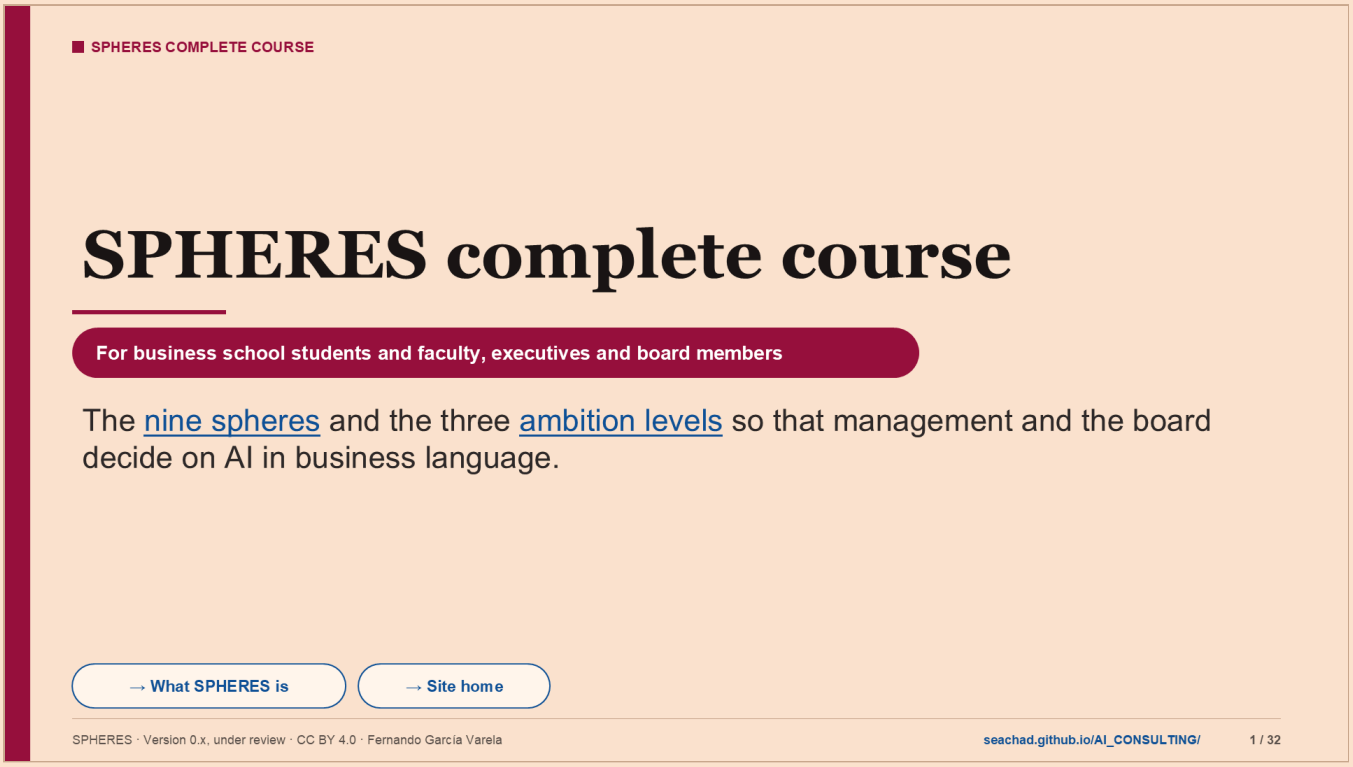


Notes

Welcome. This course presents SPHERES, Fernando García Varela's methodology for placing artificial intelligence in the business before talking about technology. SPHERES organises everything that AI can change in an organisation into nine impact spheres and grades each bet with three ambition levels: Optimise, Augment and Transform.

The name comes from the English word spheres. It is not an acronym: it says that AI is not a project for the technology area, but a change that reaches customers, the offering, people, processes, data, knowledge, decisions, obligations and governance.

SPHERES is the explanatory layer of component A (impact map) of SEVEN-G, the same author's framework for the governance, value and measurement of AI. The operating rules, the indicators with a formula and the tools are in SEVEN-G. SPHERES explains; SEVEN-G governs, decides and measures. The two are closely related and link to each other.

Why it matters: a board does not decide on models or platforms. It decides on risk, opportunity, accountability and competitive advantage. This course gives the vocabulary for that conversation.

Notes for the classroom:

- All companies, figures and cases in the examples are fictitious or illustrative.
- Using the framework is free. The content is licensed under CC BY 4.0 and the code under MIT.

Opening question: in your company, who talks about AI today, and in which language: that of technology, that of finance or that of the business?

TERMS ON THIS SLIDE

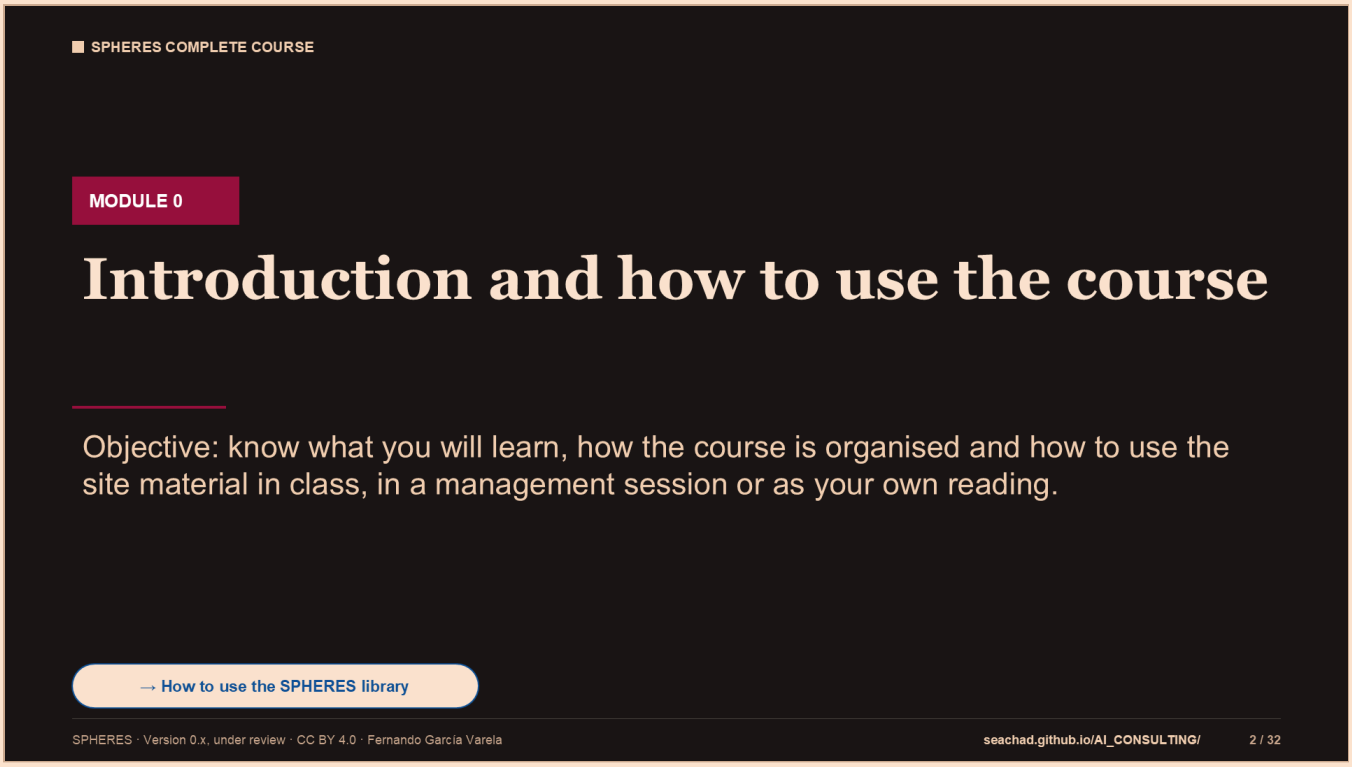
- **The nine spheres** (esferas 01–09): Nine areas where AI acts in a company: four where value is created (01 to 04), three enablers that make it possible (05 to 07), the limits of regulation and ethics (08) and the governance of

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

- **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

- **SPHERES 00 · What SPHERES is and how it helps** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **SEVEN-G 10 · Map of spheres and ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html
- **SPHERES 00 · Relationship with SEVEN-G** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#relationship-with-seven-g
- **What SPHERES is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Site home** https://seachad.github.io/AI_CONSULTING/en/index.html



Notes

Instructor's script. The course has nine modules, from 0 to 8, and a closing session with discussion cases. Each module opens with its objective and ends with an exercise or a self-check. It works for a full classroom session and also as dissemination material inside a company.

How to use it depending on the context:

- In a business school: a full session, with the exercises in pairs or small groups.
- In a management committee: modules 1, 2, 6 and 7 are enough to prepare a first session with the board.
- As your own reading: each slide links to the site document that explains the concept in detail.

Three rules for the instructor:

- The course does not define rules. If anything differs from a SPHERES or SEVEN-G document, the document prevails.
- The examples are fictitious. Do not present them as market data.
- Name first, code after: we say “the use case register (T01)”, not “the T01”.

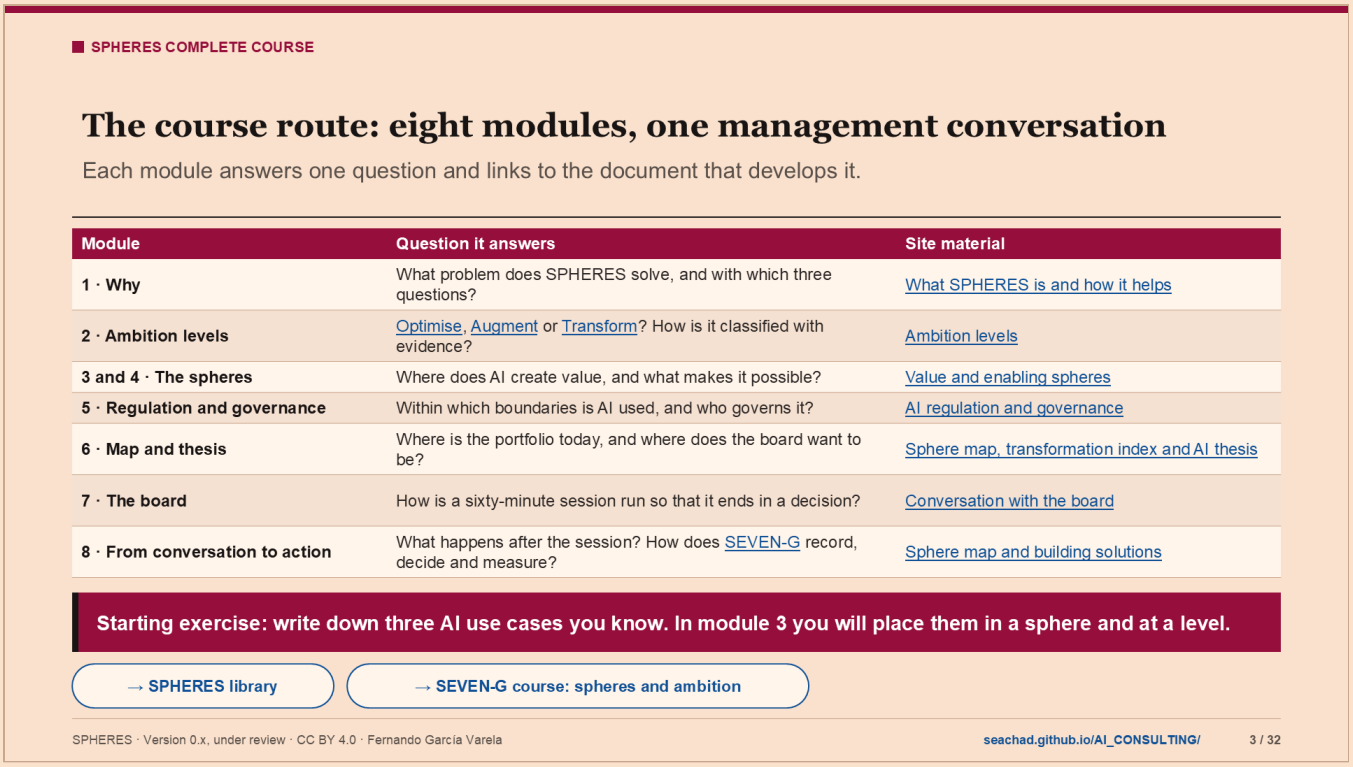
Why it matters: a method that is only useful for a workshop is forgotten the next day. SPHERES is used from the first conversation with the board to the annual portfolio review, with the same vocabulary. That is the thread of the course.

Question for the class: how many AI use cases do you think your company has? And how many does management know about?

SOURCES AND LINKS

- **SPHERES 00 §10 · How to use this library** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#how-to-use-this-library
- **SPHERES 00 §6 · How it helps** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#how-it-helps

- **How to use the SPHERES library** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#how-to-use-this-library



SPHERES COMPLETE COURSE

The course route: eight modules, one management conversation

Each module answers one question and links to the document that develops it.

Module	Question it answers	Site material
1 · Why	What problem does SPHERES solve, and with which three questions?	What SPHERES is and how it helps
2 · Ambition levels	Optimise, Augment or Transform? How is it classified with evidence?	Ambition levels
3 and 4 · The spheres	Where does AI create value, and what makes it possible?	Value and enabling spheres
5 · Regulation and governance	Within which boundaries is AI used, and who governs it?	AI regulation and governance
6 · Map and thesis	Where is the portfolio today, and where does the board want to be?	Sphere map, transformation index and AI thesis
7 · The board	How is a sixty-minute session run so that it ends in a decision?	Conversation with the board
8 · From conversation to action	What happens after the session? How does SEVEN-G record, decide and measure?	Sphere map and building solutions

Starting exercise: write down three AI use cases you know. In module 3 you will place them in a sphere and at a level.

→ SPHERES library | → SEVEN-G course: spheres and ambition

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Notes

Present the route in two minutes. The logic is the same as that of a well-run management conversation: first why (module 1), then with what ambition (module 2), where (modules 3, 4 and 5), how it looks as a whole (module 6), how to talk to the board (module 7) and what happens next (module 8).

Modules 3 and 4 cover the seven spheres that are analysed with ambition levels: four where value is created (01 to 04) and three enablers (05 to 07). Module 5 deals with spheres 08 and 09, which are assessed in a different way.

Module 6 relies on SEVEN-G: the heat map (document 10), the transformation index (document 12) and the AI thesis with the ambition per sphere (document 13). The SEVEN-G course has its own module, 03, on spheres and ambition; it is a good complement for anyone who wants the operating version.

Starting exercise: ask each student to write down three AI use cases they know, from their own company or one they know well. They do not need to classify them yet. We will use them in module 3.

Why it matters: starting with real use cases turns the theory into a decision of one's own. The same happens in board sessions: when the board sees its own company on the map, the tone of the conversation changes.

TERMS ON THIS SLIDE

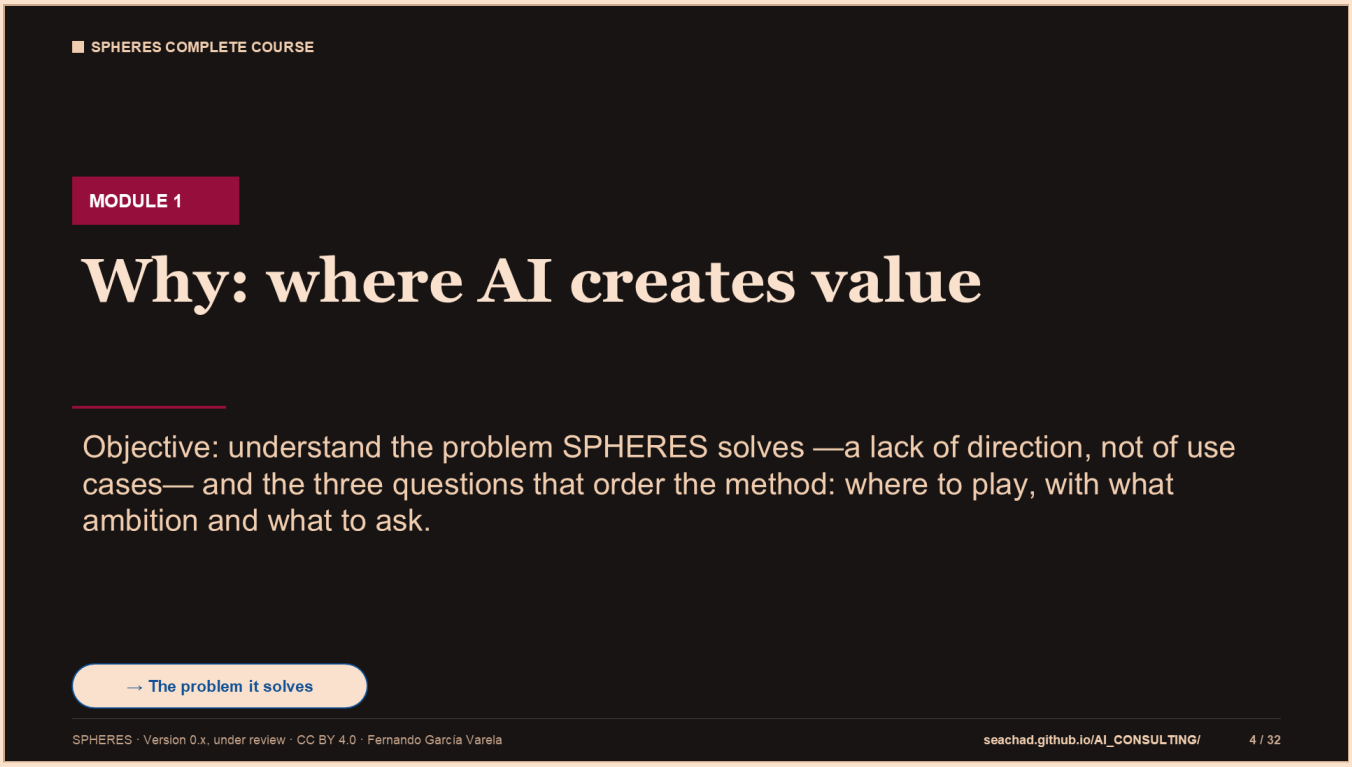
- **Optimise**: The first ambition level: AI makes what the company already does cheaper or faster, without changing the process. Its value is measured in savings and time and must be shown early. It is the most frequent level and the one that transforms least. The link opens its explanation in the spheres 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
- **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

- **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

- **SPHERES 00 · What SPHERES is and how it helps** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **SEVEN-G course · M03 Spheres and ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M03_SEVEN-G_Curso_Esferas_y_ambicion.html
- **SPHERES library** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/index.html
- **SEVEN-G course: spheres and ambition** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/curso/M03_SEVEN-G_Curso_Esferas_y_ambicion.html



Notes

Instructor's script. Most organisations do not have a problem of a lack of AI use cases, but of a lack of direction over them. The symptoms are recognisable:

- The board receives a list of use cases that it does not know how to prioritise, because they describe the technology and not the effect on the business.
- All the effort is concentrated on automating internal tasks, because efficiency is easier to justify and to measure.
- A “transformation with AI” is announced that changes nothing visible.
- Use cases are delayed or stopped in advanced phases for lack of data, knowledge or decision rules.
- Regulation appears at the end, when the system has already been built.
- Nobody knows who is accountable for AI in the company.

