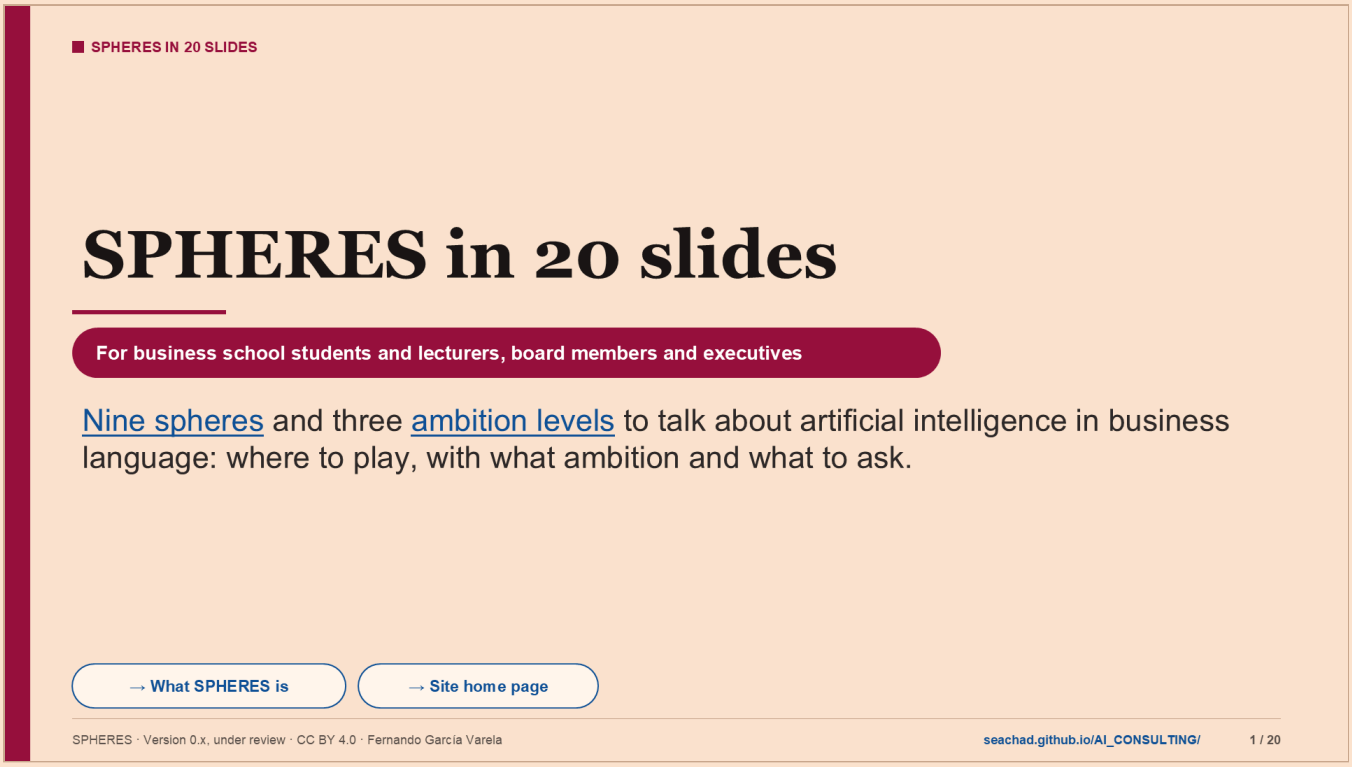


Notes

SPHERES is Fernando García Varela's methodology for placing artificial intelligence in the business before talking about technology. It 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 describes the central idea: 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.

This presentation follows a fixed order:

- The problem and the three questions of the method.
- The three ambition levels, one by one, with examples and false ideas.
- The nine spheres, with one example per level and what to ask.
- The spheres × ambition map, the AI thesis, the transformation index and the conversation with the board.
- The relationship with SEVEN-G and how to use SPHERES in a working session.

Why it matters: a board does not decide on models or platforms. It decides on risk, opportunity, accountability and competitive advantage. SPHERES gives everyone the same map to decide where to invest without understanding how each system works.

All the examples, companies and figures are fictitious or illustrative. SPHERES is published under the CC BY 4.0 licence for content and MIT for code, and its use is free of charge.

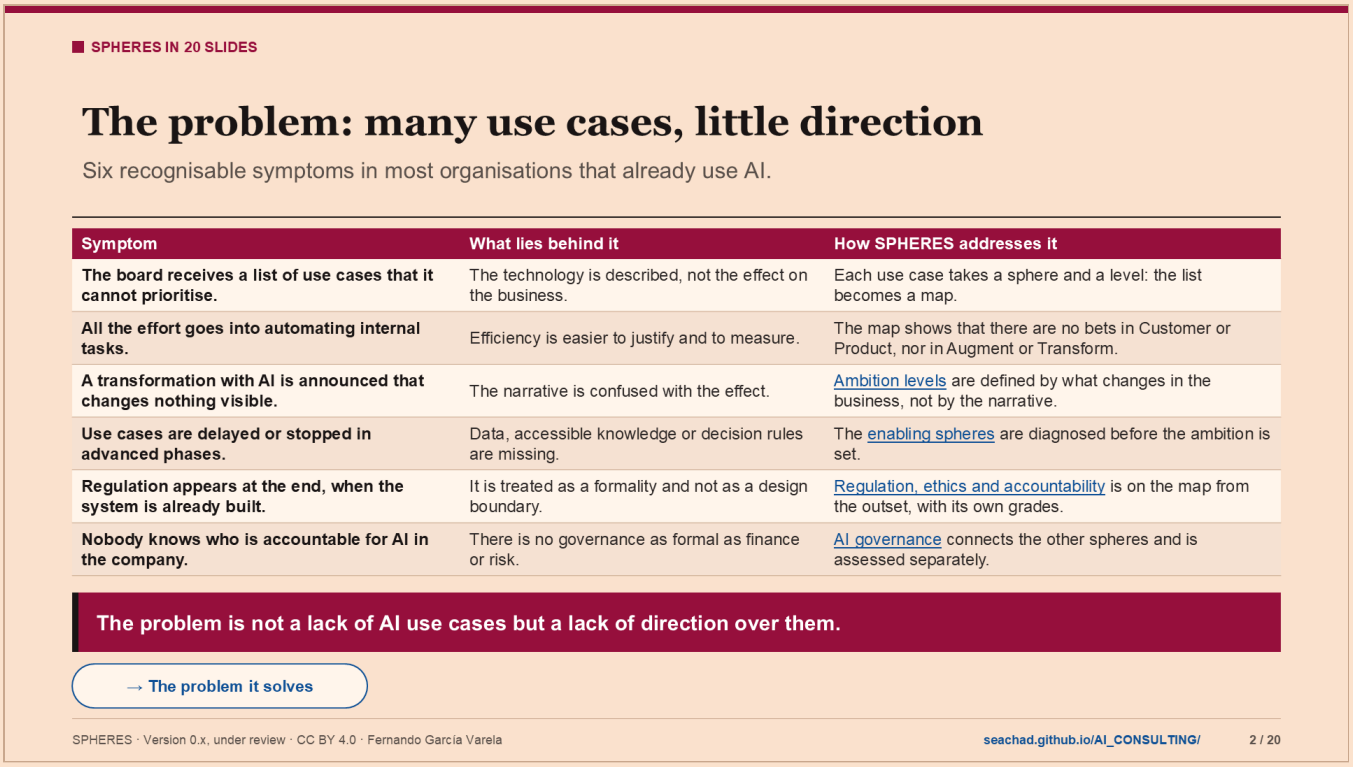
Question for the classroom: who talks about AI in your organisation today, and with what words? Do technology, finance and the business use the same words?

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** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#what-spheres-is
- **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
- **What SPHERES is** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **Site home page** https://seachad.github.io/AI_CONSULTING/en/index.html



SPHERES IN 20 SLIDES

The problem: many use cases, little direction

Six recognisable symptoms in most organisations that already use AI.

Symptom	What lies behind it	How SPHERES addresses it
The board receives a list of use cases that it cannot prioritise.	The technology is described, not the effect on the business.	Each use case takes a sphere and a level: the list becomes a map.
All the effort goes into automating internal tasks.	Efficiency is easier to justify and to measure.	The map shows that there are no bets in Customer or Product, nor in Augment or Transform.
A transformation with AI is announced that changes nothing visible.	The narrative is confused with the effect.	Ambition levels are defined by what changes in the business, not by the narrative.
Use cases are delayed or stopped in advanced phases.	Data, accessible knowledge or decision rules are missing.	The enabling spheres are diagnosed before the ambition is set.
Regulation appears at the end, when the system is already built.	It is treated as a formality and not as a design boundary.	Regulation, ethics and accountability is on the map from the outset, with its own grades.
Nobody knows who is accountable for AI in the company.	There is no governance as formal as finance or risk.	AI governance connects the other spheres and is assessed separately.

The problem is not a lack of AI use cases but a lack of direction over them.

→ The problem it solves

SPHERES · Version 0.x, under review · CC BY 4.0 · Fernando García Varela seachad.github.io/AI_CONSULTING/ 2 / 20

Notes

Most organisations do not have a problem of a lack of AI use cases. They have a problem of a lack of direction over them. The six symptoms in the table are easy to recognise in a conversation with any management committee.

Each symptom has a different cause:

- The list of use cases describes tools, not effects on the business. That is why it cannot be prioritised.
- Efficiency is easier to justify and to measure. That is why the portfolio fills up with internal automations.
- The transformation narrative does not match what really changes.
- Use cases stop late because data, accessible knowledge or decision rules are missing.
- Regulation is treated as a final formality and not as a design boundary.
- Nobody is accountable for the whole because there is no formal governance of AI.

Fictitious example: a distribution company presents twenty use cases as ‘our AI strategy’. When they are placed on the map, nineteen are Optimise and eleven are in Operations. The company is becoming more efficient, not transforming.

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 classroom: choose a company you know. Which of the six symptoms do you recognise first? Which management decision is missing behind that symptom?

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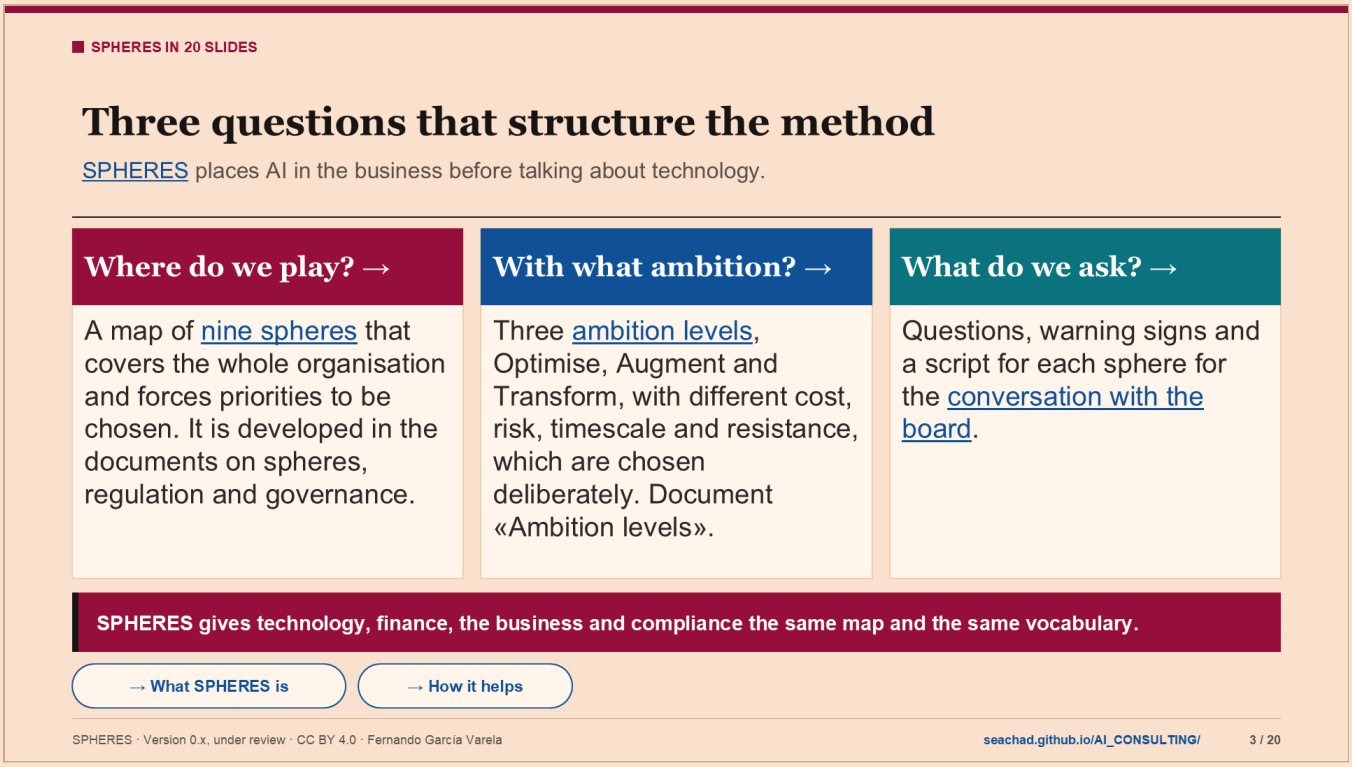
- **Ambition levels**: Three levels stating how much a company wants to change with each use case: Optimise (do the same better), Augment (extend what people can do) and Transform (change the business). Each level is decided,

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

- **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 · 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
- **SPHERES 00 · A complete example** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#a-complete-example
- **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

SPHERES answers three questions that any board or management committee should be able to answer clearly.

