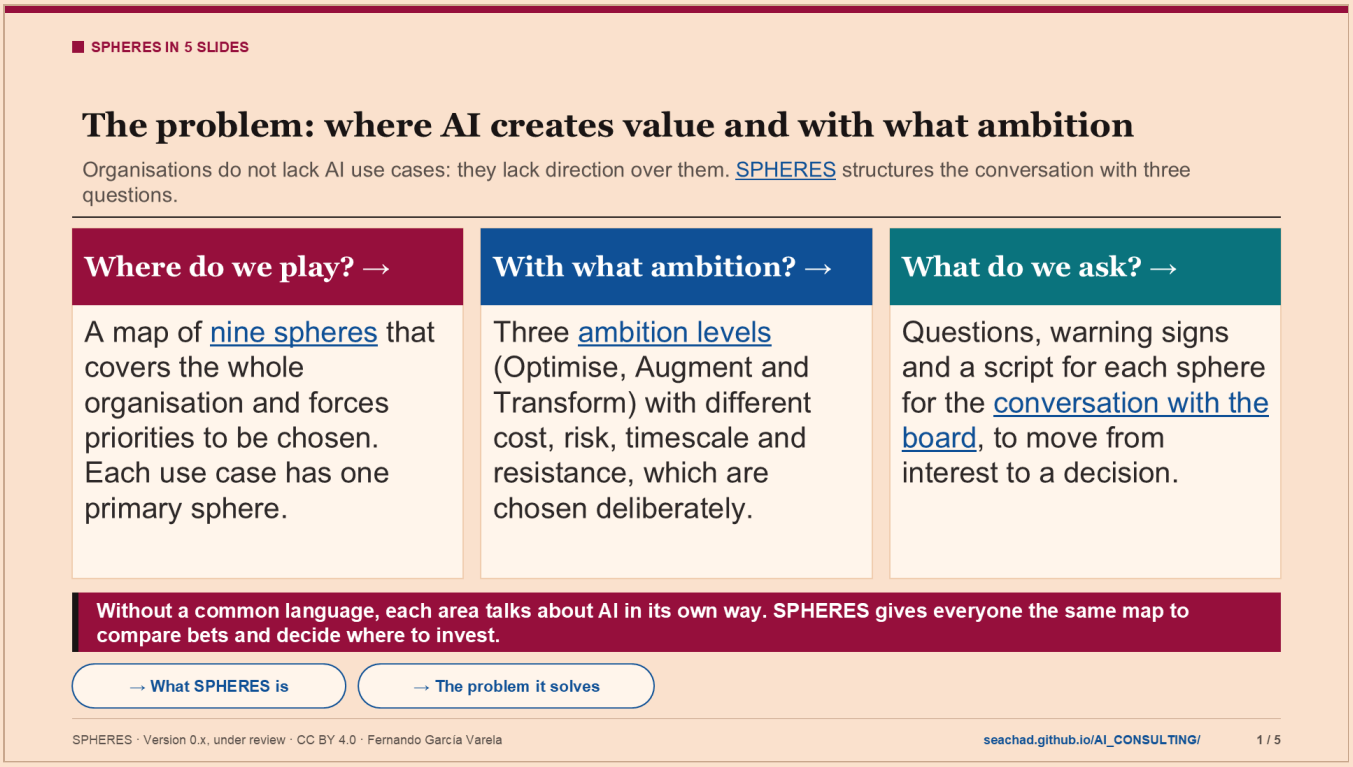


Notes

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

The starting problem is not a lack of use cases, but 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 it describes 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.
- Regulation appears at the end, when the system has already been built.
- Nobody knows who is accountable for AI in the company.

The three questions structure the answer. Where do we play? is answered with the map of nine spheres. With what ambition? is answered with three levels that are chosen deliberately. What do we ask? is answered with questions, warning signs and a conversation script for each sphere.

Illustrative example (fictitious company): a medium-sized 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, even though its strategic plan talks about launching digital services.