Why it matters: these symptoms are not corrected with more technology or more pilots. They are corrected with a well-structured management conversation. SPHERES makes that conversation repeatable: the same spheres, the same levels and the same questions at every review.

Question for the class: of the six symptoms, which one do you recognise in an organisation you know? Ask for a show of hands per symptom. The first or the second usually wins.

SOURCES AND LINKS

- **SPHERES 00 §2 · The problem it solves** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-problem-it-solves
- **The problem it solves** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-problem-it-solves



Notes

Explain the three questions as the skeleton of the whole method.

Where do we play? The map of nine spheres covers all the areas of relationship of a company, whatever its sector. It forces a choice: a thesis that declares every sphere a priority guides no decision.

With what ambition? The three levels are not a ladder. They are types of bet with different cost, risk, timescale and organisational resistance. That is why each one is judged with different criteria.

What do we ask? The method does not end in a diagram. It gives the board reference questions, warning signs and a sixty-minute script that ends with a mandate.

Why it matters: without a common language, technology talks about models, finance about savings, the business about use cases and compliance about risks. With the same map, the board can compare bets, detect gaps and decide where to invest without understanding how each system works.

Example: a committee presents twenty use cases as “our AI strategy”. When they are placed on the map, it shows that almost all of them are Optimise and none touches the product. The list did not show it; the map does.

Question for the class: which of the three questions is the hardest to answer in your company, and why?

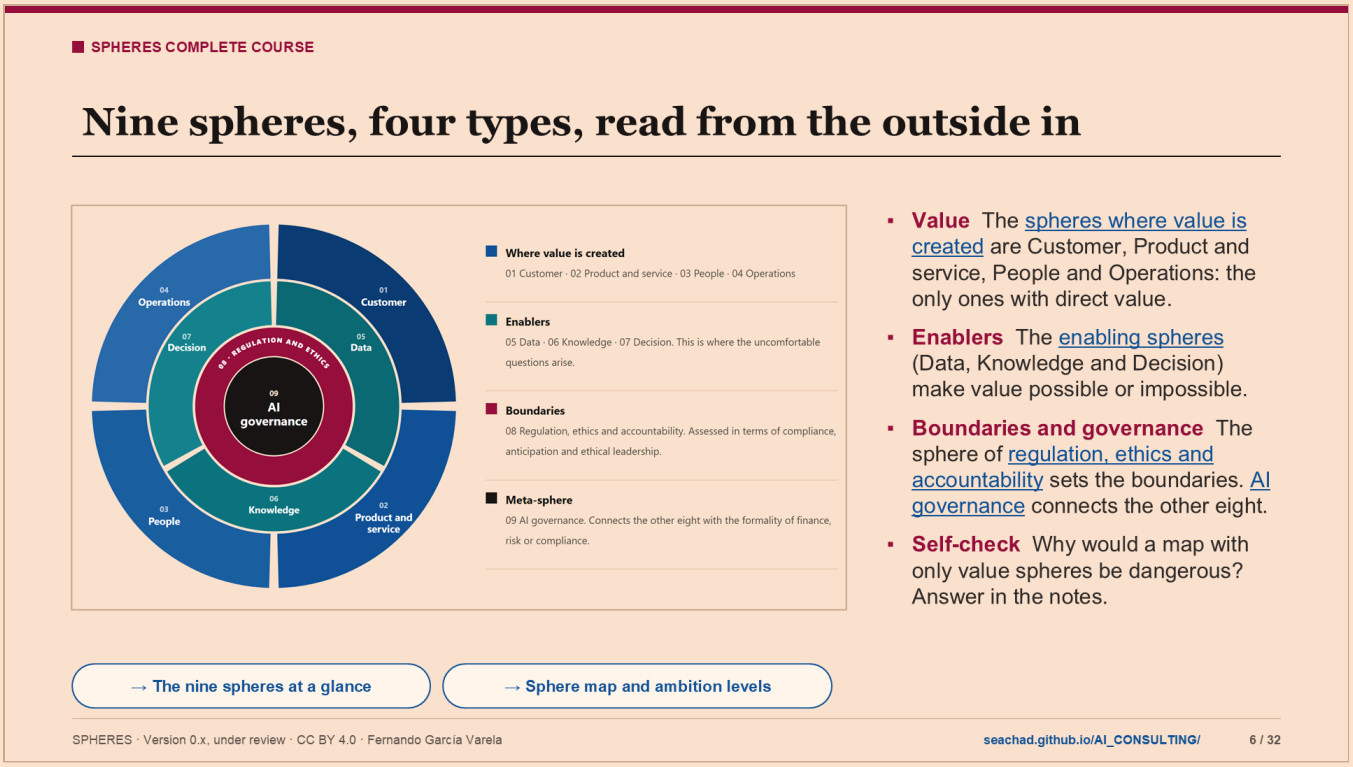
TERMS ON THIS SLIDE

- **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
- **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
- **Conversation with the board**: A SPHERES document with a script for talking about AI with the board using the spheres and ambition levels: what to ask in each sphere, which signals to look for and how to lead the conversation to decisions. The link opens the document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html

SOURCES AND LINKS

- **SPHERES 00 §1 · What SPHERES is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#what-spheres-is
- **SPHERES 00 §7 · A complete example** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#a-complete-example
- **What SPHERES is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#what-spheres-is



Notes

Walk through the drawing from the outside in.

Spheres 01 to 04 are the only ones in which AI creates direct value: revenue, retention, margin, productivity, cost or quality. Each one has a motto: Customer (knowledge, relationship and anticipation), Product and service (AI inside, on top of or as the product), People (recipients, subjects and promoters of AI) and Operations (processes, value chain and efficiency).

Spheres 05 to 07 constrain value. A high ambition in Customer without reliable data, without accessible knowledge and without clear decision rules is a high-risk bet. It is in these spheres that the uncomfortable questions appear.

Sphere 08 sets the boundaries: the law, ethical principles and accountability when something goes wrong. Sphere 09 is the centre: the governance system that decides, oversees and corrects across the other eight.

Answer to the self-check: a map with only value spheres would invite the pursuit of opportunities without checking whether the company can execute them (enablers) or whether it should (boundaries and governance). SPHERES forces the opportunity, the capability and the accountability to be looked at together.

Principle of use: if a use case does not fit into any sphere, its business objective is most probably unclear.

Question for the class: in which sphere would you put an assistant that drafts replies to complaints for the service team? Hint: it depends on the primary metric. We will see it in module 3.

TERMS ON THIS SLIDE

- **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

- **SPHERES 00 §3 · The nine spheres at a glance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **SEVEN-G 10 §2 · 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
- **The nine spheres at a glance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **Sphere map and ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-impact-map



Notes

Instructor's script. An ambition level describes what an AI use case changes in the business. It does not describe the technology it uses, what it costs or how novel it seems.

The same technology can serve different levels. A generative AI agent that drafts replies for the service team is Optimise: the service and the job are the same. A classic statistical model that makes it possible to launch pay-per-kilometre insurance is Transform: the customer receives an offering that did not exist before.

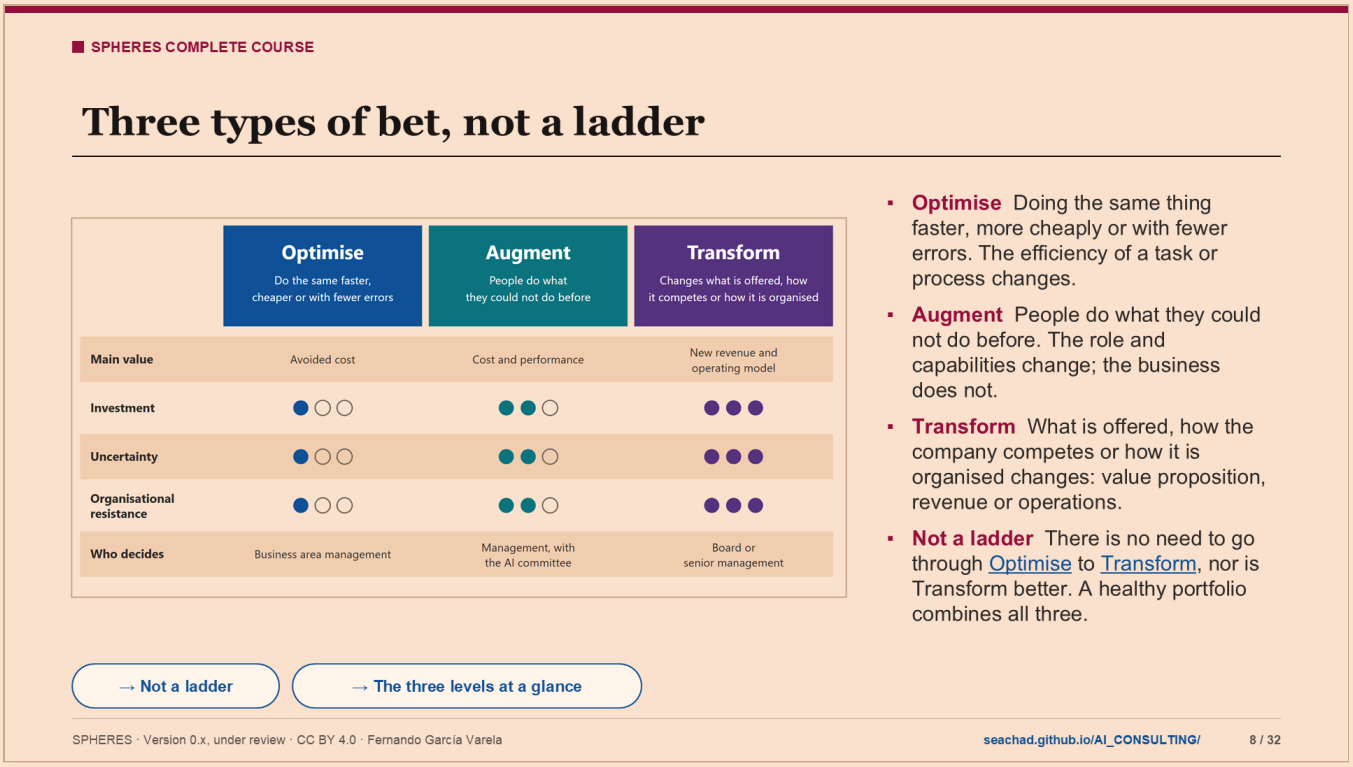
Why it matters: if the level were assigned by technology, any programme with generative AI would be presented as transformation and the portfolio would look far more ambitious than it is. Defining the level by the effect on the business lets the board know whether the company is transforming or only becoming more efficient. Both are legitimate, but they do not cost the same and are not governed in the same way.

The levels apply to spheres 01 to 07. Spheres 08 and 09 have their own grades, which we will see in module 5.

Question for the class: think of the last “transformation with AI” you read about in the press or in an annual report. What really changed in the business?

SOURCES AND LINKS

- **SPHERES 01 §2 · What an ambition level is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#what-an-ambition-level-is
- **Ambition levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html



Notes

Explain each level with an example from the same sphere so that the difference can be seen.

Optimise: automatically classifying the enquiries that reach customer service. The customer receives the same service; assignment time goes down. The value lies in cost avoided, cycle time and fewer errors. Its typical risk is counting freed-up hours as savings: if the time does not turn into a real lower cost or an explicit reassignment, the saving does not exist in the income statement.

Augment: before each visit, account managers receive an analysis of each customer's likely needs and risk of churn. They hold a conversation they could not prepare before. Its typical risk is measuring licences instead of use. It is the level where most value is lost silently.

Transform: an AI agent becomes the main point of contact with the customer, with referral to people in defined cases. How the company relates to its customers changes. Its typical risk is calling an automation with a good narrative a transformation.

It is not a ladder. A company can bet on Transform in Product while it optimises Operations. A mature company does not have everything in Transform: maturity is measured with other criteria (SEVEN-G document 11). And the amount does not determine the level: a large automation is still Optimise.

Why it matters: if the levels were a ladder, each area would try to move up a level to look more advanced, and the classification would lose all its value as information for the board.

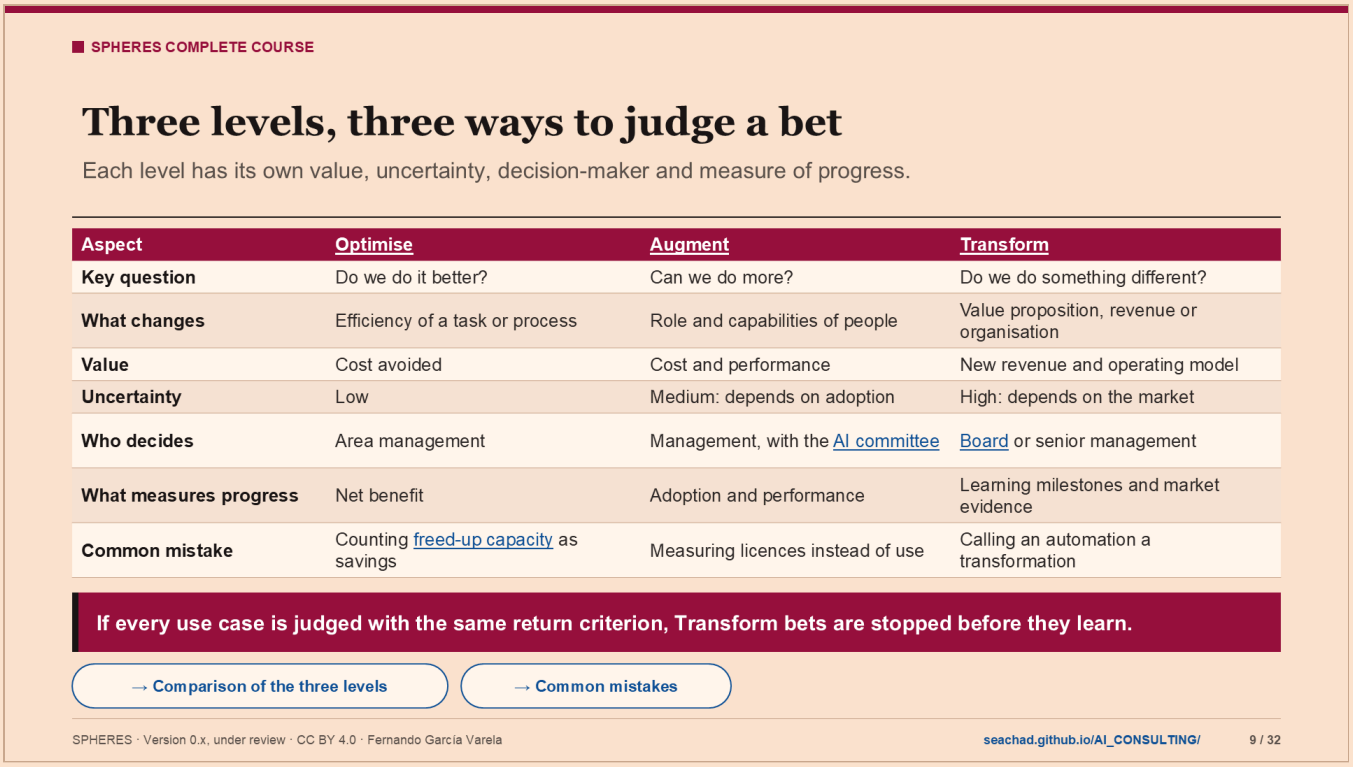
TERMS ON THIS SLIDE

- **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
- **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

SOURCES AND LINKS

- **SPHERES 01 §7 · Not a ladder** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#not-a-ladder
- **SEVEN-G 10 §3 · 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
- **Not a ladder** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#not-a-ladder
- **The three levels at a glance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-three-ambition-levels-at-a-glance



SPHERES COMPLETE COURSE

Three levels, three ways to judge a bet

Each level has its own value, uncertainty, decision-maker and measure of progress.

Aspect	Optimise	Augment	Transform
Key question	Do we do it better?	Can we do more?	Do we do something different?
What changes	Efficiency of a task or process	Role and capabilities of people	Value proposition, revenue or organisation
Value	Cost avoided	Cost and performance	New revenue and operating model
Uncertainty	Low	Medium: depends on adoption	High: depends on the market
Who decides	Area management	Management, with the AI committee	Board or senior management
What measures progress	Net benefit	Adoption and performance	Learning milestones and market evidence
Common mistake	Counting freed-up capacity as savings	Measuring licences instead of use	Calling an automation a transformation

If every use case is judged with the same return criterion, Transform bets are stopped before they learn.

