Analysis Sheet Of Your Project With TRAIDA

The TRAIDA framework (Transformative AI and Data Solutions) is based on three domains:
Technical (blue cards), Governance (green cards) and Business (red cards).
To scale AI profitably across the enterprise, these three domains must be aligned

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TRANSFORMATIVE AI & DATA SOLUTION

TRAIDA FRAMEWORK

These tables are automatically calculated from the corresponding sheets in this workbook

BUSINESS	PRODUCTIVITY	C
	CREATIVITY	C
	TRUSTWORTHINESS	C
	TREASURY & ASSURANCE	C
GOVERNANCE	TRAIDA GUIDE	C
	GLOSSARY	C
	HUMAN RESOURCES	C
	ENTERPRISE ARCHITECTURE (EA)	C
	ENTERPRISE GOVERNANCE	C
IT	CORE SYSTEM DATA	C
	OPERATIONAL DATA STORE (ODS)	C
	MASTER DATA MANAGEMENT (MDM)	C
	ENTERPRISE KNOWLEDGE GRAPH (EKG)	C
	DATA LAKE WAREHOUSE	C
	DATA INTEGRATION	C
	STYLE OF DATABASE	C
	ARTIFICIAL INTELLIGENCE	C

The semantic platform recommended by TRAIDA is based on the **ODS**, **MDM**, and **EKG** data repositories

BUSINESS	GOVERNANCE	IT	YOUR SCORE
C	C	C	

By default, all responses are set to "No," which corresponds to a grade of "C"

Enter your comments here:

User Instruction:

This Excel workbook allows you to explore each TRAIDA card using four questions.

These questions give you the opportunity to reflect on how you or your organization approaches the use of AI at scale within the company, along with the associated data management. Each question is scored on a 10-point scale based on your answers:
- "**No**": 1 point;
- "**Partial**": 5 points;
- "**Yes**": 10 points.

From these points, a letter grade is then calculated to aggregate your results by card, and for each of the business, governance, and technical domains:
- "**A**": 8 or higher. You have full mastery of the card;
- "**B**": between 5 and 8. You have reasonable mastery of the card;
- "**C**": 5 or lower. Your mastery of the card is insufficient.

In the business domain, you can add cards according to your needs; however, be sure to update the Excel formulas accordingly. The workbook is not protected, so you have full freedom to make your adaptations. The cards for the governance and technical domains are generally sufficient, so you shouldn't need to add more.

Finally, you can reuse this workbook to create your own questions based on your projects, educational approach, or skills assessment that you wish to conduct for yourself and your company.

SUPPORT: If you identify an error in the formulas of this assessment, please contact the author so that the corrections can benefit the entire community: pierre.bonnet@hlfl-consulting.com or via the community website www.engage-meta.com.

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ENGAGE META

TRAIDA - Business Domain Evaluation

TRANSFORMATIVE AI & DATA SOLUTION

TRAIDA FRAMEWORK

No matter how powerful a new technology is, its use is unlikely to be profitable if it doesn't sufficiently take into account the requirements of the business. This is especially true for AI, whose use cases are limitless and which raises questions about human employability

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Productivity — C

Improving productivity across all company processes is a key objective of AI. In the TRAIDA approach, achieving productivity gains is the primary objective to reach an initial return on investment from AI at the enterprise level. This is achieved through an analysis of hidden costs

Do you agree with the McKinsey 2024 outlook, which highlights that 70% of tasks can be automated to a 50% level with effective use of AI?	No	1
Have you already identified use cases where applying AI could generate sufficient productivity gains to finance an initial version of the semantic platform based on the three data repositories—ODS, MDM, EKG—and ontologies?	No	1
Do you use a socio-economic approach to identify hidden costs in your organization where AI could generate productivity gains?	No	1
Do you have an AI sandbox that allows users to freely test this technology without security risks?	No	1