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

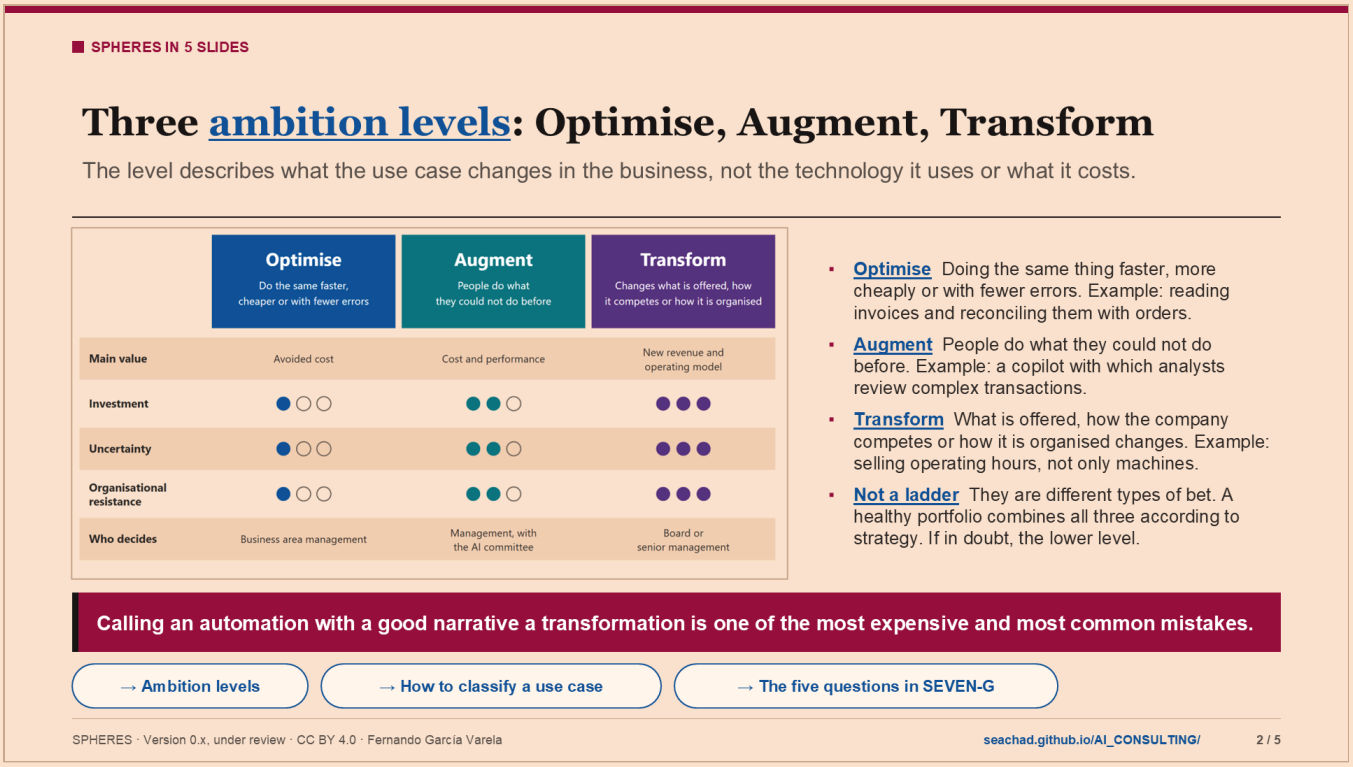
Question for the classroom: think of a company you know. Does its list of AI use cases describe technology or effects on the business?

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 · What SPHERES is and what it is for** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/00_SPHERES_Que_es_y_para_que_sirve.html
- **SPHERES 00 · A complete example (fictitious company)** 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
- **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

An ambition level describes what an AI use case changes in the business. It does not describe the technology, the cost or how novel it looks. The same technology can serve different levels: a generative AI agent that drafts responses for the customer service team is Optimise; a classical statistical model that makes it possible to launch pay-per-kilometre insurance is Transform.

- Optimise: the value lies mainly in avoided cost and uncertainty is low. The head of the area decides. To proceed, a positive annual net benefit within the set horizon is required.
- Augment: the value combines cost and performance. Uncertainty is medium, because it depends on people adopting the new way of working. To proceed, actual adoption and measured performance improvement are required.
- Transform: the value lies in new revenue and changes to the operating model, with high uncertainty. The board or senior management decides, with learning milestones and an investment limit per stage.