→ Comparison of the three levels → Common mistakes

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Notes

Read the table by rows, not by columns. Each row is a different decision for the board.

Who decides: an Optimise bet is decided by area management within the approved portfolio framework. An Augment bet needs visibility from the AI Committee, because its value depends on people changing the way they work. A Transform bet requires an explicit decision by the board or senior management, because it affects structures, incentives and decision-making power.

What measures progress: in Optimise, the annual net benefit within the set horizon. In Augment, real adoption and performance improvement against the starting position. In Transform, learning milestones, an investment limit per stage and market evidence.

Why it matters: applying the same return criterion to all use cases is one of the most expensive mistakes. Transform bets are stopped before they learn and the portfolio is left with efficiencies only. The other way round, applying transformation criteria to an expensive automation gives it a tolerance it does not deserve.

The common-mistake row is the most useful one in class. Ask the students for a real example of each mistake. The first one, counting freed-up hours as savings, is almost universal.

Question for the class: who decides today, in your company, a use case that changes the value proposition to the customer? Does it match the “Who decides” row?

TERMS ON THIS SLIDE

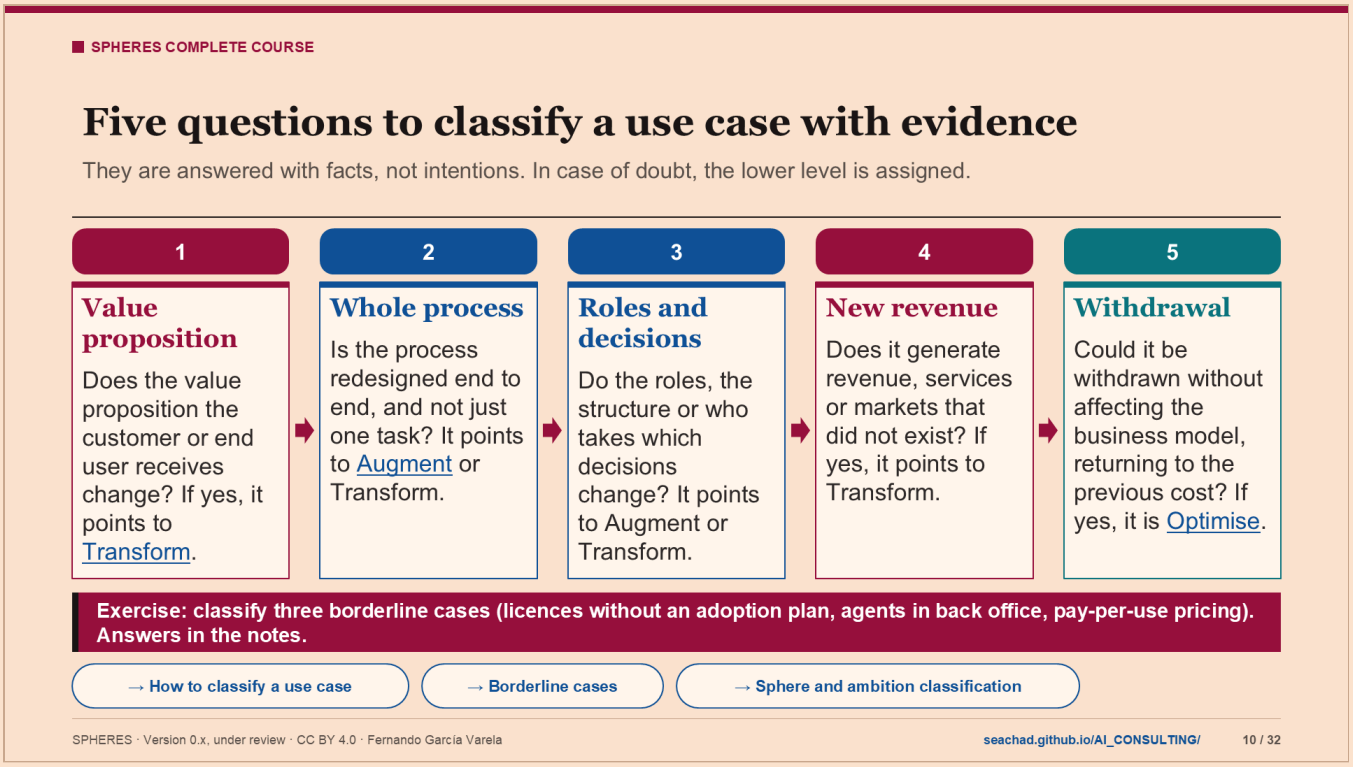
- **Optimise**: The first ambition level: AI makes what the company already does cheaper or faster, without changing the process. Its value is measured in savings and time and must be shown early. It is the most frequent level and the one that transforms least. The link opens its explanation in the spheres 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

- **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
- **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
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SOURCES AND LINKS

- **SPHERES 01 §6 · Comparison of the three levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#comparison-of-the-three-levels
- **SPHERES 01 §11 · Common mistakes** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#common-mistakes
- **Comparison of the three levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#comparison-of-the-three-levels
- **Common mistakes** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#common-mistakes



Notes

The five questions turn a discussion of opinions into a check. The full classification rules are in SEVEN-G document 12, and the sphere and ambition classification template (P07) records them for each use case.

Three rules of use:

- They are answered with evidence, not with what the use case wants to become.
- In case of doubt, the lower level is assigned.
- Levels are not averaged. A use case with an Optimise component and a Transform component is split, or classified by the component that accounts for more than half of the investment.

Exercise, about ten minutes in pairs. Classify these three cases:

- A. Licences for an AI assistant for the whole workforce, without an adoption plan.
- B. Automation with agents of a complete back-office process, with fewer people doing the same thing.
- C. A personalised pay-per-use price that the customer chooses as a new option.

Answers:

- A is Optimise: no role and no process changes demonstrably (questions 2 and 3: no).
- B is Optimise: reducing the number of people who do the same thing is not a change of role. If the process were redesigned without changing the roles, it would be Augment.
- C is Transform: the customer receives a new form of price (question 1: yes). By contrast, dynamic pricing within current tariffs is Augment.

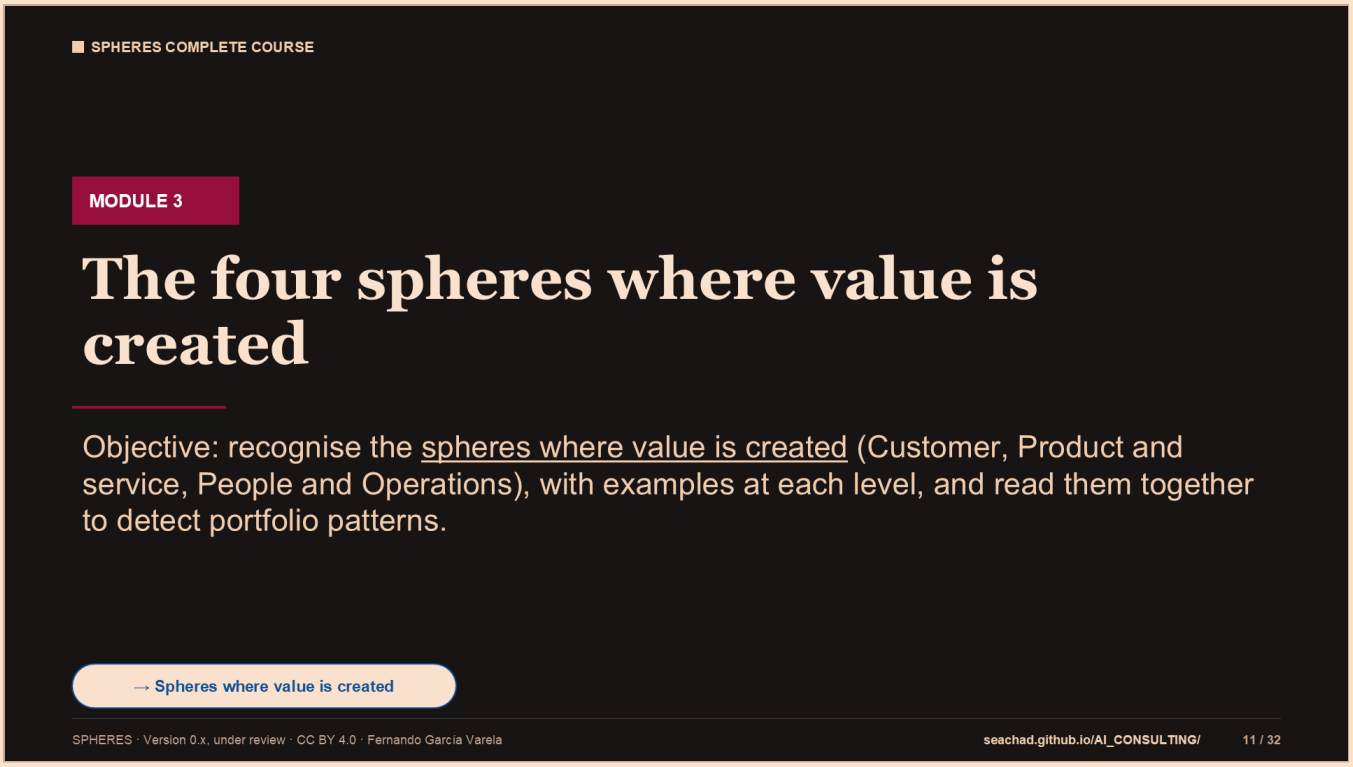
Why it matters: moving up a level to obtain funding makes the board approve expectations that will not be met. Classification with evidence, reviewed by someone independent, prevents it.

TERMS ON THIS SLIDE

- **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
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SOURCES AND LINKS

- **SPHERES 01 §8 and §9 · Classifying and borderline cases** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#how-to-classify-a-use-case
- **SEVEN-G 12 §3.1 · The five questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-1-the-five-questions
- **SEVEN-G 12 §3.3 · Borderline cases** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-3-borderline-cases
- **How to classify a use case** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#how-to-classify-a-use-case
- **Borderline cases** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#borderline-cases
- **Sphere and ambition classification** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P07_SEVEN-G_Clasificacion_de_esfera_y_ambicion.html



Notes

Instructor's script. Of the nine spheres, four are the only ones in which AI creates direct value: 01 Customer, 02 Product and service, 03 People and 04 Operations. Spheres 05 to 07 (Data, Knowledge and Decision) are enablers and we will see them in module 4. Sphere 08 sets the boundaries and 09 is the governance meta-sphere; we will see them in module 5. Spheres 01 to 07 are analysed with the levels Optimise, Augment and Transform; 08 and 09 are assessed with their own grades.

Why these four: they cover the relationships of any company with what creates value. Who it relates to (Customer), what it offers (Product and service), who works (People) and how it works (Operations). They are valid for any sector because they do not describe industries, but relationships.

Primary sphere rule: each use case has a single primary sphere, the sphere where the main metric of its value hypothesis is measured. The other spheres it influences are secondary. An assistant that drafts replies to complaints goes to Customer if its main metric is satisfaction or retention, and to Operations if it is the cost per complaint.

Why it matters: without a primary sphere, the same use case appears in three places on the map and the portfolio looks more diverse than it is.

Go back to the starting exercise: ask each student to assign a primary sphere to their three use cases.

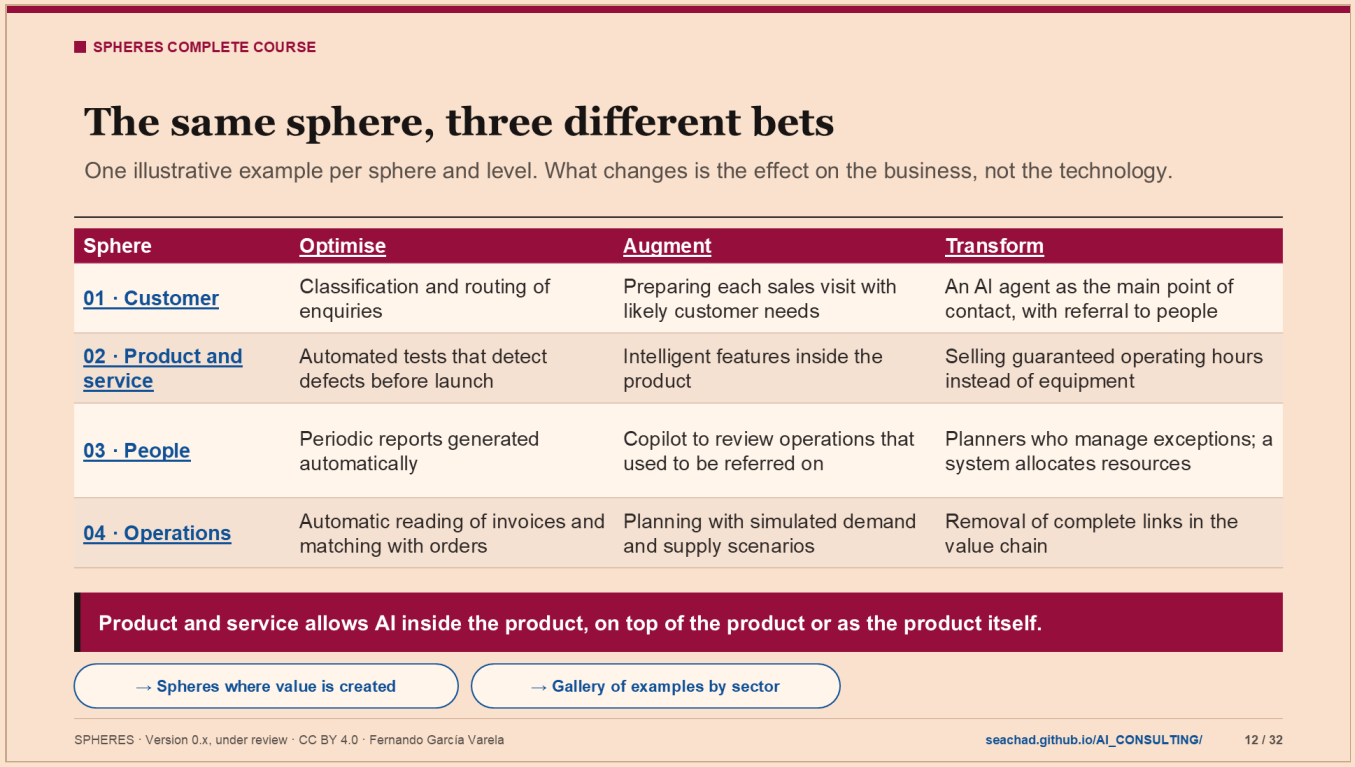
TERMS ON THIS SLIDE

- **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

SOURCES AND LINKS

- **SPHERES 02 §1 · Why these four spheres** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#why-these-four-spheres

- **SEVEN-G 10 §4.1 · Primary and secondary sphere** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#4-1-primary-sphere-and-secondary-sphere



SPHERES COMPLETE COURSE

The same sphere, three different bets

One illustrative example per sphere and level. What changes is the effect on the business, not the technology.

Sphere	Optimise	Augment	Transform
01 · Customer	Classification and routing of enquiries	Preparing each sales visit with likely customer needs	An AI agent as the main point of contact, with referral to people
02 · Product and service	Automated tests that detect defects before launch	Intelligent features inside the product	Selling guaranteed operating hours instead of equipment
03 · People	Periodic reports generated automatically	Copilot to review operations that used to be referred on	Planners who manage exceptions; a system allocates resources
04 · Operations	Automatic reading of invoices and matching with orders	Planning with simulated demand and supply scenarios	Removal of complete links in the value chain

Product and service allows AI inside the product, on top of the product or as the product itself.

→ Spheres where value is created → Gallery of examples by sector

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Notes

Go through the table by rows. In each sphere, the question is always the same: what changes in the business?

Customer: the motto is knowledge, relationship and anticipation. Routing enquiries does not change the service; preparing each sales visit changes what the account manager can do; an agent as the main point of contact changes how the company relates to its customers.

Product and service: AI can be inside the product, on top of the product or be the product. The jump to Transform is moving from selling equipment to selling a continuous result, such as guaranteed operating hours thanks to predictive maintenance. What is sold and how it is charged change.

People: people appear in three roles, as recipients of AI, as subjects of decisions taken with AI and as promoters of new uses. Transform here means that the structure and the distribution of work change in a complete unit.

Operations: processes, value chain and efficiency. It is the sphere where efficiency is easiest to measure and where many companies concentrate their effort.

Why it matters: the same type of technology appears in all three columns. If the student sees that an agent can be Optimise or Transform depending on what changes, they have understood the method.

To go further: the SEVEN-G gallery of examples by sector shows use cases from eleven sectors with their sources.

Question for the class: in which cell of this table would you put each of your three use cases from the starting exercise?

