- **Risk matrix and register** (T06): A likelihood-by-impact matrix (5 × 5) and register of each use case's risks: inherent and residual risk, controls and their effectiveness, response, contingency and who accepts the risk. It is mandatory from phase 3. It is filled in with template P12 or in the «Risks» view of the use case register, which also

downloads an Excel file for the use case with proposed mitigation plans. Fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html

- **Inherent and residual risk**: Inherent risk is the risk a use case has without controls; residual risk is what remains after applying them. Both are measured as likelihood by impact on a 5 × 5 matrix. The residual level decides who must accept the risk: only the board accepts a Critical one. The link opens the explanation in document 33. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#inherent-risk-controls-and-residual-risk

SOURCES AND LINKS

- **Document 01 · Incompatibilities** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-2-incompatibilities
- **Document 30 · Adaptation to small organisations** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#adaptation-to-small-organisations
- **Course module 05** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M05_SEVEN-G_Curso_Gobierno_y_riesgo.html
- **Use case roles** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles



Notes

Go through the five cards as the rules of governance.

Nobody approves their own work: the AI Risk Owner and the AI Auditor are incompatible with the roles that build. At Lite intensity, the sponsor can also be product, technical or operations owner; never risk owner or auditor.

Six roles per use case: the sponsor answers for the benefit; the product owner, for use; the technical owner, for construction; the operations owner, for the system in production; the risk owner gives clearance; the auditor verifies.

Three bodies: the board approves the thesis, the ambition, the risk appetite and the Transform bets. The AI Committee manages the portfolio and decides the Enterprise gates. The AI Office keeps the inventory and the method and verifies the gates of Lite use cases.

Classify before design: knowing whether a system is high-risk under the EU AI Act changes what has to be built.

Agents: autonomy levels go from A0 (the person decides and acts) to A3 (the system acts alone within strict limits and can always be stopped). A principle of document 35: the model is not a security boundary.

Why it matters: segregating duties is what makes figures and signatures credible.

TERMS ON THIS SLIDE

- **Use case sponsor**: The business person who asks for the use case, answers for its value and defends its budget. Without a sponsor, the use case does not pass the authorisation gate. They cannot verify or audit their own use case. It matters because AI without a business owner stays a pilot. The link opens the roles in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles
- **AI auditor**: An independent person who verifies gate evidence in Enterprise-intensity use cases (in Lite the AI office does it). They do not build, sponsor or decide the use case they verify. They give the board assurance that figures and controls are not signed only by those who defend them. The link opens their independence and

competences in document 38. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/38_SEVEN-G_Marco_de_auditoria_de_IA.html#independence-and-competences-of-the-ai-auditor

- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **AI committee**: A management body that decides the portfolio and the gates at its level, allocates budget and escalates to the board what belongs there. It brings together business, technology, finance and risk, and follows rules of procedure (P38). It matters because it turns scattered decisions into a single portfolio. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-3-ai-committee
- **AI office**: The team that coordinates the method: it keeps the use case register and the inventory, prepares the gates and the board pack, and verifies the gates in Lite use cases. It neither decides nor builds the use cases. In a small company it can be one or two people. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-4-ai-office
- **Regulatory classification** (P11): The determination, with qualified legal judgement, of each AI system's category under regulation (prohibited, high risk, transparency obligations, minimal risk or out of scope) and of the company's role. It is provisional in phase 0 and final in phase 3. It decides which assessments and obligations apply. It is documented with template P11; the link opens the classification tree in document 32. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/32_SEVEN-G_Inventario_y_clasificacion_regulatoria.html#regulatory-classification-tree
- **Autonomy levels** (A0–A3): A scale of how much an AI system acts on its own. A0: only informs; A1: proposes and a person validates each action; A2: acts within limits and a person supervises; A3: acts alone in a defined scope. The more autonomy, the more controls: an A2 or A3 agent with effects on third parties is Enterprise. The link opens the scale in document 35. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/35_SEVEN-G_Seguridad_de_IA_y_agentes.html#autonomy-levels
- **Design gate** (G4): The gate that approves the full design before building: architecture, data, security, human oversight, rollback and adoption. It checks that the controls are planned from the start. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-5-g4-design
- **Go-live gate** (G5): The gate that authorises using the AI system with real users, customers or data. It requires validation and pilot passed, a tested rollback plan and multi-level sign-off (business, technology, risk). Nothing goes into production without this sign-off. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live

SOURCES AND LINKS

- **Document 35 · Autonomy levels A0 to A3** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/35_SEVEN-G_Seguridad_de_IA_y_agentes.html#5-1-definition
- **Document 32 · Inventory and regulatory classification** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/32_SEVEN-G_Inventario_y_clasificacion_regulatoria.html
- **Regulation (EU) 2024/1689 on Artificial Intelligence** https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- **OWASP · Top 10 for Agentic Applications 2026** https://genai.owasp.org/resource/owasp-top-10-for-agentic-applications-for-2026/
- **Company bodies** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-3-company-bodies
- **Security principles** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/35_SEVEN-G_Seguridad_de_IA_y_agentes.html#security-principles

SEVEN-G COMPLETE COURSE

Risk = probability × impact, and who accepts it

5 × 5 matrix: the score goes from 1 to 25. The inherent and residual risk is assessed: before and after the controls.

Residual level	Score	Who accepts it	Condition
Low	1 to 4	AI Product Owner.	With a record.
Medium	5 to 9	Use case sponsor.	With clearance from the AI risk owner.
High	10 to 15	AI committee.	Treatment plan, indicators and validity until the next review.
Critical	16 to 25	Not accepted. By exception, only the board.	Without that approval, it blocks the feasibility gate and the go-live gate.

Accepting a risk does not exempt from the law: a legal breach is not accepted; it is corrected.

→ Risk level and 5 × 5 matrix → Who accepts residual risk

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Notes

Risk is scored with one scale for the whole company: probability from 1 to 5 times impact from 1 to 5. The result goes from 1 to 25 and falls into four levels: Low (1 to 4), Medium (5 to 9), High (10 to 15) and Critical (16 to 25).

Each risk is assessed twice. Inherent risk is the risk without controls. Residual risk is what remains with the controls applied. The difference between the two must be credible: it depends on the real effectiveness of the controls.

Each residual level has a body that accepts it. The higher the risk, the higher the body. A Critical residual risk is not accepted; by exception, only the board or its board committee, within the appetite approved in the direction decision (C2). Without that approval, it blocks the feasibility gate (G3) and the go-live gate (G5).

Two more rules: no one accepts a risk of a use case they are building, and acceptance expires when the system, the model, the supplier or the autonomy changes.

Why it matters: one scale lets the company compare risks between cases and take to the board only what belongs there.

Question for the classroom: why is Critical risk not accepted by default?

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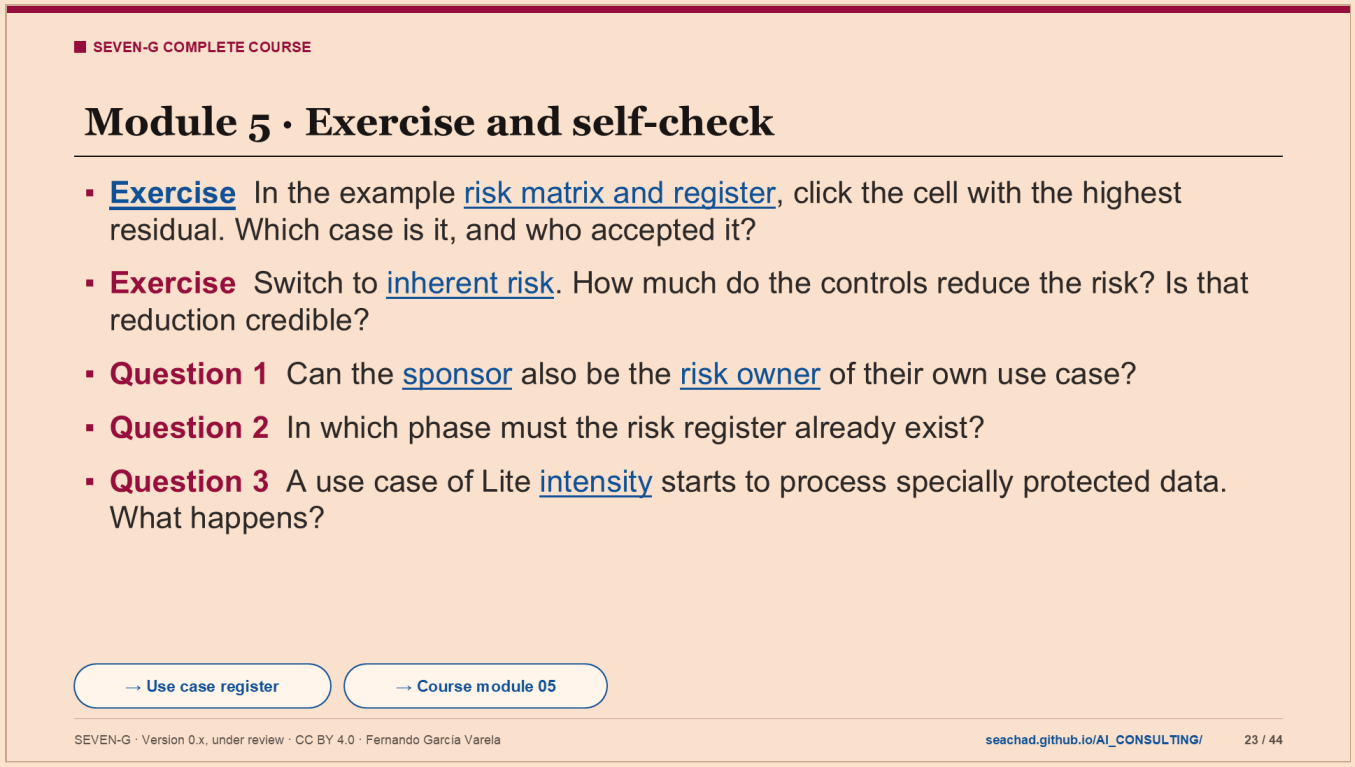
- **Inherent and residual risk**: Inherent risk is the risk a use case has without controls; residual risk is what remains after applying them. Both are measured as likelihood by impact on a 5 × 5 matrix. The residual level decides who must accept the risk: only the board accepts a Critical one. The link opens the explanation in document 33. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#inherent-risk-controls-and-residual-risk
- **Use case sponsor**: The business person who asks for the use case, answers for its value and defends its budget. Without a sponsor, the use case does not pass the authorisation gate. They cannot verify or audit their own use

case. It matters because AI without a business owner stays a pilot. The link opens the roles in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles

- **AI risk owner**: A second-line function that reviews the risks, regulatory classification and suppliers of each use case, and confirms the intensity. It is independent from whoever builds: it cannot verify what it has prepared. It prevents the team that wants to launch the use case from assessing its own risks alone. The link opens the role incompatibilities in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-2-incompatibilities
- **AI committee**: A management body that decides the portfolio and the gates at its level, allocates budget and escalates to the board what belongs there. It brings together business, technology, finance and risk, and follows rules of procedure (P38). It matters because it turns scattered decisions into a single portfolio. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-3-ai-committee
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- **Go-live gate** (G5): The gate that authorises using the AI system with real users, customers or data. It requires validation and pilot passed, a tested rollback plan and multi-level sign-off (business, technology, risk). Nothing goes into production without this sign-off. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live

SOURCES AND LINKS

- **Document 33 · Risk level and 5 × 5 matrix** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#4-3-risk-level-and-5-5-matrix
- **Document 33 · Who accepts residual risk** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#7-1-who-accepts-residual-risk
- **Template P12 · Risk matrix and register** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P12_SEVEN-G_Matriz_y_registro_de_riesgos.html
- **NIST AI RMF 1.0** https://www.nist.gov/publications/artificial-intelligence-risk-management-framework-ai-rmf-10
- **Risk level and 5 × 5 matrix** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#4-3-risk-level-and-5-5-matrix
- **Who accepts residual risk** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html#7-1-who-accepts-residual-risk



Notes

Exercise (fifteen minutes). Open the example register (T01) and its risk view, the risk matrix and register (T06). Remember that the risks are fictitious.

First, click the cell of the matrix with the highest residual risk. The students must find the use case, who accepted the risk and whether it has a contingency plan. If a High or Critical risk has no contingency plan, the tool flags it as an observation.

Then switch the matrix to inherent risk. The question is whether the reduction that the team attributes to the controls is credible. A large reduction with weak controls is a warning sign.

Self-check answers:

- Question 1: no. The roles are incompatible.
- Question 2: in phase 3. Having the register is a criterion of the feasibility gate (G3).
- Question 3: it moves to Enterprise intensity. Intensity is reviewed at the feasibility gate (G3) and at each continuity review (R6), and one criterion is enough.

Why it matters: the risk register is not a formality. It is what lets the committee and the board know which risk they are really accepting.