How it is classified: five questions answered yes or no, always with evidence; a yes without evidence counts as no. If the value proposition, the complete process, the roles and the revenue do not change, the use case is Optimise, however it is presented. In case of reasonable doubt the lower level is assigned, and whoever proposes the higher level provides the evidence. The full rules are in the SEVEN-G transformation index (document 12).

Why it matters: investment, uncertainty and resistance increase from Optimise to Transform. Measuring a Transform bet against the payback period of an automation kills it before it can demonstrate anything. And a portfolio made up only of Optimise leaves a more efficient company with the same business model.

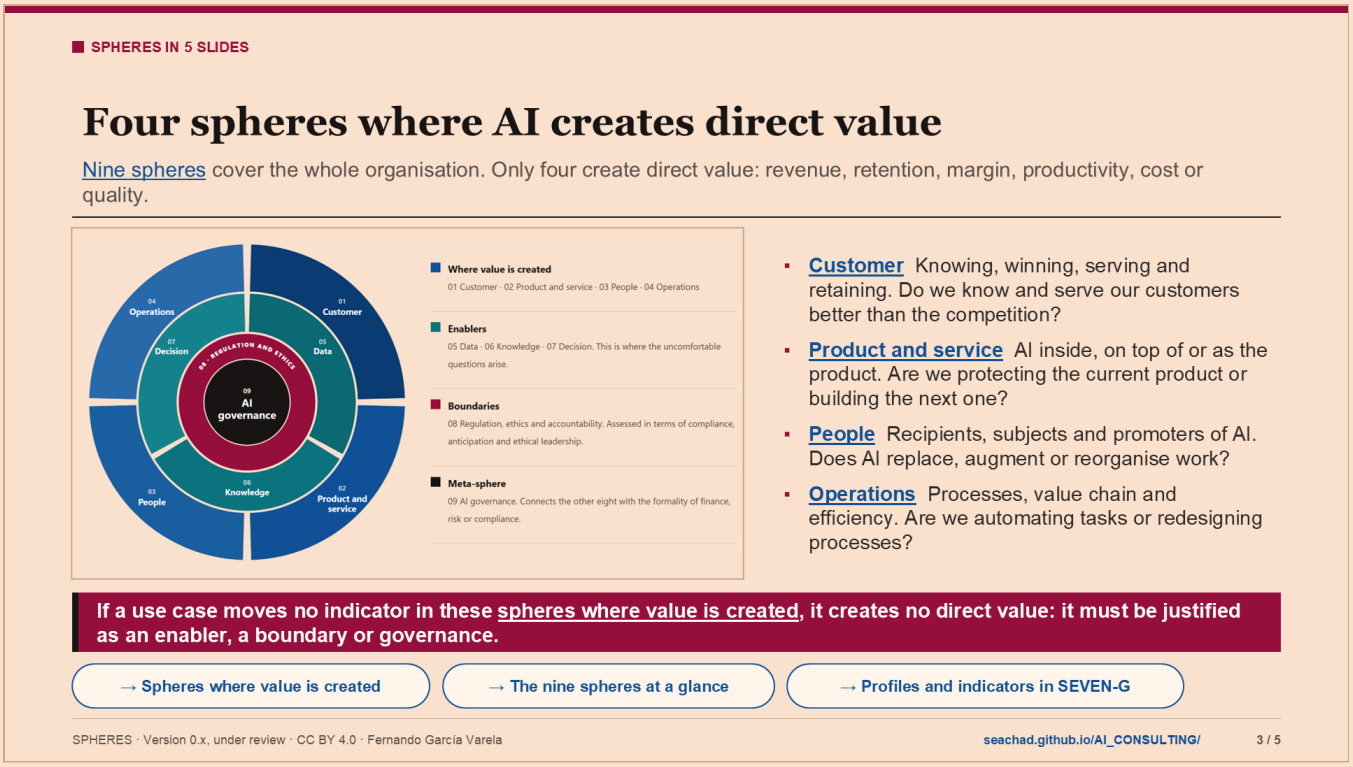
Question for the classroom: licences of an AI assistant for the whole workforce, with no adoption plan: what level are they? According to SPHERES, Optimise: no role or process changes in a demonstrable way.