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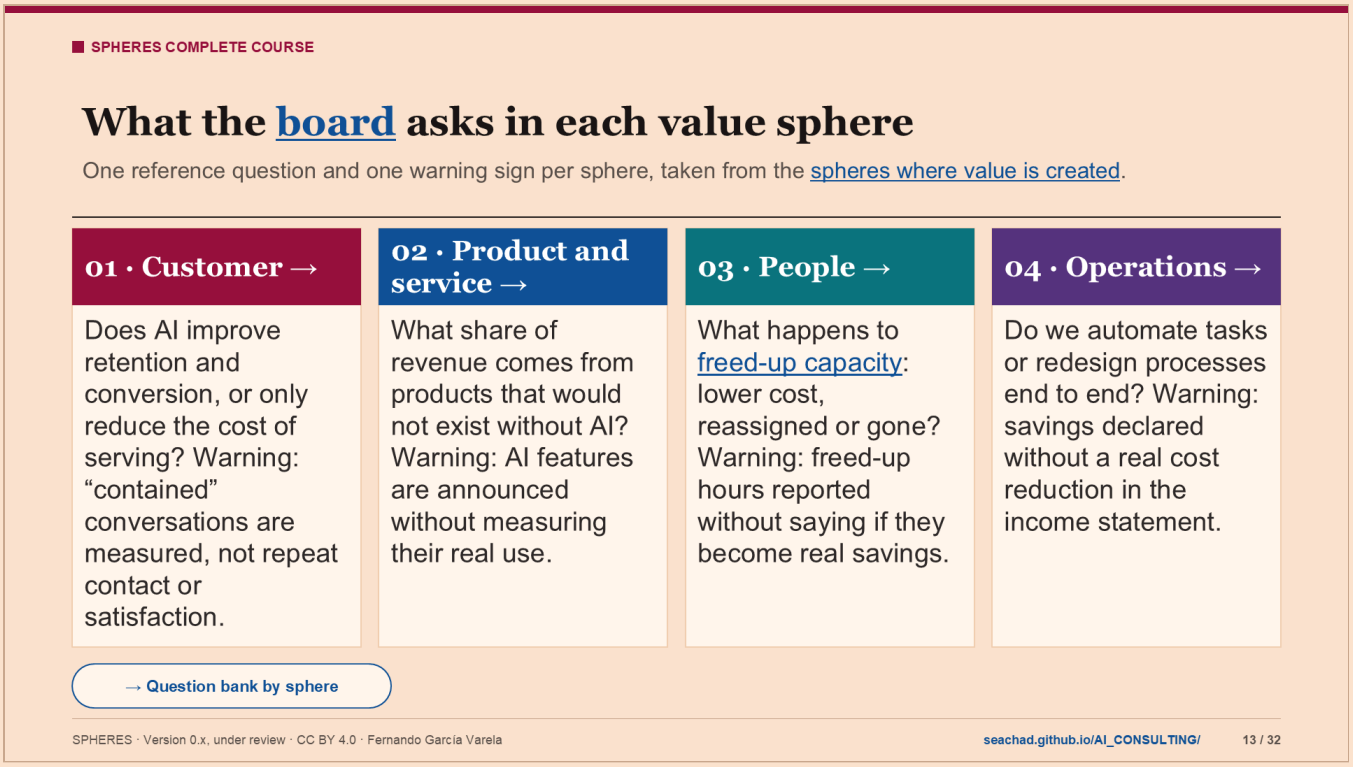
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SOURCES AND LINKS

- **SPHERES 02 §2 to §5 · The four value spheres** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html
- **SPHERES 01 §3 to §5 · Examples by level** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html
- **SPHERES 02 · The three roles of people** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#the-three-roles-of-people-with-regard-to-ai
- **Spheres where value is created** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html
- **Gallery of examples by sector** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/galeria/index.html



Notes

Each sphere in document 02 has questions for the board, warning signs and a way of measuring. Here there is one question and one warning per sphere; the rest is in the document and in the question bank of document 05.

Customer: the question separates two types of value. Reducing the cost of serving is Optimise. Improving retention or conversion requires a control group to attribute the effect to AI. The warning is measuring what is easy, the conversations the assistant resolves, and not what is important, whether the customer calls again or is satisfied.

Product and service: the question forces a separation between the product that is protected and the product that is built. The typical warning is the announcement without measured use.

People: the question about freed-up capacity is the most uncomfortable one. If freed-up hours do not turn into a lower cost or an explicit reassignment, the saving does not exist.

Operations: automating isolated tasks usually moves the bottleneck to the next step. Redesigning the complete process is another bet, at another level.

Why it matters: a board member does not need to understand the model to ask these questions. They need to know which one to ask in each sphere. That is the value of the method for the board.

Self-check: why is measuring only contained conversations a warning sign? Answer: because a contained conversation can end in a customer who calls again or leaves; the cost goes down and the value can fall.

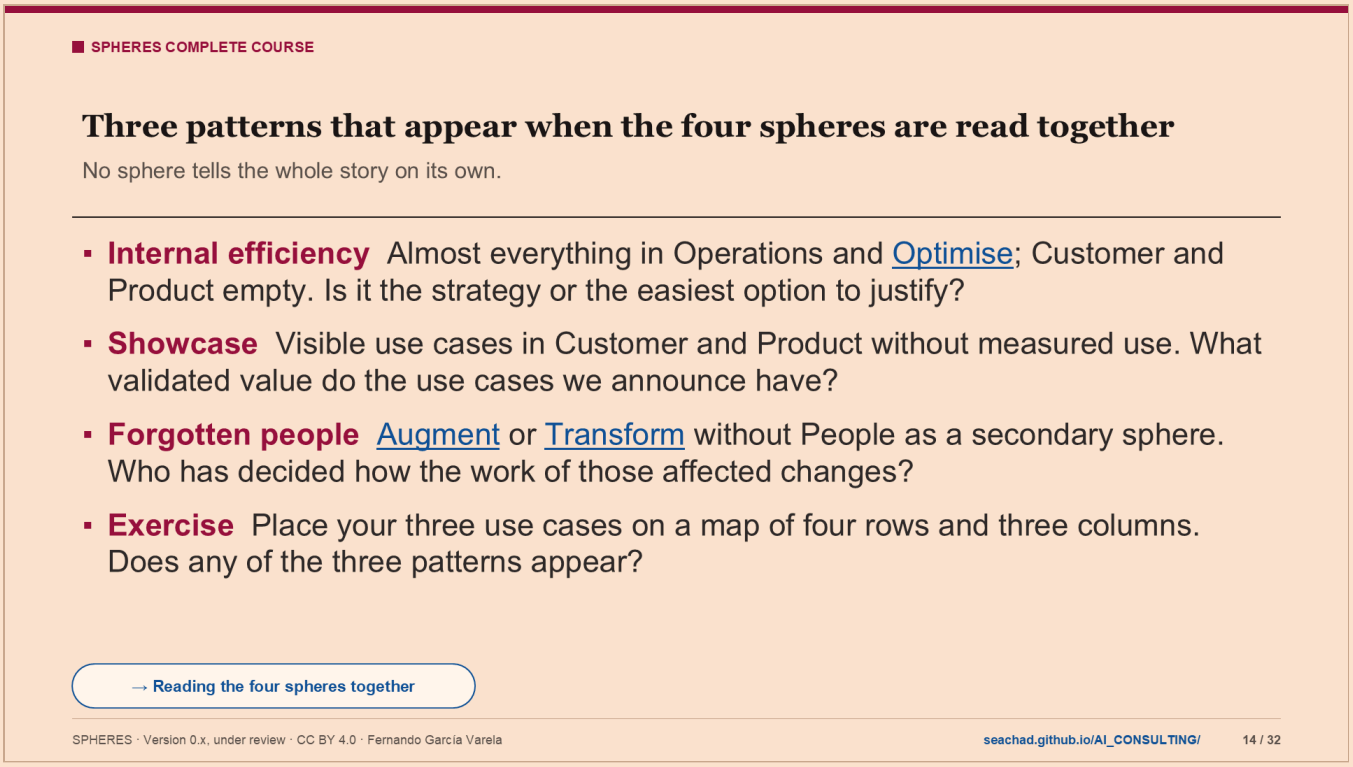
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SOURCES AND LINKS

- **SPHERES 05 §5 · Question bank by sphere** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#question-bank-by-sphere
- **Question bank by sphere** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#question-bank-by-sphere



Notes

This is the close of module 3. The value spheres are read as a set, and three patterns appear frequently.

Internal efficiency: most use cases are in Operations and Optimise; Customer and Product are almost empty. It usually means that AI is used to reduce cost, not to compete. It is not necessarily a mistake: it may be the strategy. The question is whether it is a decision or the easiest option to justify.

Showcase: there are visible use cases in Customer and Product without measured use, and few in People and Operations. AI is used to communicate, not to change.

Forgotten people: there are Augment or Transform use cases in Customer, Product or Operations that do not have People as a secondary sphere. Roles are changed without an adoption plan or an explicit management decision.

Why it matters: looking at the spheres together lets the board distinguish a deliberate strategy from a set of projects that have built up over time.

Exercise, about ten minutes in groups of four. Each group puts its twelve use cases from the starting exercise on a map of four rows (spheres 01 to 04) and three columns (levels). Each group says in one sentence which pattern it sees and which question it would ask the board.

In class, the map usually comes out loaded in Operations and Optimise. It is a good way into module 4: data, knowledge or decisions are almost never thought of first.

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SOURCES AND LINKS

- **SPHERES 02 §6 · Reading the four spheres together** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#reading-the-four-spheres-together
- **Reading the four spheres together** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#reading-the-four-spheres-together



Notes

Instructor's script. Spheres 05 Data, 06 Knowledge and 07 Decision do not create value in themselves, but make it possible or impossible. They are analysed with the same ambition levels as the value spheres, because a use case can optimise, augment or transform the data, knowledge or decision capability itself.

It is in these spheres that the uncomfortable questions appear. Talking about opportunities in Customer or Product is easy. Admitting that nobody knows what data the company has, that critical knowledge is in the heads of three people, or that a system already sets prices without anyone having decided it, is not.

Why it matters: a Transform ambition in a value sphere without enough capability in Data, Knowledge and Decision is a sign of risk, not of boldness. Most delays and failures of AI use cases are not caused by the model, but by unavailable data, undocumented knowledge or decisions without rules.

Important rule: a use case that uses data is not placed in the Data sphere because of that; almost all of them use data. An enabler is the primary sphere only when the main result of the use case is the capability itself. A common data platform goes to Data; a product recommender that uses behavioural data goes to Customer, because its metric is conversion.

Question for the class: in your experience, what stops more AI projects: the model, the data or the lack of rules on who decides?

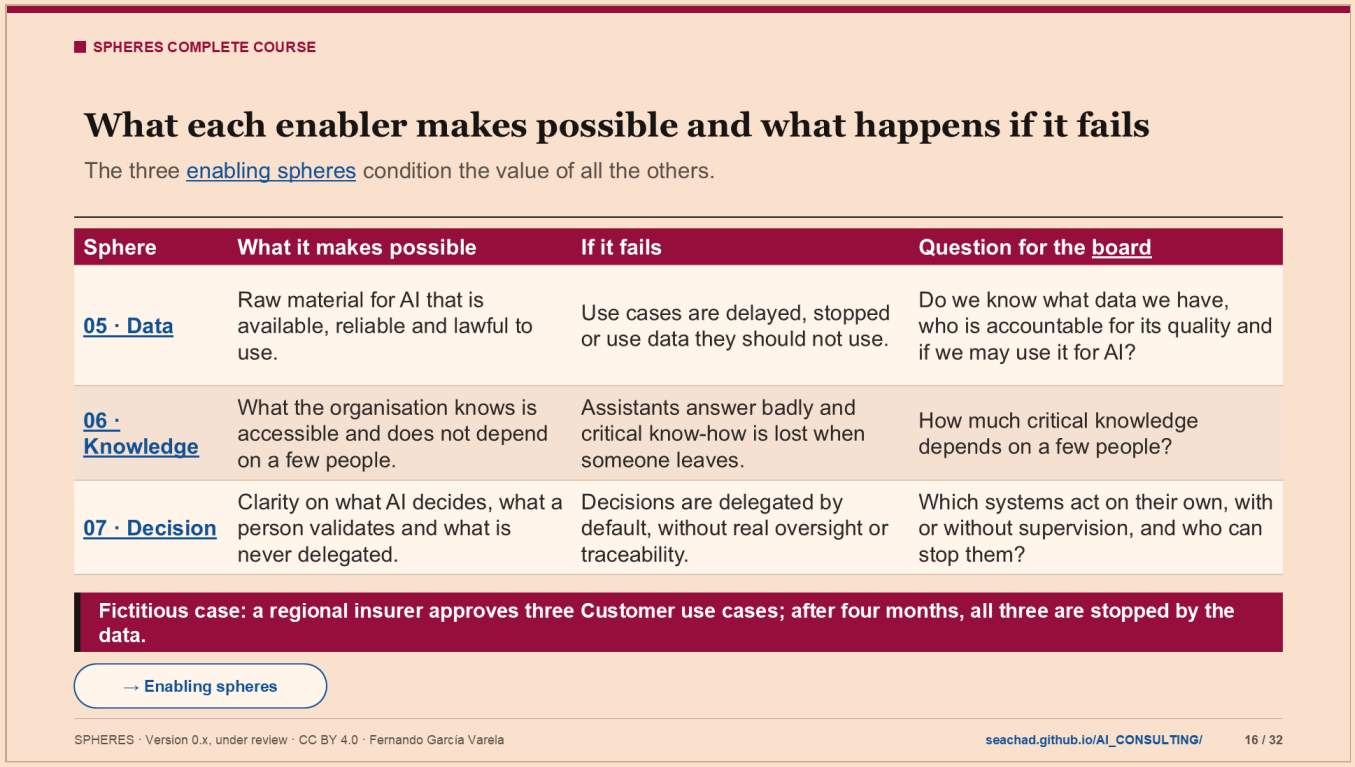
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- **Enabling spheres** (esferas 05–07): The three spheres that do not create value on their own but make it possible, such as data, technology and people. Without them, use cases in the value spheres stay as pilots. The document explains each one with examples and questions. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html

SOURCES AND LINKS

- **SPHERES 03 §1 · What the enabling spheres are** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#what-the-enabling-spheres-are

- **SPHERES 03 · When an enabler is the primary sphere** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#when-an-enabler-is-the-primary-sphere



SPHERES COMPLETE COURSE

What each enabler makes possible and what happens if it fails

The three enabling spheres condition the value of all the others.

Sphere	What it makes possible	If it fails	Question for the board
05 · Data	Raw material for AI that is available, reliable and lawful to use.	Use cases are delayed, stopped or use data they should not use.	Do we know what data we have, who is accountable for its quality and if we may use it for AI?
06 · Knowledge	What the organisation knows is accessible and does not depend on a few people.	Assistants answer badly and critical know-how is lost when someone leaves.	How much critical knowledge depends on a few people?
07 · Decision	Clarity on what AI decides, what a person validates and what is never delegated.	Decisions are delegated by default, without real oversight or traceability.	Which systems act on their own, with or without supervision, and who can stop them?

Fictitious case: a regional insurer approves three Customer use cases; after four months, all three are stopped by the data.

→ Enabling spheres

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Notes

Explain each enabler with its motto and its example of Optimise, Augment and Transform.

Data: cleaning and removing duplicates is Optimise. Letting any authorised employee query data in natural language is Augment: more people can use more data to decide. Offering aggregated and anonymised data as a service to third parties is Transform: data generates a revenue line that did not exist.

Knowledge: semantic search over internal documentation is Optimise. Capturing the tacit knowledge of experts with domain assistants is Augment. Turning the company's own knowledge into a competitive advantage that is hard to replicate is Transform.

Decision: automating low-risk, high-frequency decisions is Optimise. Presenting options with their risk and probability so that a person chooses and leaves a record is Augment. Executives overseeing decision systems instead of deciding each case is Transform.

The case in the highlight is fictitious and comes from document 03. A regional insurer approves three Customer use cases. After four months, all three are stopped: customer data is spread over four systems, without an owner, and nobody has confirmed whether the consent allows that use. The company first opens an Optimise use case in Data. The diagnosis of the enablers, which we will see in two slides, would have shown it on the first day.

Why it matters: a board that approves ambitions without looking at the enablers is approving promises that the organisation cannot keep.

Question for the class: which of the three questions in the last column is hardest to answer in a company you know?

TERMS ON THIS SLIDE

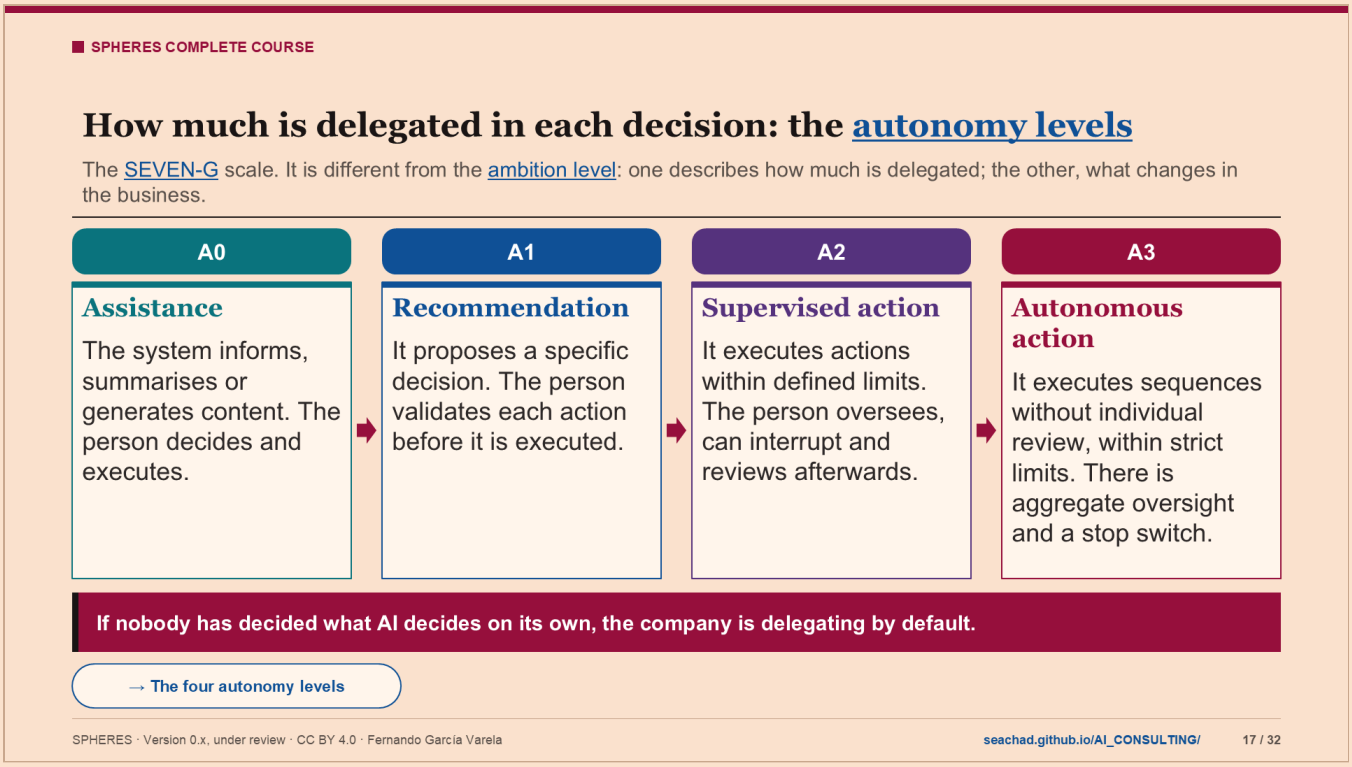
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SOURCES AND LINKS

- **SPHERES 03 §2 · Sphere 05 · Data** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-05-data
- **SPHERES 03 §3 · Sphere 06 · Knowledge** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-06-knowledge
- **SPHERES 03 §4 · Sphere 07 · Decision** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-07-decision



Notes

The Decision sphere covers which decisions AI systems take, recommend or execute, with what information, at what autonomy level, with what human oversight and with what traceability. Its motto: who decides, with what information and with how much delegation.