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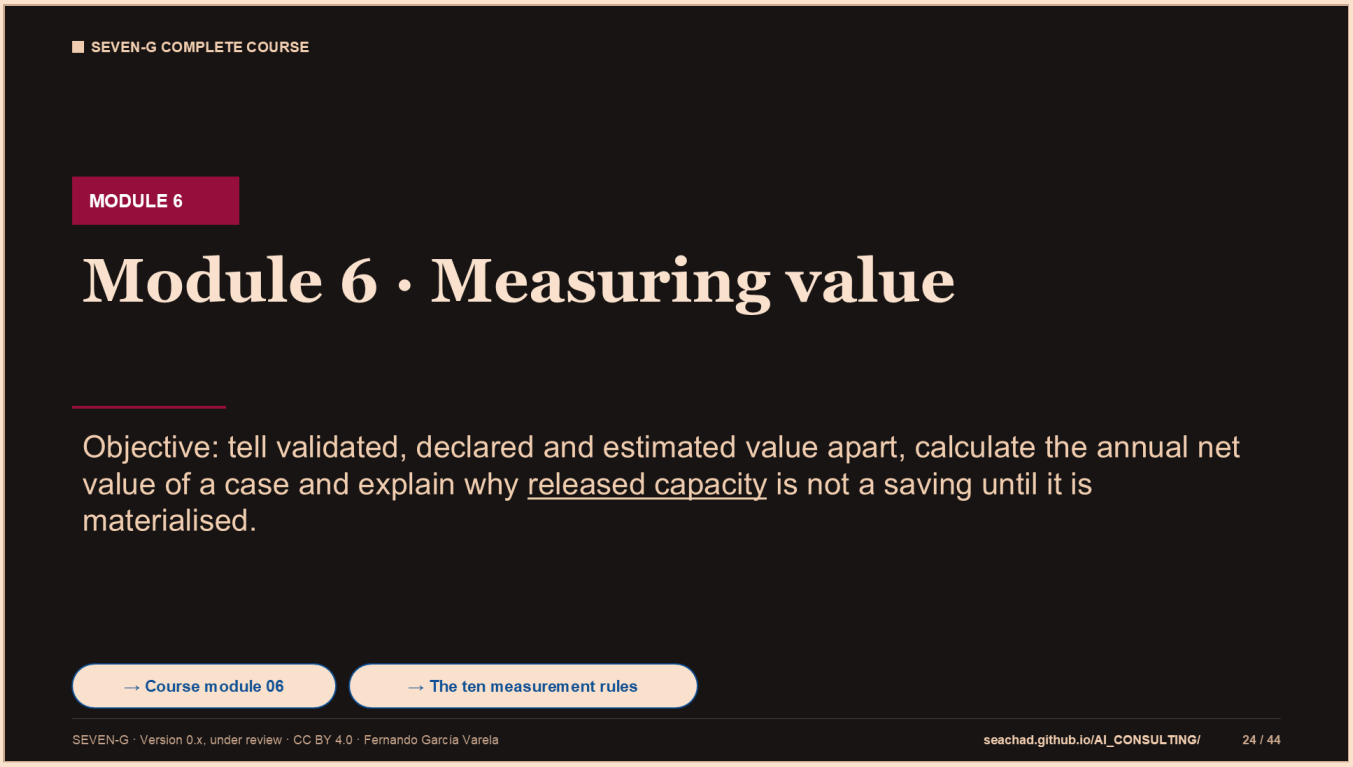
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- **Application intensity**: How much governance each use case needs: Express, Lite or Enterprise. It is decided per use case, not per company. The gates are always the same; what changes is how many criteria are assessed, which sessions are grouped and who verifies. It makes the framework proportionate: an internal assistant does not carry the same load as an agent deciding about customers. The link opens the definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#application-intensity-express-lite-and-enterprise

SOURCES AND LINKS

- **Course · Module 05 · Governance and risk** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M05_SEVEN-G_Curso_Gobierno_y_riesgo.html
- **Document 33 · AI risk methodology** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/33_SEVEN-G_Metodologia_de_riesgos_de_IA.html
- **Course module 05** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M05_SEVEN-G_Curso_Gobierno_y_riesgo.html



Notes

This module answers the board question «are my use cases profitable?».

The central idea: every amount has a formula and a status. There are three statuses. Validated: an independent third party, such as management control or audit, has checked it with real data. Declared: the area that benefits states it. Estimated: it is a forecast. Only validated value reaches the portfolio net that the board sees.

The formula of annual net value is: efficiencies plus return minus recurring cost. Without the full recurring cost (licences, model consumption, operation, people), the figure is not valid.

The only economic feasibility criterion is a net present value (NPV) equal to or greater than zero, with the horizon and the rate set by the board. Return on investment and payback period inform, but they do not decide.

Why it matters: AI savings figures are often declared and never checked. A board that decides with them decides blind.

Question for the classroom: if a supplier promises 30 % more productivity, in which status is that figure?

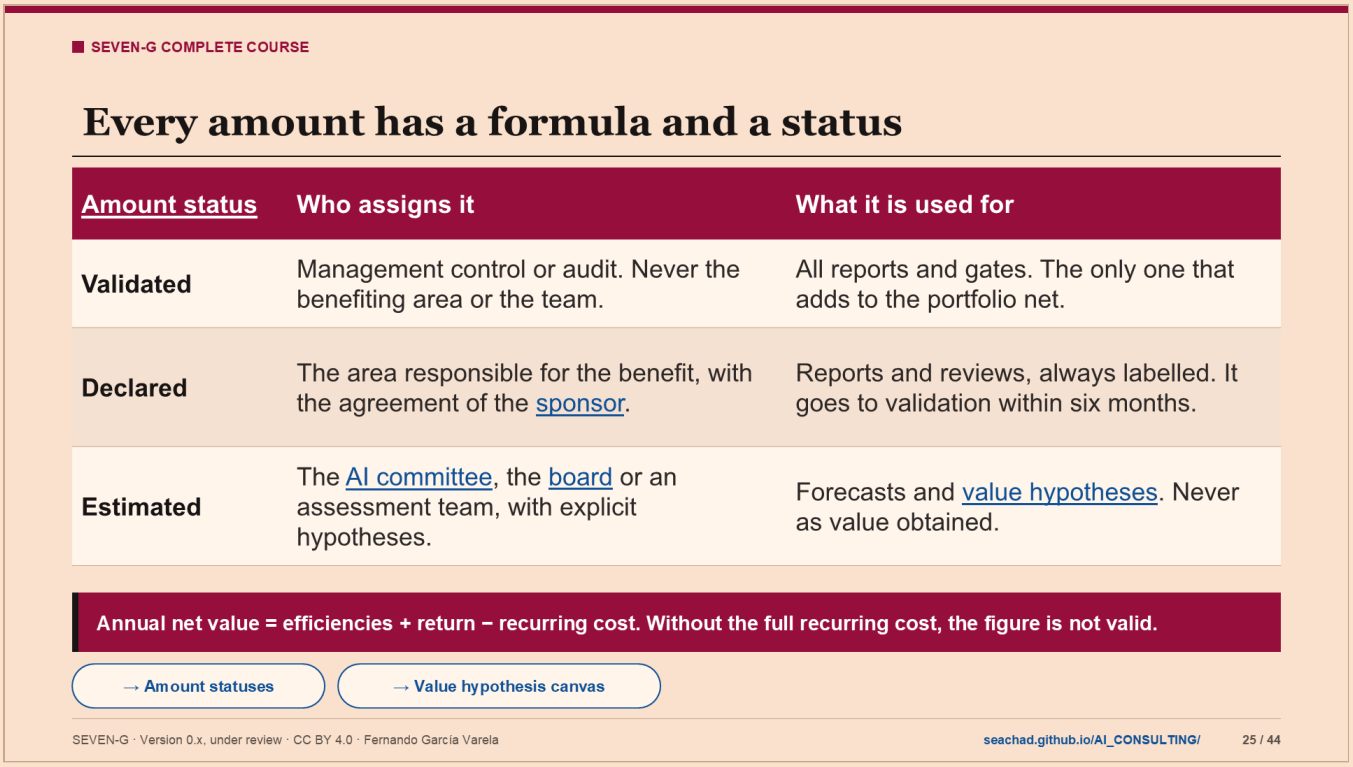
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- **Released capacity**: Working hours that AI saves. They do not count as value until they are materialised (lower real cost) or reassigned to another activity that creates measurable value. It avoids the most common mistake: adding up «hours saved» that nobody turns into money. The link opens the rule in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#3-3-rule-3-released-capacity-is-not-counted-until-it-is-materialised-or-reassigned

SOURCES AND LINKS

- **Document 40 · Amount statuses** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#amount-statuses

- **Document 40 · Feasibility criterion rule** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#8-3-rule
- **Course module 06** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M06_SEVEN-G_Curso_Medir_el_valor.html
- **The ten measurement rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#value-measurement-rules



Notes

Explain the three statuses with a fictitious example. An area says that its assistant saves 200,000 euros a year. While nobody checks it, it is declared value. If the AI Office makes its own calculation to test it, that calculation is estimated. Only when management control checks, with real data and a closed period, that the avoided cost exists, does it become validated.

Validated value expires after twelve months, or earlier if the model, the process or the volume changes. Declared value must go to validation within six months; otherwise it is shown with an alert.

Document 40 explains the errors that inflate value. Almost all of them are familiar: counting hours as money, forgetting the recurring cost or attributing to AI an improvement that had other causes.

Before anything is built, the value hypothesis (P08) and the baseline (P09) fix three data points: the baseline, the attribution method and the stop criteria. Without them, nothing can be measured later.

Why it matters: the status tells the board how far it can believe each figure. Without a status, an optimistic forecast is presented as a result.

Question for the classroom: which part of the AI value that your company reports is validated?

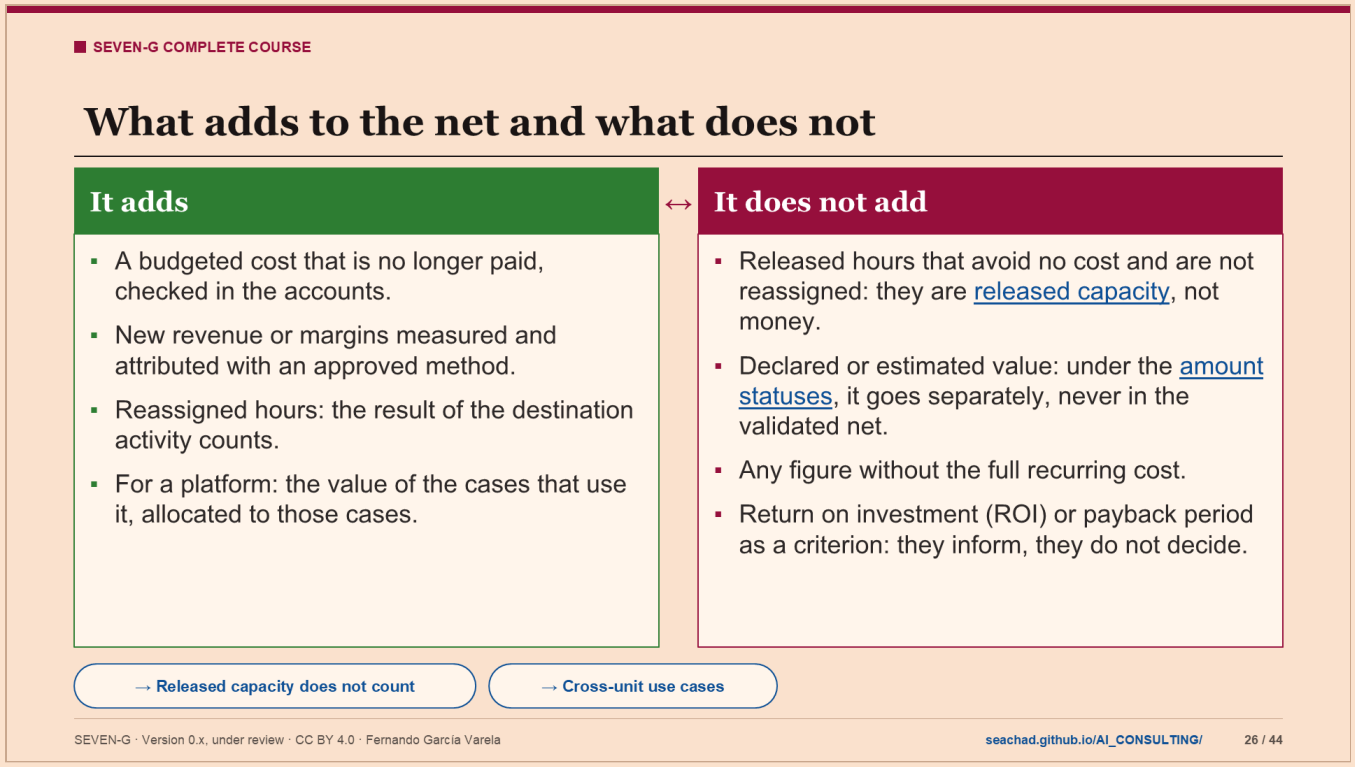
TERMS ON THIS SLIDE

- **Amount statuses**: Every value figure carries its status: estimated (a forecast), declared (the business says so) or validated (management control has checked it). Only validated value counts as realised before the board, and «no data» is never zero. So the board knows how much to trust each figure. The link opens the statuses in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#amount-statuses
- **Use case sponsor**: The business person who asks for the use case, answers for its value and defends its budget. Without a sponsor, the use case does not pass the authorisation gate. They cannot verify or audit their own use case. It matters because AI without a business owner stays a pilot. The link opens the roles in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles

- **AI committee**: A management body that decides the portfolio and the gates at its level, allocates budget and escalates to the board what belongs there. It brings together business, technology, finance and risk, and follows rules of procedure (P38). It matters because it turns scattered decisions into a single portfolio. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-3-ai-committee
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **Value hypothesis** (fase 2): The phase in which the use case writes down how much value it expects, how it will measure it, against which baseline and with which stop criterion. It ends at the hypothesis gate (G2). It matters because, without a measurable hypothesis, nobody will ever know whether the use case worked. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-2-value-hypothesis

SOURCES AND LINKS

- **Document 40 · Common errors that inflate value** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#common-errors-that-inflate-value
- **Template P08 · Value hypothesis canvas** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P08_SEVEN-G_Lienzo_de_hipotesis_de_valor.html
- **Value hypothesis canvas** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P08_SEVEN-G_Lienzo_de_hipotesis_de_valor.html



Notes

This comparison sums up the rules that are most discussed in the classroom.

Released capacity is not counted until it is materialised or reassigned. Example: an assistant saves a team 4,000 hours a year. If the team is the same and costs the same, there is no saving. There is a saving if a budgeted cost is avoided, for example a planned hire that is no longer made. If the hours go to another activity, the result of that activity counts, not the hours.

Cross-unit use cases, such as a generative assistant in the office suite for several units, are a single use case. They are measured by unit with a ladder: cost, adoption, declared released capacity and materialised value. The portfolio net is presented with and without these use cases and the platforms.

An enabling platform has no value of its own: its value is allocated to the cases that use it.

Why it matters: these rules avoid counting the same value twice and confusing theoretical efficiency with real saving.