TERMS ON THIS SLIDE

- **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
- **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 · Borderline cases** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/01_SPHERES_Niveles_de_ambicion.html#borderline-cases
- **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
- **SEVEN-G 12 · Ambition classification of a use case** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#ambition-classification-of-a-use-case
- **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
- **The five questions in SEVEN-G** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/12_SEVEN-G_Indice_de_transformacion.html#3-1-the-five-questions



Notes

The nine spheres cover all the areas of relationship of a company, regardless of its sector. They are read from the outside in: where value is created (01 to 04), enablers (05 to 07), boundaries (08) and meta-sphere (09). This slide covers the first four; the next one, the other five.

- 01 · Customer: revenue, retention, conversion and experience. It is usually led by the sales, marketing or customer management function.
- 02 · Product and service: offering, differentiation, margin and new revenue. AI can be inside the product, on top of it (speeding up its design and launch) or be the product itself.
- 03 · People: productivity, capabilities, roles and organisation. People are recipients, subjects and promoters of AI.
- 04 · Operations: cost, time, quality and operational resilience.

Reading rule: each use case has one primary sphere, the one of the metric that justifies the investment. It is not decided by the technology, by the sponsoring area or by the supplier. Illustrative example: a product recommender in the digital channel goes in Customer, because its main metric is conversion, even though it depends on data.

Illustrative example (fictitious telecommunications company): it starts with Optimise, classifying and routing enquiries. It moves to Augment: during the call, agents see the customer's churn risk and the retention offers that make sense. Before approving a Transform bet, an assistant as the main channel for one segment, the board asks how repeat contact and satisfaction will be measured.

Why it matters: the Product and service sphere decides whether AI protects the current business or builds the next one. If nobody decides this explicitly, protecting the current product always wins, because its return is easier to demonstrate.

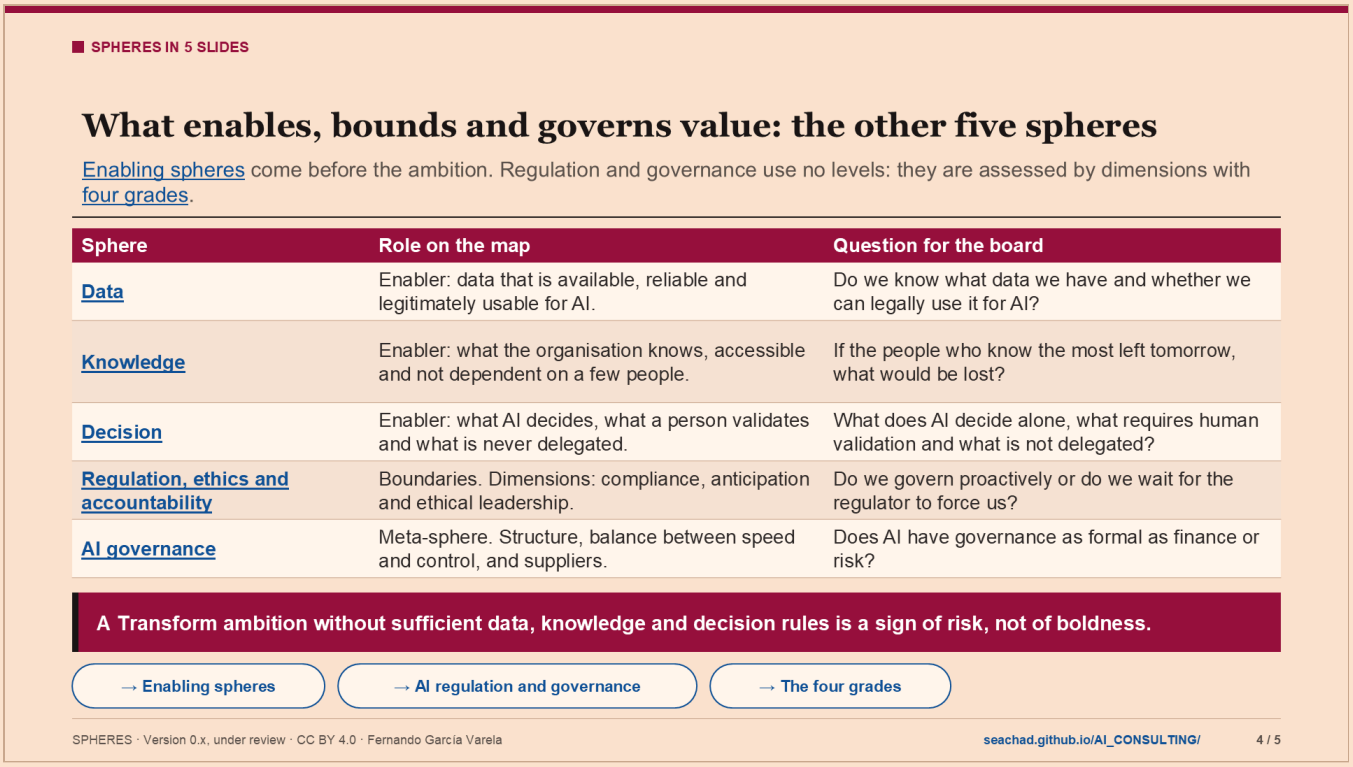
Question for the classroom: in which of the four spheres would a company in your sector place its first Transform bet, and why?