Where do we play? This is the question of the map. The nine spheres cover all the areas of relationship of a company, regardless of its sector. They force a choice: a thesis that declares all spheres to be priorities does not guide any decision.

With what ambition? This is the question of the level. Optimise, Augment and Transform have different cost, risk, timescale and organisational resistance. They are chosen deliberately, sphere by sphere.

What do we ask? This is the question of oversight. Each sphere has a reference question, follow-up questions and warning signs.

Why it matters: without a common language, each area talks about AI in its own way. 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.

SPHERES has concrete uses: the first conversation with the board, the diagnosis, setting the ambition, prioritising the portfolio, quarterly oversight, communicating to the organisation and filtering new ideas. It is used with the same vocabulary from the first session to the annual review. That continuity makes it possible to compare one year with the next.

Question for the classroom: which of the three questions is hardest to answer in your organisation? Why?

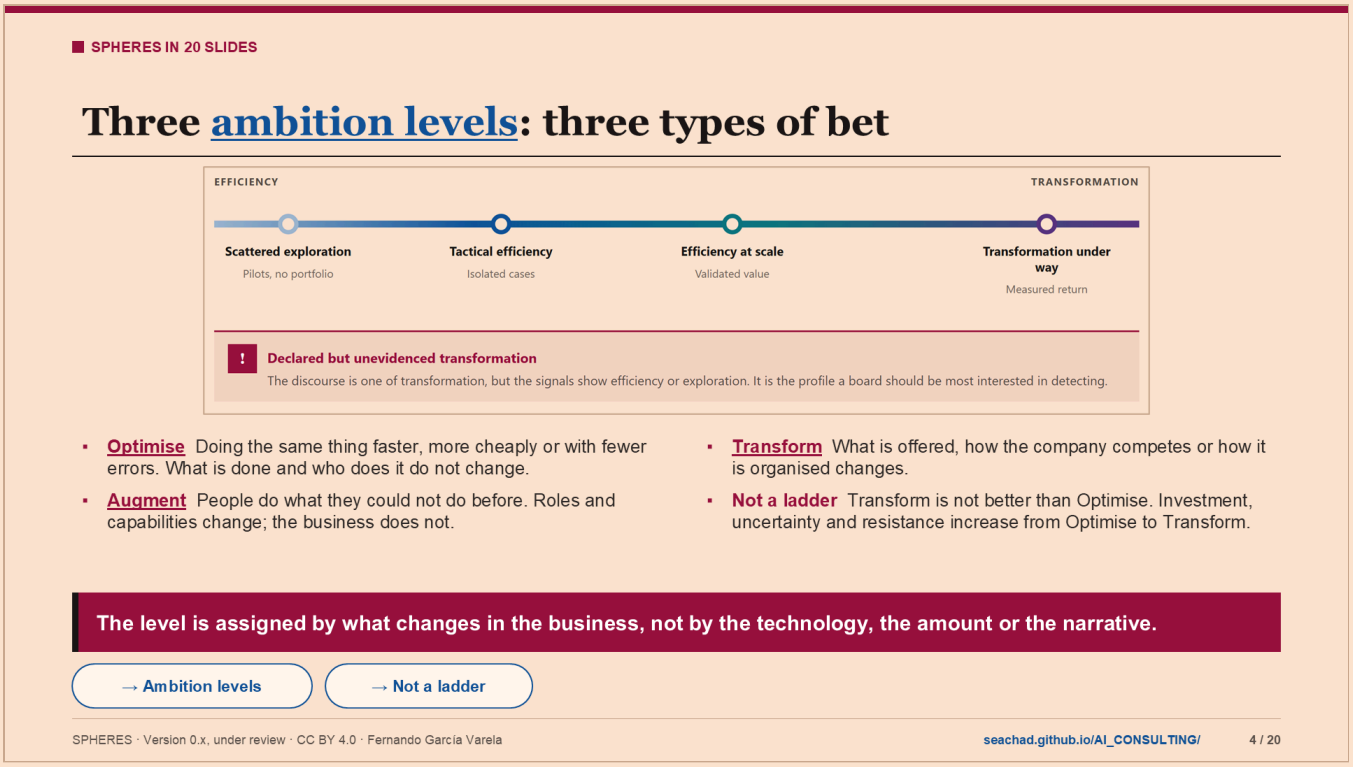
TERMS ON THIS SLIDE

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

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



Notes

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 looks.

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

The levels are not a ladder. Four common false ideas:

- ‘First you optimise, then you transform.’ A company can start with Transform in Product while it optimises Operations, if it has enough enabling capability.
- ‘Transform is better than Optimise.’ In a non-priority sphere, Optimise may be the right ambition.
- ‘A mature company has everything in Transform.’ A healthy portfolio combines the three levels. Maturity is measured with other criteria (SEVEN-G document 11).
- ‘If the project is big, it is Transform.’ The amount does not determine the level.

Why it matters: if the level were assigned by the technology, any programme with generative AI would look like a transformation. Defining it 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.

Question for the classroom: think of an AI use case you know. Which level would you give it? What would change your answer?

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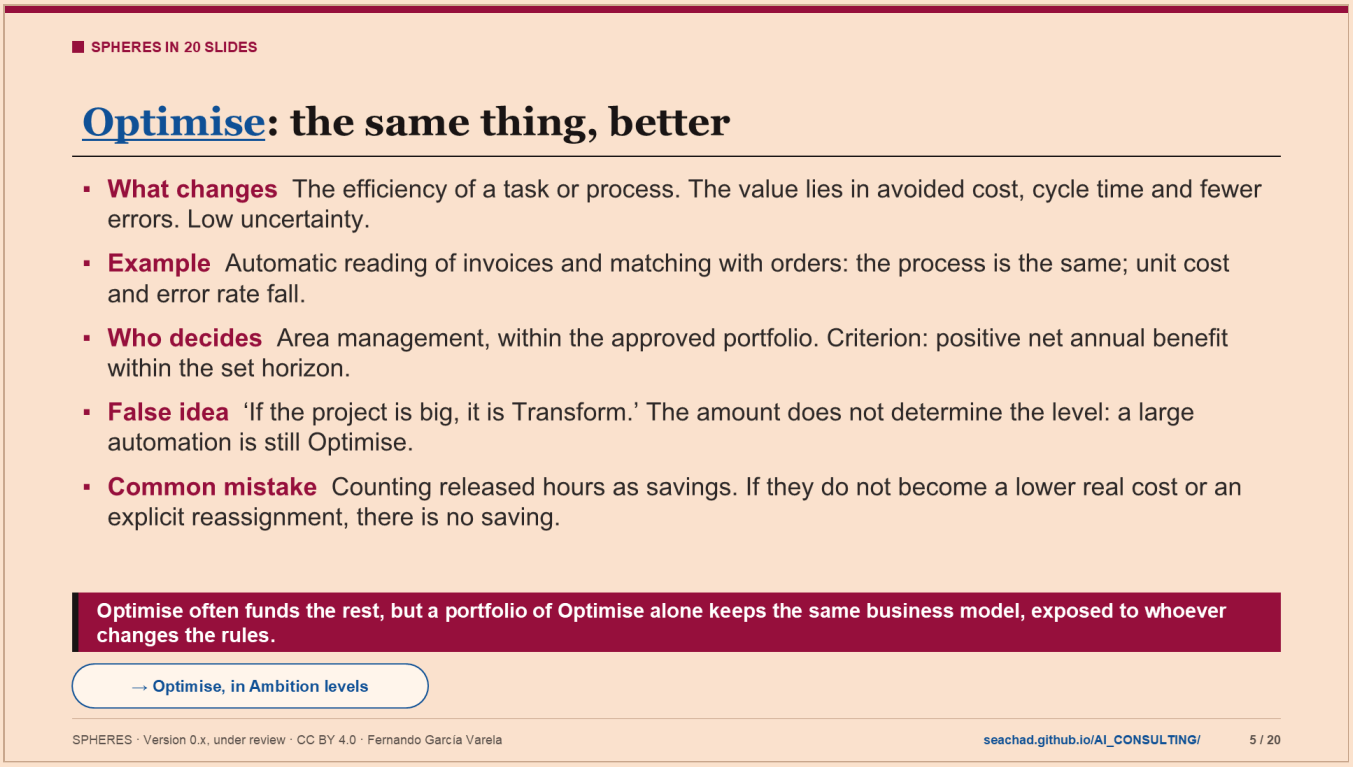
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- **Optimise**: The first ambition level: AI makes what the company already does cheaper or faster, without changing the process. Its value is measured in savings and time and must be shown early. It is the most frequent level and the one that transforms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

SOURCES AND LINKS

- **SPHERES 01 · Not a ladder** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#not-a-ladder
- **SEVEN-G 10 · The three ambition levels** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-three-ambition-levels
- **Not a ladder** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#not-a-ladder



Notes

Optimise means doing what is already done, faster, more cheaply or with fewer errors. What is done and who does it do not change.

Illustrative examples by sphere:

- Customer: automatic classification and routing of enquiries that arrive by email.
- Product and service: automated tests that detect defects before launch.
- People: automatic generation of periodic reports that used to be done by hand.
- Data: detection and removal of duplicate customer records.

If the use case is retired, the company goes back to doing the same thing at the previous cost and time. That is the simplest test to recognise Optimise.

Risks specific to the level:

- Counting released hours as savings. SEVEN-G distinguishes released, materialised and reassigned capacity: only materialised capacity reaches the income statement.
- Moving the bottleneck. Automating an isolated step speeds up the queue at the next step without improving the whole process.
- Accumulating invisible dependencies. Many small automations end up supporting critical processes without anyone having decided so.

Why it matters: Optimise is the natural entry point to AI and often funds later bets. It is a legitimate result. What SPHERES asks is that it be a deliberate choice and not inertia.