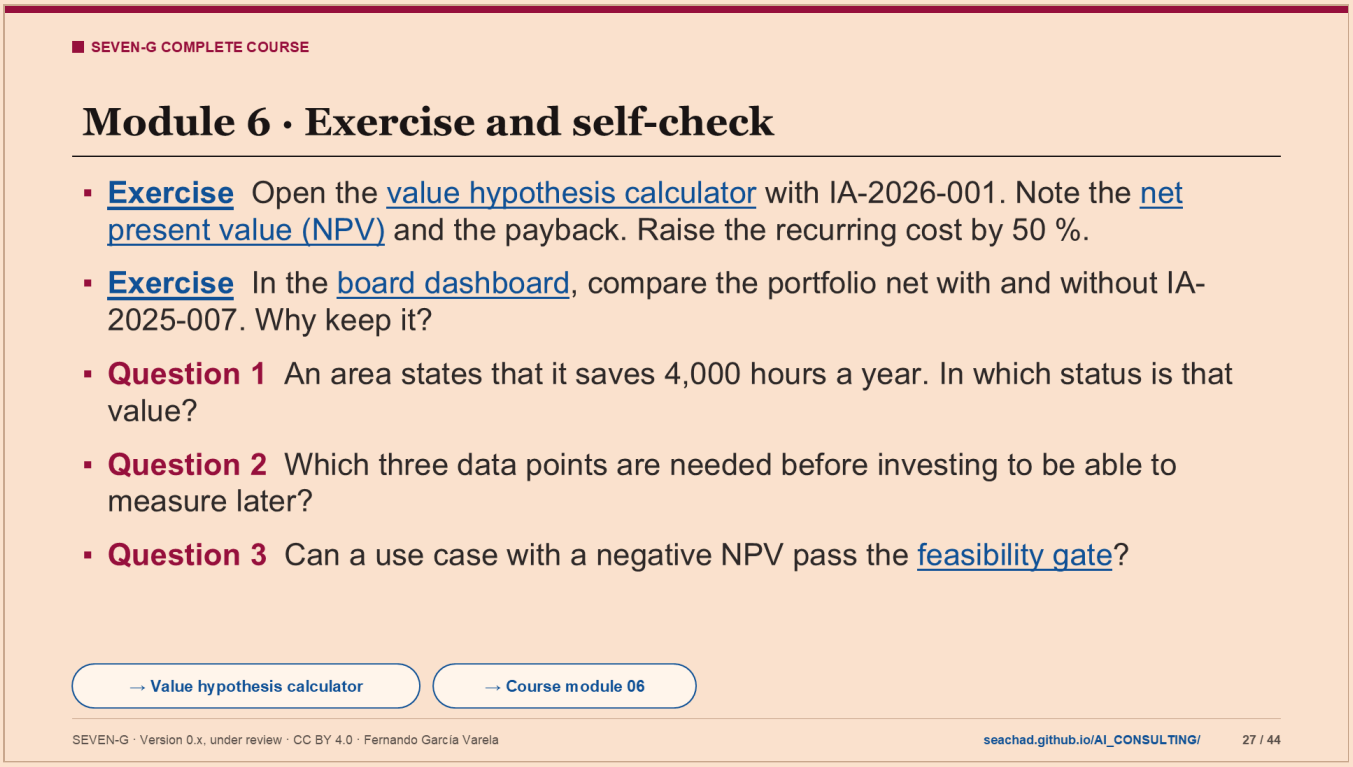
Question for the classroom: which of the four rules on the right is broken most often in company reports?

TERMS ON THIS SLIDE

- **Released capacity**: Working hours that AI saves. They do not count as value until they are materialised (lower real cost) or reassigned to another activity that creates measurable value. It avoids the most common mistake: adding up «hours saved» that nobody turns into money. The link opens the rule in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#3-3-rule-3-released-capacity-is-not-counted-until-it-is-materialised-or-reassigned
- **Amount statuses**: Every value figure carries its status: estimated (a forecast), declared (the business says so) or validated (management control has checked it). Only validated value counts as realised before the board, and «no data» is never zero. So the board knows how much to trust each figure. The link opens the statuses in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#amount-statuses

SOURCES AND LINKS

- **Document 40 · Cross-unit use cases and platforms** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#7-2-cross-unit-use-cases-and-enabling-platforms
- **Document 00 · Value measurement rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#value-measurement-rules
- **Cross-unit use cases** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#7-2-cross-unit-use-cases-and-enabling-platforms



Notes

Exercise (twenty minutes), with fictitious data.

First, the value calculator (T11) with its example case, IA-2026-001, a bank reconciliation agent. The students note the NPV, the return on investment and the payback period. Then they raise the recurring cost by 50 % and see what happens to the NPV. The lesson: recurring cost is the variable most often forgotten and the one that changes the decision most.

Second, the example board dashboard (T17). Use case IA-2025-007 is a generative assistant in the office suite for the whole company. Its annual net is negative, about −440,000 fictitious euros. It can make sense to keep it if adoption rises and value is materialised by unit; that is why the dashboard shows the portfolio net with and without cross-unit use cases.

Self-check answers:

- Question 1: declared. It is also released capacity: it is not counted as a saving until it is materialised.
- Question 2: the baseline, the attribution method and the stop criteria.
- Question 3: no. The economic criterion is single, NPV equal to or greater than zero. What changes with the ambition is the horizon used to calculate it, which the board sets.

Why it matters: the exercise shows how a figure changes sign with only one assumption.

TERMS ON THIS SLIDE

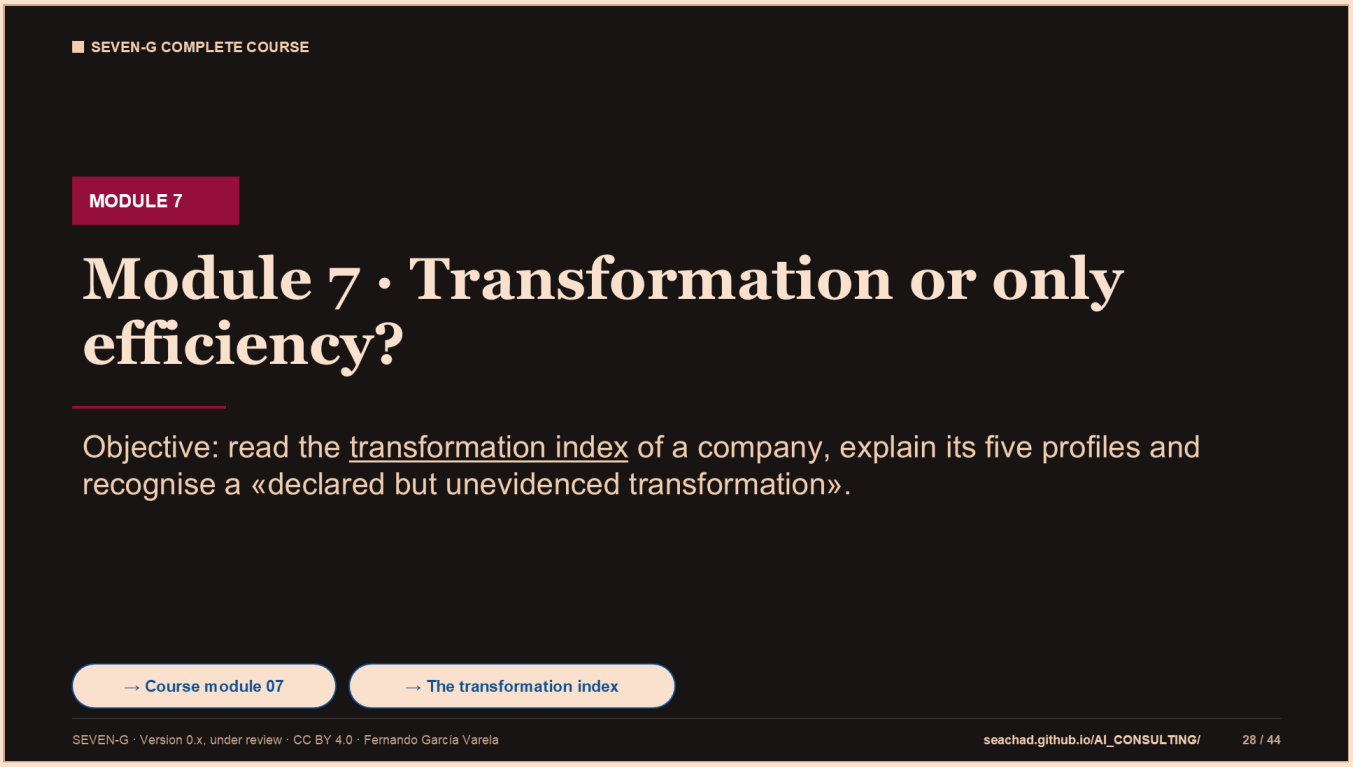
- **Value hypothesis calculator** (T11): A tool that turns a value hypothesis into figures: baseline, efficiencies and return with a formula, full cost, annual net value and net present value with the horizon and rate the company sets. It includes the cost calculator per use case. It helps prepare the hypothesis and feasibility gates with defensible numbers. The link opens an example with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T11_calculadora_valor/calculadora.html
- **Net present value (NPV)**: The sum of a use case's cash flows over the horizon the company sets, discounted at its rate. In SEVEN-G it is the only economic feasibility criterion: the use case is viable if the NPV is not negative;

ROI and payback period are for information only. The link opens the rule in document 40. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#horizon-discounting-and-single-economic-criterion

- **Board dashboard** (T17): A supervision dashboard generated from the use case register. It shows the board cost, validated versus declared value, the funnel, risks, incidents, adoption, maturity and what holds back scaling, with a «?» help on each card. It is for deciding, not just for informing. The link opens the example dashboard with fictitious data; the interface is in Spanish and the help texts are in both languages. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility

SOURCES AND LINKS

- **Course · Module 06 · Measuring value** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M06_SEVEN-G_Curso_Medir_el_valor.html
- **Tool T17 · Example board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html
- **Document 40 · Feasibility criterion rule** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/40_SEVEN-G_Reglas_de_medicion_del_valor.html#8-3-rule
- **Course module 06** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M06_SEVEN-G_Curso_Medir_el_valor.html



Notes

This module answers the board question «am I transforming or only becoming more efficient?».

Both are legitimate. A company can decide to use AI only to become more efficient, and that is fine. The problem is twofold: calling a portfolio of automations a transformation, or blocking a transformation with cost-cutting criteria.

The transformation index does not give opinions: it looks at evidence. It has three baseline conditions and eight observable signals, scored from 0 to 3. The signals look at where the investment goes, where the value comes from, what capacity is reassigned, which processes are redesigned, which revenue depends on AI, what reaches production and what the board decides.

An important rule: «no data» is not evidence. It scores zero and is shown as no data. The coverage of the index is already part of the diagnosis.

The index is calculated in the initial diagnosis (C1) and in each annual review (C5).

Why it matters: many companies announce a transformation with AI. The index lets the board check whether the facts support it.

Question for the classroom: think of a company that says it is transforming with AI. What evidence would prove it?

TERMS ON THIS SLIDE

- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index

SOURCES AND LINKS

- **Document 12 · The eight signals** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#4-4-the-eight-signals
- **Document 12 · Baseline conditions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#4-3-baseline-conditions
- **Course module 07** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M07_SEVEN-G_Curso_Transformacion_o_eficiencia.html
- **The transformation index** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#5-3-company-level-transformation-index

SEVEN-G COMPLETE COURSE

Five profiles, assigned with rules

The signals of the transformation index give a profile; then it is compared with what the company declares.

Profile	When it is assigned
Scattered exploration	None of the conditions of the following profiles is met.
Tactical efficiency	At least one use case in production with measured value, in any status.
Efficiency at scale	Governed portfolio, validated value, scale in production and materialised capacity.
Transformation under way	Baseline met, the board decides, cases reach production, there is return or deep change.
Declared but unevidenced transformation	The company declares transformation, but the signals show another profile.

→ Assignment rules → Transformation index calculator

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Notes

The profile is assigned in two steps, with written rules.

Step 1, evidenced profile. The conditions are checked in order and the first profile whose conditions are all met is assigned. Transformation under way requires a lot: the baseline conditions (governed portfolio and validated value), a board decision, cases that reach production, return or AI-enabled revenue, a redesign of processes or of the operating model, and a sum of signals of 14 or more. If not, efficiency at scale, which requires a governed portfolio, validated value, at least five cases in production and materialised capacity. If not, tactical efficiency: at least one case in production with measured value. If not, scattered exploration.

Step 2, comparison with the declaration. If the company declares that it is transforming and the evidenced profile is not transformation under way, the assigned profile is declared but unevidenced transformation. The evidenced profile is shown as the underlying profile.

Why it matters: the fifth profile is not a punishment. It is an alert for the board: the announced ambition is not visible in the data.