Illustrative examples of each level:

- A0: the summary of a file before the analyst reviews it.
- A1: a discount proposal that the account manager approves or rejects.
- A2: automatic replenishment of stock with a daily review of exceptions.
- A3: continuous adjustment of the prices of a catalogue within an approved band.

Do not confuse autonomy with ambition. An A3 system that adjusts prices within current tariffs can be Augment; an A0 assistant can be part of a Transform bet.

Fictitious case from document 03: a logistics operator installs a route allocation system as a “support tool”. In its first diagnosis it finds out that for months the system has been changing routes without review: in practice it works as A2, but nobody decided it. The override rate by traffic managers is almost zero, and management read that as success. In reality, traffic managers had no simple way to override. The company defines the types of decision, assigns A2 with written limits, sets up a stop switch with an owner and records each override.

Why it matters: when something goes wrong, someone has to be able to reconstruct what the system recommended, what the person decided and why.

Question for the class: is an override rate close to zero good news or bad news?

TERMS ON THIS SLIDE

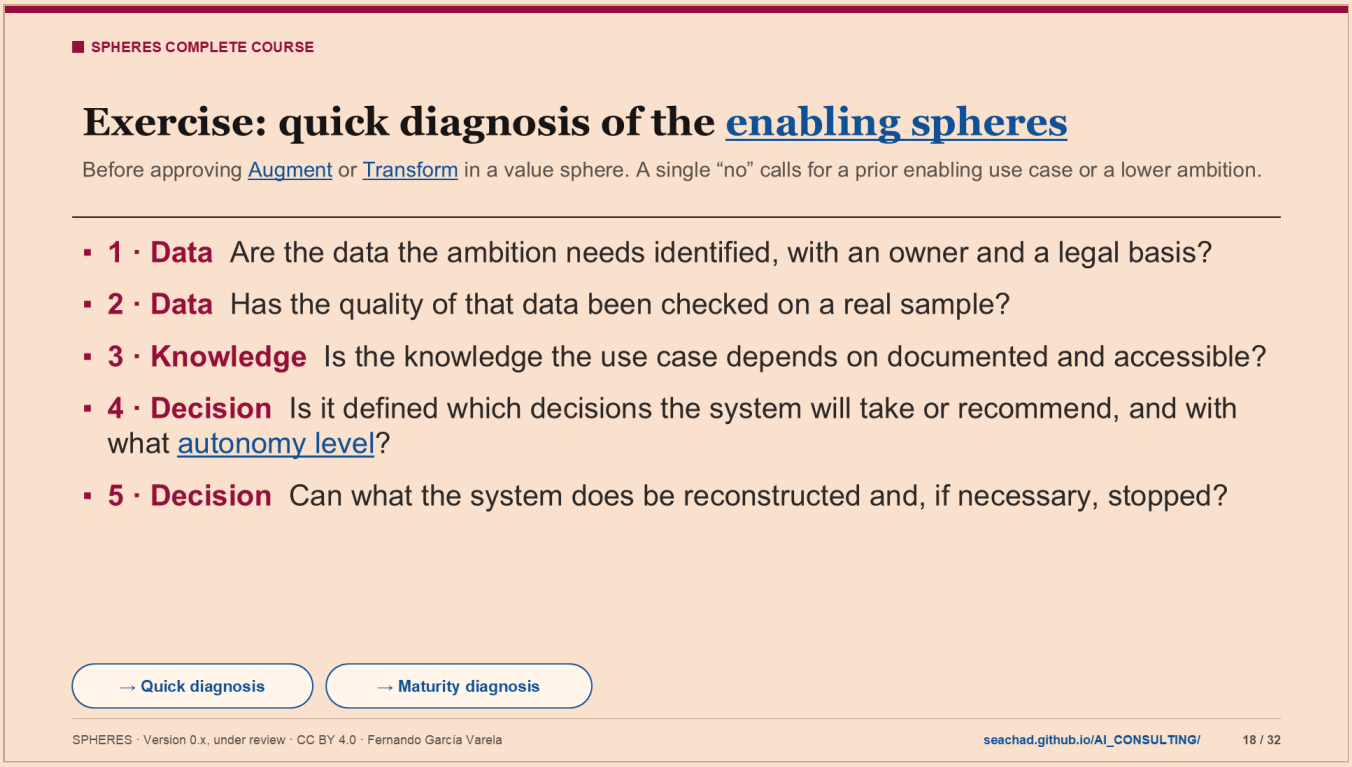
- **Autonomy levels** (A0–A3): A scale of how much an AI system acts on its own. A0: only informs; A1: proposes and a person validates each action; A2: acts within limits and a person supervises; A3: acts alone in a defined

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

- **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
- **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

- **SPHERES 03 §4 · Sphere 07 · Decision** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-07-decision
- **SPHERES 03 · The four autonomy levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#the-four-autonomy-levels
- **The four autonomy levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#the-four-autonomy-levels



Notes

This is the closing exercise of module 4. The diagnosis is cheap and quick, and it prevents the most expensive mistake in AI portfolios: approving ambitious use cases that stop months later for reasons that could be known on the first day.

How it works: if the proposed ambition in a value sphere is Optimise, the usual diagnosis continues. If it is Augment or Transform, the five questions are answered. If all are "yes", the ambition is sustainable. If any is "no", there are two ways out: open a prior enabling use case or reduce the ambition.

What to do with each "no":

- Question 1: first open a Data use case or reduce the ambition.
- Question 2: set quality thresholds and measure them before building.
- Question 3: capture the critical knowledge and assign who checks the answers.
- Question 4: define types of decision, level A0 to A3 and oversight before deploying.
- Question 5: design traceability and the stop switch as requirements, not as improvements.

Exercise, about ten minutes in pairs. Choose the most ambitious use case on your list from the starting exercise. Answer the five questions with what you really know, not with what you assume. Count how many "no" and how many "I don't know" answers come out. In class, "I don't know" is the most frequent answer; treat it as a "no".

To go further: in SEVEN-G, the maturity diagnosis (T15) measures the company's capability with seven dimensions and evidence.

TERMS ON THIS SLIDE

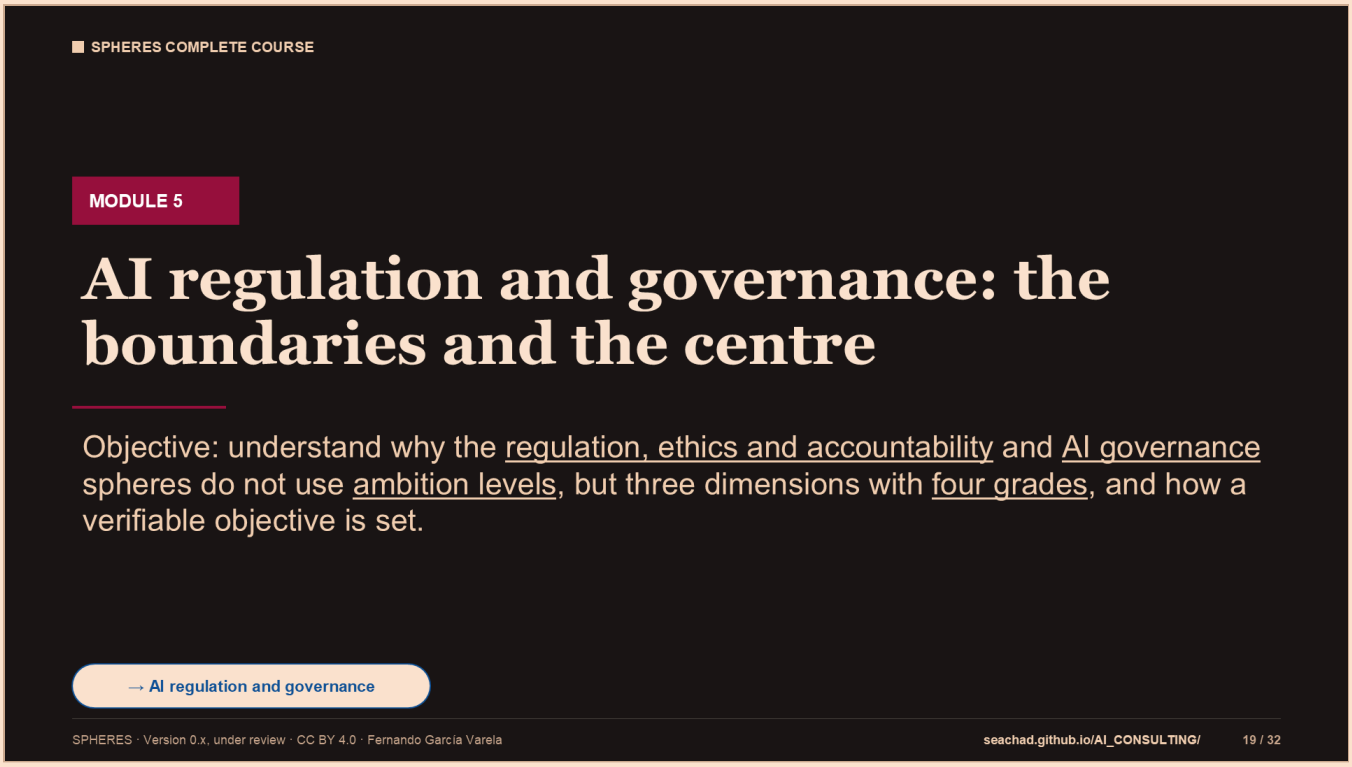
- **Enabling spheres** (esferas 05–07): The three spheres that do not create value on their own but make it possible, such as data, technology and people. Without them, use cases in the value spheres stay as pilots. The document

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

- **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
- **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
- **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

SOURCES AND LINKS

- **SPHERES 03 §5 · Quick diagnosis of the enablers** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#quick-diagnosis-of-the-enablers
- **Quick diagnosis** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#quick-diagnosis-of-the-enablers
- **Maturity diagnosis** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T15_diagnostico_madurez/madurez.html



Notes

Instructor's script. Spheres 01 to 07 describe where AI is used and what makes it possible. Spheres 08 and 09 describe within which boundaries it is used and how it is governed.

Sphere 08, Regulation, ethics and accountability, sets the boundaries: the applicable rules, the ethical principles the company takes on voluntarily and the chain of accountability when something goes wrong. Its reference question: do we govern proactively, or do we wait for the regulator to force us?

Sphere 09, AI governance, is the centre: the meta-sphere that connects the other eight with a structure of accountability, decision and oversight. Its question: does AI have corporate governance with the same formality as finance, risk or compliance?

That is why they are not assessed with Optimise, Augment and Transform. They do not create value in themselves: they set the conditions for the value of the others to be legitimate, sustainable and controllable.

Why it matters: if these spheres were measured with ambition levels, phrases such as “Transform regulation” or “Augment governance” would appear, which mean nothing verifiable. Worse still: investing in compliance would be read as a simple efficiency and would lower the profile of the portfolio, or it would be used to inflate it.

Question for the class: in a company you know, who would answer to the board if an AI system discriminated against a group of customers?

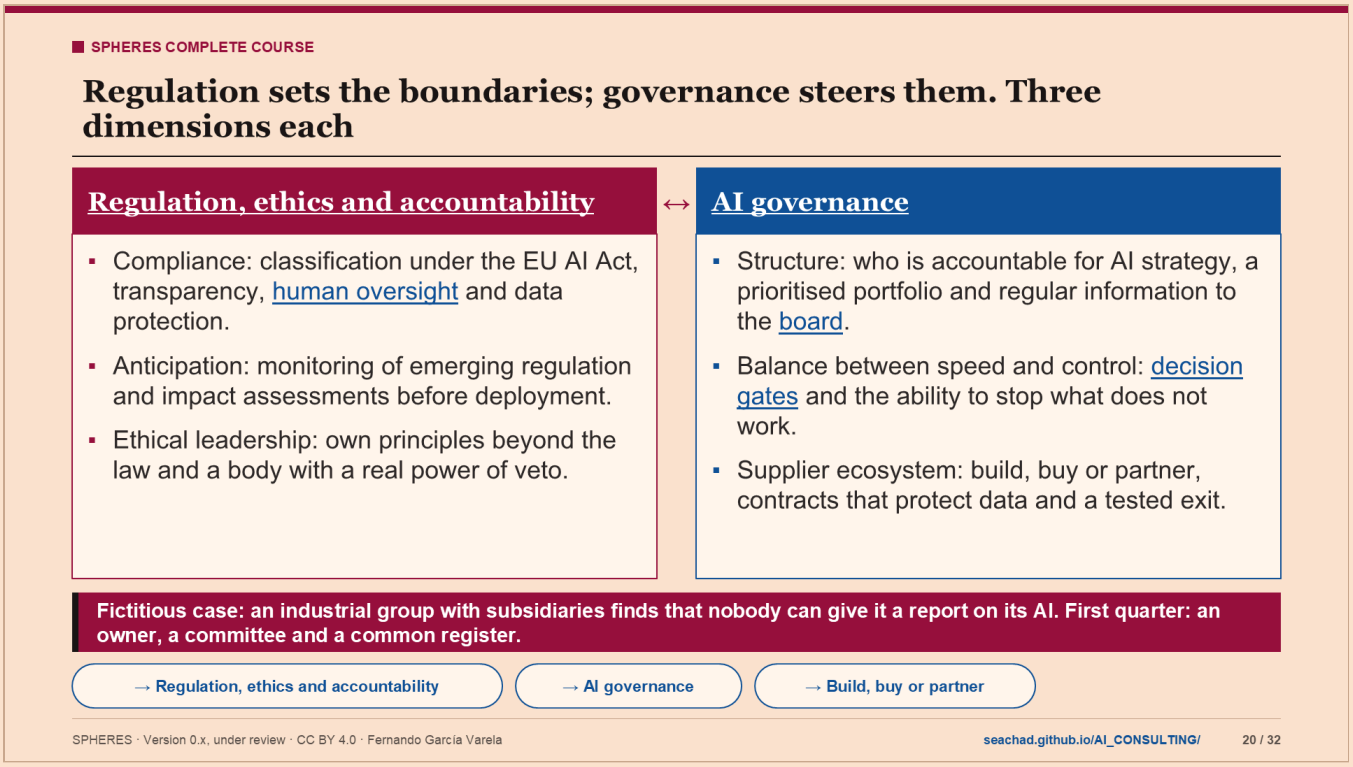
TERMS ON THIS SLIDE

- **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
- **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
- **Four grades of spheres 08 and 09**: The scale used to assess the regulation and governance spheres: absent, basic, systematic and advanced. They do not use ambition levels because the point is not how much change is wanted but how much control exists. The link opens the grades in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#the-four-grades

SOURCES AND LINKS

- **SPHERES 04 §1 · Why these two spheres are different** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#why-these-two-spheres-are-different
- **SEVEN-G 10 §4.2 · Rule for spheres 08 and 09** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#4-2-rule-for-spheres-08-and-09
- **AI regulation and governance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html



Notes

Each sphere is assessed in three dimensions. Explain each one with its question for the board.

Sphere 08:

- Compliance: are all our AI systems classified? Could any of them be a prohibited or high-risk practice without our knowing? Who signs that classification?
- Anticipation: which obligations will apply to us in the coming years, and which systems do they affect?
- Ethical leadership: is there someone with a real power to say no to a profitable but inappropriate use case?

Sphere 09:

- Structure: who has ultimate accountability for the AI strategy? Do we receive regular and understandable information?
- Balance between speed and control: are there decision gates in the life cycle? Can we stop a use case that does not work?
- Supplier ecosystem: do we depend on a single model provider? For each capability, the company chooses to build (if it is differentiating and there is own data and talent), buy (if it is common in the market) or partner (if it requires knowledge or data the company does not have on its own).

Fictitious case from document 04: each subsidiary of an industrial group launched its own use cases and hired its own suppliers. The board asks for a report and nobody can provide it. In the first quarter, the group appoints an AI owner who reports to the board, creates a committee with the power to stop use cases and records everything in a common register. When reviewing the register, the committee stops three duplicated use cases and finds that almost all model spending is with a single provider without an exit strategy.

Why it matters: without sphere 09, nobody is accountable for the other eight.