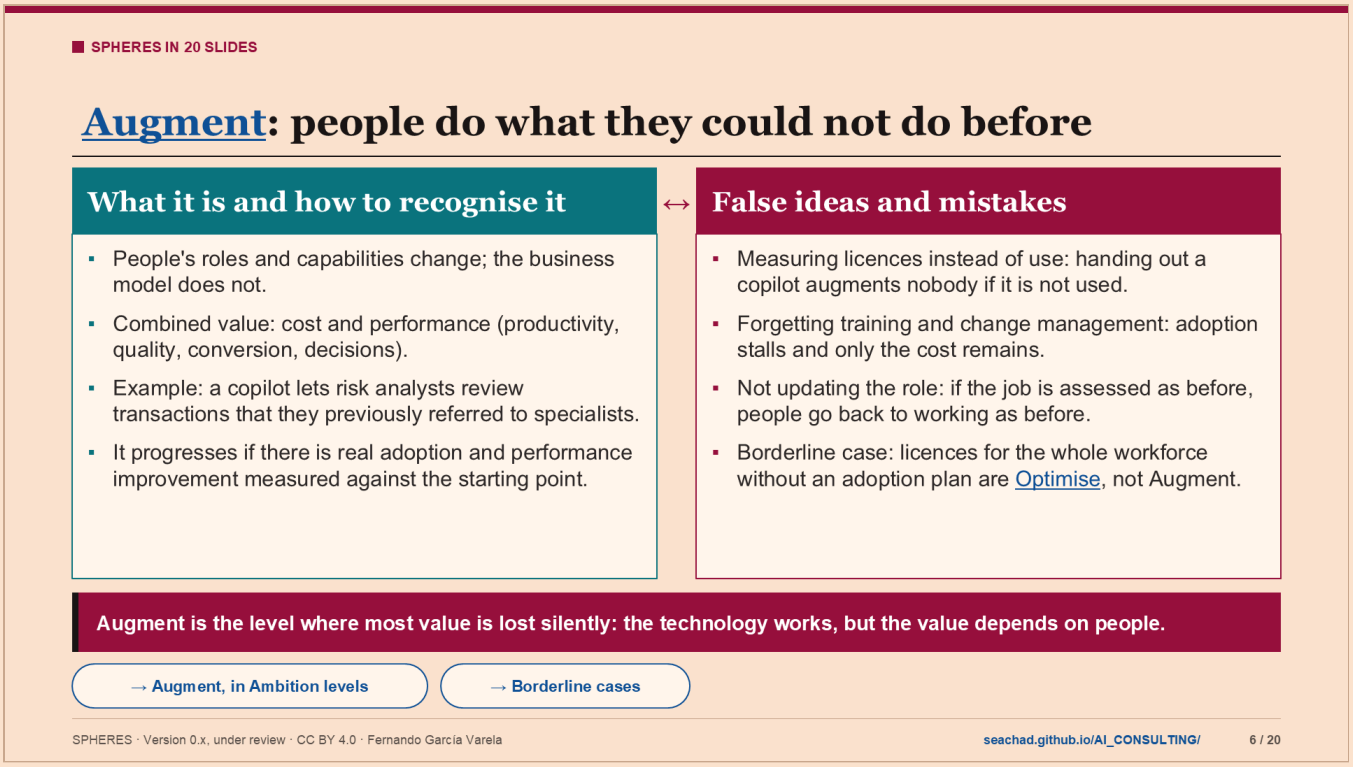
Question for the classroom: if an automation releases the equivalent of ten jobs and the cost of the area does not fall, where is the value? Which decision is missing?

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

SOURCES AND LINKS

- **SPHERES 01 · Common mistakes** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#common-mistakes



Notes

Augment means that people do what they could not do before. Human work does not disappear: it expands and the role changes. The business model stays the same.

Illustrative examples:

- Customer: account managers receive, before each visit, an analysis of each customer's likely needs and risk of churn.
- Operations: planners simulate demand and supply scenarios before deciding.
- Knowledge: an internal legal assistant gives business teams access to criteria that only the experts knew.
- Decision: the system presents options with their risk and probability; a person chooses and leaves a record.

Uncertainty is medium because the value depends on people really adopting the new way of working. Management decides, with visibility for the AI committee. Progress is measured by real adoption and performance improvement, not by licences.

A borderline case helps to understand the limit. An assistant for the whole workforce without an adoption plan is Optimise: it does not change any role demonstrably. The same assistant, with an analysis team that takes on reviews it previously outsourced, is Augment: the content of the job changes.

Why it matters: Augment is also the level that best protects the culture, because it treats people as beneficiaries and not only as a cost.

Question for the classroom: your company has bought assistant licences for everyone. Which three data points would you ask for six months later to know whether it is Augment?

TERMS ON THIS SLIDE

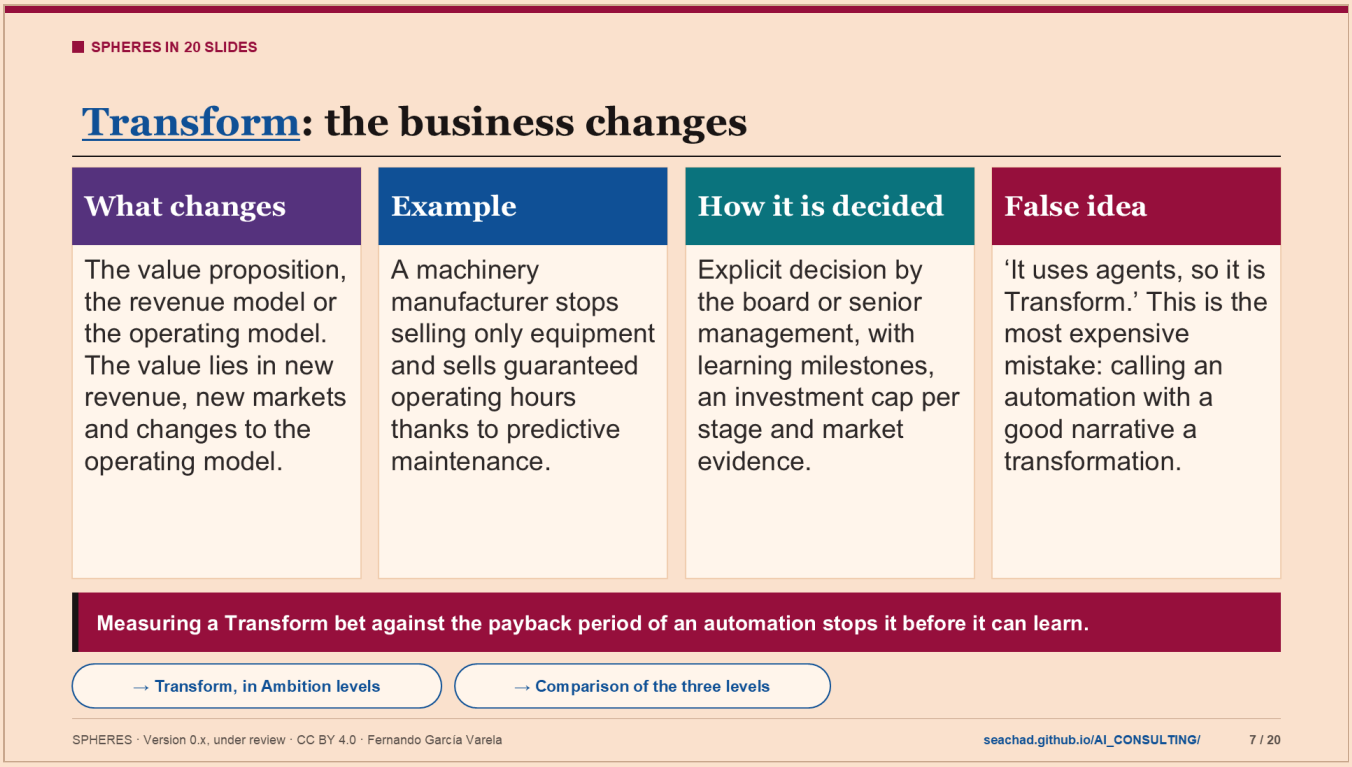
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SOURCES AND LINKS

- **SPHERES 01 · Borderline cases** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#borderline-cases
- **Borderline cases** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#borderline-cases



Notes

Transform fundamentally changes what the company offers, how it competes or how it is organised. It has the greatest potential and the greatest risk. Uncertainty is high because it depends on the market, the customer or the organisation itself. Resistance is also high: it affects structures, incentives and decision-making power.

Illustrative examples:

- Customer: an AI agent becomes the main point of contact, with handover to people in defined cases.
- Data: aggregated and anonymised operational data is offered as a service to third parties.
- Decision: prices for the whole catalogue are set autonomously within approved limits, and the pricing team moves to designing and overseeing the rules.

Risks specific to the level:

- Calling an automation with a good narrative a transformation. Transformation budgets and timescales are approved for something that does not change the business.
- Demanding a return too early. The bet is stopped before it can provide market evidence.
- Underestimating the enablers. Transforming without data, knowledge and decision rules is a sign of risk, not of boldness.
- Ignoring the effect on people. Deciding it without an explicit position creates rejection and reputational risk.

Why it matters: Transform is the only level that changes the competitive position. That is why it is decided by whoever is accountable for the strategy, in stages and accepting that some bets will fail.

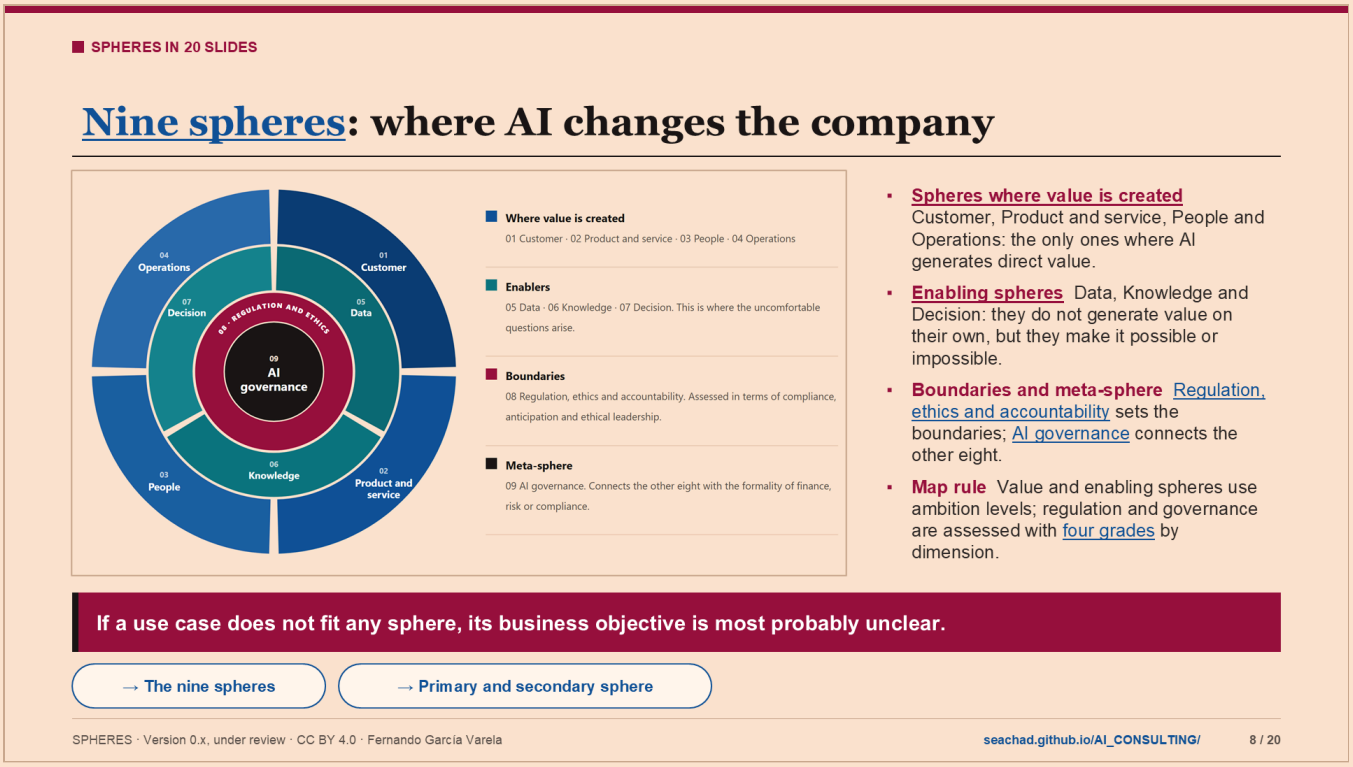
Question for the classroom: which learning milestone would you ask for at six months to decide whether a Transform bet continues?

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

SOURCES AND LINKS

- **SEVEN-G 13 · Return horizon by ambition level** 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
- **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



Notes

The nine spheres cover all the areas of relationship of a company, regardless of its sector. They are read from the outside in, in four types.