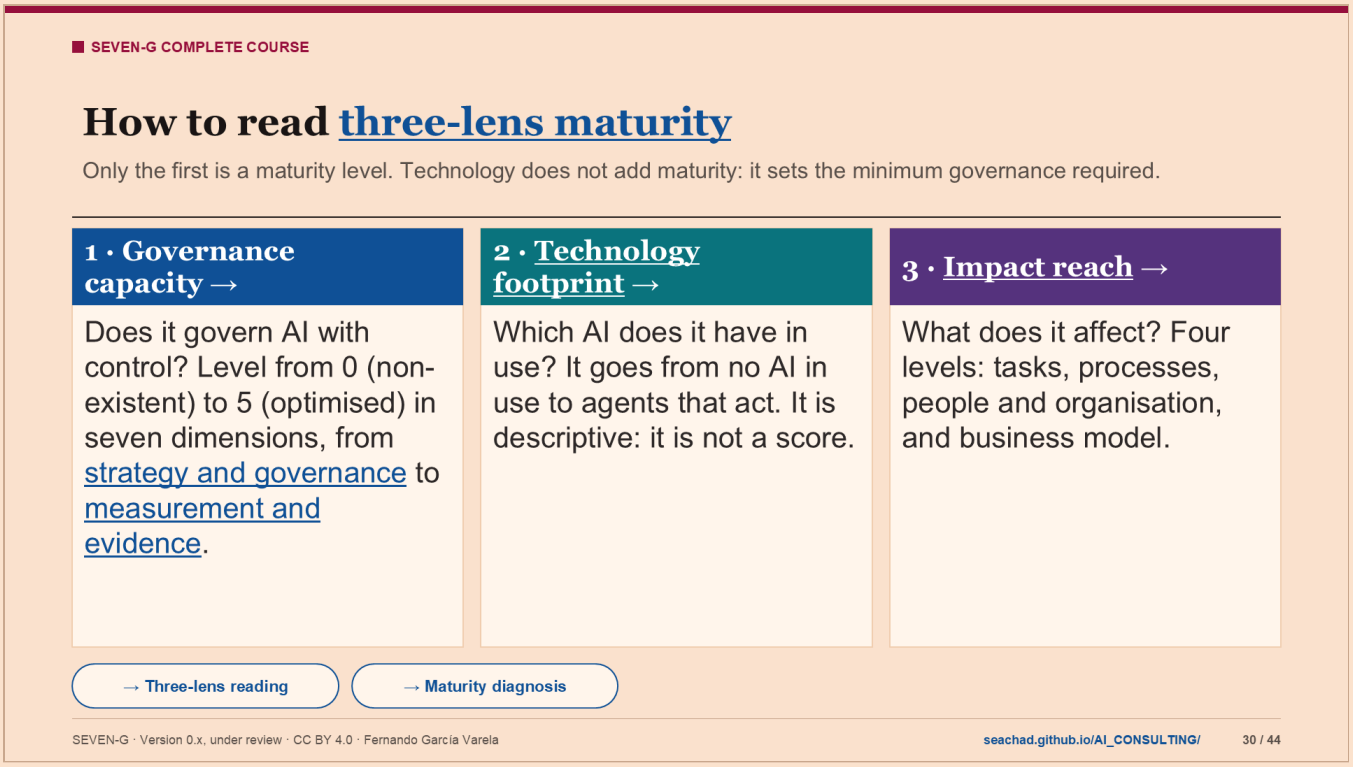
Question for the classroom: a company with twenty automations in production and no Transform bet, which profile does it probably have? Answer: efficiency at scale.

TERMS ON THIS SLIDE

- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors

SOURCES AND LINKS

- **Document 12 · Assignment rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#5-2-assignment-rules
- **Document 12 · Baseline conditions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#4-3-baseline-conditions
- **Assignment rules** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#5-2-assignment-rules
- **Transformation index calculator** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T14_indice_transformacion/indice.html



Notes

The transformation index looks at the portfolio. Maturity looks at the company's capacity to govern AI. They are presented together, with three lenses, and they are not mixed.

Lens 1, governance capacity: it is the only maturity level. It is measured with a verified questionnaire, the maturity diagnosis (T15), in seven dimensions: strategy and governance (D1), value and portfolio (D2), data and knowledge (D3), technology and operation (D4), people and adoption (D5), risk, security and compliance (D6) and measurement and evidence (D7). The levels go from 0, non-existent, to 5, optimised.

Lens 2, technology footprint: which AI is in use, from HT0 to HT5. The order is one of increasing governance demand, not of better technology.

Lens 3, impact reach: what AI affects, from IM1 (tasks) to IM4 (business model).

The key rule: technology does not raise or lower the maturity level. If it were added, it would reward adopting ahead of governance. What the footprint does is set the minimum governance required and trigger alerts, such as «adoption ahead of governance».

Why it matters: a company with well-governed predictive models is more mature than another with uncontrolled generative AI.

Question for the classroom: why is having agents with weak risk control an alert and not more maturity?

TERMS ON THIS SLIDE

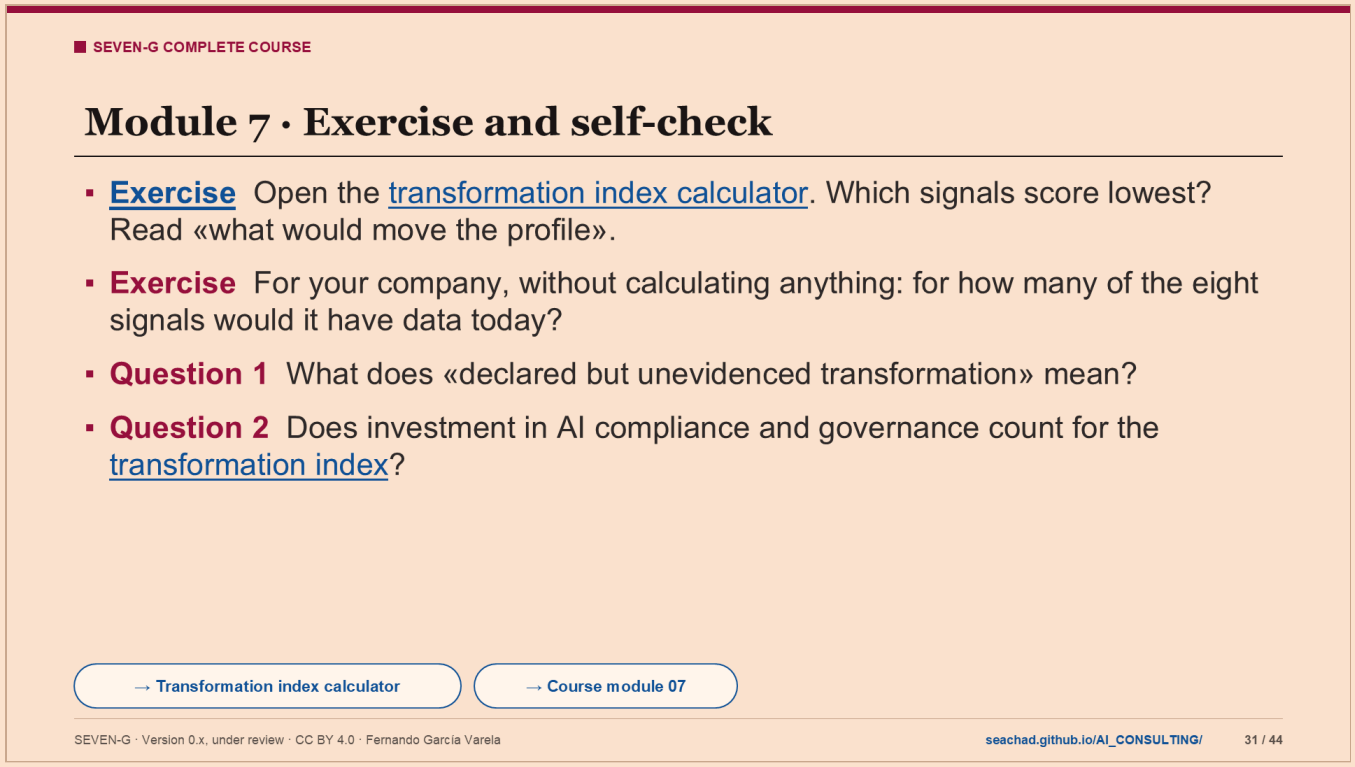
- **Three-lens maturity**: A way of reading maturity through three views together: governance capability (the seven dimensions), technology footprint (what AI is used) and impact reach (task, process, people or business). Technology adds no points: it sets the minimum governance required. So adopting AI ahead of governance is not rewarded. The link opens the reading in document 11. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#7-6-three-lens-reading
- **Strategy and governance** (D1): The maturity dimension that measures whether the company has an approved AI thesis, bodies that decide, assigned roles and a board that oversees. Together with the risk dimension, it caps the

overall level: a company cannot be more than one level above this dimension. The link opens its levels and questions in document 11. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#3-2-d1-strategy-and-governance

- **Measurement and evidence** (D7): The maturity dimension that measures whether the company really measures what AI delivers and costs, keeps evidence of its decisions and reports to the board with a reliable dashboard. Without measurement, no other dimension can be proven. The link opens its levels and questions in document 11. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#3-8-d7-measurement-and-evidence
- **Technology footprint** (HT0–HT5): A scale describing what AI the company uses, in order of governance demand: HT0 no AI, HT1 only rules or RPA, HT2 third-party AI, HT3 in-house models, HT4 generative AI in processes and HT5 agents that act. It is not a maturity level: each step requires minimum governance in certain dimensions. The link opens the scale in document 11. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#7-6-three-lens-reading
- **Impact reach** (IM1–IM4): A scale of how far the change produced by AI reaches: IM1 a task, IM2 a whole process, IM3 people and the organisation, IM4 the business model. It helps tell efficiency apart from transformation. If the impact reaches people or the organisation while people maturity is low, an alert is raised. The link opens the scale in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-7-impact-reach-im1-im4

SOURCES AND LINKS

- **Document 11 · Dimensions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#2-1-dimensions
- **Document 11 · Levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#2-2-levels
- **Maturity diagnosis** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T15_diagnostico_madurez/madurez.html



Notes

Exercise (fifteen minutes). Open the transformation index calculator (T14). Its example uses the fictitious data of the company in the use case register (T01) and reproduces the example in document 12.

The result of the example is «declared but unevidenced transformation», with an underlying efficiency profile. The students find the signals with the lowest score and read «what would move the profile»: the tool says which figures are missing or what would have to change.

Then each student answers for their company, without calculating: for how many of the eight signals would it have data today? Most answer that very few. That is the first conclusion: without data there is no diagnosis, and «no data» scores zero.

Self-check answers:

- Question 1: the company has declared a transformation ambition, but the signals do not support it.
- Question 2: not in the investment and production signals. It goes in a separate band: governing well is not transforming.

Why it matters: the index replaces opinion with evidence. A board can ask for the same calculation every year and see whether the company really moves forward.

Question for the classroom: which signal would be the easiest to improve in six months in your company?

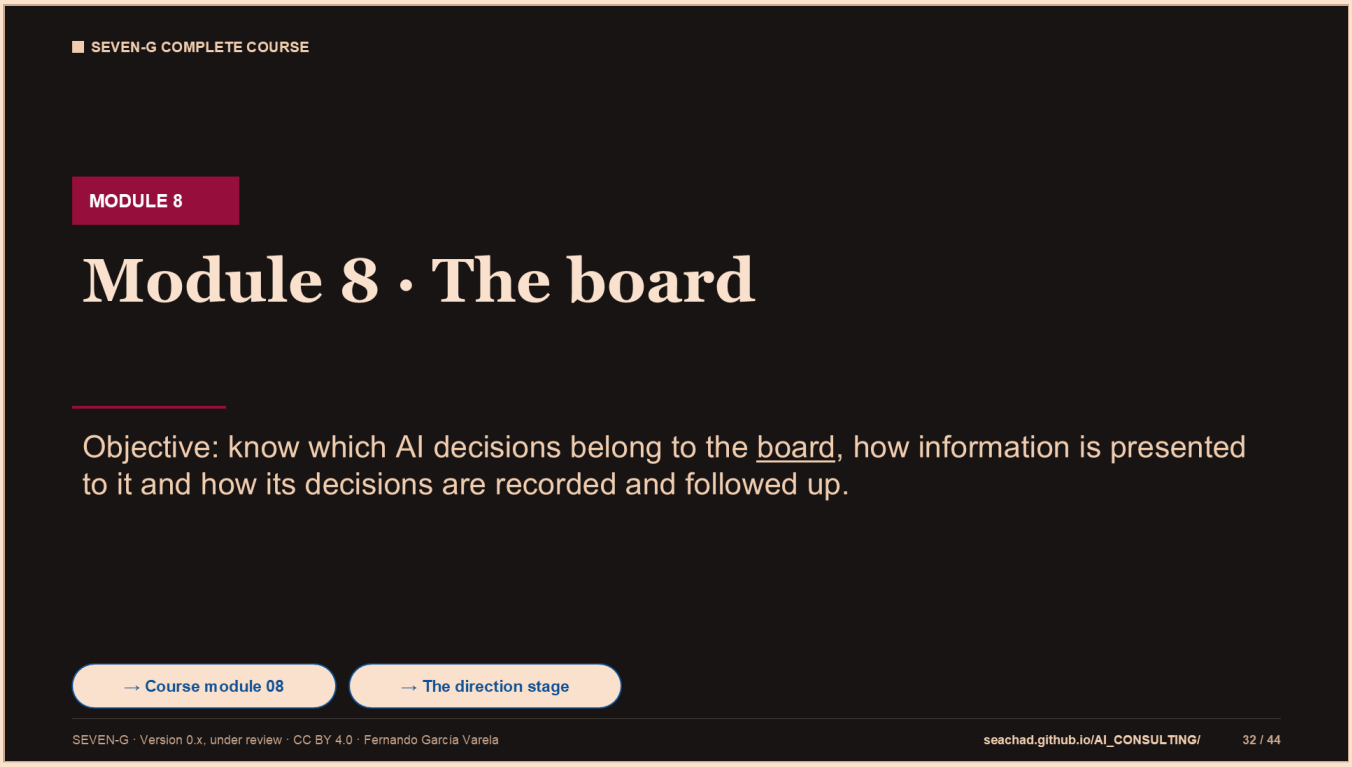
TERMS ON THIS SLIDE

- **Transformation index calculator** (T14): A tool that calculates the company's transformation index from the use case register: baseline conditions, eight signals, profile and alerts. It never estimates: anything missing stays as «no data». The AI office uses it for the board report. The link opens example calculations with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T14_indice_transformacion/indice.html
- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens

the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index

SOURCES AND LINKS

- **Course · Module 07 · Transformation or efficiency** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M07_SEVEN-G_Curso_Transformacion_o_eficiencia.html
- **Document 12 · Transformation index** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html
- **Course module 07** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M07_SEVEN-G_Curso_Transformacion_o_eficiencia.html



Notes

This module is central for an audience of board members and executives.

The board does not approve technical projects: it takes business decisions. In the direction decision (C2) it approves the AI thesis, the ambition per sphere, the risk appetite and the thresholds. It approves the Transform bets. And it oversees AI at least every quarter.

Information to the board follows four rules. Business language and clear answers, in one of four formats: «yes», «yes, with a condition», «not yet, because ... is missing» or «no, because ...». Few and defensible figures, always with their status: validated, declared or estimated. At most three cases in detail per meeting. And what is decided is recorded and followed up: each decision and each recommendation has an identifier, an owner, a deadline and a status.

A recommendation that nobody completes on time does not disappear: it stays open in the register, with its status and its new date, and it returns to the board.