TERMS ON THIS SLIDE

- **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
- **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
- **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
- **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
- **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

- **Regulation (EU) 2024/1689 on artificial intelligence** https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- **Regulation (EU) 2016/679 on data protection** https://eur-lex.europa.eu/eli/reg/2016/679/oj/eng
- **Build, buy or partner** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#build-buy-or-partner

SPHERES COMPLETE COURSE

The four grades per dimension, always with evidence

Each grade includes the requirements of the previous one. Without the minimum evidence, the lower grade is assigned.

Grade	What it means	Minimum evidence
Absent	No owner or defined practice, or only occasional and undocumented ones.	None. Typical phrase: “each project looks after that”.
Basic	There are practices and owners, but they depend on people or projects and miss areas.	Partial documents or records.
Systematic	A defined, approved process applied to the whole scope, with owners.	Approved procedure, complete records and calculated indicators.
Advanced	Systematic, on target for two quarters, with continuous improvement and independent review.	Internal or external audit with no major nonconformities open.

Self-check: why is there no such thing as “Transform regulation”? Answer in the notes.

→ The four grades | → Regulation and governance on the map

SPHERES · Version 0.x, under review · CC BY 4.0 · Fernando García Varela seachad.github.io/AI_CONSULTING/ 21 / 32

Notes

Three rules for using the grades well:

- A grade is assigned with evidence, not by optimistic self-assessment. Without the minimum evidence, the lower grade is assigned.
- The grades are not maturity levels of the company. They serve as evidence for the SEVEN-G maturity model, but they do not replace it.
- The objective is set per dimension. “Reach Systematic in Compliance and Basic in Ethical leadership in twelve months” is a verifiable objective; “improve AI governance” is not.

Fictitious case from document 04: a financial institution has in production a model that prioritises financing applications and an assistant that answers customers. Neither is classified. Diagnosis: Compliance, Basic; Anticipation, Absent; Ethical leadership, Basic. The board sets for twelve months Systematic in Compliance and in Anticipation, and Basic in Ethical leadership with a body that has a real power of veto. The first action is to classify all the systems in the inventory, starting with those that affect decisions about people.

On the portfolio map, 08 and 09 do not occupy Optimise, Augment and Transform columns. They are shown in a separate block, with the current grade and the target grade of each dimension.

Answer to the self-check: because regulation does not create value in itself or change the business; it sets the conditions for the value of the other spheres to be legitimate. “Transform regulation” cannot be verified. “Move from Basic to Systematic in Compliance in twelve months” can.

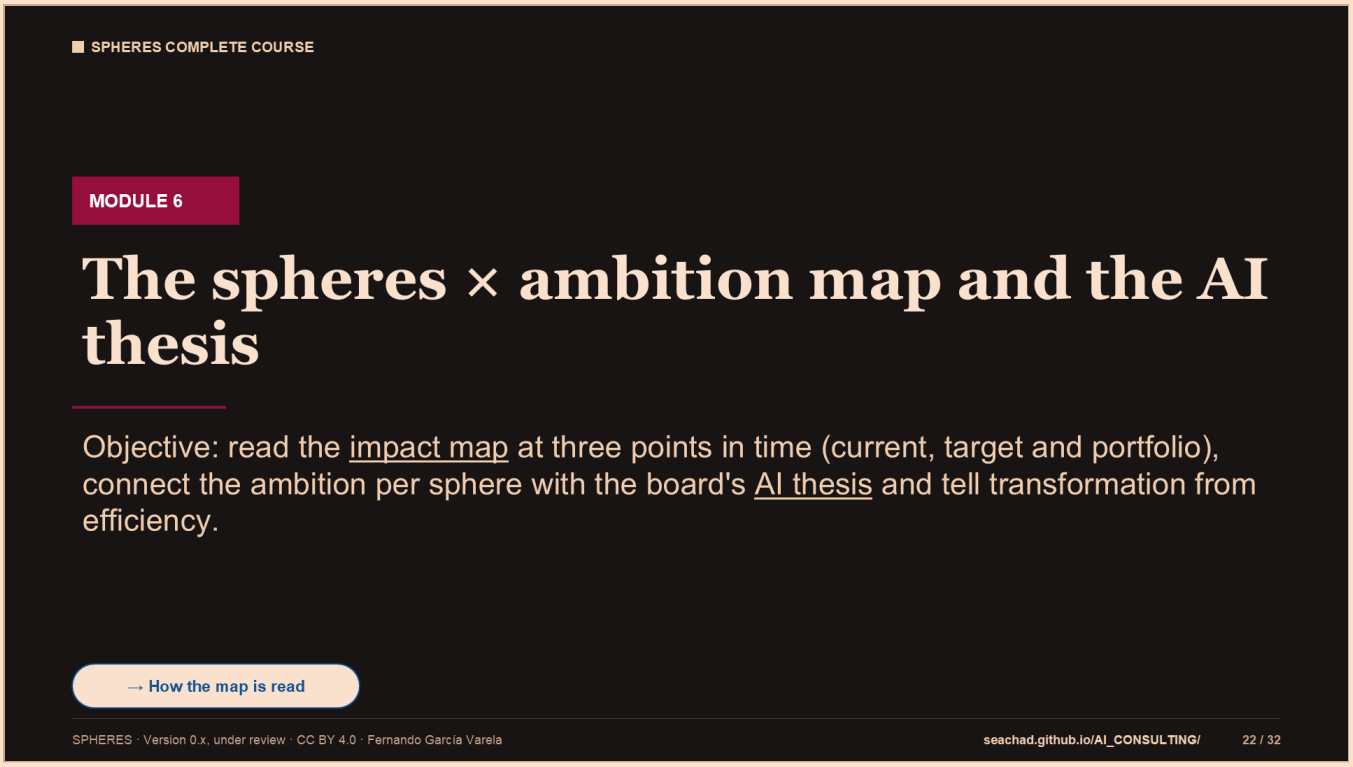
TERMS ON THIS SLIDE

- **Four grades of spheres 08 and 09**: The scale used to assess the regulation and governance spheres: absent, basic, systematic and advanced. They do not use ambition levels because the point is not how much change is wanted but how much control exists. The link opens the grades in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#the-four-grades

- **Nonconformity** (P50): A breach of a framework rule or a control, even if it caused no harm (for example, a use case in production without sign-off). It is classed as minor, major or critical, recorded (P50), its root cause analysed (P52) and corrected on time. It lets governance learn from its failures. The link opens the process in document 37. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/37_SEVEN-G_No_conformidades_e_incidentes.html#nonconformity-process

SOURCES AND LINKS

- **SPHERES 04 §5 · How 08 and 09 appear on the map** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#how-08-and-09-are-presented-on-the-map
- **Regulation and governance on the map** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#how-08-and-09-are-presented-on-the-map



Notes

Instructor's script. This module connects SPHERES with SEVEN-G. SPHERES is the explanatory layer of the impact map; the rules, indicators and tools are in three SEVEN-G documents:

- Document 10, map of spheres and ambition levels: rules for the primary and secondary sphere, and the heat map.
- Document 12, transformation index: how each use case is classified and whether the company is transforming or only becoming more efficient.
- Document 13, AI thesis, ambition and risk appetite: the board's decision on where and with what ambition to use AI.

The map is read at three points in time:

- Current map: where the company's AI is today.
- Target map: what ambition management wants in each sphere.
- Portfolio map: which approved use cases lead from one to the other.

The comparison gives three readings: concentration (everything in a few cells), gaps (priority spheres without use cases) and inconsistency (declared ambition without a portfolio to deliver it).

Why it matters: a map that only shows the current state is an inventory. A map that compares current, target and portfolio is a decision tool.

Question for the class: what is more dangerous for a board, an empty priority sphere or a non-priority sphere full of use cases?

TERMS ON THIS SLIDE

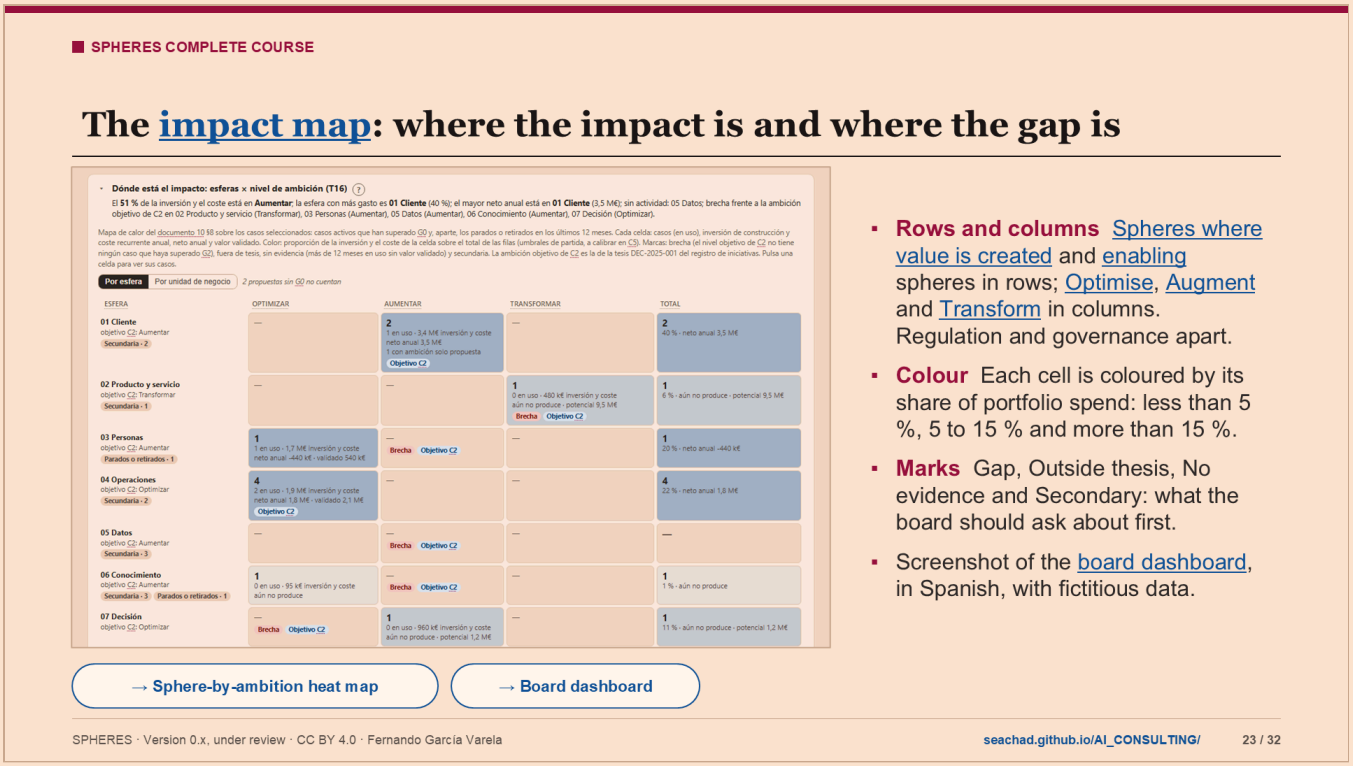
- **Impact map** (T16): Component A of SEVEN-G: where and with what ambition AI acts. It is read as a grid of the portfolio, with the spheres in rows and Optimise, Augment and Transform in columns. Each cell shows use cases, investment, cost and value, and flags the gap against the ambition the board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

- **AI thesis, ambition and risk appetite** (documento 13): It explains the board's big decision: what the company wants AI for (thesis), with what ambition in each sphere, how much risk it accepts (appetite), with what budget and with which thresholds. It is decided in the direction stage and recorded in template P35. The link opens the document. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#ai-thesis

SOURCES AND LINKS

- **SPHERES 00 §5 · How the map is read** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#how-the-map-is-read
- **SPHERES 00 §8 · Relationship with SEVEN-G** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#relationship-with-seven-g
- **How the map is read** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#how-the-map-is-read



Notes

The image is the “Where the impact is” card of the SEVEN-G board dashboard, with the fictitious example portfolio. It is the operating version of the SPHERES map. The screenshot is in Spanish.

How to read it:

- Each cell gathers the use cases of one primary sphere and one level: how many there are, how many are in production, the investment, the recurring cost, the net and the validated value.
- The colour depends on the share of portfolio spend in the cell, with thresholds of 5 % and 15 %.
- The target ambition of each sphere comes from the AI thesis approved by the board and stored in the use case register (T01).

The four marks are the most useful part for a session:

- Gap: the target ambition of the sphere has no approved use case to deliver it.
- Outside thesis: there is investment in a cell that the thesis does not prioritise.
- No evidence: the cell has use cases without measured value.
- Secondary: the sphere appears only as the secondary sphere of other use cases.

Illustrative example from document 10: a portfolio with 75 % of spend in Optimise and 40 % in Operations. The map does not say that this is wrong. It says that the board must confirm whether it is its strategy.

Why it matters: on one screen, the board sees where it puts the money, where it wanted to put it and what is missing to get there.

Question for the class: if a Transform cell is marked as a Gap, what decision can the board take? There are two: approve a use case to deliver it, or lower the ambition.

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
- **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
- **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
- **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 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 10 §8 · 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
- **SEVEN-G 10 §8.2 · Illustrative example** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#8-2-illustrative-example
- **SEVEN-G 60 §10.5 · Where the impact is in the dashboard** 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
- **Sphere-by-ambition heat map** 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
- **Board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html

SPHERES COMPLETE COURSE

The AI thesis: where, with what ambition and what will not be done

The board approves it in the direction stage of the corporate cycle. It is a short statement, not a project plan.

Element	What it sets	Rule
AI thesis	Why AI matters, where to use it, with what ambition and what will not be done.	Two to four pages. It contains specific renunciations.
Ambition per sphere	Priority, target ambition, horizon, indicator and owner in the other spheres.	At most three high-priority spheres.
AI regulation and governance	Target grade per dimension, with horizon, indicator and owner.	Never Optimise, Augment or Transform.
Return horizon	What is required to continue at each level.	Transform does not require NPV ≥ 0 overall; its first stage, at most 25 %.
Portfolio balance	Spend bands per level: Prudent, Balanced or Ambitious postures.	If the thesis has Transform, its band does not start at 0 % after the first year.

A thesis that declares every sphere a priority guides no decision.

→ AI thesis, ambition and risk appetite → AI thesis and risk appetite

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Notes

The AI thesis is the board decision that turns the map into direction. It is approved in SEVEN-G cycle C2 · Direction and documented with the AI thesis and risk appetite template (P35).

It is a short statement, of two to four pages, that explains why AI matters to the company, where it wants to use it, with what ambition and what it will not do. It is not a project plan or a catalogue of technologies. It must be readable in ten minutes and usable to say no to a use case.

Ambition per sphere: for each sphere from 01 to 07, the thesis sets the priority (at most three high-priority spheres), the target ambition, the horizon, the main indicator and a member of senior management who is accountable. Illustrative example from document 13: Product and service, high priority, Transform in 24 months; Operations, high priority, Optimise in 12 months.

Return horizon: in Optimise, NPV ≥ 0 is required within the horizon set in C2. In Transform, NPV ≥ 0 is not required overall: the first stage must not exceed 25 % of the estimated total investment, learning milestones come at most every six months and there are stop criteria per stage.

Portfolio balance, illustrative postures: Prudent, 70 to 85 % in Optimise; Balanced, 55 to 70 %; Ambitious, 40 to 55 %.

Why it matters: without a thesis, the heat map has nothing to compare against. With a thesis, each gap and each cell outside the thesis is a concrete question for the board.

Exercise: write three renunciations for the thesis of a company you know.

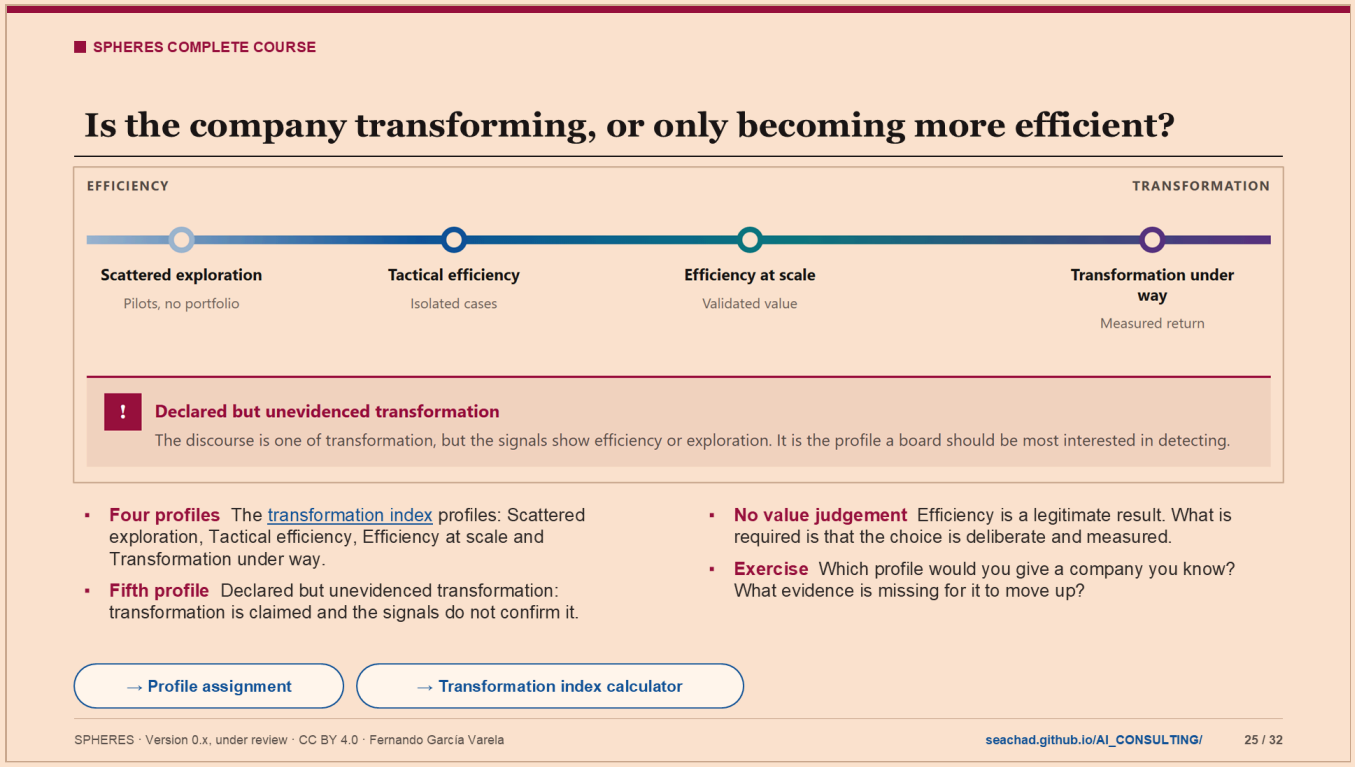
TERMS ON THIS SLIDE

- **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

- **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
- **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
- **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
- **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
- **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

SOURCES AND LINKS

- **SEVEN-G 13 §3 and §4 · Thesis and ambition per sphere** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#ambition-per-sphere
- **SEVEN-G 13 §4.3 · Illustrative example** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#4-3-illustrative-example
- **SEVEN-G 13 §7 and §8 · Return and balance** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#return-horizon-by-ambition-level
- **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#ai-thesis
- **AI thesis and risk appetite** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P35_SEVEN-G_Tesis_de_IA_y_apetito_de_riesgo.html



Notes

This is the close of module 6. The map says where and with what ambition the company bets. The transformation index in SEVEN-G document 12 says whether that ambition is really met.