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

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
- **Profiles and indicators in SEVEN-G** 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



SPHERES IN 5 SLIDES

What enables, bounds and governs value: the other five spheres

Enabling spheres come before the ambition. Regulation and governance use no levels: they are assessed by dimensions with four grades.

Sphere	Role on the map	Question for the board
Data	Enabler: data that is available, reliable and legitimately usable for AI.	Do we know what data we have and whether we can legally use it for AI?
Knowledge	Enabler: what the organisation knows, accessible and not dependent on a few people.	If the people who know the most left tomorrow, what would be lost?
Decision	Enabler: what AI decides, what a person validates and what is never delegated.	What does AI decide alone, what requires human validation and what is not delegated?
Regulation, ethics and accountability	Boundaries. Dimensions: compliance, anticipation and ethical leadership.	Do we govern proactively or do we wait for the regulator to force us?
AI governance	Meta-sphere. Structure, balance between speed and control, and suppliers.	Does AI have governance as formal as finance or risk?

A Transform ambition without sufficient data, knowledge and decision rules is a sign of risk, not of boldness.

→ Enabling spheres | → AI regulation and governance | → The four grades

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Notes

Spheres 05, 06 and 07 do not generate value in themselves: they make the value of spheres 01 to 04 possible or impossible. This is where the uncomfortable questions arise: not knowing what data you have, critical knowledge sitting in the heads of three people, or a system already setting prices without anyone having decided so.

An enabler is the primary sphere only when the result of the use case is the capability itself. Illustrative example: a common data platform for several AI cases goes in Data. The fact that a use case uses data does not place it in sphere 05.

Spheres 08 and 09 are not assessed with Optimise, Augment and Transform, because they do not generate value in themselves. Each has three dimensions with four grades: Absent, Basic, Systematic and Advanced. A grade is assigned with evidence; without the minimum evidence, the lower grade is assigned.

- 08 · Regulation, ethics and accountability: compliance, anticipation and ethical leadership. It includes, for example, the classification of systems under the EU AI Act.
- 09 · AI governance: structure, balance between speed and control, and supplier ecosystem.

Sphere 08 is never used to signal that a use case in another sphere carries regulatory risk: that goes in its regulatory classification and its risk register.

Illustrative example (fictitious industrial group): each subsidiary launches its own use cases and contracts its own suppliers. The board asks for a report and nobody can provide it. Diagnosis of sphere 09: Structure, Absent. In the first quarter, an owner of AI is designated, a committee with the power to stop use cases is created and everything is entered in a common register.

Why it matters: most delays and failures are not due to the model, but to unavailable data, undocumented knowledge or decisions without rules. And "improve AI governance" is not a verifiable target; "reach Systematic in Compliance within twelve months" is.