- Where value is created: 01 Customer, 02 Product and service, 03 People and 04 Operations. They are the only ones in which AI generates direct value: revenue, retention, margin, productivity, cost or quality.
- Enablers: 05 Data, 06 Knowledge and 07 Decision. They do not generate value in themselves, but they constrain it. A high ambition in Customer without reliable data, without accessible knowledge and without decision rules is a high-risk bet.
- Boundaries: 08 Regulation, ethics and accountability. It sets the limits within which the company can act.
- Meta-sphere: 09 AI governance. It is the system that decides, oversees and corrects across the other eight.

Each use case has a primary sphere: the one in which the main metric that justifies the investment is measured. It is not decided by the technology, by the sponsoring area or by the supplier. It may have, at most, one secondary sphere, only if there is a second measurable effect. Investment and value are attributed only to the primary sphere.

Why it matters: a map with only value spheres would invite the pursuit of opportunities without checking whether the company can execute them or whether it should. By including enablers, boundaries and governance, SPHERES forces the opportunity, the capability and the accountability to be looked at together.

Question for the classroom: an assistant drafts replies to complaints and is measured by handling time. What is its primary sphere?

TERMS ON THIS SLIDE

- **The nine spheres** (esferas 01–09): Nine areas where AI acts in a company: four where value is created (01 to 04), three enablers that make it possible (05 to 07), the limits of regulation and ethics (08) and the governance of AI itself (09). Each use case sits in one primary sphere. The link opens the overview in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#the-nine-spheres-at-a-glance
- **Spheres where value is created** (esferas 01–04): The four spheres in which AI creates direct business value, such as the customer relationship, operations or the product. For each one, the document gives examples by ambition level, why it matters and what to ask. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html
- **Enabling spheres** (esferas 05–07): The three spheres that do not create value on their own but make it possible, such as data, technology and people. Without them, use cases in the value spheres stay as pilots. The document explains each one with examples and questions. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html
- **Regulation, ethics and accountability** (esfera 08): The sphere of limits: what regulation requires, what the company considers acceptable and who answers for what AI does. It produces no direct value, but without it value is not sustainable. It is assessed with four grades. The link opens the sphere in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#sphere-08-regulation-ethics-and-accountability
- **AI governance** (esfera 09): The meta-sphere: how the company governs its own AI, that is, who decides, how it is measured and how the other spheres are controlled. It is the one SEVEN-G develops in detail. It is assessed with four grades. The link opens the sphere in SPHERES. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html#sphere-09-ai-governance
- **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

- **SEVEN-G 10 · The impact map** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-impact-map
- **SEVEN-G 10 · Primary sphere 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
- **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 IN 20 SLIDES

Spheres where value is created: Customer and Product and service

Aspect	01 · Customer	02 · Product and service
What it is	How the company knows, wins, serves, retains and anticipates its customers.	AI inside, on top of or as the product that the company sells.
Optimise	Classification and routing of enquiries.	Automated testing and defect detection before launch.
Augment	Preparing each sales visit with the customer's likely needs.	Intelligent features in the product: recommendations, predictions, assistants.
Transform	An AI agent as the main point of contact, with handover to people.	Selling guaranteed operating hours instead of equipment.
What to ask	If a competitor knows our customers better, how long until we lose relevance?	Are we using AI to protect the current product or to build the next one?

Warning sign: measuring how many conversations an assistant resolves without measuring repeat contact or satisfaction.

→ Sphere 01 · Customer → Sphere 02 · Product and service

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Notes

Customer covers everything AI can change in how the company knows, wins, serves, retains and anticipates the needs of its customers, across all channels. It is where competitive advantage or disadvantage is felt first. Loss of relevance does not arrive all at once: it arrives customer by customer.

Fictitious case of a telecommunications company: it starts with Optimise, with a model that classifies enquiries. It moves to Augment: during the call, service agents see the risk of churn and the retention offers that make sense. It studies Transform: a conversational assistant as the main channel for one segment. Before approving it, the board asks how repeat contact and satisfaction will be measured, and what information the customer will receive about talking to an AI system.

Product and service covers AI inside the product (a feature), on top of the product (it speeds up its design and launch) or as the product (without the model there would be no product). This sphere decides whether AI protects the current business or builds the next one. If nobody decides, protecting the current product always wins, because its return is easier to demonstrate.

Why it matters: the AI cost per unit of service goes straight against the margin in a pay-per-use model. That is why the board asks to know it before approving a Transform bet.

Question for the classroom: what part of the revenue of a company you know comes from products that would not exist without AI?

TERMS ON THIS SLIDE

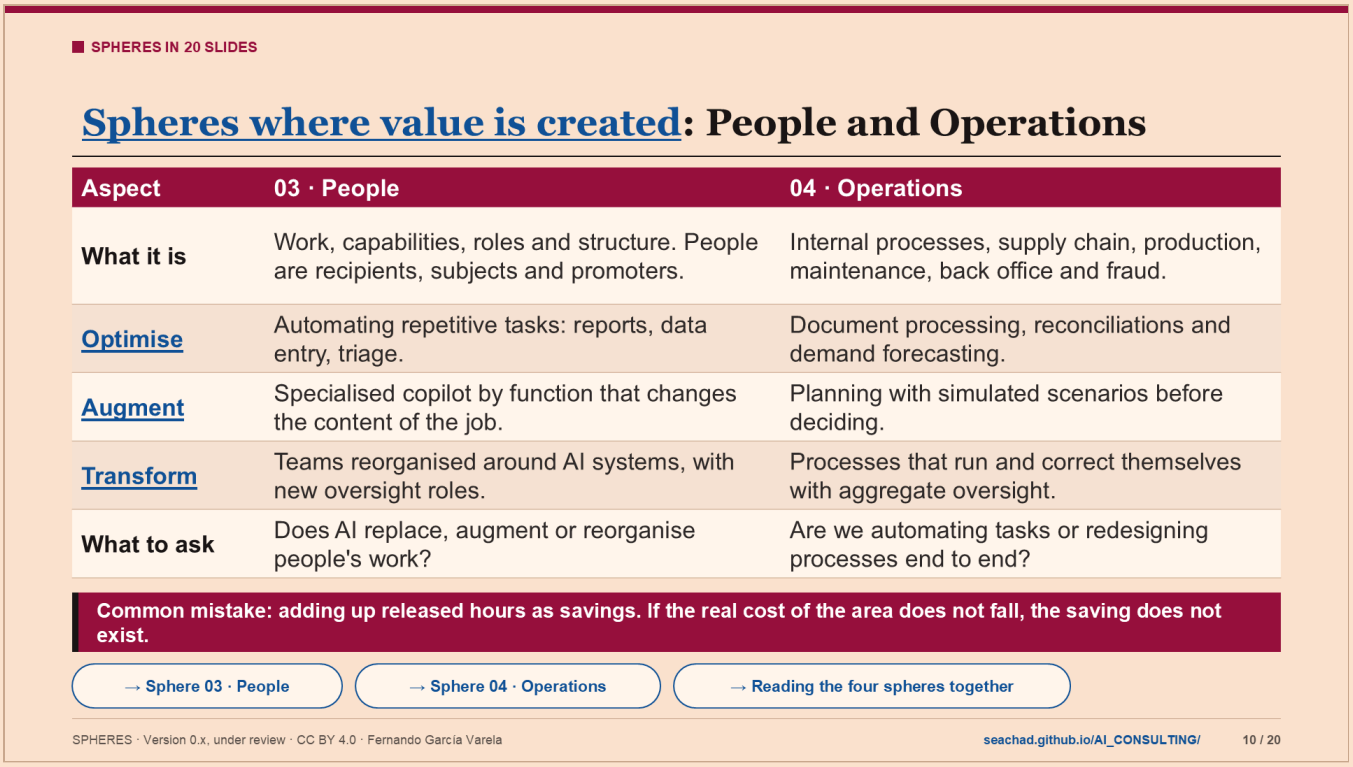
- **Spheres where value is created** (esferas 01–04): The four spheres in which AI creates direct business value, such as the customer relationship, operations or the product. For each one, the document gives examples by ambition level, why it matters and what to ask. The link opens the SPHERES document. https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html
- **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

SOURCES AND LINKS

- **SPHERES 02 · Sphere 01 · Customer** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-01-customer
- **SPHERES 02 · Sphere 02 · Product and service** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-02-product-and-service
- **SEVEN-G 10 · Profiles of spheres 01 to 07** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#profiles-of-spheres-01-to-07
- **Sphere 01 · Customer** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-01-customer
- **Sphere 02 · Product and service** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-02-product-and-service



Notes

People is the most sensitive sphere. AI does not only change what people do: it can also change how many are needed and for what. People play three roles at once:

- Recipients: their tools and expectations change without them choosing it. This requires training and change management.
- Subjects: AI can restructure or eliminate jobs. This requires an explicit decision by management and the board.
- Promoters: whoever knows a process best sees uses that no outsider would see. This requires a channel for proposing use cases.

People is almost always the secondary sphere of Augment or Transform use cases that change roles, even when the primary sphere is Customer or Operations.

Operations is the sphere with the return that is easiest to demonstrate and the one where the first use cases concentrate. That ease is its advantage and its trap. Fictitious case: a distributor has eleven Optimise use cases. The sum of released hours equals dozens of jobs, but the real cost does not fall: the work accumulates in the exceptions. Management decides to redesign procurement end to end. The board asks what happens if the system fails in the middle of a campaign.

Reading the four spheres together reveals patterns: internal efficiency (almost everything in 04 and Optimise), shop window (visible use cases in 01 and 02 with no measured use) and forgotten people (role changes without 03 as a secondary sphere).

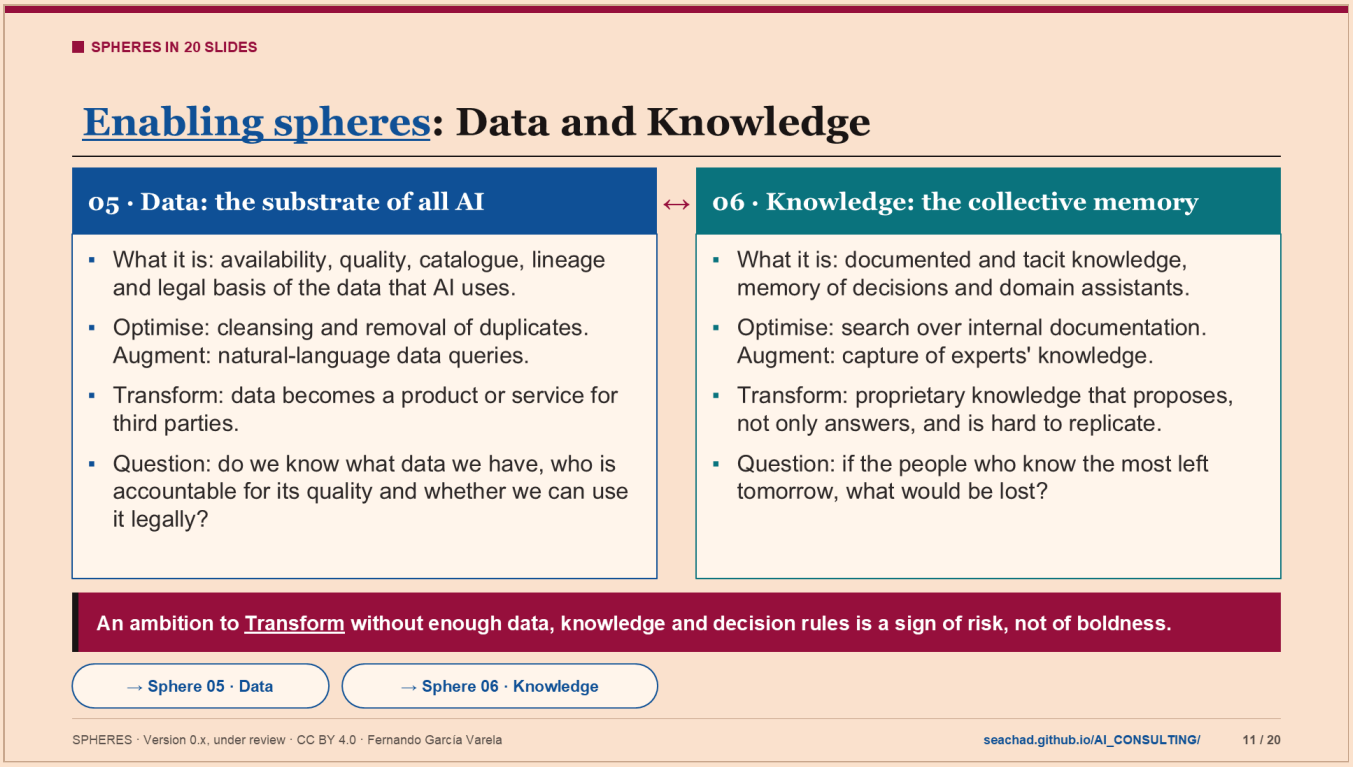
Question for the classroom: which position would you take before the board: replace, augment or reorganise? Can it differ by function?

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
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- **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 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 02 · Sphere 04 · Operations** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-04-operations
- **SPHERES 02 · 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
- **Sphere 03 · People** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-03-people
- **Sphere 04 · Operations** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/02_SPHERES_Esferas_donde_se_genera_valor.html#sphere-04-operations
- **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

Spheres 05, 06 and 07 do not generate value in themselves: they make the value of spheres 01 to 04 possible or impossible. It is in them that the uncomfortable questions appear.

Data covers the availability, quality, catalogue, lineage and legal basis of the data used by AI systems, and data as a product. Without adequate data, no system works well. Without a documented legal basis, a system that works can become a regulatory problem.

Fictitious case: a regional insurer approves three Customer use cases. Four months later, all three are stopped at the same phase. Interaction data sits in four systems, without an owner, and nobody has confirmed whether consent allows that use. The company first opens a use case with Data as its primary sphere and Optimise as its level.

Knowledge covers what the organisation knows and is not always written down. Data records facts; knowledge explains how things are done and why something was decided. Generative AI assistants answer with what they find: if knowledge is disorganised or out of date, they answer badly with complete confidence.

An enabler is the primary sphere only when the main result is the capability itself. The fact that a use case uses data does not place it in sphere 05.

Why it matters: most delays in AI use cases are not caused by the model, but by unavailable data, undocumented knowledge or decisions without rules.

Question for the classroom: how many use cases in your organisation have been delayed by a lack of data? Does anyone measure it?

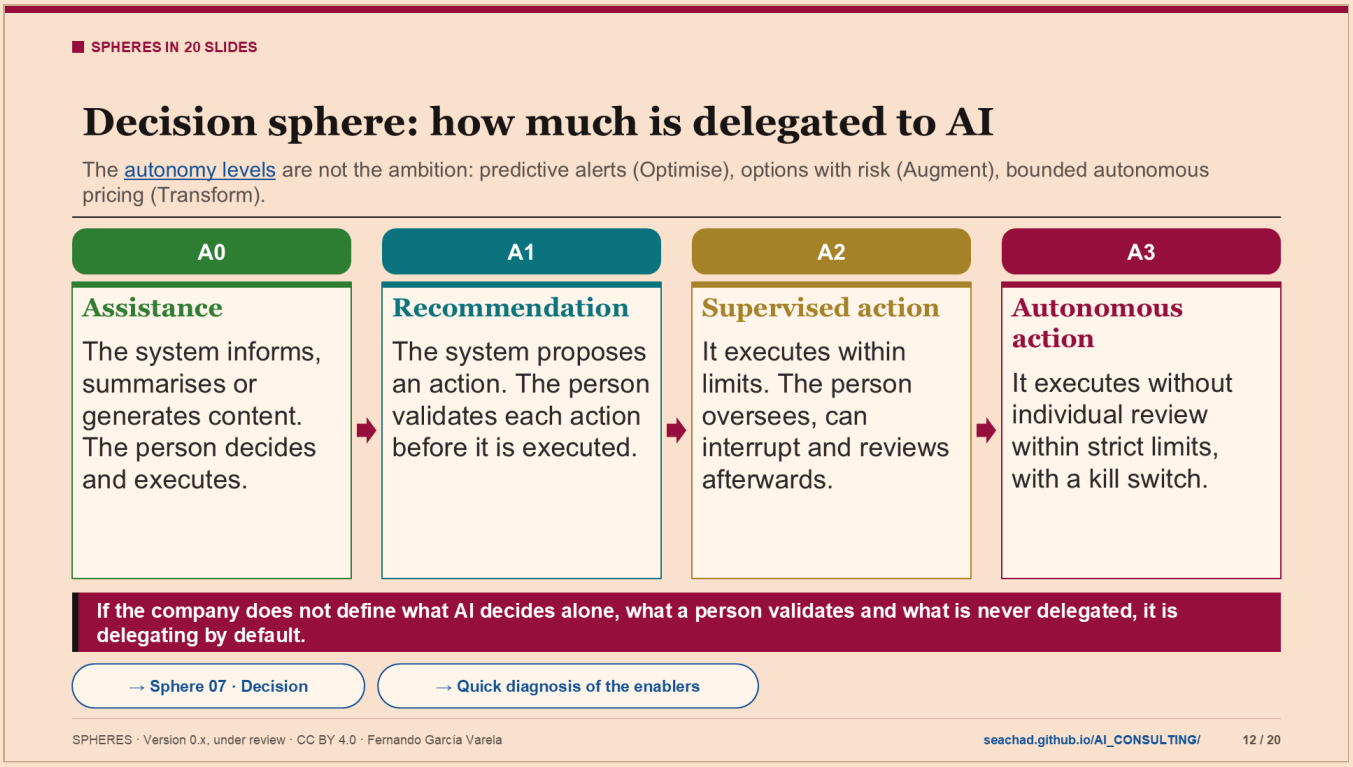
TERMS ON THIS SLIDE

- **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

- **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 03 · 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 · Sphere 05 · Data** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-05-data
- **SPHERES 03 · Sphere 06 · Knowledge** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-06-knowledge
- **Sphere 05 · Data** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-05-data
- **Sphere 06 · Knowledge** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-06-knowledge



Notes

The Decision sphere covers which decisions AI systems make, recommend or execute, with what information, with what autonomy level, with what human oversight and with what traceability. SPHERES uses the SEVEN-G autonomy scale, from A0 to A3.

The autonomy level is not the same as the ambition level. An A0 system that only summarises information can be part of a Transform bet. Conversely, if a decision that a person used to make passes to an A2 or A3 system, who decides changes, and that points at least to Augment.

Fictitious case of a logistics operator: a routing system installed as a ‘support tool’ has been changing routes without review for months. It works as A2, but nobody decided so. The override rate by traffic managers is almost zero and management read that as success. In reality, they had no simple way to override a decision. The company defines the decision types in writing, assigns A2 with limits, enables a kill switch with an owner and records every recommendation and every override.

Before setting Augment or Transform in a value sphere, a quick five-question diagnosis of the enablers is advisable: data with an owner and legal basis, checked quality, accessible knowledge, decisions with an autonomy level, and traceability and a kill switch. If one answer is no, an enabling use case is opened first or the ambition is reduced.

Why it matters: assigning an autonomy level turns ‘trusting AI’ into a rule that can be approved, overseen and audited.

Question for the classroom: which decision in your organisation would you never delegate to a system? Why?

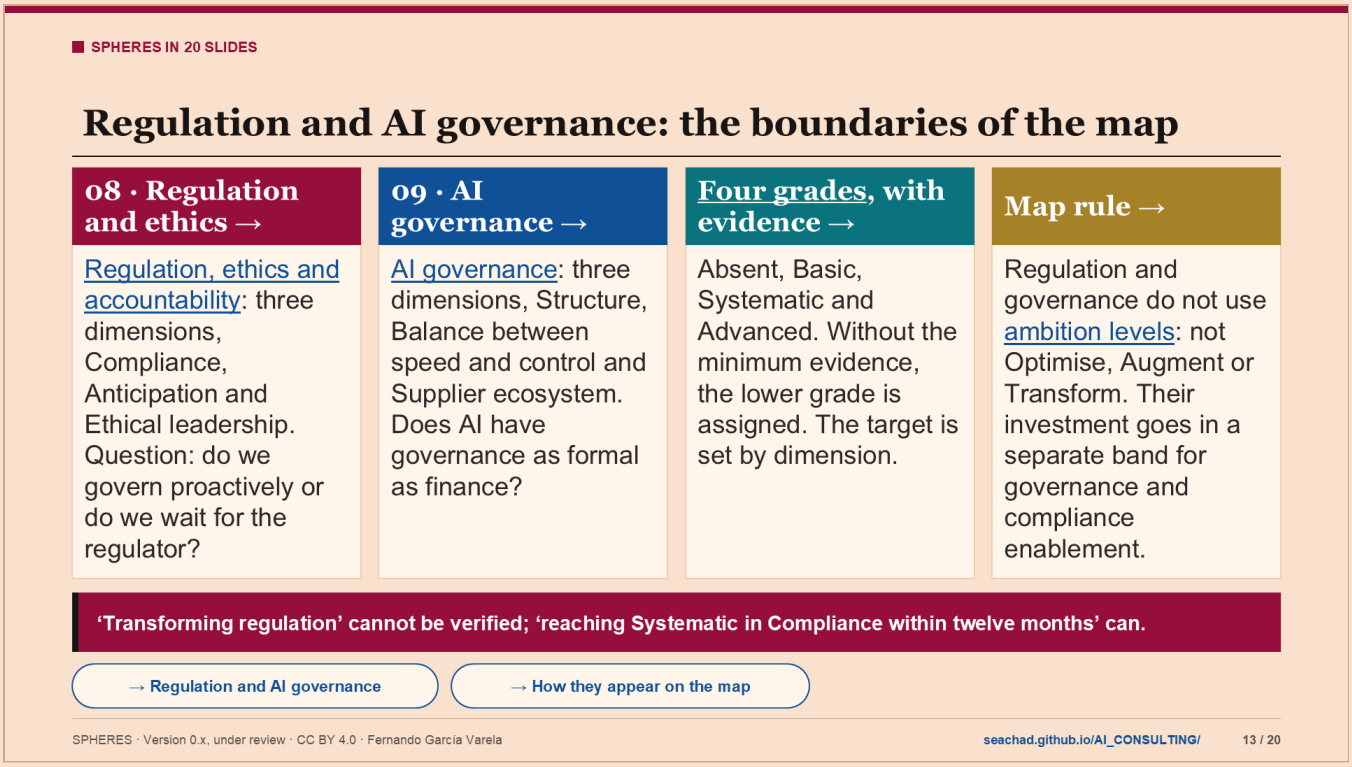
TERMS ON THIS SLIDE

- **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

SOURCES AND LINKS

- **SPHERES 03 · The four autonomy levels** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#the-four-autonomy-levels
- **SPHERES 03 · Quick diagnosis of the enablers** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#quick-diagnosis-of-the-enablers
- **SEVEN-G 10 · Sphere 07 · Decision** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#5-7-sphere-07-decision
- **Sphere 07 · Decision** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#sphere-07-decision
- **Quick diagnosis of the enablers** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/03_SPHERES_Esferas_habilitadoras.html#quick-diagnosis-of-the-enablers



Notes

Spheres 01 to 07 say where AI is used and what makes it possible. Spheres 08 and 09 say within which limits it is used and how it is governed. That is why they are not assessed with Optimise, Augment and Transform: they do not generate value in themselves. Each is assessed in three dimensions with four grades.

Sphere 08, Regulation, ethics and accountability:

- Compliance: classification of systems under the EU AI Act, transparency, human oversight, data protection in automated decisions and sector regulation.
- Anticipation: monitoring of emerging regulation and impact assessments before deployment.
- Ethical leadership: own principles beyond the law and a body with real veto power.

Sphere 09, AI governance: Structure (who is accountable and with which portfolio), Balance between speed and control (decision gates and the ability to stop) and Supplier ecosystem (build, buy or partner, contracts, concentration and exit).

Fictitious case: an industrial group with several subsidiaries cannot report to the board because there is no common register and no ultimate owner. In the first quarter it appoints an owner, creates a committee with the power to stop use cases and registers all use cases. When it reviews the register, it stops three duplicate use cases and discovers that almost all model spending depends on a single supplier with no exit strategy.

Why it matters: without Compliance, the company is in breach today; without Anticipation, tomorrow; without Ethical leadership, it can comply with the law and still lose trust. These references are not legal advice: each organisation verifies the rules that apply to it.

Question for the classroom: is there anyone in your organisation with real power to say no to a use case that is profitable but inappropriate?

TERMS ON THIS SLIDE

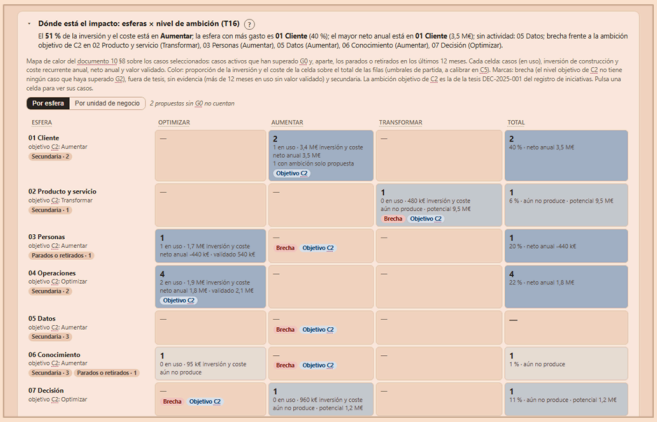
- **Regulation, ethics and accountability** (esfera 08): The sphere of limits: what regulation requires, what the company considers acceptable and who answers for what AI does. It produces no direct value, but without it value is not sustainable. It is assessed with four grades. The link opens the sphere 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
- **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
- **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 04 · Regulation and AI governance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html
- **SEVEN-G 10 · 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
- **Regulation (EU) 2024/1689 (AI Act), EUR-Lex** https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- **Regulation (EU) 2016/679 (GDPR), EUR-Lex** https://eur-lex.europa.eu/eli/reg/2016/679/oj/eng
- **Regulation and AI governance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html
- **How they 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

SPHERES IN 20 SLIDES

The impact map: how to read it



- **Rows and columns** Rows: value and enabling spheres; regulation and governance, separate. Columns: the three levels. Colour: weight of investment and cost.
- **Gap** In the cell of the sphere's target ambition there is no use case that has passed the hypothesis gate.
- **Outside the thesis** Over 5 % of investment in a sphere declared non-priority. No evidence: more than 12 months without validated value.
- **Screenshot** Screenshot in Spanish of the board dashboard, with fictitious data. Thresholds are initial, to be calibrated.

Three readings almost always appear: concentration in Operations and Optimise, gaps in priority spheres and inconsistencies with the enablers.

→ Heat map in SEVEN-G | → How the map is read | → Board dashboard

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Notes

The SPHERES map is read by crossing spheres and levels. Each use case occupies one cell: its primary sphere and its ambition level. In SEVEN-G this map is called the heat map (tool T16): it is generated from the use case register (T01) and shown in the board dashboard (T17).

Each cell shows the number of use cases (total and in production), investment and annual recurring cost, validated net annual value and the sphere's target ambition. Colour shows what share of investment and cost is in that cell: no activity, low (less than 5 %), medium (5 % to 15 %) or high (more than 15 %). These are initial thresholds, to be calibrated.

The markers turn the map into questions:

- Gap: the sphere has a target ambition and nobody is executing it.
- Outside the thesis: there is investment in a sphere that the board did not declare a priority.
- No evidence: use cases with more than 12 months in production and no validated value.
- Secondary: how many use cases have the sphere as secondary, without amounts.

Without a target ambition approved in the thesis, the map cannot mark gaps or ‘outside the thesis’.

The map is read at three points in time: current situation (where are we?), target ambition (where do we want to be?) and portfolio (is what we are doing taking us there?).

Why it matters: a map does not decide for the board, but it makes visible decisions that were being made unintentionally.

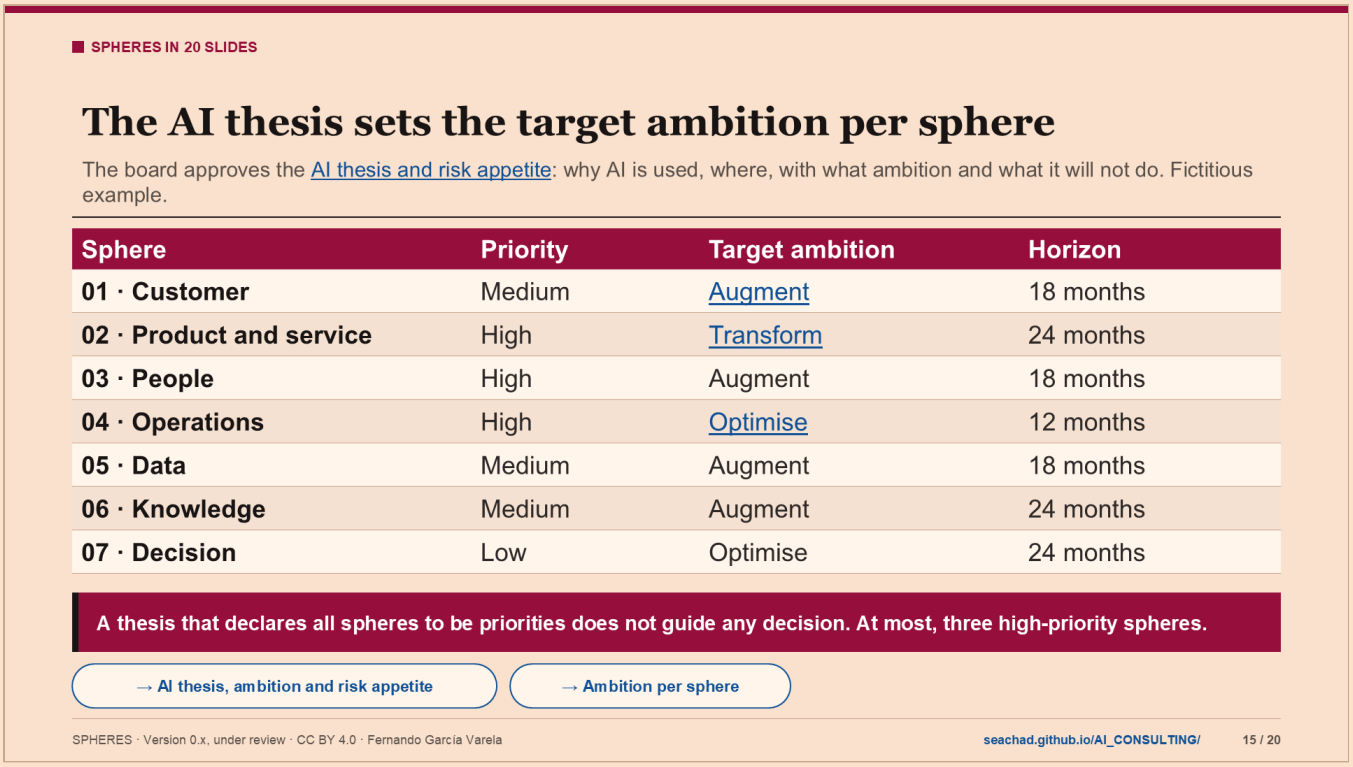
Question for the classroom: in the fictitious example in document 10, 75 % of investment is in Optimise and the thesis sets Transform in Product. What would you ask first?

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
- **Hypothesis gate** (G2): The gate that approves the value hypothesis: how much is expected, how it will be measured, against which baseline and when it will be stopped. Transform bets are approved here by the board. Without an approved hypothesis the feasibility test is not funded. The link opens its criteria in document 21. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/21_SEVEN-G_Criterios_de_gate_y_auditoria.html#6-3-g2-hypothesis
- **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 · Heat map: construction** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#8-1-construction
- **SEVEN-G 10 · Heat map: 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
- **SPHERES 00 · 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
- **Heat map in SEVEN-G** 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
- **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
- **Board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html



SPHERES IN 20 SLIDES

The AI thesis sets the target ambition per sphere

The board approves the AI thesis and risk appetite: why AI is used, where, with what ambition and what it will not do. Fictitious example.

Sphere	Priority	Target ambition	Horizon
01 · Customer	Medium	Augment	18 months
02 · Product and service	High	Transform	24 months
03 · People	High	Augment	18 months
04 · Operations	High	Optimise	12 months
05 · Data	Medium	Augment	18 months
06 · Knowledge	Medium	Augment	24 months
07 · Decision	Low	Optimise	24 months

A thesis that declares all spheres to be priorities does not guide any decision. At most, three high-priority spheres.

→ AI thesis, ambition and risk appetite → Ambition per sphere

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Notes

In SEVEN-G, the board sets the direction for AI at stage C2 of the corporate cycle. The result is the AI thesis: a 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 should be readable in ten minutes and usable to say no to a use case.

For each sphere from 01 to 07, the thesis sets a priority (high, medium, low or non-priority), a target ambition, a horizon, a main indicator from document 10 and an owner from senior management. For spheres 08 and 09 it sets a target grade per dimension, never an ambition level.

Main rules:

- The target ambition is based on the current map: the level achieved and the level in the portfolio are stated for each sphere.
- A sphere with a Transform ambition needs an envelope in the budget and, within the horizon, at least one candidate use case.
- A high ambition in a value sphere should be accompanied by enough capability in the enablers on which it depends.

A good thesis contains renunciations, is consistent with the budget, is verifiable, is consistent with capability and takes a position on people.

The target ambition of each sphere is recorded in the use case register (T01), in the board decision that approves the thesis, and the dashboard takes it from there to mark gaps.

Why it matters: the question ‘are we transforming?’ only has an answer if the declared ambition is compared with what the portfolio executes, sphere by sphere.

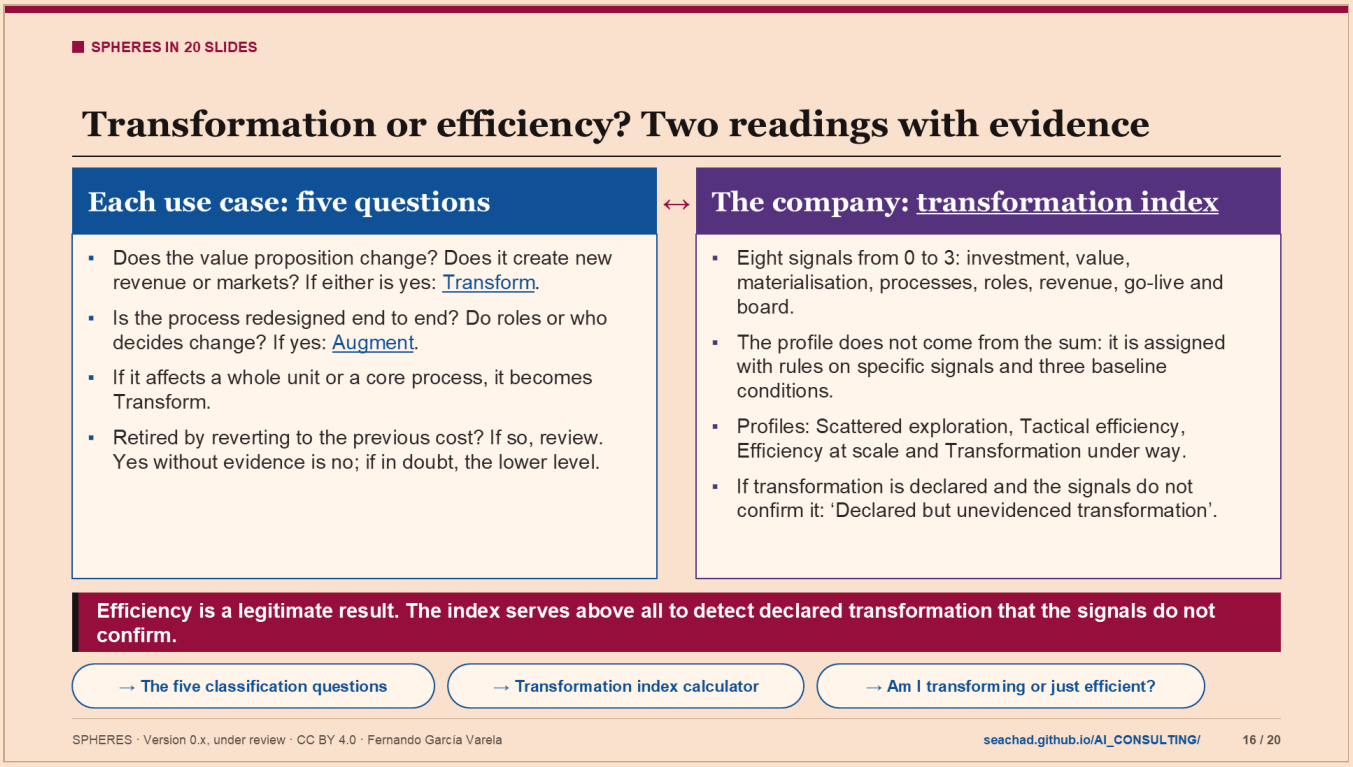
Question for the classroom: in the example, Data and Knowledge ask for Augment. Why does that make sense if Product asks for Transform?