Creativity — C

Enhancing the creativity of certain company processes is an AI objective that complements the goal of improving productivity. The way decision-makers perceive the impact of AI on their own role also influences the relevance of the choices they will make for their organization's transformation. Indeed, AI is also competing with the intelligence of executives at all levels of the hierarchy

Before implementing AI to achieve creative gains, have you assessed your ability to achieve productivity improvements with AI?	No	1
Do your top-level decision-makers already use AI on a daily basis?	No	1
Do you believe that intellectual work lacking sufficient creativity will be replaced by AI?	No	1
Is your organization open to becoming more decentralized and agile to scale the use of AI?	No	1

Trustworthiness — C

Trust in data and AI must be objectively assessed to successfully implement AI throughout the enterprise. The coupling of humans and AI enhances the intelligence of the organization, provided they complement each other to ensure reliable management. To achieve this, the user's trust in AI must be strong and can be improved by promoting AI that upholds the following qualities: reliability, honesty, competence, and integrity

Is your organization mature enough to recognize that collaboration between humans and AI systems is fundamental, including the application of critical thinking to assess AI results and engage in a positive interaction loop with AI?	No	1
Do you know how to use Retrieval-Augmented Generation (RAG) to reduce hallucinations in generative AI?	No	1
Do you believe that your organization has no choice but to succeed in its transformation with AI, ensuring a sufficient level of trust in its use?	No	1
Do you consider AI to be a new stakeholder in your organization?	No	1

Treasury & Assurance — C

Properly managing budgets and mastering value analysis are essential for successfully scaling AI. TRAIDA plans to deploy AI in three phases to manage financial commitments and economic risks: Boost (Phase 1), Expand (Phase 2), and Institutionalize (Phase 3)

Do you view the TRAIDA recommendation for the AI transformation journey positively, which is based on these three phases: boost (productivity), expand (creativity), and institutionalize (scale)?	No	1
Are you already able to estimate the CAPEX and OPEX for the boost phase?	No	1
Are you prepared to implement a minimum viable architecture to scale AI during the boost phase?	No	1
Is your legal department or advisor already involved in establishing your legal policies regarding AI?	No	1

Add your card — C

According to your context, you create job cards that are added to those provided by default by TRAIDA

Question #1	No	1
Question #2	No	1
Question #3	No	1
Question #4	No	1

Enter your comments here:

ENGAGE META

TRAIDA - Governance Domain Evaluation

TRANSFORMATIVE AI & DATA SOLUTION

TRAIDA FRAMEWORK

The cards in this domain are universal and apply to all business contexts. You select the practices that correspond to your needs and complete them to manage a roadmap for implementing your minimum architecture to scale AI and data management solutions in your company

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TRAIDA Guide — C

TRAIDA is a knowledge repository with an educational purpose on AI and data solutions. Its primary use is therefore the culture development of your teams on the architectural consequences of AI and data solutions on your information system. Once your teams are sufficiently aware of the architectural impacts of AI and associated data, TRAIDA is used as an operational tool to assist in the gradual transformation of your information system towards large-scale AI implementation. It relies on three stages: Initial personalization of the framework (1); construction of the minimum viable architecture (2); business alignment (3)

Have you already attended a TRAIDA masterclass for a deep dive into the framework?	No	1
Have you arranged any workshops to customize TRAIDA for your specific context?	No	1
Is the concept of minimum viable architecture for scaling IA well understood in your organization?	No	1
Do you believe you will be able to use the TRAIDA cards to better align IT, governance, and business needs?	No	1

Glossary — C

To increase your speed of spreading a culture of AI and data management that is understandable by all of your technical and business teams, it is essential to establish and share a glossary of AI and data solutions terms. Although popular, some of these terms do not always have a definition commonly recognized by the market. You will therefore need to decide on your vocabulary choices. This card gives you the starting point for this semantic work, which is fundamental to building and managing your transformation with AI and data management

