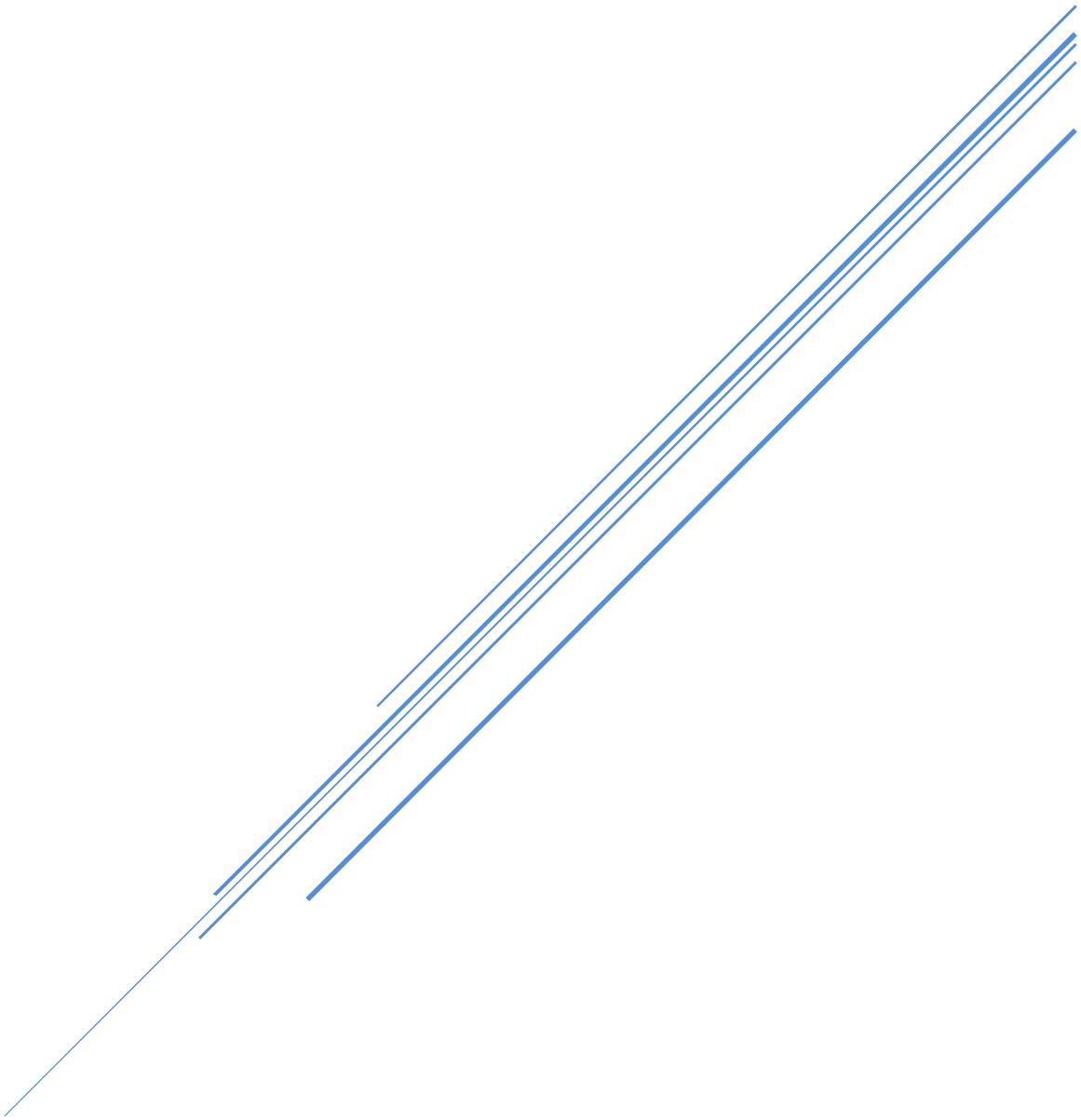
SIMA360™ GUIDE

The Definitive Guide to the Structured AI Maturity Accelerator



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Purpose of the SIMA360™ Guide

SIMA360™ exists to provide organizations with a clear, practical path for turning AI ambitions into sustainable value. In a world where artificial intelligence is evolving faster than most businesses can adapt, the Guide serves as both a compass and a playbook—helping leaders, teams, and stakeholders navigate AI adoption with confidence, clarity, and governance.

The Guide defines the SIMA360™ framework: a structured, evidence-based approach to assessing AI maturity, uncovering gaps, and building the capabilities needed to achieve responsible, high-impact AI outcomes. Every approach described in the framework serves a specific role in guiding the application of SIMA360™ to real-world challenges. Following these approaches ensures that AI initiatives deliver measurable results, reduce risks, and align with strategic goals. Skipping components or altering the intended application weakens those results and can lead to wasted investment, compliance failures, or missed opportunities.

SIMA360™ is not tied to a single industry or technology stack. It is adaptable, scalable, and relevant whether you are deploying predictive analytics in healthcare, automating workflows in manufacturing, or experimenting with generative AI in creative fields. The Guide is intended for anyone approaching AI adoption—executives, innovators, compliance officers, technologists, and change leaders alike.

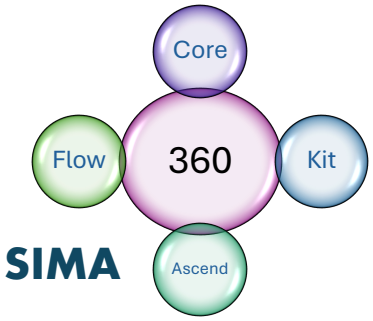
While the framework provides the foundation, we recognize that every organization's AI journey is unique. New methods, tools, and adaptations will emerge as you apply SIMA360. These context-specific applications may vary widely—but all can be anchored back to the approaches and practices described in this Guide.

For more information, please visit www.sima360.ai or contact us at infor@sima360.ai.

Glossary

SIMA360™
Structured AI Maturity Accelerator

SIMA360™ Overview



SIMA360™ is a comprehensive, evidence-based AI maturity framework designed to help organizations implement artificial intelligence with confidence, clarity, and control. It offers a structured, phased approach for assessing, planning, and accelerating AI adoption while mitigating strategic risks such as misalignment, technical debt, and unintended consequences. The framework is categorized as follows: SIMA-Core™ , which describes the models; SIMA-Flow™ , which outlines how to utilize the models; SIMA-Kit™ , which contains the resources required for application; and SIMA-Ascend™ , which provides a training and staff maturity model.

SIMA360™ advantages

- Stage-based assessments
- Actionable guidance
- Safe, scalable adoption
- AI application at levels
- A synthesis of the best models
- Specific tools and role
- Methodical progression
- An empirical cyclical growth pattern

The Challenge

Scaling AI across an enterprise introduces several challenges, including unclear strategy, inconsistent governance, inadequate data foundations, skills gaps, and technology fragmentation. Without a structured approach, organizations risk inefficient AI deployment, ethical breaches, and missed opportunities.

The SIMA360™ Solution

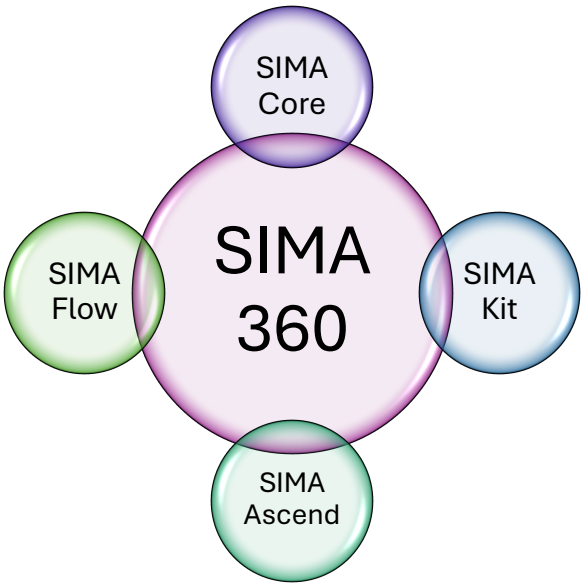
SIMA360™ delivers a staged-based AI adoption model that guides organizations around five strategic domains: Strategic, Governance, Data, People, and Technology. It combines actionable capabilities assessments, toolkits, training, and execution cycles to support safe, scalable, and controlled AI implementations.

The vision

For organizations scaling AI initiatives across the enterprise, several risks arise, including strategic misalignment, technical debt, and unintended consequences.	**SIMA360™ is a comprehensive AI maturity framework that delivers stage-based assessments with actionable guidance across strategy, governance, data, people, and Technology—enabling safe, scalable, and controlled AI adoption.**	**Unlike existing implementation models, SIMA360™ is grounded in evidence-based research and provides specific tools, roles, and activities to help organizations progress methodically through each category of AI capabilities.**

Framework Components

SIMA360™ consists of four interlocking components that collectively support organizational maturity in AI adoption. SIMA-Core™ , SIMA-Kit™ , SIMA-Flow™ , and SIMA-Ascend™ .



SIMA-Core™

SIMA-Core™ is structural, not dynamic. Within the SIMA-Core™ lie the primary models and their description: Strategic Domains, AI capabilities, and AI tools. The dynamic application of each of these models is facilitated by SIMA-Flow™ , which is supported by SIMA-Kit™ resources.

SIMA-Flow™

SIMA-Flow™ provides the execution engine for SIMA360. SIMA-Flow™ is a macro cycle that guides and supports a micro flow. It is built on two cycles: a core cycle that sets the groundwork for project iterations and a project cycle that promotes cyclical learning at the project level. The project cycle is iterated upon multiple times to gather insights on the AI application and these insights are then applied to a further assessment at the core cycle.

SIMA-Kit™

SIMA-Kit™ is a capability-level-specific toolbox that offers templates, recommended activities, role guidance, and artifacts, along with the capability assessment toolkit. The Kit contains guidance and resources for gap analysis, go-forward planning, role-based responsibilities, and tool category selection. It enables organizations to operationalize guidance from SIMA-Core™ and prepares them for continuous improvement.

SIMA-Ascend™

SIMA-Ascend™ is a structured training and certification path to build practitioner capability across three levels: Agent (individual contributors), Orchestrator (team leads), and Strategist (enterprise leaders). SIMA-Ascend™ aligns skills and roles with framework application and capability targets, ensuring that staff members understand SIMA360™ at the appropriate level of responsibility.

SIMA-Core™

SIMA-Core™ is the structural foundation, and its description is as follows. It consists of 3 models

- Strategic Domains
- AI Capability Levels
- AI Tool Categories

SIMA-Core™ is static. SIMA-Flow™ provides the dynamic application of the core models, while SIMA-Kit™ provides the necessary collateral to apply the Core Models.

SIMA-Core™ Strategic Domains Model

The SIMA360™ framework identifies five strategic domains to categorize effective and responsible AI maturity: Strategy, Governance, Data, People, and Technology. These domains serve as organizing principles for assessing organizational readiness and implementing AI in a scalable, ethical, and value-generating manner.

Strategy Domain

The Strategy domain ensures that AI initiatives align with the organization's broader business goals. This domain focuses on developing a coherent, value-driven roadmap for the adoption of AI.

Strategy Domain Key Characteristics

• Vision Alignment: AI initiatives support and enhance strategic business outcomes.
• Prioritization: Use cases are selected based on strategic impact and feasibility.
• Investment Planning: Budgets and resources are allocated with long-term ROI in mind.
• Integration: AI strategy is embedded within digital transformation and enterprise planning.
• Evaluation: Success metrics and performance indicators are clearly defined and monitored.

A mature strategy domain ensures that AI is not a series of one-off projects, but a critical driver of competitive differentiation and organizational transformation.

Governance Domain

Governance addresses the policies, processes, and structures that manage AI risks, ensure regulatory compliance, and uphold ethical standards. This domain includes responsible AI (RAI) practices, transparency, and accountability.

Governance Domain Key Characteristics

- Ethical Oversight: Frameworks are in place for assessing fairness, bias, and social impact.
- Regulatory Compliance: Systems align with legal requirements across geographies and industries.
- Risk Management: AI-specific risks are proactively identified and mitigated.
- Documentation: Models, decisions, and data flows are recorded and auditable.
- Communication: Stakeholders are informed of AI usage and associated responsibilities.

Effective governance transforms AI from a technical tool into a trusted component of business operations, ensuring that its deployment is responsible, secure, and defensible.

Data Domain

The Data domain encompasses data quality, access, governance, and strategy—elements that form the foundation of reliable AI systems. Clean, comprehensive, and ethically sourced data is essential for building trustworthy AI.

Key Characteristics:

- Accessibility: Data is available, well-organized, and usable by AI systems.
- Quality: Mechanisms exist for cleansing, validating, and improving data.
- Integration: Siloed data sources are unified for cross-functional analysis.
- Governance: Data lineage, ownership, and usage are governed through formal policies.
- Stewardship: Roles and responsibilities are defined for data management and protection.

A mature data domain ensures AI systems are built on reliable foundations, enabling accurate insights and reducing operational and ethical risks.

People Domain

The People domain focuses on workforce readiness, cultural adoption, and cross-disciplinary collaboration. It recognizes that successful AI implementation requires human expertise, buy-in, and continuous learning.

Key Characteristics:

- AI Literacy: Employees understand AI concepts and how AI supports their roles.
- Talent Strategy: Hiring, training, and retention practices support AI initiatives.
- Cross-functional Teams: Collaboration bridges technical, business, and ethical

perspectives.
• Change Management: Organizational transformation is supported through structured change programs.
• RAI Awareness: Employees are trained in responsible and ethical AI practices.

Organizations with strong people capabilities are better equipped to integrate AI effectively, overcome resistance, and innovate in ethically responsible ways.

Technology Domain

The Technology domain encompasses the infrastructure, tools, and technical practices necessary to support the deployment of scalable, secure, and efficient AI. This includes everything from data pipelines to MLOps to integration into products.

Key Characteristics:

• Infrastructure: Systems support compute-intensive workloads and data integration.
• Tools: AI development, deployment, and monitoring tools are standardized and efficient.
• Lifecycle Management: Models are tested, deployed, monitored, and retrained through structured pipelines.
• Security: Infrastructure and models are secure against threats and misuse.
• Innovation: Technical architecture supports rapid experimentation and adoption of new methods.

A mature technology domain ensures AI initiatives are technically viable and resilient, enabling rapid innovation while maintaining operational integrity and compliance.

Taken together, these Strategic Domains contain a way to conceptualize and organize maturity capabilities. They also include an organized approach to improving at each level of AI capabilities.

SIMA-Core™ AI Capability Levels Model

The SIMA-Core™ AI Capability Levels Model defines five progressive levels of increasing maturity and capability, each with increasing levels of AI control and growth objectives:
1. Initial – All initiatives start with this level. AI is being considered. Curious but unstructured application. AI vision and leadership support has begun here.
2. Exploring – Structured experimentation and foundational skill development.
3. Formalizing – Standardizing governance, workflows, and initial AI applications.
4. Optimizing – Refining systems with feedback loops, proactive governance, and operational AI.
5. Leading – Continuous AI-driven innovation and enterprise-wide integration.

These levels serve as a roadmap for identifying the guidance needed for each strategic domain, as well as instructions on advancing to the next higher level. The point is not to reach the highest capability, but to use the capability assessment to lay the groundwork for projects and identify areas for improvement.

Initial Capability Level

By default, Organizations are at the Initial stage. They may not have formally started any AI initiatives. It is here that the organization begins to build AI vision and leadership support. The strategic domains of Strategy, Governance, Data, People, and Technology are introduced at this level.

Exploring Capability Level

Organizations at the Exploring stage are in the early phase of AI awareness. AI is recognized as a potential opportunity, but formal strategies, governance, and infrastructure are absent. Experiments may be occurring in isolated teams, but these efforts lack cohesion, oversight, or measurable impact.

- Strategy: There is little to no formal AI strategy in place. AI is seen as an opportunity rather than a planned initiative. Projects are often reactive, technology-driven, and lack alignment with business goals.
- Governance: No responsible AI (RAI) policies or governance structures are in place. Compliance, risk management, and security are minimal or absent. Ethical risks are neither understood nor mitigated.
- Data: Data is fragmented, unstructured, and siloed. There is no governance strategy, and data quality is poor, limiting its use in AI models.
- People: The workforce is unprepared. Employees lack AI literacy, and leadership does not prioritize AI capabilities. Training programs are absent, and there may be resistance or fear of AI.
- Technology: Legacy systems dominate. AI-specific infrastructure is nonexistent, and deployment is manual and isolated. Basic analytics may exist, but not at scale.

This level is characterized by low readiness and high risk. Moving forward requires awareness-building, cross-functional dialogue, and a clear articulation of potential use cases. There may be disconnected experiments, limited awareness, and a lack of strategic direction.

Applying Capability Level

At the Applying level, organizations begin piloting AI projects with a limited scope and success. These initiatives are often opportunistic rather than strategic in nature. Foundational investments in talent, data quality, and tooling begin to emerge.

- Strategy: Early-stage AI use cases are explored, often in silos. There is growing leadership interest, but AI remains outside the core business strategy.
- Governance: Basic guidelines for the use of AI are introduced. Risk management and compliance are ad hoc. Some documentation exists, but it lacks consistency.
- Data: Efforts are made to improve data quality. Initial governance frameworks emerge. Data begins to be organized, but silos and accessibility challenges persist.
- People: AI literacy programs are launched for select teams. Some cross-functional collaboration emerges, but efforts are fragmented. There is growing curiosity, but a lack of depth.
- Technology: Foundational infrastructure is introduced. Open-source tools are used in isolated environments, and investments in scalable platforms begin to emerge.

At this level, organizations transition from theory to action. Progress is uneven, but experimentation helps build internal momentum. Success requires consistent governance and a focus on scalable processes and infrastructure.

Formalizing Capability Level

Organizations in the Formalizing stage establish repeatable practices and governance frameworks. AI is being prioritized by leadership and is increasingly being integrated into business processes. Teams begin to adopt agile, cross-functional approaches and define success metrics.

- Strategy: A formal AI strategy is articulated and aligned with specific business objectives. Use cases are tied to measurable outcomes, and leadership provides budgetary support.
- Governance: Policies for responsible AI are documented and enforced. Compliance, privacy, and risk management practices are standardized and consistently applied across all areas. AI is embedded into internal governance mechanisms.
- Data: Data governance becomes organization-wide. Cleansing and consolidation practices are standardized, ensuring that data is usable and reliable for AI initiatives.
- People: Competency frameworks emerge. Talent strategies are updated, centers of excellence are established, and cross-functional teams operate with shared goals.

- Technology: Dedicated AI engineering teams are formed. Tools and platforms are integrated into workflows. Lifecycle processes, such as CI/CD and containerization, are being adopted.

This stage reflects an organizational commitment and increasing maturity across domains, but complete optimization and integration are still in development. Advancing requires feedback loops, risk mitigation, and the extension of capabilities beyond pilot projects.

Optimizing Capability Level

In the Optimizing stage, organizations leverage AI strategically across functions and business units. Governance structures are robust and proactive. Real-time analytics, feedback mechanisms, and ethical audits are standard.

- Strategy: AI strategy is integrated into broader business plans. Proven AI use cases are scaled, and innovation is directed toward high-value initiatives. AI is aligned with digital transformation efforts.
- Governance: Governance frameworks are comprehensive and adaptive. Proactive risk management, regular audits, and RAI compliance are embedded in the lifecycle. Internal structures (e.g., ethics boards) support scalability.
- Data: High-quality, well-structured data supports real-time analytics. Data is treated as an asset, with lineage tracking and governance embedded in AI development cycles.
- People: The workforce is highly engaged. AI training is organization-wide, with a culture of experimentation and continuous learning. RAI practices are sociotechnical and cross-disciplinary.
- Technology: Advanced platforms, MLOps practices, and automated pipelines enable rapid iteration and refinement. Tools are customizable and scalable across AI lifecycles.

Organizations at this level operate with confidence and control, continuously refining AI capabilities and driving innovation through systematic investment. The focus shifts to optimization, scaling, and enabling innovation through the use of AI.

Leading Capability Level

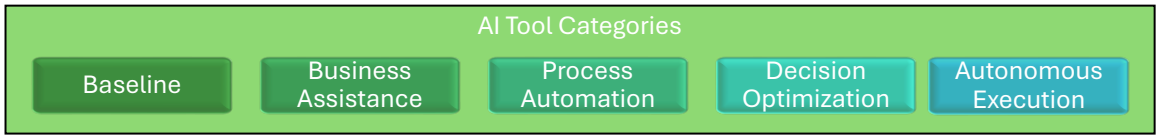
At the Leading level, AI is Core to strategic differentiation. Organizations drive innovation, shape industry standards, and generate new revenue streams through AI-driven solutions. Ethical design and societal impact are built into the development lifecycle.

- Strategy: An AI strategy is essentially synonymous with an organizational strategy. AI drives innovation, new revenue models, and market leadership. Investment decisions are driven by data and strategically aligned.
- Governance: Effective governance practices shape industry standards. AI systems are designed to be trustworthy, with complete transparency, explainability, and adaptive risk management.
- Data: Data is monetized and fully integrated into decision-making. Real-time, high-fidelity data supports advanced analytics. Governance ensures privacy, compliance, and ethical integrity.
- People: AI culture is inclusive, adaptive, and resilient. RAI is deeply integrated into all processes, and employees actively contribute to shaping the AI strategy and its execution. External partnerships and community engagement are strong.
- Technology: The AI infrastructure is world-class—flexible, scalable, and innovative. AI enables the development of entirely new product lines, services, and operational paradigms.

Leading organizations define the future of AI-enabled enterprises. They serve as benchmarks and actively shape the global AI ecosystem. This level reflects leadership in responsible AI and systemic transformation. Continued success requires focus on ecosystem collaboration, transparency, and societal benefit.

SIMA-Core™ AI Tool Categories

SIMA-Core™ categorizes AI tools based on their autonomy and functional capabilities. The categories run from passive assistants to strategic, independent actors. As organizations mature, they can safely enact AI tools at higher levels with controlled risk.



As with the AI Capabilities Levels Model, the purpose of each tool category is not to encourage the use of all tools, but to provide groupings of tools that can be safely applied with reduced risk based on the AI Capabilities Level. For example, using a complicated tool such as autonomous execution while being at an Exploring capability level would be ill-advised. Starting with a lower-level tool at first will enhance learning in a less impactful environment.

Baseline Tool Category

The Baseline category represents the foundational tier—primarily passive AI tools that require human initiation and operate within clearly defined boundaries.

In practice, Baseline tools are frequently realized as chatbots or query mechanisms. These systems provide structured access to knowledge, data, or assistance and are characterized by low autonomy and high control, making them ideal for early-stage adoption of AI. Organizations in the "Initial" or "Exploring" phases of AI capability benefit most from Baseline tools, which allow for experimentation, trust-building, and organizational learning with minimal risk.

The Baseline tool category serves as the starting point in the AI maturity journey defined by SIMA360. It aligns with the lowest levels of the Capability Levels Model (Initial and Exploring), and it supports all five Strategic Domains—Strategy, Governance, Data, People, and Technology—by offering controlled and observable interactions with AI.

Baseline tools help align strategy, ensure compliance, identify data gaps, enhance AI literacy, and work within existing infrastructure constraints. They bridge traditional systems and more advanced AI applications, ensuring AI projects are grounded in real-world feasibility and governance.

Purpose: Learn basics, gather usage data
Use Cases: FAQs, internal wikis, static query-based support

Baseline Tools Key Characteristics

Baseline tools have several defining characteristics:
- Low Autonomy, High Guidance: They require human initiation and don't act independently.
- Static or Semi-Structured Knowledge Bases: Typically built on wikis, FAQs, or decision trees.
- Minimal Context Awareness: Limited ability to handle complex, multi-turn conversations.
- Narrow Purpose and Scope: Designed for specific, well-defined functions.

Chatbots (Passive Knowledge Source) as Exemplars of the Baseline Category

Chatbots exemplify Baseline tools, offering conversational interfaces over structured knowledge bases. They simulate dialogue but are primarily routing mechanisms that direct users to predefined responses.

Use cases include IT support, HR FAQs, customer service triage, and the delivery of compliance information. These bots are governed by deterministic flows that prioritize safety and simplicity.

Baseline Tools Strategic Value and Risks

Strategic Value:
- Provides a controlled environment for initial AI engagement
- Surfaces common questions, gaps in knowledge, and service bottlenecks
- Builds AI literacy and comfort among users
- Enables usage and feedback data collection for future analysis

Risks:
- User frustration if the tool is perceived as more capable than it is
- Inflexibility in handling nuanced or unexpected queries
- Potential misinformation if the knowledge base is outdated

What Will Be Learned with Baseline Tools

By implementing Baseline tools, organizations learn:
- How users interact with AI and what questions arise most frequently
- The importance of accurate, well-structured, and current knowledge sources
- How to monitor, refine, and evaluate AI tools
- The foundational governance needs for scalable AI

These tools serve as a learning laboratory for AI culture, data needs, and organizational readiness. They enable informed next steps into higher categories, such as Business Assistance or Process Automation.

Business Assistance Tool Category

The Business Assistance category in SIMA360™ represents the second stage of AI tool adoption, where tools are designed to actively enhance human productivity and decision-making. Examples include writing assistants, coding copilots, and tools that synthesize data to support decisions. These tools require human initiation but offer more dynamic responses than Baseline tools.

These tools go beyond passive responses and begin to actively augment human capability—offering predictive text, data synthesis, and content generation. Often deployed as writing assistants or code generation copilots, they enable knowledge workers to complete tasks more efficiently while staying in full control.

Business Assistance Key Characteristics

This category is defined by interactive, human-guided AI tools that:
- Provide dynamic but non-autonomous support
- Function within task-specific boundaries
- Require explicit human input to operate
- Offer suggestions, not decisions

Business Assistance Example Tools

- Co-editors for writing emails, documents, or reports
- AI pair programming assistants (e.g., GitHub Copilot)
- AI research summarizers or slide builders
- Meeting note transcribers and classifiers

Business Assistance Strategic Value and Risks

Strategic Value:
- Boosts productivity and creativity in knowledge work
- Reduces time spent on rote or repetitive tasks
- Supports early adoption through trust and usability

Risks:
- Overreliance on AI outputs without critical review
- Misunderstanding tool limitations or domain boundaries
- Inconsistent results depending on input quality

What Will Be Learned with Business Assistance

Applying Business Assistance tools helps organizations:
- Recognize the power of prompt engineering
- Build AI literacy across non-technical teams
- Identify where human-in-the-loop AI creates efficiency
- Design safe boundaries for content-generating systems

These tools offer a rich environment for low-risk learning that can evolve into broader adoption of AI.

Process Automation Tool Category

The Process Automation category of SIMA360™ involves AI systems that handle predefined, rule-based tasks and structured workflows. These tools automate repetitive processes, freeing human workers to focus on more complex and valuable tasks. They mark a transition from assistive AI to operational AI embedded into business processes.

Process Automation Key Characteristics

- Rule-based logic with deterministic outcomes
- Integration with structured enterprise workflows
- Limited scope for ambiguity or variation
- Strong auditability and repeatability

Process Automation Example Tools

- Robotic Process Automation (RPA) bots for finance or HR
- AI-enabled form fillers and approval triggers
- Automated schedulers and document processors
- Workflow orchestrators for onboarding or procurement

Process Automation Example: Task Automator

Performs predefined, rules-based tasks. It supports repeatable processes with minimal variation or decision-making.

Purpose: Free resources, gain efficiency
Use Cases: RPA scripts, scheduling assistants, data entry bots

Process Automation Example: Process Automator

Automates multi-step workflows that may include logic-based decisions. It supports structured processes across business functions.

Purpose: Optimize business, gather optimization data
Use Cases: HR onboarding flows, procurement approval systems

Process Automation Strategic Value and Risks

Strategic Value:
- Improves consistency, compliance, and speed
- Standardizes execution of high-volume tasks
- Reduces human error in structured environments

Risks:
- Rigid processes may lack flexibility
- Poorly mapped workflows result in rework
- Over-automation can reduce human oversight

What Will Be Learned with Process Automation

Organizations applying these tools learn:
- How to map and optimize internal workflows
- Where automation delivers the highest ROI
- How to design clear escalation and exception protocols
- How to embed AI governance into daily operations

The process of applying this tool level fosters operational discipline and scalable digital capability.

Decision Optimization Tool Category

Decision Optimization tools represent a shift toward AI-enhanced strategy and foresight. These tools synthesize data, evaluate alternatives, and learn from outcomes to inform or automate decision-making. They support high-value contexts such as logistics, pricing, and strategic planning.

Decision Optimization Key Characteristics

- Use predictive modeling and scenario analysis
- Offer evidence-based recommendations
- Adapt to new data and outcomes
- Operate under human supervision but with analytical autonomy

Decision Optimization Example Tools

- Dynamic pricing engines for retail or travel
- AI route optimization in supply chains
- Scenario planners for marketing or product strategies
- Real-time resource allocation models

Decision Optimization Example: Adaptive Executor

Executes decisions and actions while learning from outcomes. Adjusts behaviors in real-time or across cycles.

Purpose: Find new AI insights, adapt to dynamic input
Use Cases: Dynamic pricing, intelligent routing, personalized learning paths

Decision Optimization Example: Strategic Partner

Provides strategic insights, modeling, and planning with partial independence. Supports executive decision-making with projections and scenarios.

Purpose: Co-create long-term strategy, optimize complex systems
Use Cases: AI-supported market planning, simulation-driven strategy development

Decision Optimization Strategic Value and Risks

Strategic Value:
- Transforms data into actionable insight
- Supports rapid, evidence-based decision-making
- Enables simulation of future scenarios

Risks:
- Poor input data leads to flawed recommendations
- Lack of transparency in model logic
- User overconfidence in predictive suggestions

What Will Be Learned with Decision Optimization

Using these tools teaches:
- How to balance AI insight with human judgment
- The value of structured experimentation and validation
- How to measure and iterate on decision quality
- Ways to integrate ethics and accountability into model use

They are essential for building strategic agility through the use of AI.

Autonomous Execution Tool Category

Autonomous Execution tools are the most advanced in the SIMA360™ tool hierarchy. These AI systems operate independently across domains, initiating actions, learning from the results, and adjusting their behavior without human intervention. They include mission-critical systems such as self-managing IT infrastructure or autonomous vehicles.

Autonomous Execution Key Characteristics

- Full or near-full autonomy
- Continuous learning and self-regulation
- Often embedded in physical systems or critical operations
- High transparency, explainability, and compliance required

Autonomous Execution Example Tools

- AI-managed infrastructure or cyber defense systems
- Fully autonomous warehouse or factory operations

- AI command centers for large-scale logistics
- Self-driving vehicles and drone networks

Autonomous Execution Example: Autonomous Manager

Manages operational functions without human intervention. Optimizes internal processes with minimal oversight.

Purpose: Free oversight resources, scale operations safely
Use Cases: System health monitoring, AI-managed data centers

Autonomous Execution Example: Independent Actor

Acts independently and initiates decisions across domains. Highest level of autonomy and operational risk.

Purpose: Drive autonomous execution in mission-critical environments
Use Cases: Fully autonomous vehicles, AI command centers

Autonomous Execution Strategic Value and Risks

Strategic Value:
- Maximizes scalability and operational efficiency
- Enables real-time response in dynamic environments
- Reduces human intervention in critical systems

Risks:
- High regulatory, ethical, and reputational risk
- Complex failure modes and safety dependencies
- Requires robust validation and escalation mechanisms

What Will Be Learned with Autonomous Execution

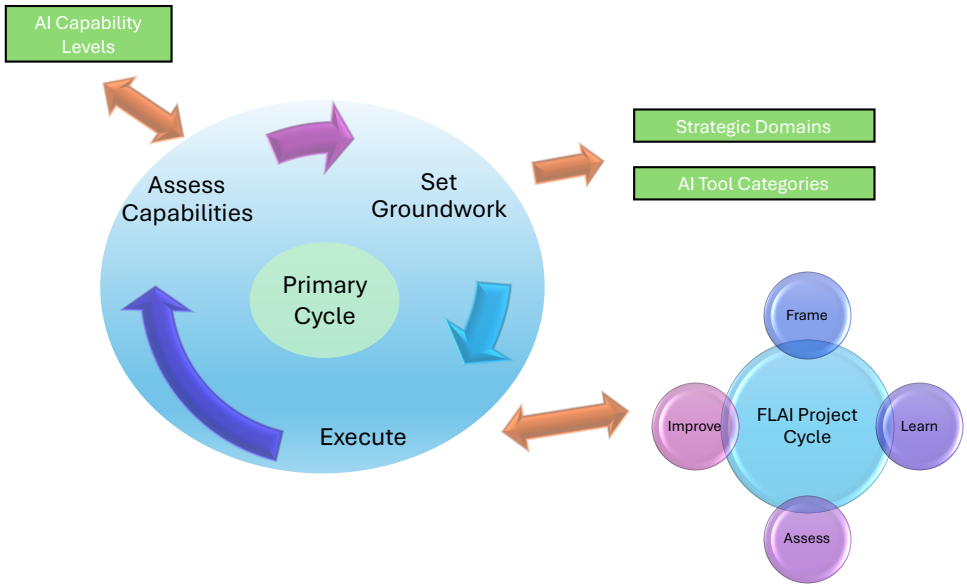
Deploying these tools enables organizations to:
- Master continuous validation, testing, and monitoring
- Implement guardrails and human override systems
- Understand the intersection of autonomy, risk, and governance
- Build culture and capability for responsible AI leadership

These tools transform not just operations, but enterprise strategy and resilience.

SIMA-Flow™

SIMA-Flow™ serves as the execution engine, tying SIMA-Core™ to SIMA-Kit™ . Flow is built on two cycles.,

- The core cycle of Assess Capabilities, Set Groundwork, and Execute
- The project level FLAI cycle: Frame, Learn, Assess, Improve



The core cycle guides the development of a basis for projects, which are executed through the project cycle and provide feedback for future rounds of capability assessments.

SIMA-Flow™ governs the application of tools from SIMA-Kit™ at both the capabilities level and the project level. It promotes learning loops at the project level and ensures capability-aligned progression through the capabilities, as well as with the selection of AI tools. SIMA-Flow™ supports project-level evaluation and refinement, reinforcing an iterative and empirical model of AI deployment. SIMA-Flow™ connects each capability stage with the corresponding AI tool categories, including Process Automation, Decision Optimization, and Autonomous Execution.

SIMA-Flow™ : Core Cycle

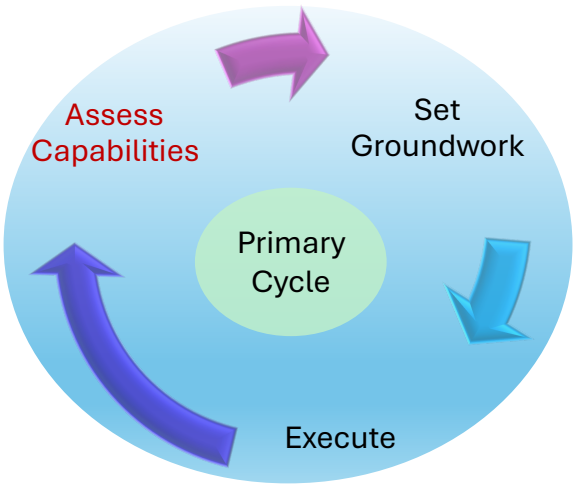
At the foundation of SIMA360™ lies the SIMA-Flow™ Core Cycle. This is the macro Flow for evaluating, preparing guidance, and executing AI initiatives. This primary cycle consists of three phases: Assess Capabilities, Set the Groundwork, and Execute. Each phase is tightly coupled with SIMA's Capability Levels, Strategic Domains, and SIMA-Kit™ tooling to create a consistent, adaptive learning loop that advances organizational maturity.

Assessment prevents overreach. Groundwork ensures alignment. Execution generates learning. This looped architecture transforms AI initiatives from high-risk bets into structured, repeatable, and scalable capability-building exercises.

By repeatedly moving through the Assess Capabilities–Set Groundwork–Execute cycle, guided by FLAI iterations and domain-based tooling, organizations evolve systematically.

SIMA-Flow™ Core Cycle Assessing Capabilities

The first phase, Assess Capabilities, acts as the entry point into the SIMA-Core™ cycle. This phase is diagnostic, but its purpose is not merely to measure—instead, it contextualizes readiness in terms of the SIMA Capability Levels. These levels, ranging from 'Initial' to 'Continuous AI at Scale,' offer an evidence-based gradient of AI maturity.

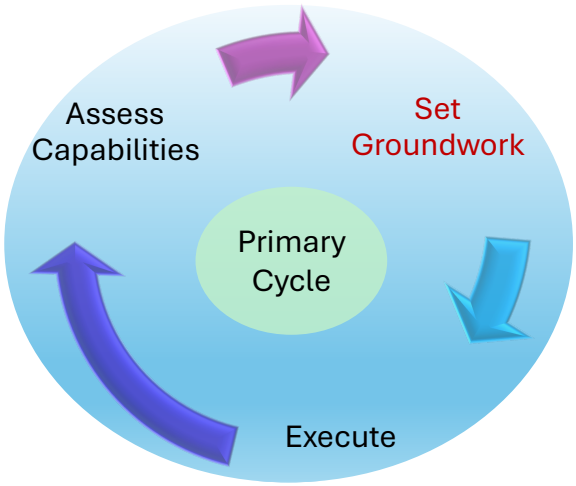


During assessment, the organization examines its posture across five Strategic Domains: Strategy, Governance, Data, People, and Technology. Using guided rubrics and domain-specific criteria, teams evaluate their ability to deliver, sustain, and govern AI systems. The results are not binary but staged; an organization may be mature in Technology but early-stage in Governance or People.

This capability assessment provides critical input into downstream planning. It shapes expectations, bounds the scope of what is feasible in the current cycle, and identifies gaps that should be targeted in the Improve phase of subsequent iterations. In essence, this step ensures that AI projects are aligned with an organization's maturity, avoiding both underperformance and overreach.

SIMA-Flow™ Core Cycle Setting the Groundwork

Building on the capability assessment, the Set the Groundwork phase prepares the organization for execution. This is where SIMA-Kit™ becomes instrumental. The SIMA-Kit™ includes curated toolboxes that provide guidance, artifacts, and templates aligned to both the current Capability Level and the Strategic Domains. This dual alignment ensures that preparation efforts are not generic but tailored.



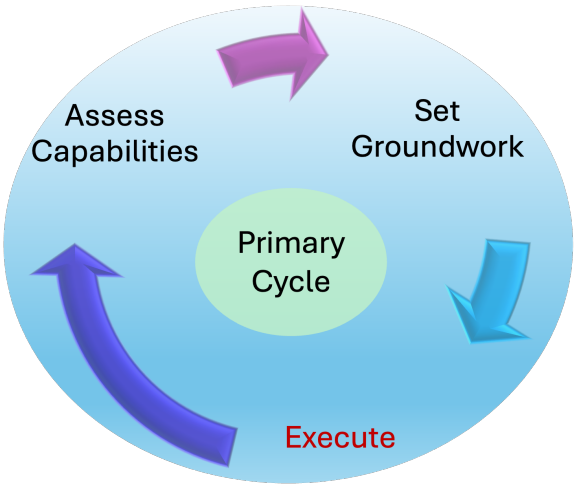
Each Strategic Domain is addressed in this phase:
- **Strategy**: Define project-level objectives, strategic alignment, and expected outcomes.
- **Governance**: Identify relevant policies, compliance frameworks, and ethical considerations.
- **Data**: Validate data availability, quality, lineage, and access controls.
- **People**: Assign roles, assess skill gaps, and ensure cross-functional collaboration structures are in place.
- **Technology**: Confirm infrastructure readiness, platform integration, and deployment environments.

SIMA-Kit™ provides not only templates but role-based guidance to support each domain. For example, governance artifacts may include a risk matrix or compliance checklist, while people-related artifacts may involve stakeholder maps or skill readiness assessments.

This phase ensures that the project is appropriately scoped and resourced. It also functions as a rehearsal space where assumptions, plans, and risks are validated before execution begins. As such, it reduces uncertainty and prepares the ground for iterative, data-driven project work.

SIMA-Flow™ Core Cycle Execute (Iterative Project Cycle)

The Execute phase operationalizes the strategic intent defined in the prior phases. Projects initiated here are not standalone efforts; they are engineered to run through one or more iterations of the Frame–Learn–Assess–Improve (FLAI) cycle. This micro-cycle mirrors the larger SIMA-Core™ loop but at the level of tactical execution.

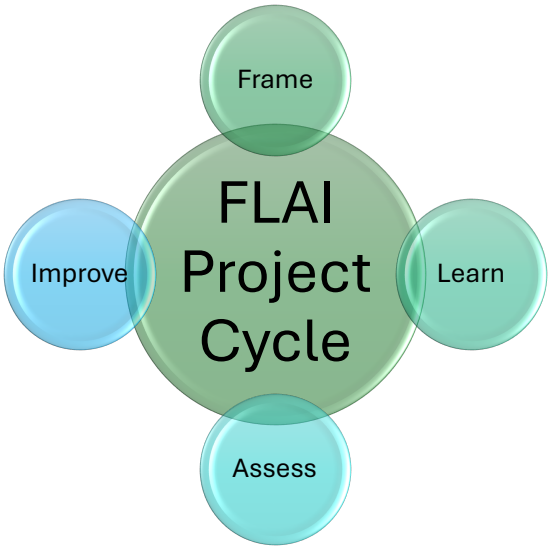


The number and complexity of FLAI iterations depend directly on the Capability Level identified in the Assess phase. For instance, an organization at the 'Curious but Unstructured' level may run a single cycle with lightweight experiments. In contrast, a more advanced team at the 'AI Embedded in Operations' level may operate parallel project streams with multiple FLAI loops addressing different functional units or use cases.

Guidance during execution is not ad hoc. SIMA provides playbooks and domain-specific best practices that correspond to the organization's capability level. These Guides the creation of artifacts (e.g., evaluation metrics, model explainability reports, change management plans) and prescribe feedback mechanisms that inform the Assessment and Improvement stages of the next iteration.

Each project is both an application and a generator of learning. As organizations complete FLAI cycles, they accumulate a portfolio of institutional knowledge, governance artifacts, and reusable assets. These outputs are fed back into the SIMA-Kit™ library, enabling future projects to begin with a stronger baseline. Over time, execution becomes not only more efficient but also more intelligent—self-correcting, data-informed, and guided by institutional memory.

SIMA-Flow™ Project Level FLAI Cycle



The FLAI Cycle governs continuous improvement through four phases:
• Frame – Identify objectives, boundaries, and risks.
• Learn – Deploy tools, collect data, and explore capabilities.
• Assess – Evaluate outcomes, detect gaps, and benchmark progress.
• Improve – Apply learnings to iterate forward.

This cycle reinforces empirical adaptation and links SIMA-Core™ guidance with the SIMA-Kit™ .

Why FLAI? A Mindset for Innovation

Whereas the more familiar Plan–Do–Inspect–Adapt (PDIA) cycle is ideal for agile delivery and execution, FLAI was designed for strategy, innovation, and hypothesis-driven work. It provides the structure for inquiry and exploration, not just incremental delivery. Language shapes mindset. FLAI replaces prescriptive terms with ones that encourage reflection, discovery, and intentional change.

The FLAI cycle treats learning as a primary deliverable. Each iteration produces not only technical improvements but also reusable governance templates, process adjustments, and insights into capabilities. These outputs are added to the SIMA-Kit™ —a shared repository of tools, role guidance, and artifacts—enabling future projects to start from a stronger baseline.

For example, an Exploring-level organization piloting a Baseline chatbot might discover gaps in its knowledge base, governance inconsistencies in handling user data, and skill gaps in prompt engineering. Documenting and addressing these findings within the Improve phase means that when the next AI project begins, these foundational issues have already been mitigated.

FLAI Step Frame

Framing establishes boundaries, identifies assumptions, and poses key questions—without locking in rigid plans. This phase is about structuring ambiguity rather than prescribing a solution. Teams define the problem space, articulate their working hypotheses, and surface unknowns. Framing invites clarity without false certainty.

FLAI Step Learn

Learning centers on exploration, research, and discovery. Instead of focusing on execution, teams focus on investigation—conducting interviews, prototyping ideas, testing assumptions, and gathering relevant data. The learning phase prioritizes insight over output, embracing failure as a source of understanding.

FLAI Step Assess

Assessment is about interpreting what has been learned in context. It goes beyond inspecting whether something 'worked' to analyzing patterns, evaluating implications, and understanding system dynamics. The team considers how the new insights validate or challenge earlier frames and what they mean for the way forward.

FLAI Step Improve

Improvement is intentional, directional, and integrated. It's not just adapting or reacting; it's refining the strategy, expanding or narrowing focus, updating guiding assumptions, and planning the next iteration. The cycle continues with each iteration delivering clearer insight and sharper action.

FLAI within the SIMA360™ Framework

SIMA360™ uses the FLAI cycle to guide strategic project work and capability building. It complements the domain assessments and capability maps by providing an iterative pathway for learning and adapting in real-time. Within each domain—Strategy, Governance, Data, People, Technology—the FLAI cycle helps drive maturity with real-world experimentation and feedback.

The critical value of cycling is that it compounds insights over time. Each loop is not an isolated effort—it builds on the accumulated evidence of prior cycles. Early cycles may focus heavily on identifying fundamental readiness gaps (e.g., data quality, user adoption barriers, governance shortcomings). In contrast, later cycles fine-tune advanced AI behaviors, integrate automation, or expand cross-domain applications.

The FLAI cycle empowers organizations to lead through complexity, not just manage it. By framing the correct problems, learning deeply, assessing thoughtfully, and improving intentionally, teams move beyond rigid planning and become adaptive engines of discovery. The FLAI cycle within SIMA360™ bridges the gap between strategic AI capability assessment and tactical project execution. By aligning AI development efforts with tool categories matched to current maturity, executing them through iterative learning loops,

and capturing reusable knowledge, FLAI transforms each project into a stepping stone toward enterprise-scale AI readiness.

This approach not only reduces the risks associated with AI experimentation but also ensures that organizational growth is evidence-based, measured, and cumulative. As teams cycle through FLAI, they create a virtuous loop of insight, capability, and readiness—positioning the organization to confidently embrace its next stage of AI maturity.

SIMA-Kit™

The SIMA-Kit™ is the operational heart of SIMA360's execution model, providing the practical tools, templates, and guidance needed to turn strategic intent into real-world AI maturity gains. It serves as the bridge between the SIMA-Core™ models and the SIMA-Flow™ cycles, ensuring that organizations can both plan strategically and execute tactically with precision.

SIMA-Kit™ is divided into two complementary components:
- Capabilities Toolkit – for enterprise-level assessment, planning, and capability growth.
- Project-Level Toolbox – for initiative-level delivery, experimentation, and iteration.

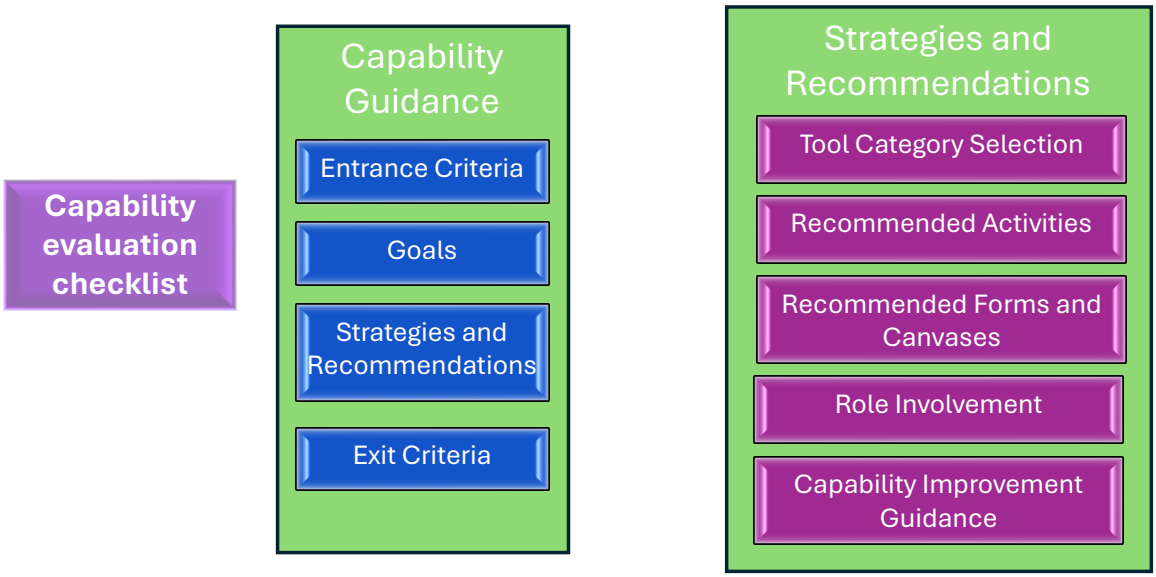
Both are mapped directly to the five SIMA strategic domains—Strategy, Governance, Data, People, and Technology—and aligned with the SIMA Capability Levels, ensuring guidance is always context-specific, relevant, and actionable.

The Kit provides a full suite of tools, including:
• Gap analysis templates
• Capability scoring rubrics
• Activity and artifact libraries
• Tool category selectors
• Role-based playbooks and project planning aids

Capabilities Toolkit (Macro cycle)

The Capabilities Toolkit enables organizations to assess their current AI maturity, pinpoint specific gaps, and develop a comprehensive roadmap for scalable improvement across all domains. It is designed for use across departments, portfolios, and enterprise functions, ensuring cross-functional alignment and a unified view of AI readiness.

SIMA-Kit™ resources are available under license; for details, contact **info@SIMA360.ai** or review sima360.ai.



The Capability Evaluation Checklist is based on over 15 different AI maturity models. It features a robust evaluation mechanism that results in an overall AI Capability Level rating ranging from Exploring to Leading. Each Capability Level results in one or more sets of guidance documents.

Guidance Framework – Each capability level provides:
- Entrance Criteria – readiness indicators before advancing AI adoption in this level.
- Goals – strategic objectives tied to the organization's context.
- Strategies – targeted approaches for gaining value while mitigating risk.
- Exit Criteria – benchmarks and deliverables signaling readiness for the next level.

The Strategies and Recommendations contain specific material related

- Tool Category Selection: one or more categories of AI tools that are appropriate for the assessed capability level
- Recommended Activities: behaviors and activities for each role while operating in the assessed capability
- Recommended Forms and Canvases: forms and other documents that can help within the assessed capability level. Defined checkpoints for AI implementation aligned with domain readiness.
- Role Involvement: a cross-reference of recommended roles and their involvement at the assessed capability level
- Capabilities Improvement Guidance: tactical and strategic guidance for operating within the assessed capability level

Key components include:

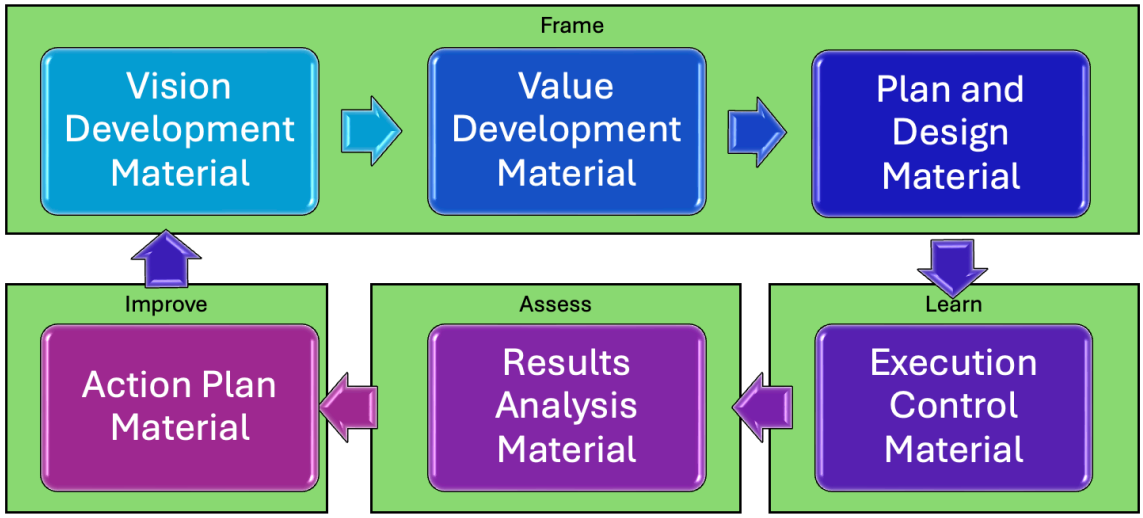
- Capability Maps: Domain-specific maturity characteristics mapped across levels (Strategy, Governance, Data, People, Technology).
- Domain Definitions: Clarified goals, expectations, and principles for each strategic domain.
- Maturity Model Guidance and Selection: Structured maturity indicators per domain and organizational layer (team, portfolio, enterprise).
- Role and Tooling Alignments: Identifies the talent and Technology needed at each level of progression.
- Milestone Plans: Defined checkpoints for AI implementation aligned with domain readiness.

The Capability Guidance stratifies much of the guidance by the strategic domains of Strategy, Governance, Data, People, Technology

Project-Level Toolbox (Per Project)

The Project-Level Toolbox applies the SIMA principles at the initiative level. It equips individual teams with the tactical resources to run pilots, proofs of concept, or scaled AI deployments using the FLAI cycle (Frame, Learn, Assess, Improve).

This set of tools is helpful for individual teams executing pilots, proof-of-concepts, or scaled deployments.



Key components include:

- Use Case Canvas – for systematically defining, evaluating, and prioritizing AI opportunities.
- Vision and Value Templates – to articulate purpose, expected benefits, and success measures.
- Project Planning Patterns – playbooks tailored to the capability level and domain readiness.
- AI Risk Checklists – ethical, compliance, and business continuity safeguards.

- Test & Learning Cards – to capture hypotheses, experiments, and observed results.
- Persona and Stakeholder Maps – to guide change management and adoption strategies.
- Analysis & Improvement Templates – for structured post-iteration reflection and refinement.

Where the Capabilities Toolkit sets the strategic direction, the Project-Level Toolbox ensures that execution is disciplined, repeatable, and evidence-based—turning each project into a knowledge asset for future work. The Project Level Toolkit is meant to guide the application of the FLAI cycle.

SIMA-Kit™ within SIMA360

SIMA-Kit™ ensures that every AI initiative is launched with clear objectives, aligned roles, and structured risk controls. It eliminates guesswork by matching tool selection, activities, and governance practices to the organization's actual maturity.

By integrating both macro (capability-level) and micro (project-level) tooling, SIMA-Kit™ :
- Reduces wasted effort on misaligned projects.
- Accelerates organizational learning through repeatable templates and playbooks.
- Embeds governance and ethical safeguards into day-to-day operations.
- Creates a living repository of best practices, artifacts, and lessons learned.

When used in concert with SIMA-Core™ and SIMA-Flow™ , the SIMA-Kit™ becomes more than a set of resources—it becomes a catalyst for sustainable AI transformation, ensuring that each step forward is deliberate, data-informed, and strategically sound. It supports both organizational assessment and project-level execution through capability-based outputs.

SIMA-Ascend™

Training and Certification Framework

SIMA-Ascend™ is the structured training and certification component of the SIMA360™ framework, designed to equip individuals and organizations with the knowledge, skills, and credentials necessary to implement artificial intelligence responsibly, effectively, and at scale. It supports progressive growth in AI fluency and leadership, mapping learning pathways to real-world roles and organizational goals.

SIMA-Ascend™ courses are not only certification preparation—they are also robust, standalone learning experiences. Each course delivers practical, real-world guidance applicable across industries and organizations, whether or not SIMA360™ is formally adopted. From aligning AI strategy to managing risk and scaling implementation, these

courses provide immediate, actionable knowledge that professionals can use to improve AI maturity within their unique environments.

SIMA-Ascend™ is the professional development arm of the SIMA360™ framework—designed to equip individuals and organizations with the skills, confidence, and credentials to adopt and scale AI responsibly.

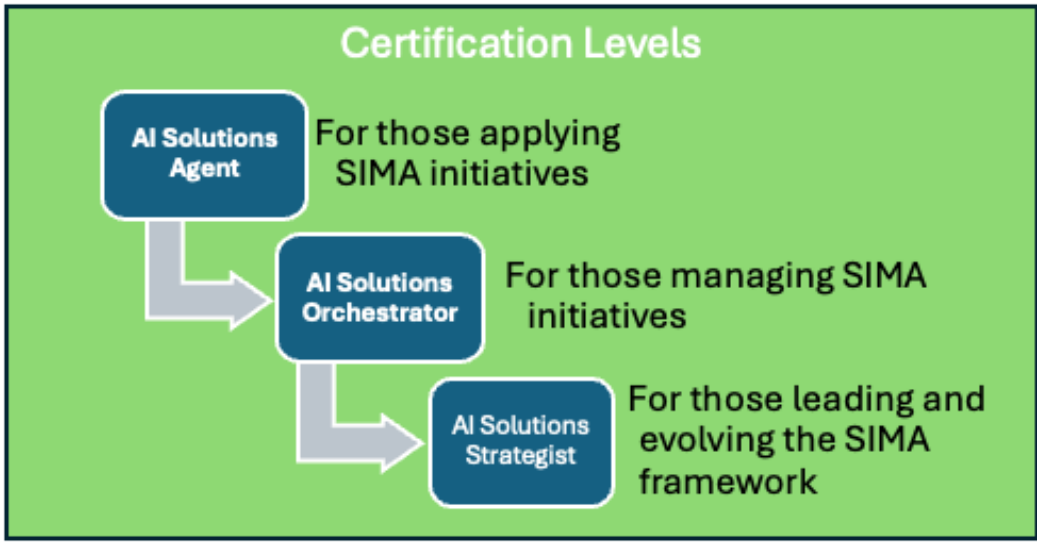
It doesn't just teach what to do; it builds the capability to do it well, consistently, and with measurable business impact.

SIMA-Ascend™ aligns directly with SIMA360's strategic domains and capability levels, ensuring that training is always relevant to both the learner's role and the organization's AI maturity stage. Whether you are an individual contributor, a team leader, or an enterprise strategist, SIMA-Ascend™ gives you the tools to apply SIMA principles effectively in your unique context.

All courses are standalone learning experiences, but also serve as direct preparation for SIMA-Ascend™ certifications.

SIMA-Ascend™ Certification Pathways

SIMA-Ascend™ certifications are designed to validate an individual's ability to apply the SIMA360™ framework with increasing levels of complexity and leadership. Certifications align with the courses and recognize a professional's progression in AI maturity and organizational impact.



SIMA-Ascend™ is the professional enablement path that ensures individuals and teams have the skills needed to apply the framework:

- Agent – Understands core framework principles and applies them independently.
- Orchestrator – Coaches and aligns teams, removing adoption barriers.
- Strategist – Leads enterprise integration, evolves practice, and ensures alignment with

governance and funding.

AI Solutions Agent

This foundational level focuses on equipping individuals with practical knowledge of the SIMA360™ framework. Certified Agents understand the goals, principles, and application of AI within their operational domain. They follow established guidance with minimal supervision and use SIMA practices to deliver real-world value.

Key Capabilities:

- Understands foundational elements and objectives of the framework.
- Applies guidance and practices with limited supervision.
- Continuously reflects on and improves their own AI practices.
- Demonstrates competence in AI integration into daily work.

AI Solutions Orchestrator

Orchestrators are team-level leaders who bridge the gap between AI strategy and implementation. They coach others, facilitate cross-functional collaboration, and ensure alignment with the framework across projects.

Key Capabilities:

- Coaches individuals and teams in applying the framework.
- Ensures consistent application of SIMA across projects.
- Removes adoption barriers and supports framework alignment.
- Acts as a liaison between teams and executive leadership.

AI Solutions Strategist

Strategists are organizational leaders who drive the adoption, evolution, and alignment of the SIMA framework with enterprise-level objectives. They define implementation strategies, build internal capability, and align AI adoption with governance, funding, and cultural initiatives.

Key Capabilities:

- Advocates for SIMA at the executive level.
- Designs and staffs AI enablement strategies.
- Creates internal training ecosystems.
- Evolves the framework based on feedback and business metrics.

SIMA-Ascend™ Courses and Descriptions

The SIMA-Ascend™ courses are designed to equip individuals and organizations with the practical skills and strategic insight needed to apply the SIMA360™ framework effectively. Each course is built to bridge theory and application, ensuring participants not only understand the concepts but can also implement them in real-world settings. The curriculum focuses on actionable learning, covering everything from a foundational understanding of SIMA360™ principles to advanced practices for optimizing AI maturity across diverse organizational contexts. These courses are structured to drive measurable outcomes, enabling learners to take immediate steps toward advancing their organization's AI capabilities.

To preserve the integrity and quality of the learning experience, **SIMA-Ascend™ Courses are exclusively delivered by approved trainers**. Each trainer has undergone a rigorous vetting and authorization process, ensuring they possess both deep subject matter expertise and the instructional skills necessary to deliver the material to the highest standards. This approval process ensures that every course is aligned with the official SIMA360™ methodology, taught consistently, and supported by relevant, up-to-date examples. Participants can be confident that they are learning directly from certified experts whose guidance reflects the authoritative standards of the SIMA360™ framework.

Training programs from **SIMA-Ascend™** can be explored and registered for at:

https://eventplannersima360.eventbee.com/boxoffice

Preparing for AI Solutions

Prepares individuals to evaluate organizational readiness, identify foundational gaps, and introduce structured AI practices with minimal risk.

Key Topics Covered:

- The AI Implementation Spectrum: Understand various levels and scopes of AI applications, from basic automation to strategic systems.
- Analyzing Organizational AI Capabilities: Assess readiness across data, culture, governance, people, and tooling dimensions.
- AI Governance and Oversight: Learn how to establish foundational policies and oversight mechanisms for ethical AI use.
- Executing AI Projects with Control: Explore methods for piloting and launching AI initiatives in a structured and measurable way.

Applying AI Solutions

Enables practitioners to initiate and execute AI projects using the FLAI cycle with real-world data and iterative assessments.

Key Topics Covered:

- Developing a Project Vision and Value: Define a clear AI project charter that includes business objectives, key stakeholders, and relevant metrics.
- Designing the FLAI Plan: Apply the SIMA360™ "Frame, Learn, Assess, Improve" cycle to structure your AI implementation approach.
- Capturing Execution Data: Identify key performance and process metrics during implementation phases.
- Analyzing Project Results: Evaluate outcomes, derive insights, and apply improvements for future iterations.

Leading AI Teams

Equips team-level leaders to coach, align, and support the adoption of SIMA across teams while evaluating impact and driving improvement.

Key Topics Covered:

- Leading Multi-Team AI Implementations: Coordinate multiple cross-functional AI projects and ensure consistency.
- Evaluating Framework Effectiveness: Use feedback loops and KPIs to evaluate how well the SIMA framework supports AI success.
- Analyzing AI Initiative Results and Developing Action: Review aggregate outcomes across teams to refine organizational practices and inform future initiatives.

Developing Organizational AI Strategies

Designed for senior leaders to customize the SIMA framework at the enterprise level and embed it within funding, policy, and governance models.

Key Topics Covered:

- Customizing Implementation Frameworks: Tailor the SIMA framework to fit enterprise-specific priorities and constraints.
- Organizational Application of the FLAI Cycle: Apply FLAI at a macro level to manage strategy deployment, funding, and governance evolution.

Business Support for AI Implementation

Focuses on non-technical leaders who enable success through selling, staffing, supporting, and institutionalizing responsible AI adoption.

Key Topics Covered:

- Selling AI Solutions: Craft compelling business cases for executive sponsors and funding stakeholders.
- Staffing AI Solutions: Design organizational roles, responsibilities, and capability development strategies.
- Teaching AI Implementation: Develop internal enablement programs to foster knowledge growth across departments.

- Coaching AI Implementation: Support teams with guidance and mentorship to ensure sustained adoption.

SIMA-Ascend™ within SIM360

Without skilled practitioners, even the best AI maturity framework can stall.

SIMA-Ascend™ ensures:

- **Role Clarity:** Each participant understands their responsibilities and the impact they have on the success of AI.
- **Scalable Capability:** Teams can consistently apply SIMA principles across multiple projects and maturity levels.
- **Continuous Improvement:** Skills and practices evolve in parallel with the growth of organizational capability.
- **Validated Expertise:** Certification provides internal and external proof of competence.

By embedding SIMA-Ascend™ into your AI maturity journey, you're not just adopting AI—you're building a **sustainable, capable, and empowered AI workforce**.

End Note

The concepts of **SIMA360™** are freely available in this Guide and can be applied to organizations of any size—from small businesses to large enterprises.

For more information, please visit www.sima360.ai or contact us at infor@sima360.ai.

SIMA-Kit™ resources are available under license. For details, please contact **info@SIMA360.ai** or review sima360.ai.

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https://eventplannersima360.eventbee.com/boxoffice

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