How it works, without going into formulas:

- Each use case has three ambitions: the one proposed at the start, the one confirmed at the hypothesis gate (G2) and the actual one, checked at the scale-or-retire gate (G7).
- Eight signals, each scored from 0 to 3 with evidence, measure the balance of the portfolio, the real change in processes and roles, materialised savings, new revenue and the involvement of the board.
- The signals give a profile, from weakest to strongest: Scattered exploration, Tactical efficiency, Efficiency at scale and Transformation under way.

The fifth profile is the most important one for a board. If the company declares that it is transforming and the signals do not confirm it, the assigned profile is Declared but unevidenced transformation, and the profile that the signals do support is also reported.

The ambition overstatement rate measures how many use cases have an actual ambition lower than the confirmed one.

Why it matters: the index is not a value judgement. Efficiency is a legitimate result, and many companies must start with it to fund their later bets. What SEVEN-G requires is that the choice is deliberate, measured and taken by the right person.

To practise: the index calculator (T14) includes a fictitious example that gives, precisely, Declared but unevidenced transformation.

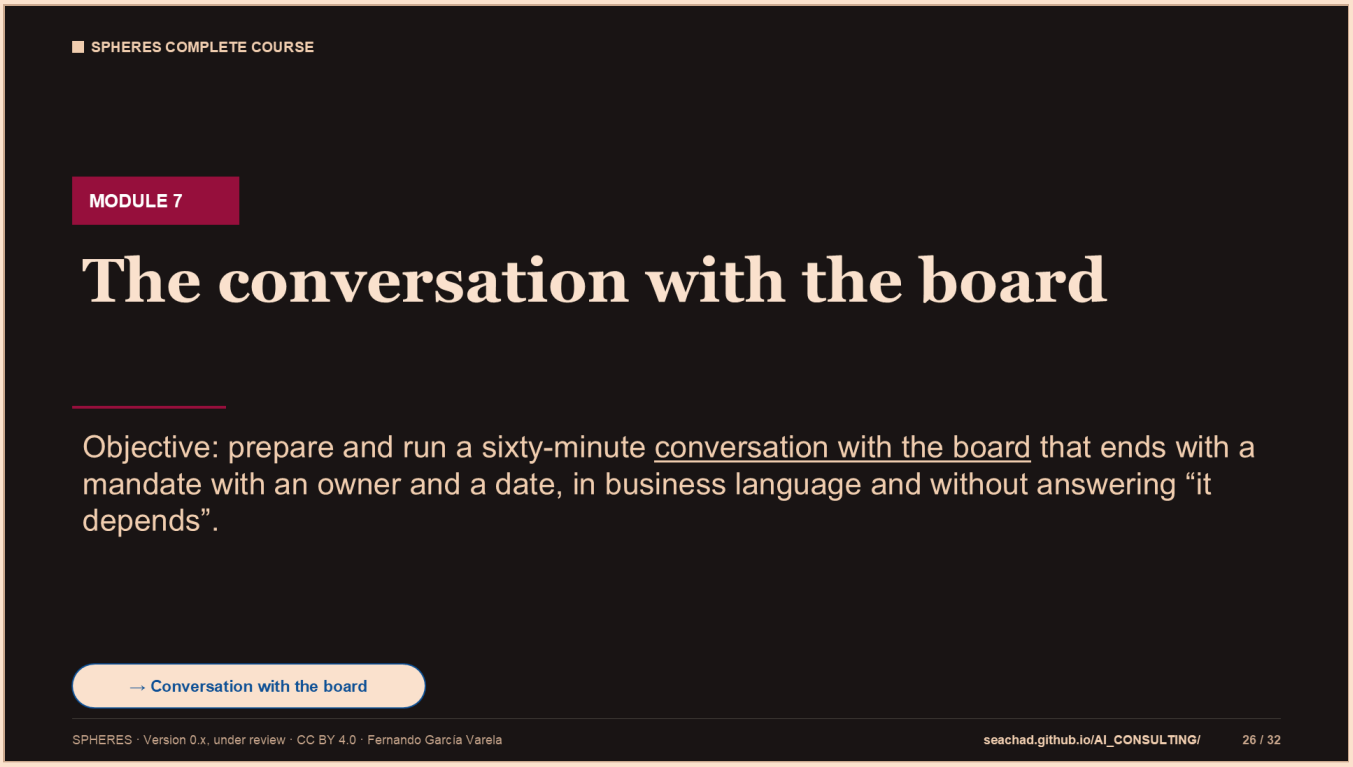
TERMS ON THIS SLIDE

- **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

- **SEVEN-G 12 §5 · Profile assignment** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#profile-assignment
- **SEVEN-G 12 §3.4 · Proposed, confirmed and actual ambition** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-4-proposed-confirmed-and-actual-ambition
- **Profile assignment** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#profile-assignment
- **Transformation index calculator** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T14_indice_transformacion/indice.html



Notes

Instructor's script. The first conversation about AI with a board has four objectives: understand the scope (AI affects the whole organisation, not only technology), place the company on the map, take a position on the priorities and on people, and decide a mandate for the first ninety days.

Preparation starts two or three weeks before:

- Two or three weeks before: short interviews with the chair, the chief executive and the heads of business, people, technology and risk.
- Two weeks before: the first preliminary map, with each known use case in its primary sphere and at its level, and the approximate grades of 08 and 09.
- One week before: a two-page note for the board with the decision that will be requested at the end.
- The day before: a rehearsal with timings.

Why it matters: the quality of the session depends on the preparation. A board that arrives without the prior note spends the session understanding the vocabulary and not deciding.

A principle of the conversation: no figures without support. Only figures from the company or from verifiable sources are used, and examples are marked as illustrative. Market statistics without a source to create urgency are avoided.

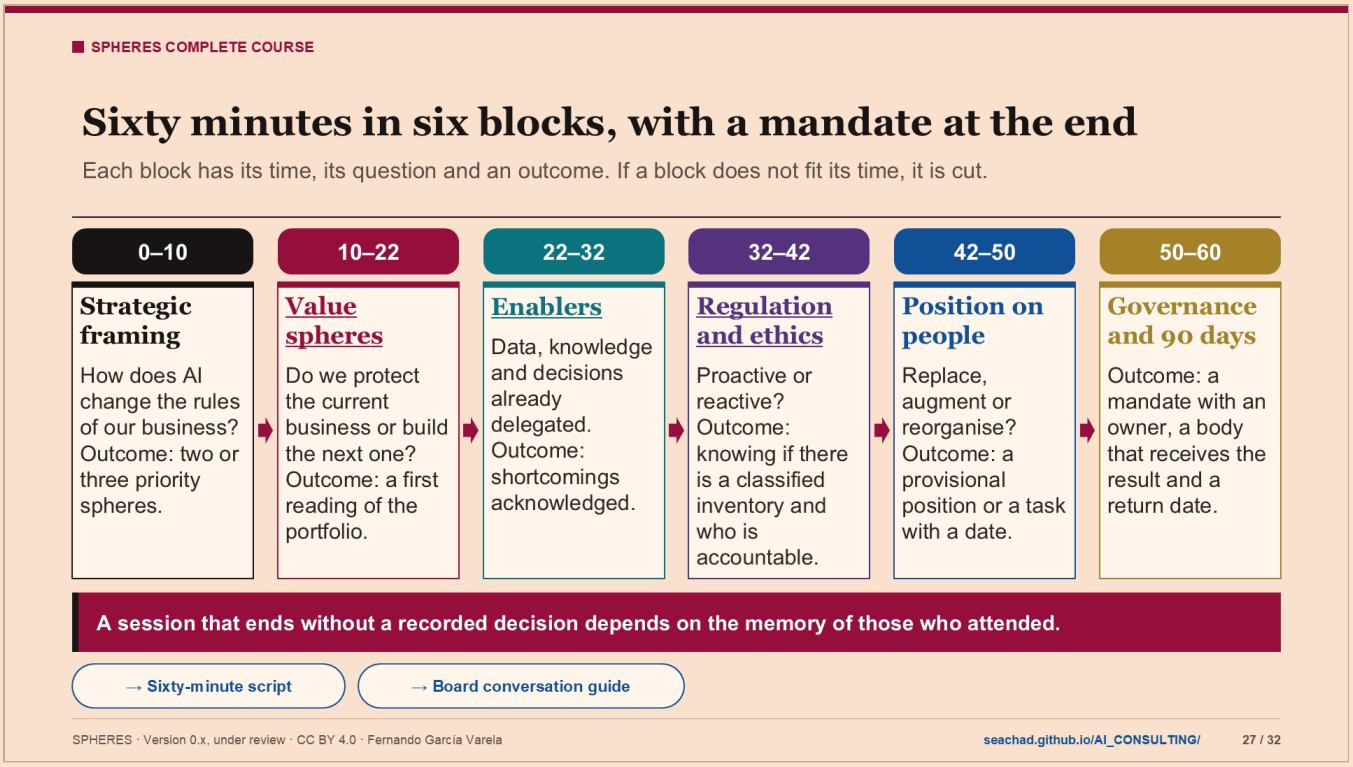
Question for the class: if you only had ten minutes with the board, what decision would you ask it for?

TERMS ON THIS SLIDE

- **Conversation with the board**: A SPHERES document with a script for talking about AI with the board using the spheres and ambition levels: what to ask in each sphere, which signals to look for and how to lead the conversation to decisions. The link opens the document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html

SOURCES AND LINKS

- **SPHERES 05 §2 · Principles of the conversation** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#principles-of-the-conversation
- **SPHERES 05 §3 · The preliminary map** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#how-to-build-the-preliminary-map



Notes

The script follows the order of the map: from the outside in, and it ends at the centre, governance.

Block 01, strategic framing, minutes 0 to 10: AI is placed as a business issue and the map is presented. Two or three priority spheres are noted.

Block 02, value spheres, minutes 10 to 22: where the company's AI is today and where it could be. A first reading of the portfolio and of whether there is any Transform bet.

Block 03, enablers, minutes 22 to 32: diagnosis of the real capability. It is the block of the uncomfortable questions.

Block 04, regulation, ethics and accountability, minutes 32 to 42: knowing whether there is an inventory with regulatory classification and who is accountable for it.

Block 05, position on people, minutes 42 to 50: an explicit position, even if provisional.

Block 06, governance and the first 90 days, minutes 50 to 60: close with a decision. The question is whether to commission the diagnosis and the governance structure in ninety days.

After the session: a note of conclusions within two working days, a record of decisions and tasks with owner and date within five working days, and the status of what was decided as the first item of the next session.

Why it matters: the most frequent mistake is a brilliant session that ends without a mandate. What was said is forgotten and AI remains without direction.

For the operating version, with the board dashboard, the SEVEN-G board conversation guide (document 61) has its own sixty-minute script.

TERMS ON THIS SLIDE

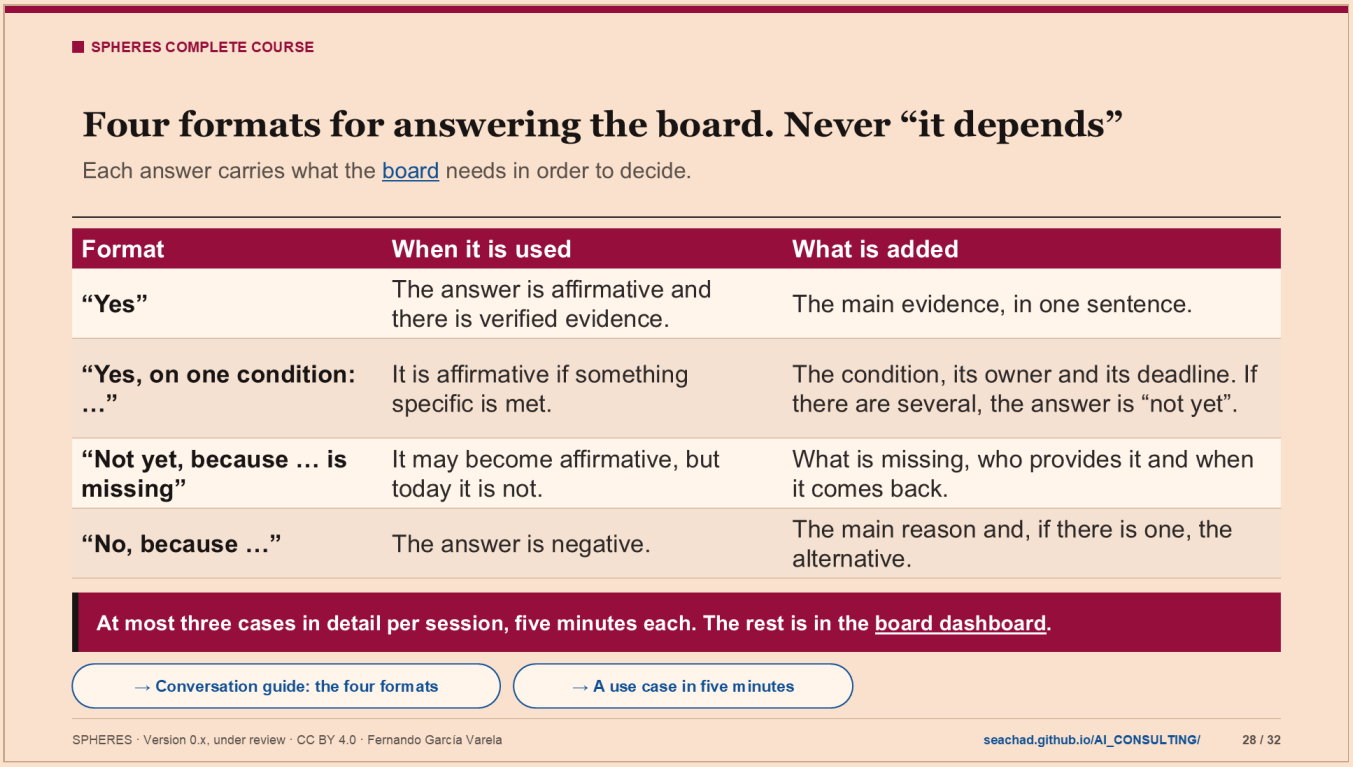
- **Spheres where value is created** (esferas 01–04): The four spheres in which AI creates direct business value, such as the customer relationship, operations or the product. For each one, the document gives examples by

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

SOURCES AND LINKS

- **SPHERES 05 §4 · Sixty-minute script** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#sixty-minute-script
- **SEVEN-G 61 · Script for a 60-minute session** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#script-for-a-60-minute-session
- **Sixty-minute script** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#sixty-minute-script
- **Board conversation guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#script-for-a-60-minute-session



SPHERES COMPLETE COURSE

Four formats for answering the board. Never “it depends”

Each answer carries what the board needs in order to decide.

Format	When it is used	What is added
“Yes”	The answer is affirmative and there is verified evidence.	The main evidence, in one sentence.
“Yes, on one condition: …”	It is affirmative if something specific is met.	The condition, its owner and its deadline. If there are several, the answer is “not yet”.
“Not yet, because … is missing”	It may become affirmative, but today it is not.	What is missing, who provides it and when it comes back.
“No, because …”	The answer is negative.	The main reason and, if there is one, the alternative.

At most three cases in detail per session, five minutes each. The rest is in the board dashboard.

→ Conversation guide: the four formats → A use case in five minutes

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Notes

This table comes from the SEVEN-G board conversation guide (document 61). It is one of the most practical tools in the course, also outside AI.

The rule: the answer is never “it depends”. If something depends on something else, the format is “Yes, on one condition” or “Not yet, because … is missing”. A board that hears “it depends” does not know what to decide.

One condition, not several: if the answer needs several conditions, the real answer is “not yet”.

Two other rules of the guide:

- At most three cases in detail per session. Three cases let the board understand, ask and decide; with more, the session becomes a presentation and decisions are postponed.
- Business language. The guide has a table of terms best avoided and how to say them. For example, “agents” on its own is replaced by a description of what the system can do: send communications, change data or make payments. The risk depends on what it can do.