Have you already adapted the TRAIDA glossary to fit your context?	No	1
Is the term "semantic" well adopted in your organization?	No	1
Is the knowledge graph database technology well understood?	No	1
Is the difference between Generative AI, Analytical AI, and Symbolic AI well understood?	No	1

Human Resources — C

An active mindset and aligned skill sets are required to enhance the positive impacts of AI and data solutions. Reducing AI to just another technology does not reflect reality. Indeed, it brings a level of intelligence that gives it a special role. Therefore, a traditional approach to change management is insufficient

Do you believe that a competition in intelligence between humans and AI is emerging?	No	1
Will your organization be able to consider AI systems (assistants) as new stakeholders to welcome?	No	1
Do you think the WASI skills framework (Write, Analyze, Share, Innovate) can be deployed at a large scale for your human stakeholders?	No	1
Do you believe this statement is important for your organization: with hundreds of AI assistants spreading throughout the organization, it is essential to implement trustworthy AI to maintain control?	No	1

Enterprise Architecture (EA) — C

Enterprise Architecture (EA) outlines practices for modeling and documenting the business system. It enables the preparation and support for large-scale deployment of AI by promoting the consideration of semantic modeling (ontology) and service-oriented architecture (SOA)

Will your organization be able to maintain the quality of your IS chain (data, rules, processes) while integrating AI at scale?	No	1
Is your organization ready to extend the business architecture with semantic modeling to design and implement the ontologies needed to run AI at scale?	No	1
Is your organization ready to use SOA (Service-Oriented Architecture) to build a solid software framework with preconditions and postconditions to supervise AI execution and control the quality of AI responses?	No	1
Will your organization be able to invest in transforming tacit knowledge into explicit data needed to train AI systems more efficiently?	No	1

Enterprise Governance — C

Enterprise governance aims to ensure the quality of data and AI across the organization. It revolves around risk management and regulatory compliance, the application of ESG (Environmental, Social, and Governance) and CSR (Corporate Social Responsibility) principles, as well as ensuring the reliability of the IT system.

Is your department in charge of enterprise governance already involved in the transformation with AI?	No	1
How do you assess the efficiency of your current data governance in your organization (yes = good, no = not sufficient, partial)?	No	1
Is your organization already using AI to run a regulatory repository or planning to do so in the near future?	No	1
How do you evaluate the maturity of AI governance processes in your organization (yes = good, no = not sufficient, partial)?	No	1

Enter your comments here:

ENGAGE META

TRAIDA - IT Domain Evaluation

TRANSFORMATIVE AI & DATA SOLUTION

TRAIDA FRAMEWORK

The cards in this domain are universal and apply to all business contexts. You select the practices that correspond to your needs and complete them to manage a roadmap for implementing your minimum architecture to scale AI and data management solutions in your company

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Core System Data — C

Improving productivity across all company processes is a key objective of AI. In the TRAIDA approach, achieving productivity gains is the primary objective to reach an initial return on investment from AI at the enterprise level. This is achieved through an analysis of hidden costs

Do you have a data catalog of existing systems to document applications, databases, datasets, business concepts, and data elements?	No	1
Do you rely on a knowledge graph database and large language models (LLM) to automate data catalog generation and updates?	No	1
Does the data catalog include links to unstructured data?	No	1
Do you think the ontology used for core system data can be reused to design your expected ontology?	No	1

Operational Data Store (ODS) — C

Enhancing the creativity of certain company processes is an AI objective that complements the goal of improving productivity. The way decision-makers perceive the impact of AI on their own role also influences the relevance of the choices they will make for their organization's transformation. Indeed, AI is also competing with the intelligence of executives at all levels of the hierarchy

Do you already have experience with implementing a unified data repository, such as CDI, PIM, or PLM?	No	1
Have you already applied an Operational Data Store (ODS) to at least a subset of your data domains?	No	1
If you have an ODS, does it rely on a data catalog derived from core system data and/or a dedicated ontology?	No	1
Does your ODS operate in read-write mode?	No	1