Why it matters: a board that receives twenty indicators without status cannot decide. One that receives a few credible figures and clear options can.

Question for the classroom: what should never be missing next to a value figure? Answer: its status and its formula.

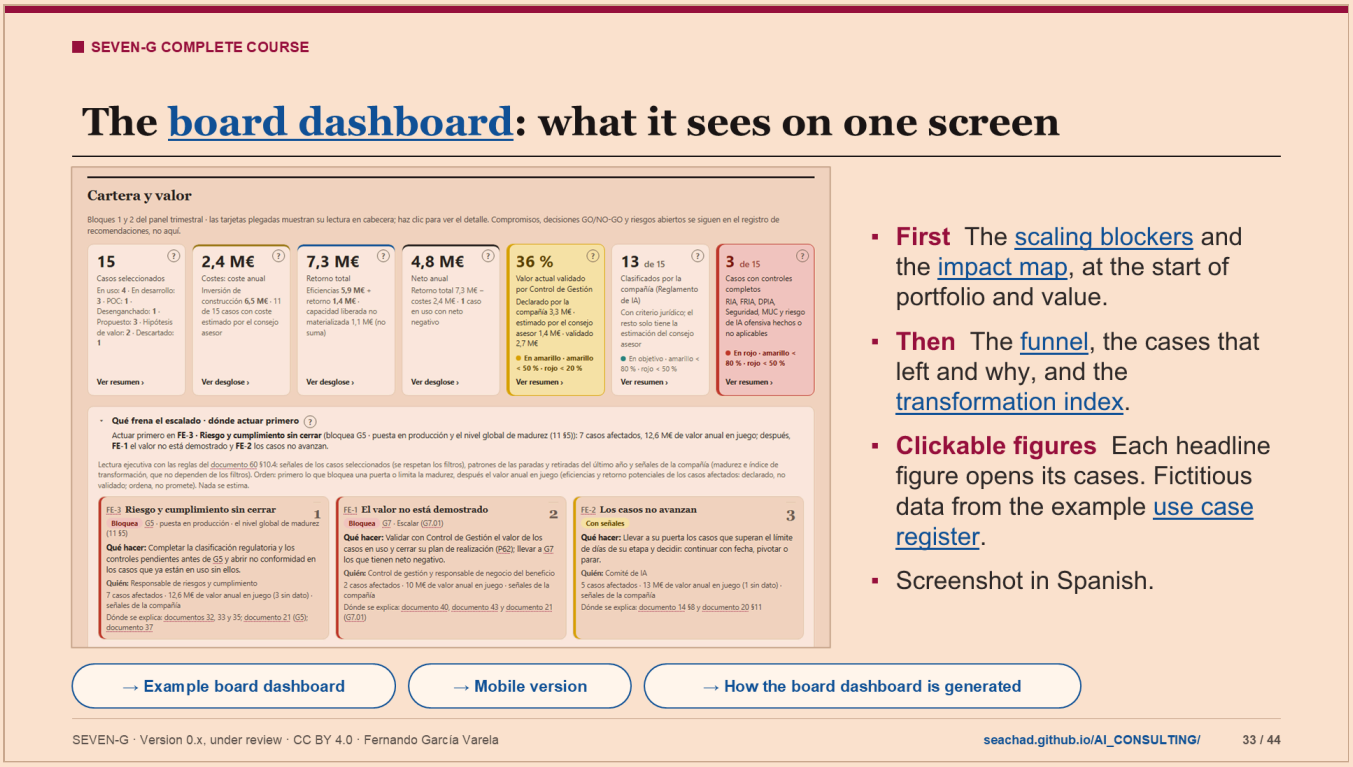
TERMS ON THIS SLIDE

- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors

SOURCES AND LINKS

- **Document 61 · The four answer formats** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#4-1-the-four-formats

- **Document 60 · Decision sheet** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/60_SEVEN-G_Paquete_para_el_consejo.html#5-1-decision-sheet
- **Document 62 · Fields of a decision** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/62_SEVEN-G_Registro_de_recomendaciones_y_decisiones.html#10-2-fields-of-a-decision
- **Course module 08** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M08_SEVEN-G_Curso_El_consejo.html
- **The direction stage** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#the-c2-decision-as-a-whole



Notes

The board dashboard (T17) is generated from the use case register (T01). It is not an application where data is entered: it reads the register and draws the full dashboard, a mobile version and the recommendation register. The screenshot uses the fictitious data of the example company and is in Spanish.

How to read it, in this order:

- «What holds back scaling»: the six scaling barriers in order, with the three to start with.
- «Where the impact is»: the heat map of spheres by ambition level.
- The portfolio and value figures: cost, efficiencies, return and net, each with its status. Each headline figure can be clicked to see its cases.
- The funnel, with the cases that left each stage and why.
- The transformation index and maturity.

Each card has a «?» button that explains what it shows and why it matters.

Why it matters: the dashboard takes to the board the same truth that the team handles. There is no version for inside and another for the board.

Question for the classroom: if you could see only one card of the dashboard before the board meeting, which would you choose, and why?

TERMS ON THIS SLIDE

- **Board dashboard** (T17): A supervision dashboard generated from the use case register. It shows the board cost, validated versus declared value, the funnel, risks, incidents, adoption, maturity and what holds back scaling, with a «?» help on each card. It is for deciding, not just for informing. The link opens the example dashboard with fictitious data; the interface is in Spanish and the help texts are in both languages. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html

- **Scaling blockers** (FE-1–FE-6): The six reasons AI does not scale: value not shown, use cases that do not move forward, risk not closed, people who do not adopt it, data and technology not ready, and lack of direction. The board dashboard reads them in the data, ranks them and says where to act first. The link opens the example dashboard; look at the «What holds back scaling» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Impact map** (T16): Component A of SEVEN-G: where and with what ambition AI acts. It is read as a grid of the portfolio, with the spheres in rows and Optimise, Augment and Transform in columns. Each cell shows use cases, investment, cost and value, and flags the gap against the ambition the board approved. It answers «where is the impact?». In the example board dashboard, look for the «Where the impact is» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Portfolio funnel**: A way of seeing all use cases as a sales funnel: mandatory stages (proposed, value hypothesis, test, development) until they reach use, with the use cases that did not pass each stage and why. It shows how much is stopped, where, and what is learned. The link opens the example funnel on the SEVEN-G entry page (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#embudo
- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index
- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html

SOURCES AND LINKS

- **Tool T17 · Board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html
- **Document 60 · Board pack** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/60_SEVEN-G_Paquete_para_el_consejo.html
- **SEVEN-G entry page · The dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#panel
- **Mobile version** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Movil_IA_v8.html
- **How the board dashboard is generated** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html

SEVEN-G COMPLETE COURSE

What holds back scaling: six blockers and what to do

Blocker	What to do	Who
Value is not proven	Validate value in use; take cases with a negative net to the scale or retire gate.	Management control and business owner.
Cases do not move forward	Take overdue cases to their gate: proceed with a date, pivot or stop.	AI committee.
Risk and compliance not closed	Complete classification and controls before the go-live gate.	Risk and compliance owner.
People do not adopt it	Adoption plan in units below the threshold; withdraw unused licences.	Business owner and People.
Data and technology are not ready	Secure data quality, access and ownership before the feasibility and risk phase.	Data and technology owners.
Lack of direction and governance	Approve thesis and ambition in the direction stage; give each case a business owner.	Senior management and the board.

→ What holds back scaling

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Notes

This table answers the question that boards ask most today: what prevents us from scaling AI? Many companies have cases that work and, even so, cannot scale them.

The dashboard orders six scaling barriers with data it already has: the selected cases, the stops and retirements of the last year, and the maturity and index diagnosis. It does not create new rules: each signal reads a rule that already exists in another document.

The order has fixed rules. First, what blocks a gate: for example, open risk blocks go-live (G5) and unproven value blocks the scale gate (G7). Then, the annual value at stake: the declared potential of the affected cases. That value orders, but it does not promise: it is not validated. The first three barriers are «act first on».

Reading example: if the main barrier is unproven value (FE-1), the action is not to launch more pilots, but to validate the value of what is already in use.

Why it matters: a dashboard that only informs leaves the decision unprepared. Ordering the barriers with written rules turns the metrics into a defensible priority for action and takes the conversation to the cause, not to the symptom.

Question for the classroom: which barrier do you think weighs most in your sector?

TERMS ON THIS SLIDE

- **Scaling blockers** (FE-1–FE-6): The six reasons AI does not scale: value not shown, use cases that do not move forward, risk not closed, people who do not adopt it, data and technology not ready, and lack of direction. The board dashboard reads them in the data, ranks them and says where to act first. The link opens the example dashboard; look at the «What holds back scaling» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Scale or retire gate** (G7): The final gate of the lifecycle. With the value actually measured, it decides to scale the use case (which starts a new cycle), iterate it or retire it with an orderly plan. Scaling a Transform bet is approved

by the board. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire

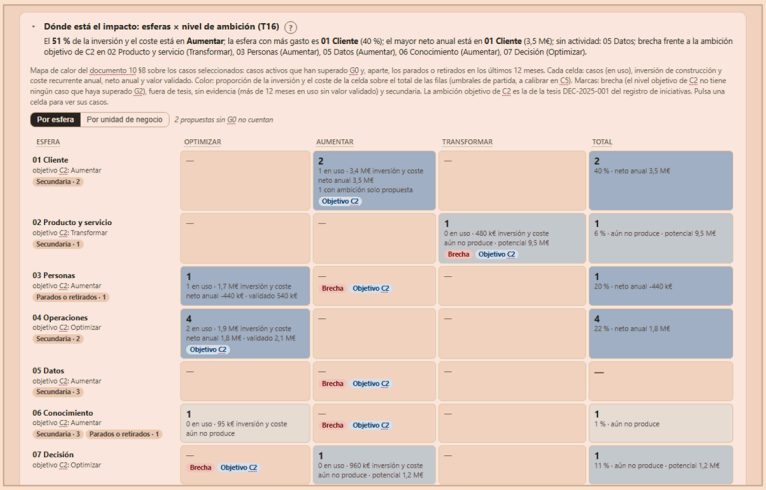
- **AI committee**: A management body that decides the portfolio and the gates at its level, allocates budget and escalates to the board what belongs there. It brings together business, technology, finance and risk, and follows rules of procedure (P38). It matters because it turns scattered decisions into a single portfolio. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-3-ai-committee
- **Go-live gate** (G5): The gate that authorises using the AI system with real users, customers or data. It requires validation and pilot passed, a tested rollback plan and multi-level sign-off (business, technology, risk). Nothing goes into production without this sign-off. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live
- **Feasibility and risk** (fase 3): The phase in which a limited test checks whether the use case is technically and economically feasible, it is classified under regulation and its risks are recorded. It ends at the feasibility gate (G3), the main stop gate before the big spend. It is where stopping in time saves the most money. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-3-feasibility-and-risk
- **Direction stage** (C2): The second stage of the corporate cycle. The board approves the AI thesis (what the company wants AI for), the ambition per sphere, the risk appetite, the budget envelope and the thresholds the whole framework will use. It is the decision that gives meaning to the rest: without it, each use case is approved on its own criteria. The link opens how that decision is taken in document 13. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#the-c2-decision-as-a-whole
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors

SOURCES AND LINKS

- **Document 60 · What holds back scaling and where to act first** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/60_SEVEN-G_Paquete_para_el_consejo.html#10-4-what-holds-back-scaling-executive-reading-and-where-to-act-first
- **Document 61 · Frequent difficult questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#frequent-difficult-questions
- **What holds back scaling** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/60_SEVEN-G_Paquete_para_el_consejo.html#10-4-what-holds-back-scaling-executive-reading-and-where-to-act-first

SEVEN-G COMPLETE COURSE

Exercise: where the impact is



- **The map** The impact map: the colour shows the weight of spending in each cell.
- **Exercise** Prepare four board-member questions: value, risk, transformation and scaling.
- **Check** Look in the board recommendations and decisions register for an example decision that answers them.
- Screenshot in Spanish, with fictitious data.

→ Where the impact is → Course module 08

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Notes

The impact map (T16) crosses the spheres with the three ambition levels. Each cell shows how many use cases there are, how many are in production, their investment, their recurring cost and their net. The colour shows the share of spending. The marks show gaps against the ambition approved by the board in the direction decision (C2), cases outside the thesis and cases without evidence. The target ambition per sphere comes from the thesis recorded in the use case register (T01). The screenshot is in Spanish and the data is fictitious.

Exercise (twenty minutes). With the example dashboard in front of them, each student prepares four questions as if they were a board member:

- Value: which part of the net is validated?
- Risk: which case has the highest residual risk, and who accepted it?
- Transformation: where is there an approved Transform ambition and no case?
- Scaling: which barrier does the company attack first, who moves it and by when?

Then they check in the «Board» view of the register (T01) whether an example decision or recommendation answers those questions.

Self-check: at which two gates does the board intervene in a Transform bet? Answer: at the hypothesis gate (G2), to authorise it, and at the scale gate (G7), if scaling is decided. How often, at least, does it receive AI information? Answer: every quarter.

Why it matters: a good board-member question forces management to show data, not opinions.

TERMS ON THIS SLIDE

- **Impact map** (T16): Component A of SEVEN-G: where and with what ambition AI acts. It is read as a grid of the portfolio, with the spheres in rows and Optimise, Augment and Transform in columns. Each cell shows use cases, investment, cost and value, and flags the gap against the ambition the board approved. It answers «where is the

impact?». In the example board dashboard, look for the «Where the impact is» card (fictitious data, interface in Spanish). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html

- **Board recommendations and decisions register** (T18): A register of what the board decides and recommends, each item with its code, owner, committed date, status, evidence and an independent assessment. Its template is P69. It keeps recommendations from getting lost between meetings and shows the board what was actually done. Document 62 explains it; the link opens the generated example with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Registro_Recomendaciones.html

SOURCES AND LINKS

- **Document 10 · Sphere × level heat map (T16)** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#sphere-level-heat-map-t16
- **Course · Module 08 · The board** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M08_SEVEN-G_Curso_El_consejo.html
- **Tool T01 · «Board» view (fictitious example)** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Where the impact is** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/60_SEVEN-G_Paquete_para_el_consejo.html#10-5-where-the-impact-is-spheres-ambition-levels-in-the-dashboard-t16
- **Course module 08** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M08_SEVEN-G_Curso_El_consejo.html



Notes

This module extends the published course with document 54, which places the framework in the real organisation chart. It is explanatory material: it does not create new bodies, criteria or evidence.

The question that opens it usually comes up by itself in the classroom: who should lead AI? Technology, transformation, a new AI department? Document 54 answers in another way: regardless of size and sector, six functions must have an owner. They can be concentrated in a few people, but none can be left empty.

The module also explains how SEVEN-G fits with SPHERES, the explanatory layer of the nine spheres and the three ambition levels, and how building the solution with AI in phases 4 and 5 is governed (document 53): human review, traceability, testing and security, verified at the gates.

Why it matters: many companies argue for months about who leads AI. Thinking in functions, not in job titles, speeds up the decision and avoids the two typical mistakes: nobody controls, or whoever builds also controls.

Question for the classroom: in your company, which role performs each of the six functions today?

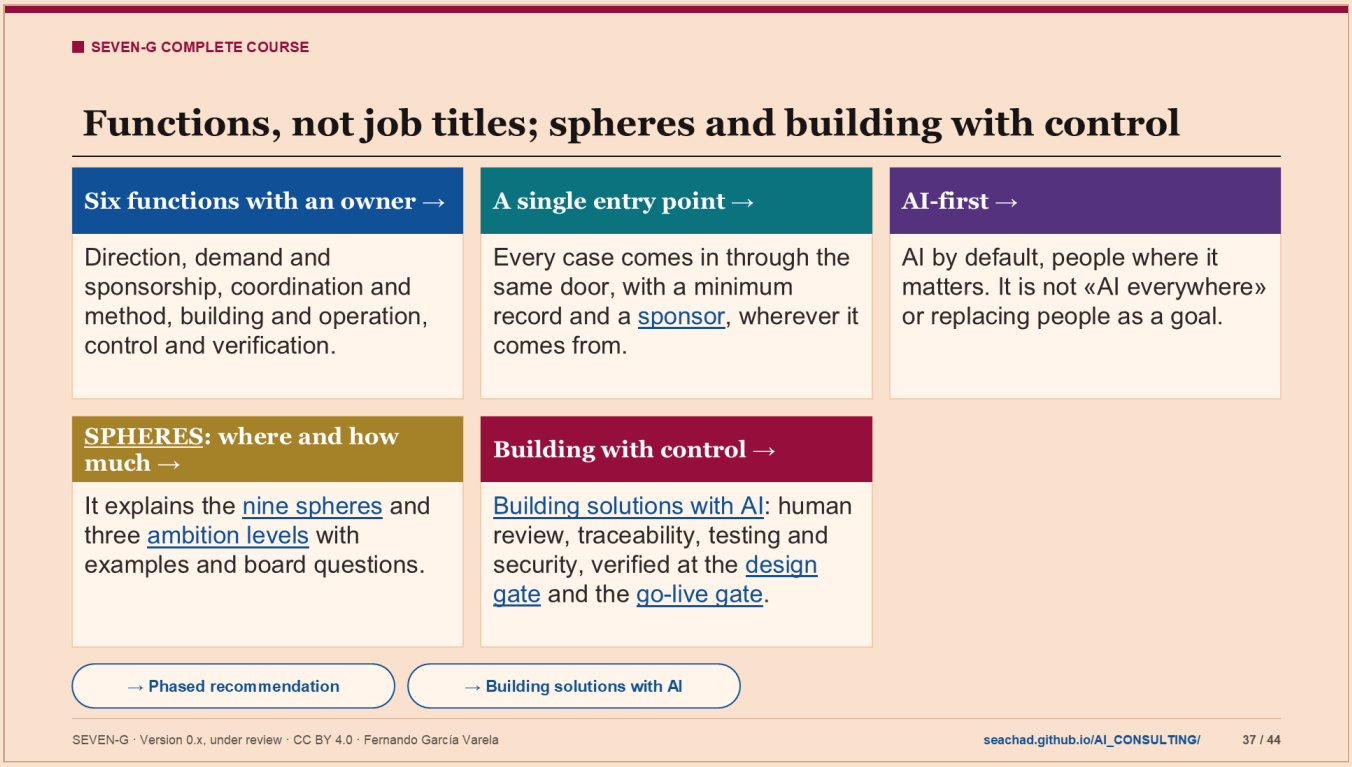
TERMS ON THIS SLIDE

- **AI-first company**: A company in which each process is designed on the assumption that AI does the work or proposes the decision, and people set the goal, decide on exceptions and answer for the result: «AI by default, people where it matters». It is checked with six tests and does not mean creating an AI function. It is the author's proposal, not a rule of the framework. The link opens the section in document 54. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#the-human-organisation-of-an-ai-first-company
- **SEVEN-G**: SEVEN-G (Seven-phase Enterprise Value & Governance) is an open framework for a company to implement, govern and measure AI, and to know whether it is transforming or only gaining efficiency. It treats each use case as an investment with decision gates and gives the board figures it can trust. Management, the AI office, risk and the board use it. The link opens its entry page, with the story, the questions and the examples. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html

- **SPHERES**: A methodology that explains where AI can create value in a company and with what ambition, through three questions: where do we play?, with what ambition? and what do we ask? It is the explanatory layer of the spheres and ambition levels; the operating rules are in SEVEN-G. It supports conversations with management and the board. The link opens its presentation document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#what-spheres-is

SOURCES AND LINKS

- **Document 54 · Organising the company for AI** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html
- **SPHERES · What it is and what it is for** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Document 53 · Building AI solutions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/53_SEVEN-G_Construccion_de_soluciones_con_IA.html
- **The six functions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#the-six-functions-someone-has-to-perform
- **Area: organisation and people** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/areas/organizacion.html



Notes

Six functions: direction (thesis, ambition, limits), demand and sponsorship (proposes cases and answers for the benefit), coordination and method (portfolio, inventory, measurement and information), building and operation, control (risk, compliance, security and data) and independent verification (audit). Three separations are not negotiable: whoever builds does not verify their evidence; whoever sponsors does not sign the risk clearance; whoever audits does not take part in building or in the decision.

A single entry point: cases come from business, technology, suppliers, employees or the board. All of them come in through the same door, with a minimum record and a sponsor.

AI-first: document 54 proposes that a company is AI-first when each process is designed on the assumption that AI does the work or proposes the decision, and people set the goal, decide on exceptions and answer for the result. To organise, it recommends a phased combination: a temporary office that starts the change, a common AI and data factory, end-to-end value chains as the destination and a mixed workforce from day one. It is the author's proposal, not a rule.

SPHERES and building: SPHERES explains where to play and with what ambition. Document 53 governs how the solution is built with AI in phases 4 and 5: recorded human review, traceability of what AI generated, testing, security and checked licences, verified at the design gate (G4) and the go-live gate (G5).

Why it matters: governance, strategy and building use the same language.

TERMS ON THIS SLIDE

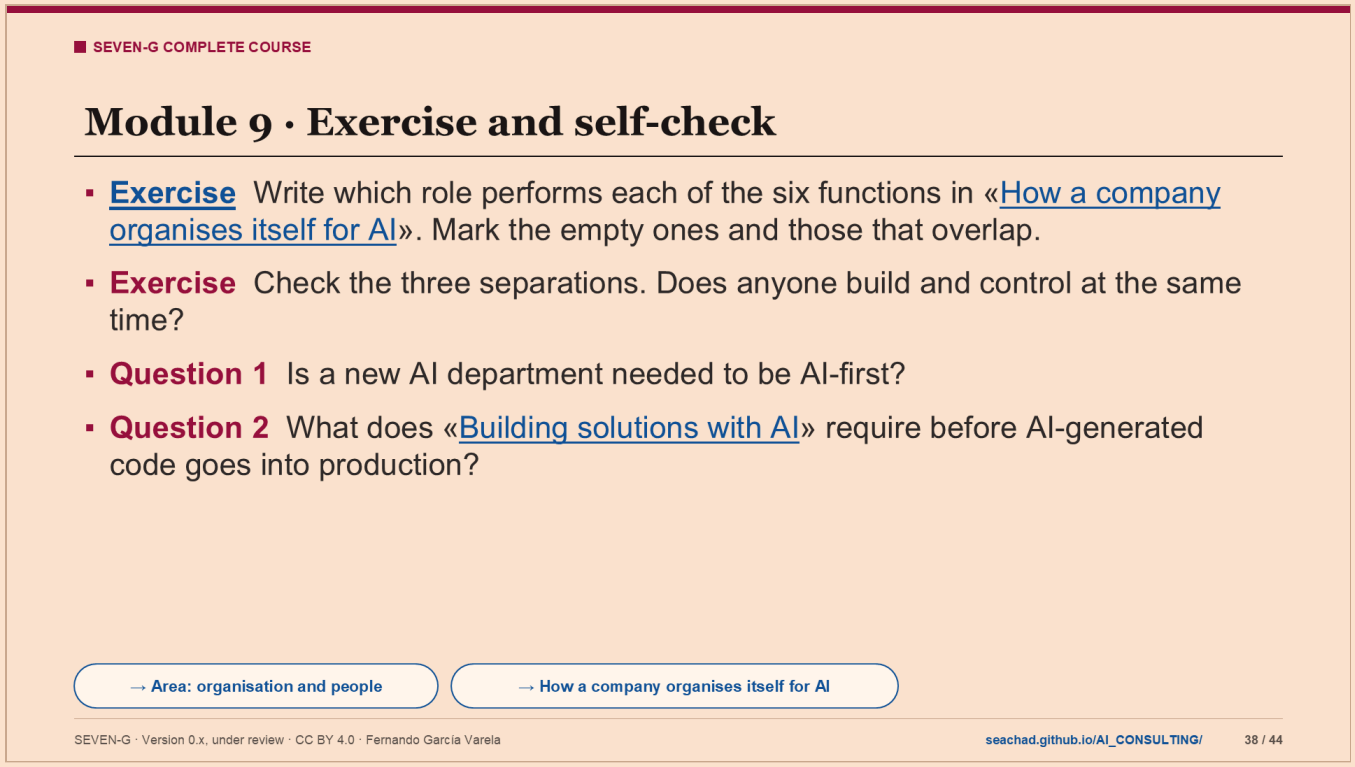
- **Use case sponsor**: The business person who asks for the use case, answers for its value and defends its budget. Without a sponsor, the use case does not pass the authorisation gate. They cannot verify or audit their own use case. It matters because AI without a business owner stays a pilot. The link opens the roles in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#8-1-use-case-roles
- **SPHERES**: A methodology that explains where AI can create value in a company and with what ambition, through three questions: where do we play?, with what ambition? and what do we ask? It is the explanatory layer of the spheres and ambition levels; the operating rules are in SEVEN-G. It supports conversations with management

and the board. The link opens its presentation document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#what-spheres-is

- **The nine spheres** (esferas 01–09): Nine areas where AI acts in a company: four where value is created (01 to 04), three enablers that make it possible (05 to 07), the limits of regulation and ethics (08) and the governance of AI itself (09). Each use case sits in one primary sphere. The link opens the overview in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **Ambition levels**: Three levels stating how much a company wants to change with each use case: Optimise (do the same better), Augment (extend what people can do) and Transform (change the business). Each level is decided, funded and measured differently. The link opens the SPHERES document that explains them with examples. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html
- **Building solutions with AI** (documento 53): What SEVEN-G requires of how a use case's solution is built: testing, code review, evaluation of model behaviour, change control and the evidence handed to the go-live gate. It refers to a separate building methodology. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/53_SEVEN-G_Construccion_de_soluciones_con_IA.html
- **Design gate** (G4): The gate that approves the full design before building: architecture, data, security, human oversight, rollback and adoption. It checks that the controls are planned from the start. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-5-g4-design
- **Go-live gate** (G5): The gate that authorises using the AI system with real users, customers or data. It requires validation and pilot passed, a tested rollback plan and multi-level sign-off (business, technology, risk). Nothing goes into production without this sign-off. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-6-g5-go-live

SOURCES AND LINKS

- **Document 54 · The six functions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#the-six-functions-someone-has-to-perform
- **Document 54 · What being AI-first means** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#9-1-what-being-ai-first-means
- **Document 54 · Recommendation: a phased combination** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#9-7-recommendation-a-phased-combination
- **SPHERES · What it is and what it is for** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Phased recommendation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html#9-7-recommendation-a-phased-combination



Notes

Exercise (fifteen minutes), alone or in pairs.

First, each student writes next to each function the role that performs it today in their company or in one they know. It is normal for one person to perform several functions in a small company. What must not happen is that a function is left empty or that the separations are crossed.

Second, check the three separations. The most frequent case is a technology area that builds the cases and also says whether the risk is acceptable. Another frequent case: the area that sponsors a case is the one that declares its saving, and nobody validates it.

Self-check answers:

- Question 1: no, in general. Document 54 says that being AI-first is not creating an AI department. The chief executive answers to the board, with value in the owners of the value chains, capacity in a common AI and data factory and control in the second line.
- Question 2: recorded human review, traceability of what AI generated, testing and security with no open critical or high findings, and checked licences. It is verified at the go-live gate (G5).

Why it matters: a clear organisation chart reduces the time of each decision and makes the controls credible.

Question for the classroom: which function seems hardest to you to cover in a medium-sized company?

TERMS ON THIS SLIDE

- **How a company organises itself for AI** (documento 54): It places the framework in the real organisation chart: which functions are needed, which positions take each part, where use cases come from, how information reaches the board, and how a company that works with AI by default can organise itself. It is a proposal, not a rule. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/54_SEVEN-G_Organizacion_de_la_compania_para_la_IA.html
- **Building solutions with AI** (documento 53): What SEVEN-G requires of how a use case's solution is built: testing, code review, evaluation of model behaviour, change control and the evidence handed to the go-live gate. It

refers to a separate building methodology. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/53_SEVEN-G_Construccion_de_soluciones_con_IA.html

SOURCES AND LINKS

- **Area: organisation and people** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/areas/organizacion.html



Notes

This module closes the course with the practical question: where do I start?

There are two different proportionality decisions. Intensity (Express, Lite or Enterprise) belongs to each use case. The implementation scope (Lite or Enterprise) belongs to the company. Size decides neither of them: the criteria of document 90 decide.

There is one library, read in three layers: essential (what every company applies), conditional (what a trigger activates) and complete (guides and reference). There are no reduced versions of the documents.

No phase or gate is skipped. At Lite they are grouped: authorisation, opportunity and hypothesis (G0 to G2) in one session; design and go-live (G4 and G5) in another; and the feasibility gate (G3) always goes separately.

The starting point changes the order, not the destination. A company without AI and another with many pilots start with different milestones, but they reach the same core of fourteen rules.

Why it matters: the most frequent objection is «we are small, this is not for us». The answer is proportionality: the core is the same, the effort is not.

Question for the classroom: a medium-sized company launches a single Transform bet. Does its implementation scope change? Answer: no; that use case is Enterprise and the board approves it, but the company's scope is still Lite.

TERMS ON THIS SLIDE

- **Implementation guide** (documento 90): How SEVEN-G is started in a company: prerequisites, choice of implementation scope (Lite or Enterprise, not decided by size), minimum route, a 90-day plan and common mistakes. The link opens the scope choice in document 90. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#choosing-the-implementation-scope

SOURCES AND LINKS

SEVEN-G COMPLETE COURSE

- **Document 90 · Scope selection criteria** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#2-2-selection-criteria
- **Document 94 · Three reading layers** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/94_SEVEN-G_Matriz_de_obligatoriedad_y_lectura_por_capas.html#2-1-three-reading-layers
- **Course module 09** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M09_SEVEN-G_Curso_Implantar_por_capas.html
- **Implementation guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html

SEVEN-G COMPLETE COURSE

Six starting points, the same destination

Starting point	How it is recognised	Typical risk
Ground zero	No own AI, and none knowingly contracted.	Unauthorised use of assistants with company data.
Third-party AI user	Assistants in the office suite or SaaS with AI; it does not develop.	AI that enters without any gate; licences without measured adoption.
Automator	Rules or robotic process automation (RPA) in production; little AI that learns.	Moving from bots to agents without the security controls.
In-house AI in production	Own models in production, without agents that act.	Models in use without a continuity review.
Many pilots	Several generative AI pilots and none or one in production.	«Pilot purgatory»: cost without value and no decision to stop.
At scale	Agents that act in production, or predictive models and generative AI together.	Exposure is already real; governance lags behind use.

→ The six archetypes → Implementation journey

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Notes

Companies do not start from the same point. Document 96 classifies them into six archetypes with a twelve-question questionnaire, which the implementation path tool (T23) answers.

The assignment rule goes from the most demanding to the least: first it checks whether the company is at scale (PP-F), then whether it has many pilots (PP-E), and so on down to ground zero (PP-A). It also records the traits of other archetypes that the company meets, and five modifiers, such as being in a regulated sector or having no sponsor in senior management. The latter blocks the path until there is one.

Each archetype starts with different things. Example: ground zero starts with the mandate, the inventory of unauthorised use and an acceptable use policy. A company with many pilots starts by registering all pilots in their real phase and using the feasibility gate (G3) to stop or scale.

The key rule: the archetype changes the order, the emphasis and the calendar, never the destination. The path has five stages and 22 milestones, and no required milestone disappears.

Why it matters: the same plan for everyone fails. One that starts where the company is does not.

Question for the classroom: which archetype best describes your company today?

TERMS ON THIS SLIDE

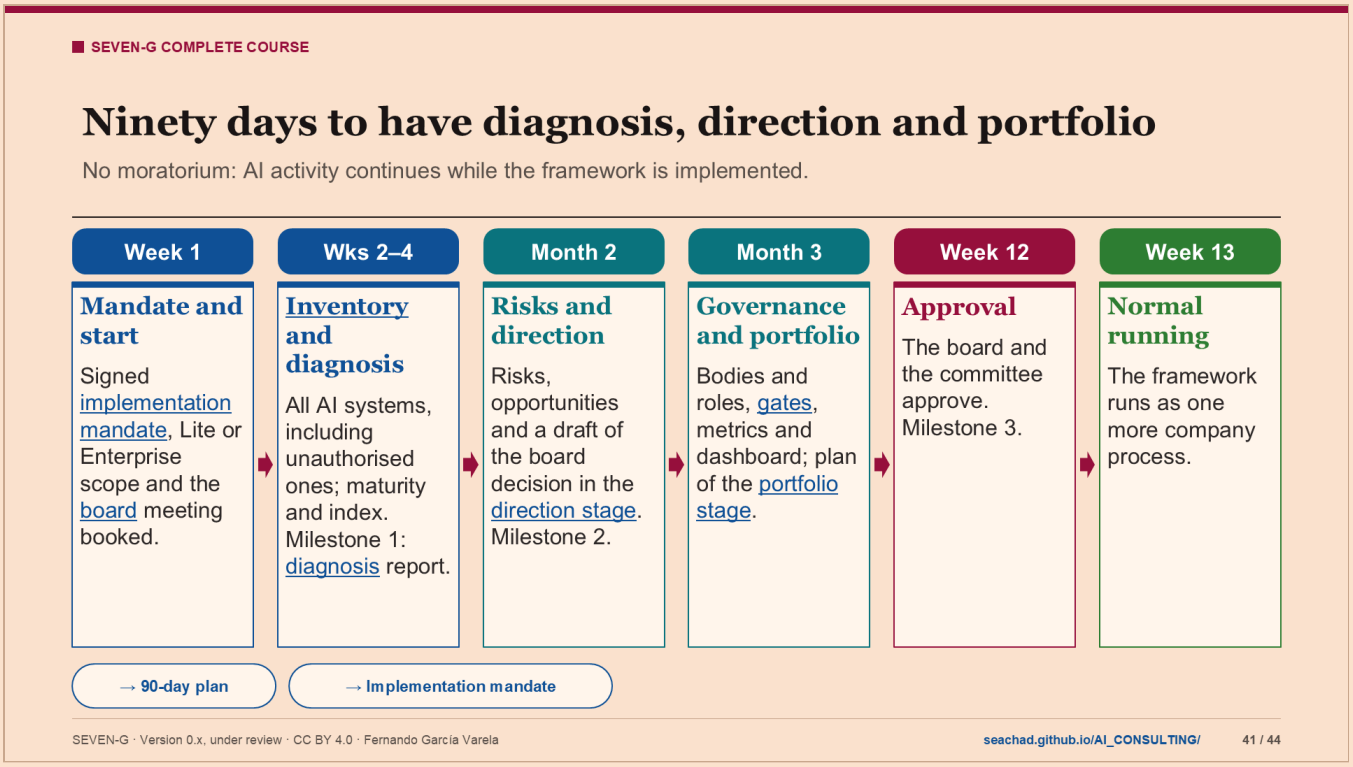
- **Starting points** (PP-A–PP-F): Six types of company by their starting point with AI: zero point, user of third-party AI, automator with rules or RPA, in-house AI in production, many pilots and at scale. The type changes the order, emphasis and calendar of implementation, never the destination or the rules. The link opens the six types in document 96. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/96_SEVEN-G_Puntos_de_partida_y_recorrido_de_implantacion.html#2-1-the-six-archetypes
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their

definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates

- **Continuity review** (R6): A periodic review of a use case in production: quarterly in Enterprise, half-yearly in Lite and yearly in Express. It checks whether value is still arriving and whether there is drift, incidents or regulatory change. A deviation brings forward the scale or retire decision (G7). It is prepared with pack P65. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-7-r6-continuity-review

SOURCES AND LINKS

- **Document 96 · The five stages** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/96_SEVEN-G_Puntos_de_partida_y_recorrido_de_implantacion.html#the-five-stages
- **Tool T23 · Implementation path** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T23_recorrido_implantacion/recorrido.html
- **SEVEN-G entry page · Where does your company start?** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#partida
- **Implementation journey** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T23_recorrido_implantacion/recorrido.html



Notes

The 90-day plan in document 90 has three months, three milestones and one board decision.

Week 1: the sponsor signs the implementation mandate (P32), the Lite or Enterprise scope is decided, the core team is formed and the board meeting is booked straight away.

Weeks 2 to 4: the census of all AI systems is made (own, third-party, corporate use and unauthorised use), together with the maturity and index diagnosis. Each management area signs that its inventory is complete. Milestone 1: the diagnosis report (C1).

Month 2: risks, opportunities and a draft of the thesis, the ambition and the risk appetite. Milestone 2.

Month 3: the bodies and roles are set up, the gates, metrics and dashboard start to work, and the portfolio plan (C3) is prepared. In week 12, the board and the committee approve. Milestone 3. In week 13, the framework enters normal running.

Two rules: there is no moratorium, AI activity continues; and if a milestone is not met, it is replanned, never moved forward with empty deliverables.

A frequent mistake is to start by buying or building tools. What is mandatory is the register, not an application.

Why it matters: ninety days is a timeframe that a board can follow.

Question for the classroom: which week of the plan seems hardest to you in your company?

TERMS ON THIS SLIDE

- **Implementation mandate** (P32): The template with which senior management commissions the implementation of SEVEN-G: objective, scope, sponsor, owners, deadlines, resources and a commitment to complete the inventory. Without this mandate, the framework stays a single department's project. The link opens the template. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P32_SEVEN-G_Mandato_de_implantacion.html

- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **AI system inventory** (T02): A list of all the company's AI systems: its own, third-party AI embedded in processes, the assistants employees use and any unauthorised use detected. Each system has an owner, a regulatory classification, an intensity and an autonomy level. It comes first, because you cannot govern what you do not know. It is a view of the use case register: open the link and choose «Inventory» (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Diagnosis** (C1): The first stage of the corporate cycle. The company looks at where it stands: what AI it uses (including unauthorised use), which use cases are under way, its maturity and its risks. The AI office does it with the management sponsor. Without this starting point, the thesis and the portfolio are decided blind. The link opens the diagnosis report template (P33). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P33_SEVEN-G_Informe_de_diagnostico_C1.html
- **Direction stage** (C2): The second stage of the corporate cycle. The board approves the AI thesis (what the company wants AI for), the ambition per sphere, the risk appetite, the budget envelope and the thresholds the whole framework will use. It is the decision that gives meaning to the rest: without it, each use case is approved on its own criteria. The link opens how that decision is taken in document 13. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#the-c2-decision-as-a-whole
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates
- **Portfolio stage** (C3): The third stage of the corporate cycle. With the thesis approved, the AI committee decides which use cases go in, in what order and with how much money, and what is regularised among what was already under way. It is recorded in the portfolio plan (P36). It means investing where the value is, not where someone pushes hardest. The link opens the stage in document 14. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/14_SEVEN-G_Gestion_de_cartera.html#stage-c3-portfolio

SOURCES AND LINKS

- **Document 90 · 90-day plan, overview** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#4-1-overview
- **Document 90 · Completion criteria for the 90 days** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#4-5-completion-criteria-for-the-90-days
- **Document 90 · Common mistakes** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#common-mistakes
- **90-day plan** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#4-1-overview



Notes

The SEVEN-G core is fourteen rules, from N-01 to N-14. They are the same for every company, intensity and scope. In summary: an inventory of all AI systems; a use case register; a determined intensity; no phase or gate is skipped; the feasibility gate (G3) always separately; segregation of duties; dual validation; the «Yes ◆ » criteria are not negotiable; a value hypothesis before building; regulatory classification and risks; rollback and continuity; the board sets the direction (C2); measurement rules and dashboard; and nonconformities. Everything else is proportionate.

The framework separates principle, practice and instrument. The core is always met. The documents are practices. Templates and tools are instruments: what is mandatory is the evidence, not its format. The register can be kept in a spreadsheet with the data model of document 03.

The tools run in the browser and keep the data on the user's device, not on a server. All the material is free of charge, licensed under CC BY 4.0 for content and MIT for code. Using the framework does not oblige anyone to hire anybody.

Why it matters: a student can leave the classroom with everything needed to start on Monday.

Question for the classroom: which of the fourteen rules would your company meet today?