Why it matters: the board does not decide on the technical quality of a use case; it decides whether it continues, on what condition and who is accountable. The four formats put that information in the first sentence.

Quick exercise: a board member asks “Is the customer assistant ready?”. The team knows it works, but the risk assessment is missing. Ask the class for the answer in one of the four formats. Expected answer: “Not yet, because the risk assessment is missing; the risk function provides it and it comes back at the next session”.

TERMS ON THIS SLIDE

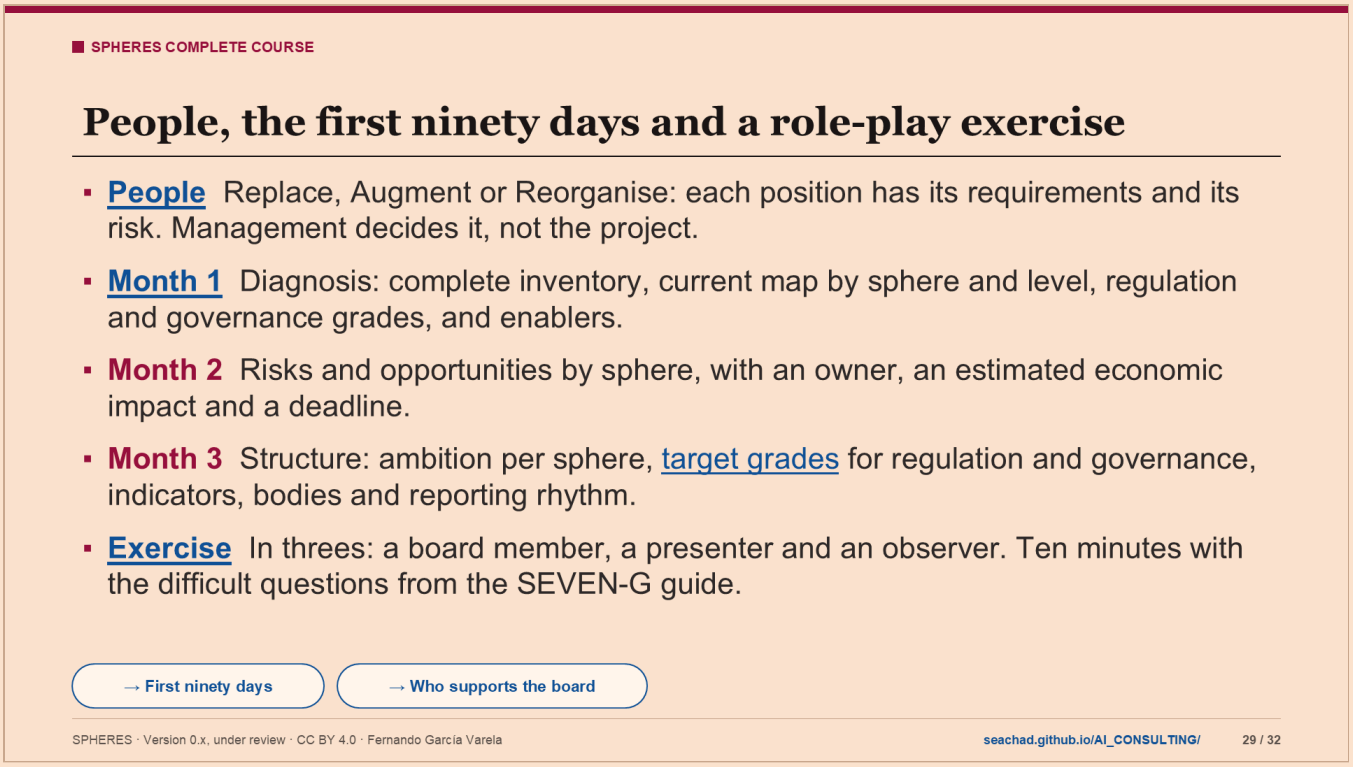
- **Board of directors**: The company's highest body. In SEVEN-G it approves the AI thesis and risk appetite (C2), Transform bets and their scaling, and oversees AI every quarter. AI is a strategic asset: its big decisions are not only

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

- **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 61 §4.1 · The four 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
- **SEVEN-G 61 §3.2 · Terms best avoided** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#3-2-terms-best-avoided-and-how-to-say-them
- **Conversation guide: the four 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
- **A use case in five minutes** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#5-3-how-to-tell-a-use-case-in-five-minutes



Notes

This is the close of module 7.

The position on people is the block that is most avoided and the one that matters most. Three possible positions:

- Replace: AI takes over work that people do today and the company reduces capacity. It requires an explicit management decision, a responsible social plan, dialogue with employee representatives where appropriate and transparent communication. Risk: internal rejection, loss of key talent and reputational risk.
- Augment: the workforce is kept and its work changes. It requires training and role redesign. Risk: investment without return if there is no real adoption.
- Reorganise: functions disappear and others appear. It requires a transition plan, reskilling and new oversight roles. Risk: prolonged uncertainty and the departure of the people with the most options.

Why it matters: if management does not decide, decisions about jobs are taken as a technical consequence of a project.

The first ninety days turn the mandate into three deliverables, one per month. The result of month 1 is a map of the current situation with the “no data” items made explicit.

Role-play exercise, about fifteen minutes. In threes: a board member, a presenter and an observer. The board member chooses two difficult questions from the SEVEN-G guide (document 61), for example “Is this transformation or only efficiency?” or the question on employment. The presenter answers with one of the four formats. The observer notes whether there was “it depends”, technical jargon or figures without support. Then the roles change.

Close: the observer says which answer would have helped the board most to decide.

TERMS ON THIS SLIDE

- **Four grades of spheres 08 and 09**: The scale used to assess the regulation and governance spheres: absent, basic, systematic and advanced. They do not use ambition levels because the point is not how much change is wanted but how much control exists. The link opens the grades in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#the-four-grades

SOURCES AND LINKS

- **SPHERES 05 §6 · The position on people** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#the-position-on-people
- **SPHERES 05 §7 · First ninety days** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#first-ninety-days
- **SEVEN-G 61 §9 · 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
- **First ninety days** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#first-ninety-days
- **Who supports the board** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#the-role-of-the-person-supporting-the-board



Notes

Instructor's script. SPHERES orders the conversation: where, with what ambition and what to ask. But a conversation governs nothing on its own. SPHERES and SEVEN-G share the work:

- SPHERES explains the impact map and prepares the conversation with the board.
- SEVEN-G governs, measures and decides. It is the framework for the governance, value and measurement of AI: the corporate cycle C1 to C5, the life cycle of each use case with its decision gates and the measurement of value with evidence.
- When a use case builds its solution, SEVEN-G also governs it in the design and delivery phases (document 53).

The mandate for the first ninety days is carried out with SEVEN-G. The inventory goes into the use case register (T01). The ambition per sphere is approved as the AI thesis in C2 · Direction. Each use case goes through gates where a person with accountability decides whether it continues. The board receives the information in its dashboard.

Why it matters: a map without a system that governs it stays a snapshot. With SEVEN-G, the same vocabulary of spheres and levels appears in the register, at the gates and in the board dashboard. Nothing is translated twice.

Using the framework is free. Each organisation adapts what it needs and is responsible for its own compliance.

Question for the class: what is harder, deciding the ambition or keeping up the follow-up quarter after quarter?

TERMS ON THIS SLIDE

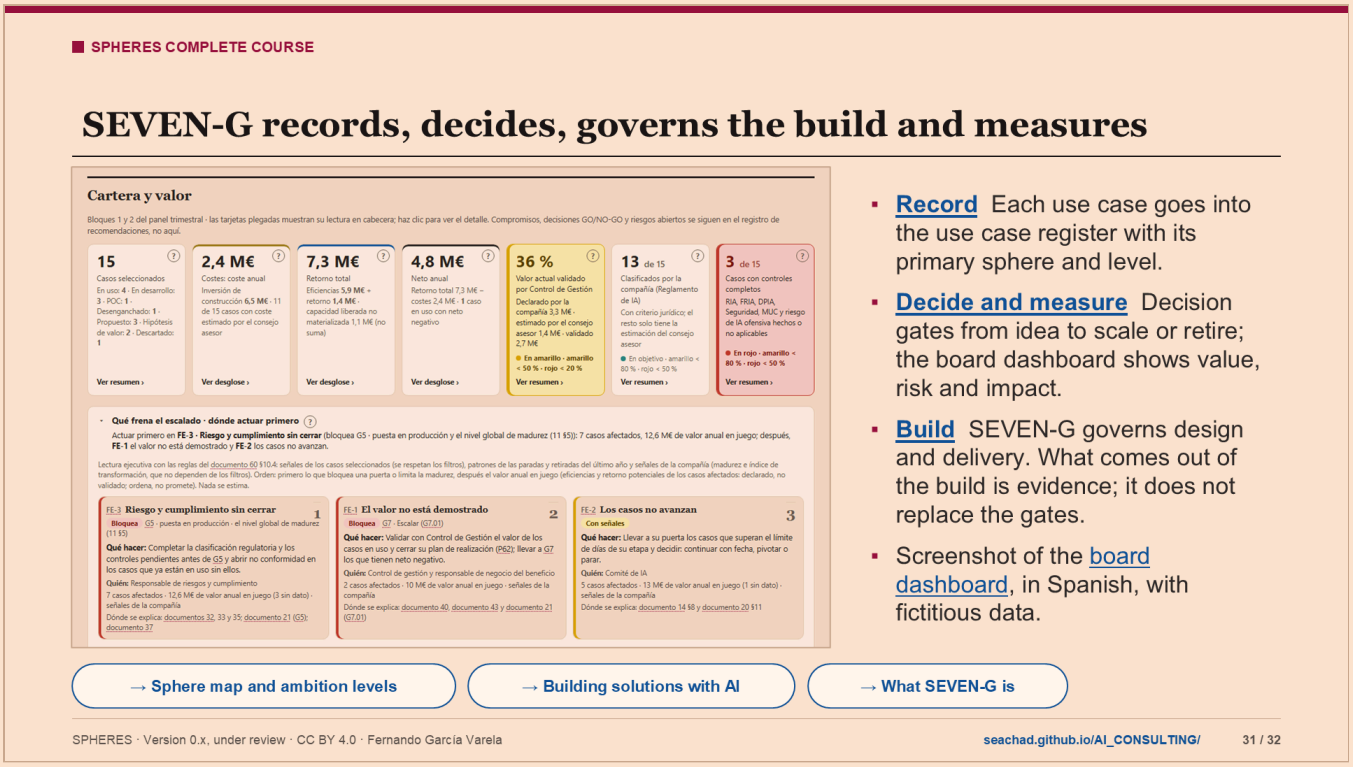
- **SEVEN-G**: SEVEN-G (Seven-phase Enterprise Value & Governance) is an open framework for a company to implement, govern and measure AI, and to know whether it is transforming or only gaining efficiency. It treats each use case as an investment with decision gates and gives the board figures it can 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

- **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

- **SPHERES 00 §8 · Relationship with SEVEN-G** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#relationship-with-seven-g
- **SEVEN-G 10 §9.1 · Use in the corporate cycle** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#9-1-corporate-cycle
- **SPHERES and SEVEN-G** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#relationship-with-seven-g



Notes

The image is the SEVEN-G board dashboard with the fictitious example portfolio. The screenshot is in Spanish. It is the place where the SPHERES map becomes quarterly follow-up.

A route in three steps:

- Record: each use case is entered in the use case register (T01), with its primary sphere, ambition level, phase and figures. It is the only data source for the dashboard.
- Decide and measure: each use case moves through a life cycle with decision gates, from the idea to the scale-or-retire gate (G7). At the hypothesis gate (G2) the ambition is confirmed; at G7 the actual one is checked. The board dashboard (T17) shows value, risk, the portfolio funnel and the impact map. The transformation index (T14) says whether the company is transforming or only becoming more efficient.
- Build: when a use case builds its solution, SEVEN-G also governs it in the design and delivery phases (phases 4 and 5, document 53). It decides what is built, with what risk and how it is measured, and what comes out of the build (design, code, tests) becomes evidence for the gates.

Three rules worth remembering:

- SEVEN-G decides whether the use case is worth it, with what risk and with what measured value.
- The build leaves evidence that the gates review.
- No technical review replaces a decision gate. A person with accountability decides.

Why it matters: a board does not need to know how an architecture plan is reviewed, but it does need to know that the build is governed and leaves evidence.

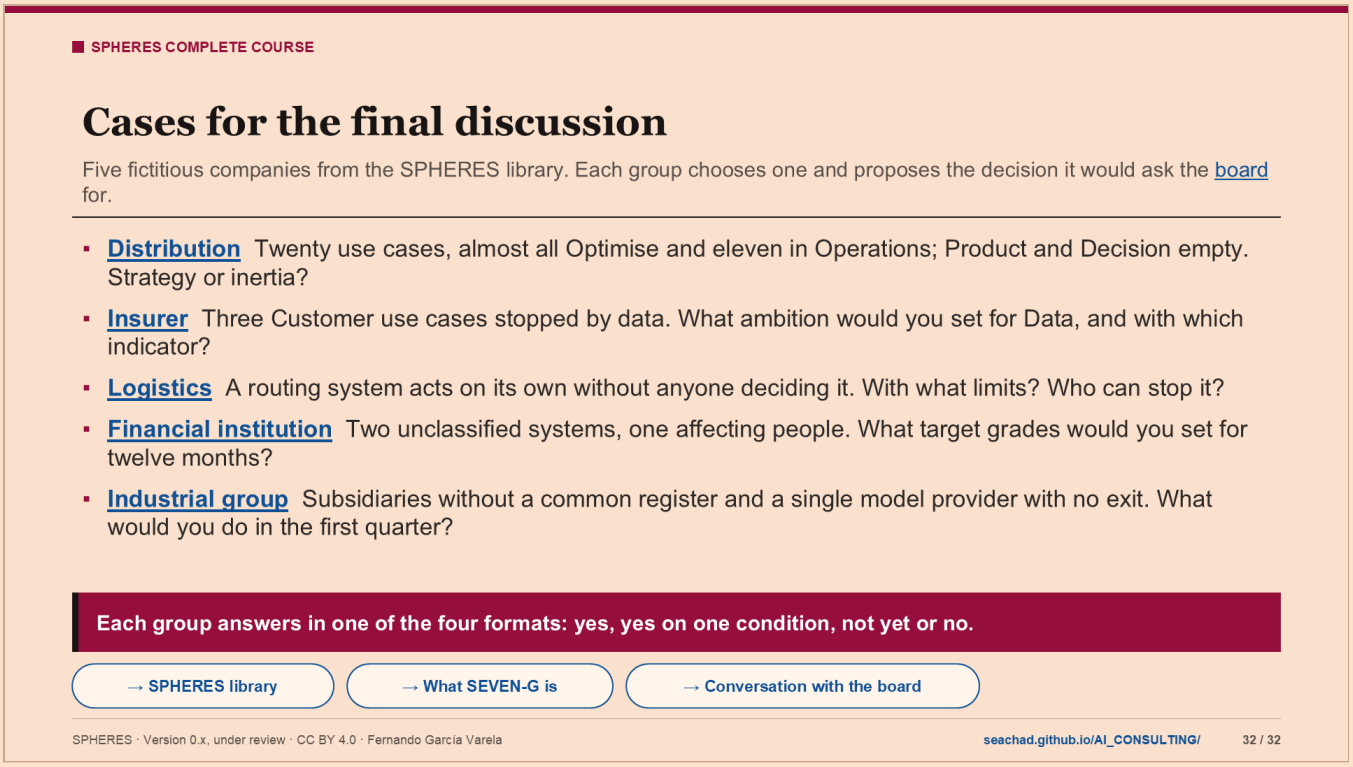
Self-check: can a favourable technical review of the build replace the SEVEN-G go-live gate? Answer: no; the decision is taken at the gate by a person with accountability.

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

SOURCES AND LINKS

- **SEVEN-G 53 · Building solutions with AI** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/53_SEVEN-G_Construccion_de_soluciones_con_IA.html
- **SEVEN-G 60 §10.5 · Where the impact is in the dashboard** 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
- **Sphere map and ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html
- **Building solutions with AI** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/53_SEVEN-G_Construccion_de_soluciones_con_IA.html
- **What SEVEN-G is** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html



Notes

Close of the course, about twenty minutes. Divide the class into five groups. Each group takes a fictitious company from the library, reads its case in the linked document and prepares in ten minutes:

- The sphere or spheres affected and their level or grade.
- The reading of the map: concentration, gap or inconsistency.
- The decision it would ask the board for, in one of the four answer formats.

Hints for the instructor, taken from the documents:

- Distribution: the company is becoming more efficient, not transforming. Product is empty although the strategic plan talks about digital services. Decision is empty, although there are Customer use cases that recommend prices and discounts.
- Regional insurer: the company opened an Optimise use case in Data, and then the board set Augment as the ambition for Data, with a quarterly indicator of use cases blocked by data.
- Logistics operator: types of decision in writing, A2 with limits, a stop switch with an owner and a record of each override.
- Financial institution: Systematic in Compliance and in Anticipation, Basic in Ethical leadership, and first classify the systems that affect people.
- Industrial group: an AI owner who reports to the board, a committee with the power to stop use cases and a common register.

Why it matters: the method is only learned by applying it to a case with incomplete data and time pressure, as in a real session.

Instructor's close: SPHERES gives the language and SEVEN-G gives the system to govern, decide and measure. Both are open and adapted to each organisation. All the companies in the course are fictitious.

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

- **SPHERES 00 §7 · A complete example** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#a-complete-example
- **SPHERES 03 · Enabling spheres (cases)** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html
- **SPHERES 04 · Regulation and governance (cases)** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html
- **SPHERES library** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/index.html
- **What SEVEN-G is** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/entrada/index.html
- **Conversation with the board** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html

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