TERMS ON THIS SLIDE

- **AI thesis and risk appetite** (P35): A template recording the board's decision in the direction stage: what the company wants AI for, ambition per sphere, risk appetite, budget envelope, thresholds and chosen indicators. It is the reference against which every use case is later judged. The link opens the template. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/plantillas/P35_SEVEN-G_Tesis_de_IA_y_apetito_de_riesgo.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
- **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

SOURCES AND LINKS

- **SEVEN-G 13 · AI thesis** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/13_SEVEN-G_Tesis_de_IA_ambicion_y_apetito_de_riesgo.html#ai-thesis
- **SEVEN-G 13 · Ambition per sphere: 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
- **SPHERES 01 · The ambition of a sphere and portfolio balance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#the-ambition-of-a-sphere-and-portfolio-balance
- **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
- **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



Notes

SEVEN-G separates two questions that are often confused.

First: what level is this use case? It is answered with five yes-or-no questions, always with evidence. If the first four are no, it is Optimise, however it has been presented. If the value proposition changes or it generates new revenue, it is Transform. If it redesigns the process or changes roles, it is Augment, unless it affects a whole unit or a core process. The fifth question is a cross-check. The level is proposed when the use case is registered, confirmed before investing in its construction and checked with evidence once it produces results.

Second: is the company transforming? It is answered with the transformation index (SEVEN-G document 12 and tool T14). It has eight observable signals, scored from 0 to 3, and three baseline conditions: governed portfolio, proportion of validated value and scale in production. The profile is assigned in two steps: first what the signals show, then the cross-check against what the company declares. 'No data' scores 0 and is shown as 'no data', never as an estimate.

Fictitious example from document 12: an industrial company with a thesis that sets Transform in Product obtains a sum of 12 out of 24. Its assigned profile is 'Declared but unevidenced transformation', with 'Efficiency at scale' as the underlying profile.

Why it matters: the index is not a score and is not compared with other companies. It says what would move the profile, with an owner and a deadline.

Question for the classroom: which three facts would have to change in that company to move to 'Transformation under way'?

TERMS ON THIS SLIDE

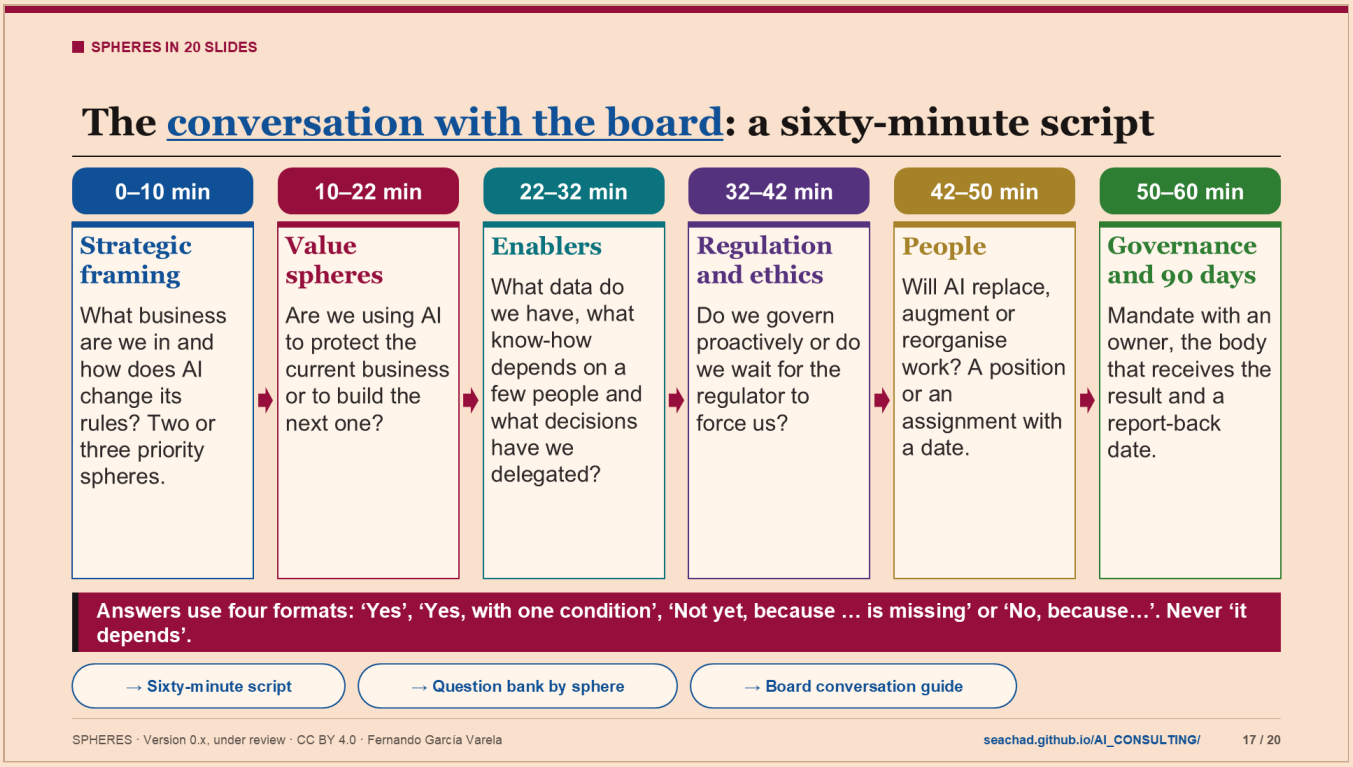
- **Transform**: The third ambition level: AI changes the business model, the product or the way of competing. Its value takes longer and is more uncertain, so it is funded in stages and approved by the board (at the hypothesis gate and when scaling). The quick-return criteria of Optimise are not applied 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

- **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
- **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 · 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 · The eight signals** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#4-4-the-eight-signals
- **SEVEN-G 12 · Profile assignment** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#profile-assignment
- **SEVEN-G 12 · Complete illustrative example** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#complete-illustrative-example
- **The five classification questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-1-the-five-questions
- **Transformation index calculator** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T14_indice_transformacion/indice.html
- **Am I transforming or just efficient?** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/preguntas/transformo.html



Notes

A board does not think in terms of 'AI use cases'. It thinks in terms of risk, opportunity, accountability and competitive advantage. The SPHERES conversation translates AI into those terms and ends with concrete decisions. It has four objectives: understand the scope, position the company, take a position and decide.

Six principles guide it: business before technology; questions before answers; one example per level is enough; honesty about gaps ('no data' is stated); no unsupported figures; and ending with a decision.

Preparation starts two or three weeks before, with interviews and a first preliminary map of the company. Presenting the board with its own company on the map changes the tone of the session: it moves from talking about AI in general to talking about its own decisions.

The people block is the shortest and the most sensitive. An explicit position is requested: replace, augment or reorganise. It can differ by function. What must not happen is that there is no position and each project decides on its own.

The SEVEN-G guide (document 61) adds the four response formats, the rule of presenting at most three cases in detail and a list of difficult questions: how much does AI save us? do we comply with the AI Act? is this transformation or only efficiency?

The session closes with a ninety-day mandate: month 1, diagnosis; month 2, risks and opportunities by sphere; month 3, ambition by sphere and governance structure for approval.

Why it matters: many board sessions on AI end with interest and no decision.

Question for the classroom: a director asks 'are we behind the competition?'. How would you answer without unsourced market figures?

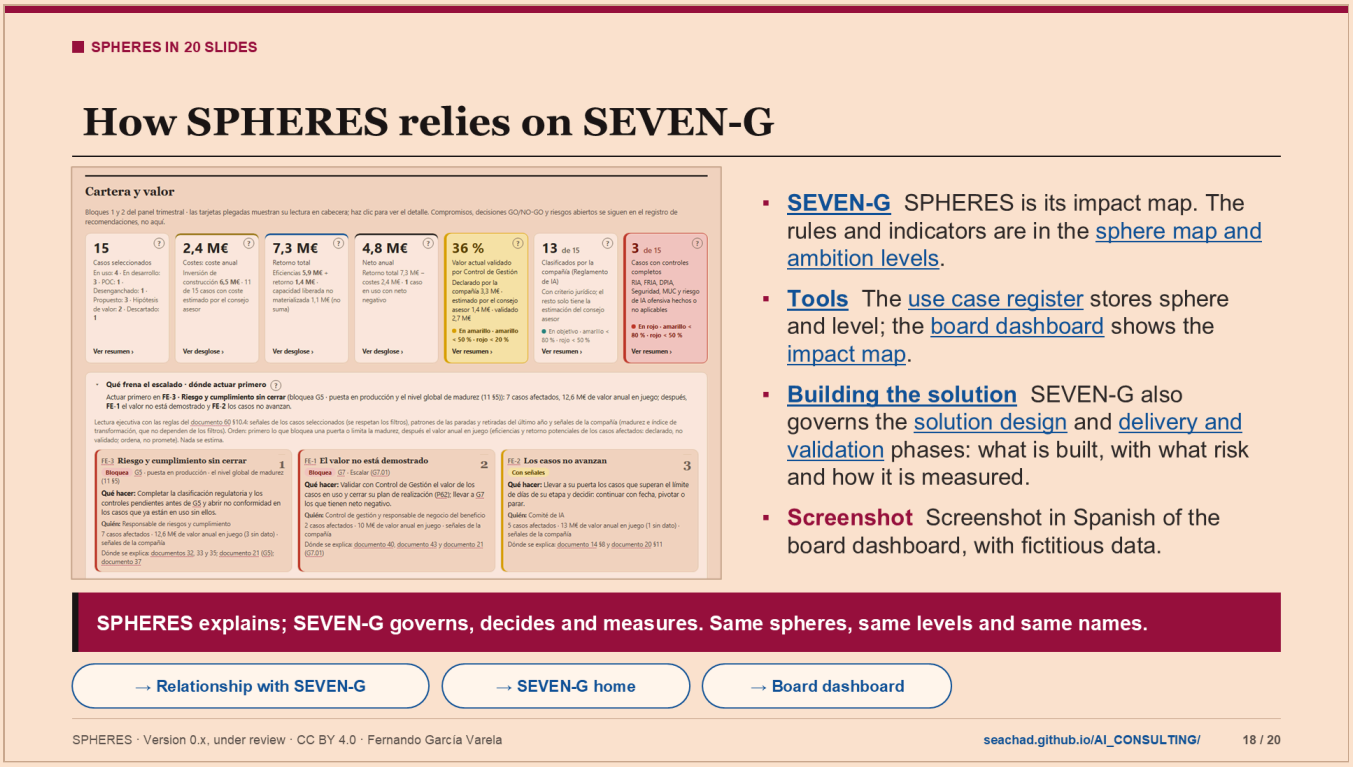
TERMS ON THIS SLIDE

- **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 · 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 · Response format for the board** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#response-format-for-the-board
- **SEVEN-G 61 · Frequent difficult questions** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#frequent-difficult-questions
- **Sixty-minute script** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#sixty-minute-script
- **Question bank by sphere** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#question-bank-by-sphere
- **Board conversation guide** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/61_SEVEN-G_Guia_de_conversacion_con_el_consejo.html#frequent-difficult-questions



Notes

SPHERES and SEVEN-G are closely related: each explains how it relies on the other and links to it.