Question for the classroom: who in your organisation can stop an AI use case that is not working today?

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
- **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
- **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

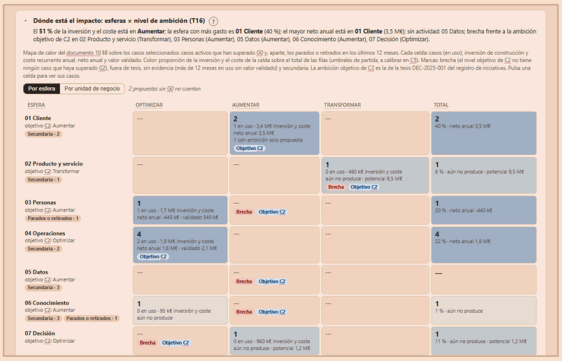
SOURCES AND LINKS

- **SPHERES 04 · AI regulation and 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 (Artificial Intelligence Act), EUR-Lex** https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng
- **AI regulation and governance** https://seachad.github.io/AI_CONSULTING/SPHERES/html/en/04_SPHERES_Regulacion_y_gobierno_de_la_IA.html

SPHERES IN 5 SLIDES

The conversation with the board and how to start

A sixty-minute session in six blocks that ends with a mandate. SEVEN-G provides the rules, the measurement and the tools.



- **The session** Framing, value, enablers, regulation, people and governance. It closes with a mandate, an owner and a report-back date.
- **Support in SEVEN-G** Rules and indicators are there, as is the impact map shown (fictitious data, screenshot in Spanish).
- **People** The board states whether AI replaces, augments or reorganises work. Having no position is read as the worst of the three.
- **How to start** Ninety days: current map with evidence, risks and opportunities by sphere, and ambition and governance for approval.

A map does not decide for the board, but it makes visible decisions that were being taken unintentionally.

→ Conversation with the board | → Ambition per sphere in SEVEN-G | → What SEVEN-G is

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Notes

The conversation that SPHERES proposes translates AI into the board's terms: risk, opportunity, accountability and competitive advantage. The sixty-minute script has six blocks: strategic framing, spheres where value is created, enabling spheres, regulation, position on people, and governance with the first ninety days. Its principles: business before technology, questions before answers, honesty about gaps, no figures without support and ending with a decision.

The position on people is requested explicitly: will AI replace, augment or reorganise work? The absence of a position is almost always interpreted as the worst of the three.

How it relies on SEVEN-G: SPHERES is component A of SEVEN-G, the impact map. SPHERES explains; SEVEN-G is the source of truth for the operating rules. SEVEN-G holds the rules for primary and secondary spheres, the indicators with a formula for each sphere, the target ambition by sphere that the board approves in the direction stage (C2), the sphere-level heat map (T16) and the board AI dashboard (T17). The image shows that map with fictitious data; the screenshot is in Spanish. When a use case moves on to building its solution, SEVEN-G also governs it in its design and delivery phases and decides at each gate whether it goes ahead.

How to start:

- Before the session, place each known use case in its primary sphere and at its level, and mark what is not known.
- Month 1: map of the current situation, with evidence and with explicit "no data" entries.
- Month 2: main risks and opportunities by sphere.
- Month 3: target ambition by sphere, target grades for 08 and 09 and governance structure for approval.

Why it matters: many board sessions on AI end with interest and no decision. The map forces a close with a mandate and is then reviewed every quarter.

Question for the classroom: what specific decision would you ask the board for at the end of the session?

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
- **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
- **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

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 10 · Sphere-level heat map (T16)** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/10_SEVEN-G_Mapa_de_esferas_y_niveles_de_ambicion.html#sphere-level-heat-map-t16
- **SEVEN-G 90 · 90-day plan** https://seachad.github.io/AI_CONSULTING/SEVEN-G/html/en/90_SEVEN-G_Guia_de_implantacion.html#90-day-plan
- **Board AI dashboard (T17), fictitious data** https://seachad.github.io/AI_CONSULTING/SEVEN-G/herramientas/T17_panel_consejo/index.html
- **Ambition per sphere in SEVEN-G** 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

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