TERMS ON THIS SLIDE

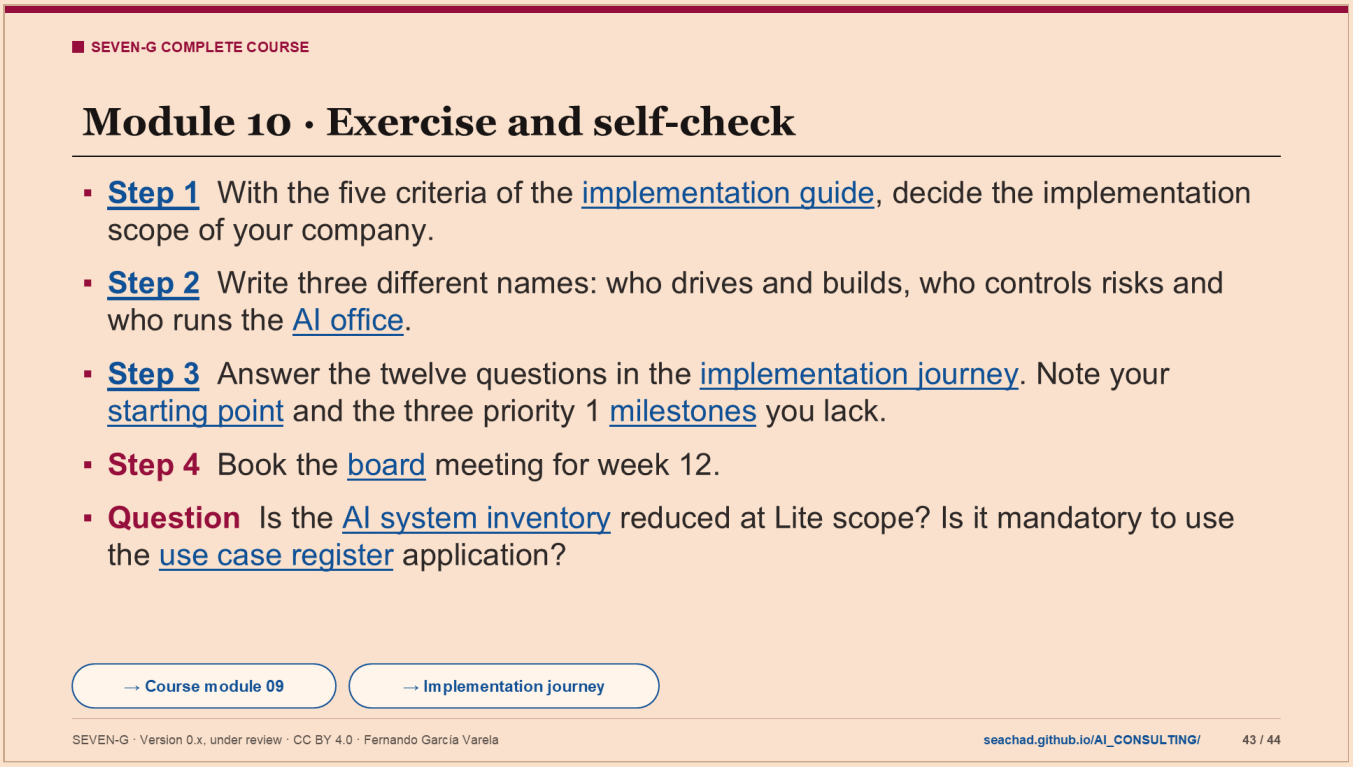
- **SEVEN-G core** (N-01–N-14): The fourteen rules that always apply, in any company, intensity and size: inventory, register, gates without skipping, the feasibility gate on its own, separation of duties, dual validation, value hypothesis, risks, rollback, board thesis, measurement and nonconformities. They are never lowered. A company declares that it applies SEVEN-G against this core. The link opens its definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#14-1-the-seven-g-core
- **Decision gates** (G0–G7): At the end of each phase there is a gate: a moment when a body decides, with verified evidence, whether the use case continues, continues with conditions, iterates, pivots or stops. There are at most two iterations before the decision is escalated. Gates turn enthusiasm into recorded decisions. The link opens their

definition in document 01. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/01_SEVEN-G_Metodologia_fundacional.html#decision-gates

- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Value hypothesis calculator** (T11): A tool that turns a value hypothesis into figures: baseline, efficiencies and return with a formula, full cost, annual net value and net present value with the horizon and rate the company sets. It includes the cost calculator per use case. It helps prepare the hypothesis and feasibility gates with defensible numbers. The link opens an example with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T11_calculadora_valor/calculadora.html
- **Transformation index calculator** (T14): A tool that calculates the company's transformation index from the use case register: baseline conditions, eight signals, profile and alerts. It never estimates: anything missing stays as «no data». The AI office uses it for the board report. The link opens example calculations with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T14_indice_transformacion/indice.html
- **Maturity diagnosis** (T15): A questionnaire of 84 evidence-based questions that measures the company's maturity in seven dimensions, from 0 to 5, and calculates the overall level. It also shows the three-lens reading and the NIST profiles. It is done in the initial diagnosis and at each annual review; its report is template P34. An unverified self-assessment does not give a valid level. The link opens an example with fictitious data. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T15_diagnostico_madurez/madurez.html
- **Board dashboard** (T17): A supervision dashboard generated from the use case register. It shows the board cost, validated versus declared value, the funnel, risks, incidents, adoption, maturity and what holds back scaling, with a «?» help on each card. It is for deciding, not just for informing. The link opens the example dashboard with fictitious data; the interface is in Spanish and the help texts are in both languages. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/ejemplo/salida/t01_Dashboard_Casos_Uso_IA_v8.html
- **Implementation journey** (T23): A tool that uses a twelve-question questionnaire to place the company at its starting point and give it an implementation journey: five stages and 22 milestones, prioritised and split by role, with the template for each and the maturity question that substantiates it. The destination is the same for everyone; the order and calendar change. Document 96 explains it. The link opens the tool with an example. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T23_recorrido_implantacion/recorrido.html

SOURCES AND LINKS

- **Document 94 · What is never omitted** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/94_SEVEN-G_Matriz_de_obligatoriedad_y_lectura_por_capas.html#what-is-never-omitted
- **Document 93 · Licence, use and citation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/93_SEVEN-G_Licencia_uso_y_citacion.html
- **Creative Commons BY 4.0 licence** https://creativecommons.org/licenses/by/4.0/deed.en
- **MIT licence** https://opensource.org/license/mit
- **What is never omitted** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/94_SEVEN-G_Matriz_de_obligatoriedad_y_lectura_por_capas.html#what-is-never-omitted
- **Quick start** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/00_SEVEN-G_Que_es_y_para_que_sirve.html#quick-start



Notes

Final framework exercise (twenty minutes). It is the most practical one of the course: the student leaves with the first step of their plan.

Step 1: with the five criteria of document 90 (section 2.2), decide whether your company goes with Lite or Enterprise scope. Remember that size does not decide.

Step 2: write the names of the three minimum persons: who drives and builds, who controls the risks and who runs the AI Office. If three different people do not come out, that is your first governance problem.

Step 3: answer the twelve questions of the questionnaire in the path tool (T23). Note your archetype, your traits and the three priority 1 milestones you do not have yet. To practise, load the fictitious third-party AI user example (PP-B) and compare it with the demonstration, which comes out «at scale» (PP-F).

Step 4: book the board meeting for week 12. It is the decision that puts everything else in order.

Self-check answers: the inventory is not reduced at Lite; it covers all systems, including third-party and unauthorised ones. The register application (T01) is not mandatory: what is mandatory is the register, which can be kept in a spreadsheet with the data model of document 03.

Why it matters: without names and without a board date, an implementation plan is only an intention.

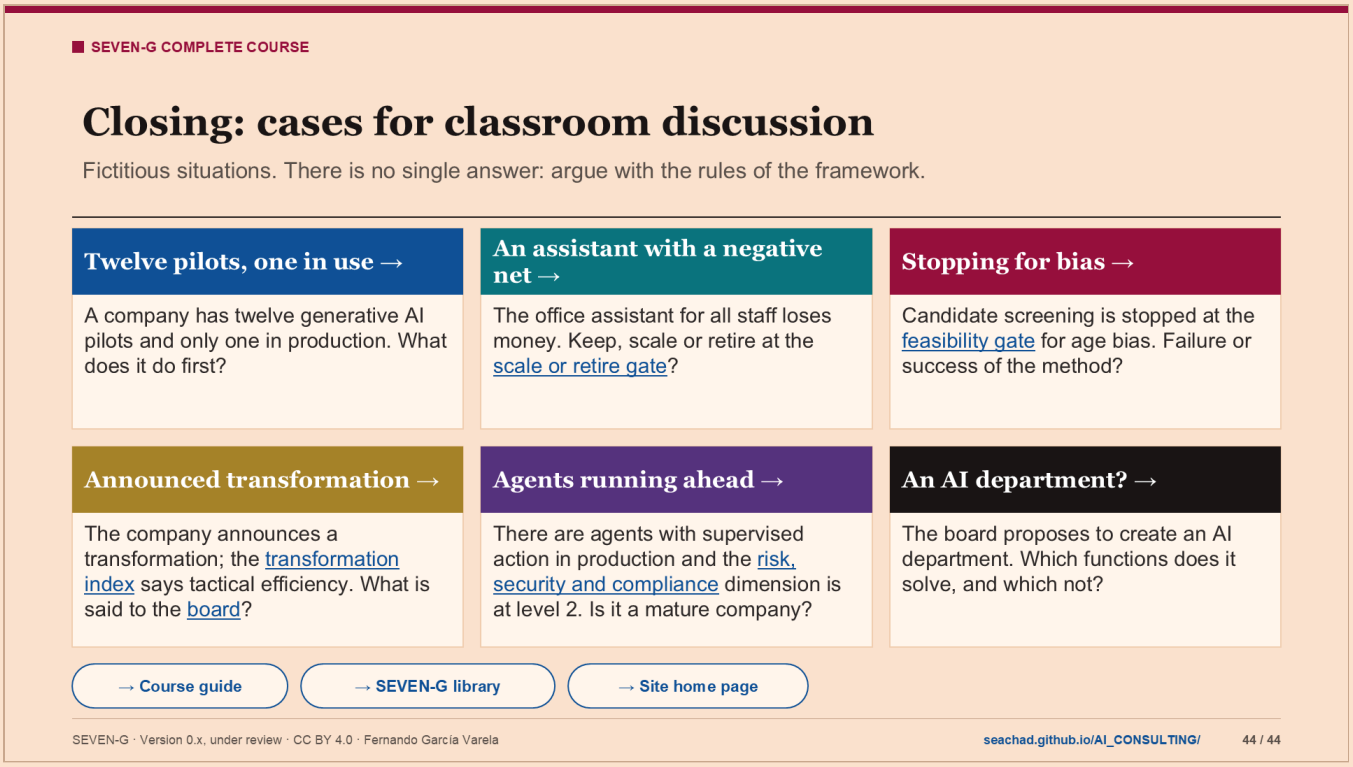
TERMS ON THIS SLIDE

- **Implementation guide** (documento 90): How SEVEN-G is started in a company: prerequisites, choice of implementation scope (Lite or Enterprise, not decided by size), minimum route, a 90-day plan and common mistakes. The link opens the scope choice in document 90. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#choosing-the-implementation-scope
- **AI office**: The team that coordinates the method: it keeps the use case register and the inventory, prepares the gates and the board pack, and verifies the gates in Lite use cases. It neither decides nor builds the use cases. In a small company it can be one or two people. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-4-ai-office

- **Implementation journey** (T23): A tool that uses a twelve-question questionnaire to place the company at its starting point and give it an implementation journey: five stages and 22 milestones, prioritised and split by role, with the template for each and the maturity question that substantiates it. The destination is the same for everyone; the order and calendar change. Document 96 explains it. The link opens the tool with an example. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T23_recorrido_implantacion/recorrido.html
- **Starting points** (PP-A–PP-F): Six types of company by their starting point with AI: zero point, user of third-party AI, automator with rules or RPA, in-house AI in production, many pilots and at scale. The type changes the order, emphasis and calendar of implementation, never the destination or the rules. The link opens the six types in document 96. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/96_SEVEN-G_Puntos_de_partida_y_recorrido_de_implantacion.html#2-1-the-six-archetypes
- **Implementation journey milestones** (HI-01–HI-22): Twenty-two steps to implement SEVEN-G in five stages, from naming a sponsor and inventorying AI to the annual review and the declaration. Each milestone says what to do, who does it, with which template or tool and which maturity question substantiates it; its priority depends on the starting point. The link opens the milestones in document 96. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/96_SEVEN-G_Puntos_de_partida_y_recorrido_de_implantacion.html#the-journey-milestones
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **AI system inventory** (T02): A list of all the company's AI systems: its own, third-party AI embedded in processes, the assistants employees use and any unauthorised use detected. Each system has an owner, a regulatory classification, an intensity and an autonomy level. It comes first, because you cannot govern what you do not know. It is a view of the use case register: open the link and choose «Inventory» (fictitious data). https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html

SOURCES AND LINKS

- **Course · Module 09 · Implementing in layers** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M09_SEVEN-G_Curso_Implantar_por_capas.html
- **Document 90 · Minimum roles in a small organisation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#minimum-roles-in-a-small-organisation
- **Course module 09** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M09_SEVEN-G_Curso_Implantar_por_capas.html



Notes

Use this slide for the final discussion. Divide the classroom into six groups; each group defends a position in five minutes with the rules of the framework. The situations are fictitious.

Hints for the teacher:

- Twelve pilots: it is the «many pilots» archetype. Register all of them in their real phase and take them to the feasibility gate (G3) to stop or scale, with a value hypothesis and a baseline.
- Assistant with a negative net: it is a cross-unit use case. It is measured by unit with the adoption ladder; the net is presented with and without it; if adoption does not pass the threshold, the roll-out is reviewed or licences are withdrawn.
- Stopping for bias: it is a success. A well-founded stop avoids a bad investment and harm to people. The lesson is recorded.
- Announced transformation: the profile is «declared but unevidenced transformation». It is said clearly, and what would move the profile is explained.
- Agents running ahead: it is not more mature. Technology does not add maturity; there is an alert of adoption ahead of governance.
- AI department: document 54 proposes thinking in functions; being AI-first does not require a new department.

Closing: thank the participants and remind them that all the material is free of charge and is on the site. SEVEN-G is under review and the community can propose improvements.

TERMS ON THIS SLIDE

- **Scale or retire gate** (G7): The final gate of the lifecycle. With the value actually measured, it decides to scale the use case (which starts a new cycle), iterate it or retire it with an orderly plan. Scaling a Transform bet is approved by the board. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-8-g7-scale-or-retire

- **Feasibility gate** (G3): The most important gate: using the feasibility test, the regulatory classification and the risk register, it decides whether the use case deserves the big spend of building it. It is always decided on its own, never grouped with others. It is the main stop gate: stopping here costs little; later, a lot. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-4-g3-feasibility
- **Transformation index** (documento 12): It answers whether the company is transforming with AI or only gaining efficiency. It uses baseline conditions and eight measurable signals to assign a profile, and warns when a transformation is declared that the evidence does not support. It is calculated with its calculator. The link opens the index in document 12. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#company-transformation-index
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only for technology. The link opens its role in the governance model (document 30). https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/30_SEVEN-G_Modelo_de_gobierno.html#3-1-board-of-directors
- **Risk, security and compliance** (D6): The maturity dimension that measures whether AI risks are identified, controlled and accepted by the right people, and whether regulation is complied with. Together with the strategy dimension, it caps the overall level. If it is below the minimum required by the AI in use, no new use case of that kind goes into production. The link opens its levels and questions in document 11. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/11_SEVEN-G_Modelo_de_madurez.html#3-7-d6-risk-security-and-compliance

SOURCES AND LINKS

- **SEVEN-G entry page · The board questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html#preguntas
- **Document 90 · Common mistakes** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#common-mistakes
- **Document 61 · Frequent difficult questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#frequent-difficult-questions
- **Course guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M00_SEVEN-G_Curso_Guia_del_curso.html
- **SEVEN-G library** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/index.html
- **Site home page** https://seachad.github.io/AI_CONSULTING/en/index.html

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