SEVEN-G is the main framework: it governs, measures and audits AI in the company and in each use case, with a corporate cycle (C1 to C5), a use case lifecycle with decision gates and tools. SPHERES was born as a framework for conversation with the board and today is component A of SEVEN-G, the impact map. The division is deliberate:

- SPHERES explains what the spheres and levels are, why they matter and how to use them in a management conversation. Its readers are the board and senior management.
- SEVEN-G contains the classification rules, the indicators with a formula, the gates, the templates and the tools. It is the source of truth in case of doubt.

SEVEN-G documents that develop SPHERES: 10 (sphere map and heat map), 12 (five questions and transformation index), 13 (thesis, ambition per sphere and risk appetite), 14 (portfolio management) and 61 (conversation with the board). The use case register (T01) stores the sphere and level of each use case; the board dashboard (T17) shows the heat map.

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. What comes out of the build becomes evidence for the gates; no technical review replaces a decision gate.

Why it matters: separating the explanation from the rule prevents the board from receiving a manual it does not need, and prevents the AI office from applying criteria different from those explained.

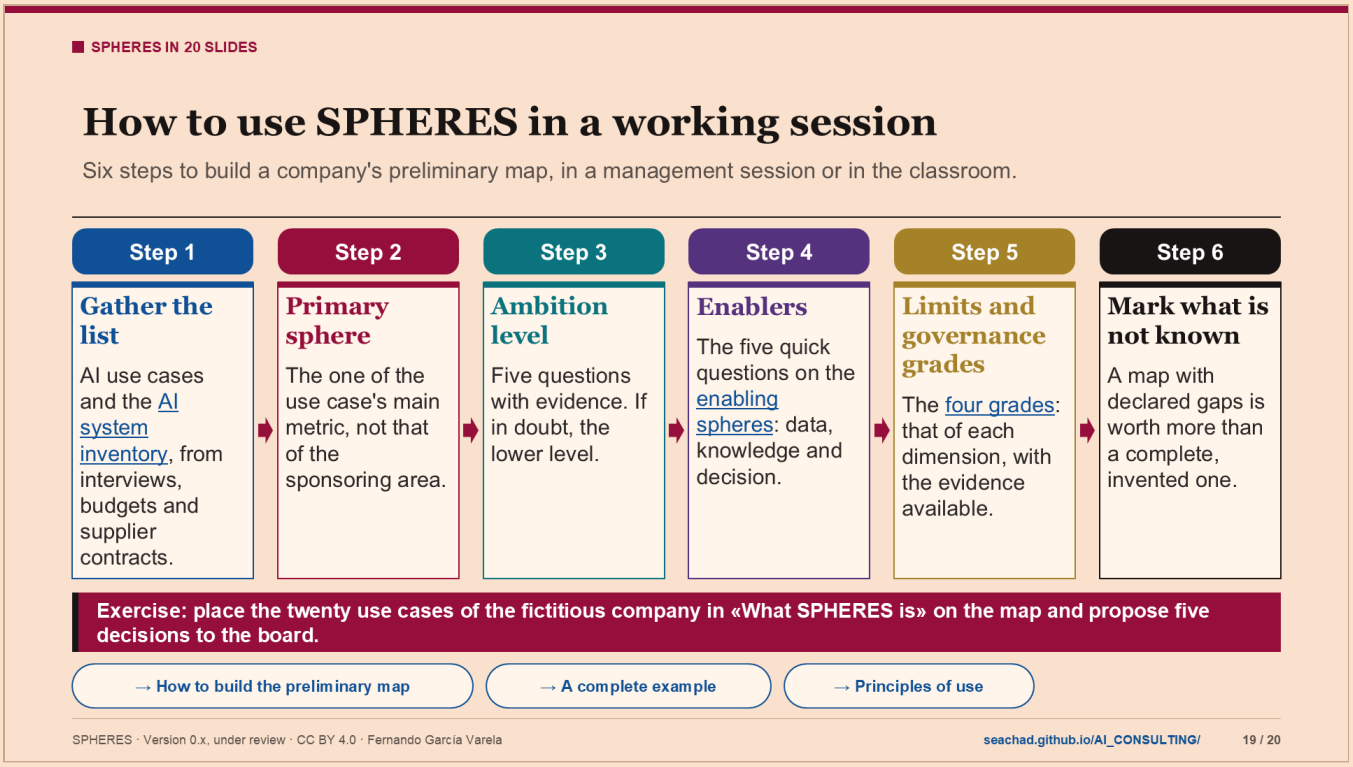
Question for the classroom: which part of this system does a board member need to know, and which part does a technical team need?

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
- **Sphere map and ambition levels** (documento 10): It defines the impact map: nine spheres (seven where value is created and two enabling ones for regulation and governance) by three ambition levels. Each use case sits in a cell and the portfolio is read as a heat map. It shows where money goes and where ambition is missing. The link opens the map in document 10. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#the-impact-map
- **Use case register** (T01): It is the central SEVEN-G tool and the single data source for all the others. It records each AI use case like an opportunity in a CRM: phase, status, dates, criteria for each gate, risks, value and stop reason. The AI office and the teams use it; the committee and the board see what comes out of it. The link opens an example register with fictitious use cases; anything you change is stored only in your browser. https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T01_registro_iniciativas/registro.html
- **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
- **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
- **Solution design** (fase 4): The phase in which the full solution is designed: architecture, data, security, human oversight, rollback plan and adoption plan. It ends at the design gate (G4). It ensures controls are designed before building, not added later when they cost more. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-4-solution-design
- **Delivery and validation** (fase 5): The phase in which the solution is built, tested with real data, piloted and validated to show it delivers what was promised without breaking any constraint. It ends at the go-live gate (G5), with multi-level sign-off. Nothing reaches production without verified evidence. The link opens the phase manual in document 20. https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/20_SEVEN-G_Manuales_de_fase.html#phase-5-delivery-and-validation

SOURCES AND LINKS

- **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
- **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 10 · Use of the map in the two cycles** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#use-of-the-map-in-the-two-cycles
- **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
- **Board dashboard** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html



Notes

The preliminary map is the central piece of any working session with SPHERES. It is built in six steps.

1. Gather the list of AI use cases and systems from interviews, budgets and supplier contracts. It is common to discover use cases that management did not know about. 2. Assign the primary sphere: the one in which the main metric is measured, not the sponsoring area. 3. Assign the ambition level with the five questions. If in doubt, the lower level; whoever proposes the higher one provides the evidence. 4. Diagnose the enablers with the five quick questions. 5. Estimate the grades of the dimensions of 08 and 09 with the evidence available. 6. Mark what is not known. The gaps in the map are often the first relevant finding.

Classroom exercise, with the fictitious example in document 00: a distribution company has twenty use cases. Nineteen are Optimise and eleven are in Operations. Product and service is empty, although the strategic plan talks about digital services. Decision is empty, but three use cases recommend prices. Data has a single use case. There is no owner for AI. Ask the groups to propose five decisions and compare them with those in the document: an investment cap in Operations, Transform in Product, Augment in Data before scaling Customer, autonomy levels for pricing and an owner with a committee that can stop use cases.

Seven principles of use: the map talks about business; each use case has one primary sphere and a single level; the levels are not a ladder; the enablers are looked at before setting the ambition; 08 and 09 have grades; if a use case does not fit, its objective is unclear; and the map is updated every quarter.

Why it matters: none of this requires technical knowledge.

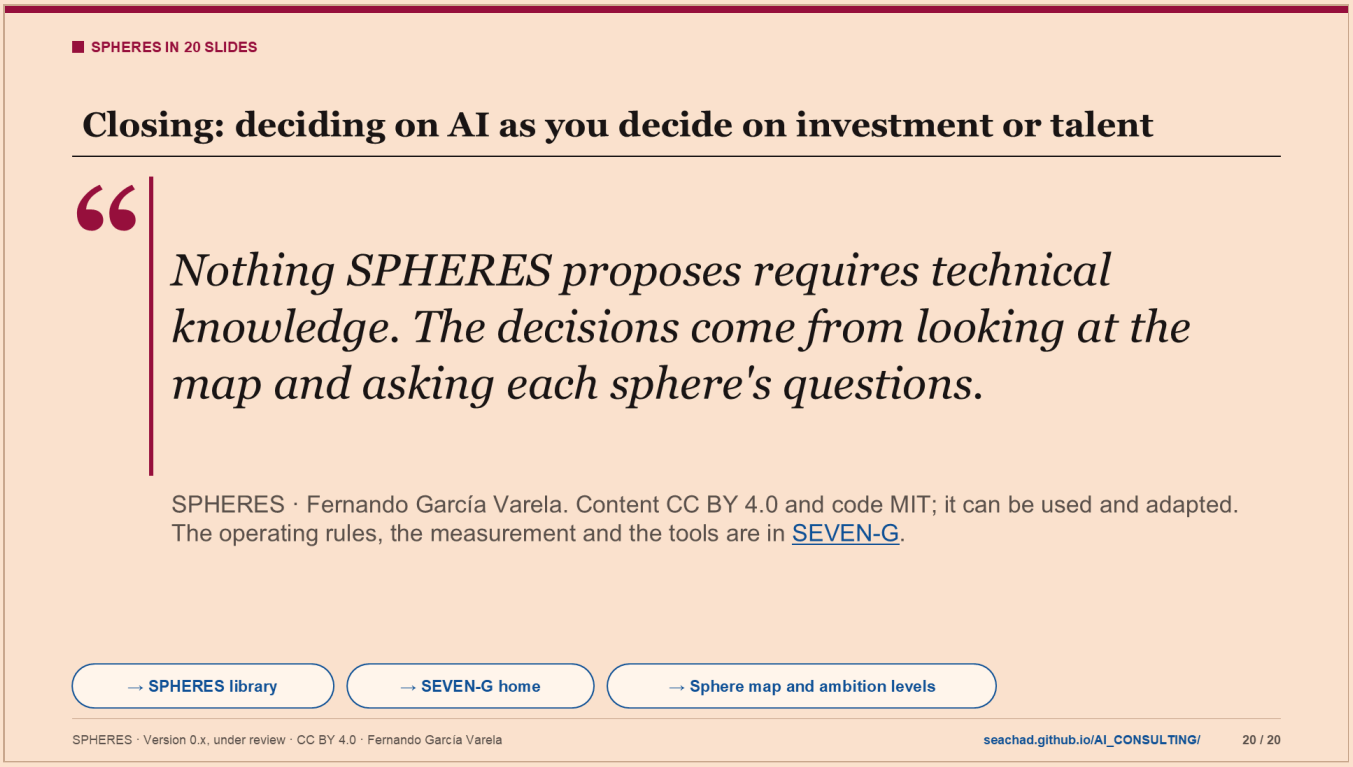
TERMS ON THIS SLIDE

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

- **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
- **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 · Preparation and preliminary map** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/05_SPHERES_Conversacion_con_el_consejo.html#preparation
- **SPHERES 00 · 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 00 · Principles of use** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#principles-of-use
- **How to build 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
- **A complete example** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#a-complete-example
- **Principles of use** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#principles-of-use



Notes

Summary of what has been covered in twenty slides:

- The problem is not a lack of AI use cases but a lack of direction over them.
- SPHERES answers three questions: where do we play, with what ambition and what do we ask.
- The three levels, Optimise, Augment and Transform, are types of bet, not a ladder. They are assigned by what changes in the business, with evidence.
- The nine spheres include value, enablers, boundaries and governance, so that the opportunity, the capability and the accountability are looked at together.
- The spheres × ambition map, with its markers for gap, outside the thesis and no evidence, turns the portfolio into questions for the board.
- The AI thesis sets the target ambition per sphere, and the transformation index checks whether what is declared is achieved.
- The conversation with the board always ends with a recorded decision and a ninety-day plan.

Why it matters: the purpose of SPHERES is for management to decide on AI as naturally as it decides on investment, risk or talent. The map is updated, not archived: it is reviewed at least every quarter and every year.

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Final question for the classroom: if tomorrow you had to open the next board session with a single SPHERES question, which one would you choose and why?

TERMS ON THIS SLIDE

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

SOURCES AND LINKS

- **SPHERES 00 · Licence, attribution and status** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html#licence-attribution-and-status
- **SEVEN-G 93 · Licence, use and citation** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/93_SEVEN-G_Licencia_uso_y_citacion.html
- **SPHERES library** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **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

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