Master Data Management (MDM) — C

Trust in data and AI must be objectively assessed to successfully implement AI throughout the enterprise. The coupling of humans and AI enhances the intelligence of the organization, provided they complement each other to ensure reliable management. To achieve this, the user's trust in AI must be strong and can be improved by promoting AI that upholds the following qualities: reliability, honesty, competence, and integrity

Do you already have an MDM system?	No	1
Do you use the MDM for data cataloging or metadata management?	No	1
If you have an MDM, does it rely on a meta-schema database technology?	No	1
If you have an MDM, does it share an ontology with the ODS and EKG?	No	1

Enterprise Knowledge Graph (EKG) — C

Properly managing budgets and mastering value analysis are essential for successfully scaling AI. TRAIDA plans to deploy AI in three phases to manage financial commitments and economic risks: Boost (Phase 1), Expand (Phase 2), and Institutionalize (Phase 3)

Does your organization already have experience with schema-free database technology, such as knowledge graphs?	No	1
Has your organization already developed an ontology to map data elements?	No	1
Do you have a knowledge management system that relies on an ontology shared with both the ODS and MDM systems?	No	1
Do you have a clear understanding of the metadata management responsibilities between the MDM and EKG systems?	No	1

Data Lake Warehouse — C

Repositories contain raw, structured, and unstructured data for business intelligence and data analytics purposes. In TRAIDA, the term 'Data lake warehouse' encompasses data warehouse, data lake, and data lakehouse. The term 'Business intelligence' includes data reporting and OLAP. The term 'data analytics' refers to data science

Are your business intelligence databases fed by transversal ODS, MDM, and/or EKG systems?	No	1
Do you have a technology that unifies data warehouses (structured data) and data lakes (multimedia content)?	No	1
Do you reuse metadata and ontology from upstream systems like ODS, MDM, and EKG to govern your data analytics systems?	No	1
Do you use vectorized databases?	No	1

Data Integration — C

Processes and software for integrating data sources and governing data flows. The data hub might compete with the ODS (Operational Data Store) of the semantic platform; and the data fabric might compete with the EKG (Enterprise Knowledge Graph). Therefore, a choice must be made to either use the data fabric as a component of the semantic platform or integrate it with more transversal MDM (Master Data Management), ODS, and EKG

Does your data integration platform run in collaboration with your ODS, MDM, and EKG systems, and operate in an event-driven mode?	No	1
Does your data integration platform rely on metadata sourced from a data catalog?	No	1
If you have a data hub, does it integrate a vertical ODS-like system that entails risks at scale?	No	1
If you have a data fabric, does it integrate a vertical EKG-like system that entails risks at scale?	No	1

Style Of Database — C

Data storage technologies according to operational needs: transaction, integrity, concurrent access, history, data natures; volume, governance, etc. The choice of these technologies is important for deciding the architecture of the semantic platform and more specifically the MDM, ODS, and EKG repositories

Does your database management strategy take into consideration the integration with shared ontologies sourced from an EKG system?	No	1
Have you already applied a knowledge graph database on a representative subset of your IS?	No	1
Do you use a schema-free strategy for specific projects, such as knowledge accumulation or regulatory databases?	No	1
Have you defined criteria for choosing a database schema strategy (e.g., SQL, NoSQL, graph, metadata, document, vectorized)?	No	1

Artificial Intelligence — C

Artificial Intelligence systems function as automated and semi-automated decision-making algorithms. The different types of AI (generative, symbolic, analytical) share ontologies to facilitate their integration and use at the enterprise level

Do you have a list of practices to enforce when using AI for automation (preconditions, execution, postconditions)?	No	1
Do you have a prebuilt process to foster the formalization of tacit knowledge into explicit knowledge for AI training purposes?	No	1
Does your AI solution at scale rely on a semantic platform integrated with ODS, MDM, and EKG systems?	No	1
Have you already used a specific AI system to oversee AI assistant responses?	No	1

Enter your comments here: