BAAF® Framework

Business AI Awareness Framework

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1. Executive Summary

The BAAF® Framework (Business AI Awareness Framework) is a methodological framework designed to guide the successful implementation of artificial intelligence in any business organization. It establishes the correct order of work: first understand the business model, then map the digital assets that support it, and on that foundation build situational awareness that perceives, comprehends, and anticipates through artificial intelligence agents. It is composed of three sequentially dependent abstraction levels: Business Foundation (L1), Digital Business Connectors (L2), and Situational Awareness (L3).

The BAAF® is applicable to B2B, B2C, and hybrid B2B2C organizations, regardless of their industry or size. Each level operates with independent pipelines, but there is a strategic alignment dependency between them: L2 pipelines must be aligned to the purpose defined in L1, and L3 pipelines depend on L2's integrity. AI agents operate at L3, and their goal is to be **Coherent, Connected, and Aware**. If the business operation does not align with the methodology defined in L1, agents will not be coherent with how the business should operate. If the digital connectors in L2 experience service losses or deficient integrations, the user experience degrades and agents lose their connection to the business. At L3, where AI agents are implemented, it is necessary to define the required maturity level (AI-Assisted, AI-Augmented, AI-Driven, or AI-Automated) and how the agent facilitates the business's situational awareness: what it perceives, what it comprehends, and what it anticipates. Without these definitions, agents lose situational awareness with the business. Once correctly implemented, all three levels operate together and continuously feed back into each other.

The BAAF® Framework simultaneously serves as:

- **A diagnostic tool:** by evaluating the state of each level, it reveals the gaps that prevent a successful AI implementation.
- **A technical blueprint:** the level map defines the architecture that the AI platform needs to operate aligned to the business.
- **A reference framework** for the implementation of artificial intelligence agents.

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2. Context and Problem It Solves

Most AI implementation initiatives fail, not only because of limitations in available technology, but because they are built on processes that no one has documented and on an incomplete understanding of the underlying business model.

Table 1: Common Errors in AI Implementations

Common Error	Consequence
Implementing AI without mapping business flows	Agents may not be coherent with the business, as there is no alignment between operations and the methodology required by the business model
Developing digital connectors in isolation, without consistent error handling or integrated QA	Agents lose connection with the business when connectors fail without control, degrading the user experience
Prompt engineering without alignment to business logic or available data	Agents lose situational awareness: they don't perceive the right signals, misinterpret context, or fail to anticipate adequately

The BAAF® Framework seeks to expose these gaps by establishing a logical and inevitable order: first understand the business (L1), then map and connect the digital assets (L2), and only then build situational awareness (L3).

3. BAAF® Framework Structure

The BAAF® Framework is composed of three levels. Each one fulfills a specific role within the framework, and their alignment determines whether AI agents will be coherent, connected, and aware.

Table 2: BAAF® Framework Levels

Level	Description
L1	**Business Foundation — Coherence.** Defines the business model and the methodology that governs its operation. AI agents will be coherent only if the operation aligns with the correct methodology for its business model.
L2	**Digital Business Connectors — Connection.** Maps and connects the business's digital assets: APIs, databases, channels, and services. Agents maintain connection with the business as long as these connectors operate with integrity.
L3	**Situational Awareness — Awareness.** Defines the required AI maturity level and how the agent facilitates the business's situational awareness: what it perceives, what it comprehends, and what it anticipates.

3.1 L1 — Business Foundation

The first level establishes the business model and the sales or marketing methodology that governs its operation. It is the starting point of the framework: every decision in L2 and L3 aligns to what is defined here.

B2C stands for Business-to-Consumer. It is the commercial model where a company sells products or services directly to the end consumer (individual people), rather than to other businesses. **B2B** stands for Business-to-Business. It is the commercial model where a company sells products or services to other companies or organizations, rather than to the end consumer. **B2B2C** stands for Business-to-Business-to-Consumer. It is a hybrid model where a company sells to another company, which in turn sells to the end consumer.

Table 3: Everyday B2C Examples

Sector	Example
E-commerce	Amazon, Mercado Libre
Streaming	Netflix, Spotify
Retail	Walmart, clothing stores
Food & beverage	McDonald's, Starbucks
Mobile apps	Instagram, Duolingo

Table 4: Everyday B2B Examples

Sector	Example
Enterprise software	Salesforce, SAP
Cloud computing	AWS, Microsoft Azure
Consulting	McKinsey, Deloitte
Logistics	FedEx, DHL (corporate services)
Telecommunications	Cisco, Twilio

Table 5: B2C vs B2B — Key Differences

Aspect	B2C	B2B
Customer	Individual person	Company or organization
Sales cycle	Short (minutes to days)	Long (weeks to months)
Purchase decision	Emotional / impulsive	Rational / formal process
Average ticket	Low to medium	Medium to very high
Customer volume	Massive	Reduced and segmented
Relationship	Transactional	Consultative and long-term
Marketing	Massive, emotional	Direct, educational (content)

Table 6: Business Models and Applicable Methodologies

Model	Characteristics	Applicable Methodologies
B2B	Long cycles, multiple decision-makers, high value	MEDDIC, MEDDPICC
B2C	Quick decision, emotional, massive	AIDA, JTBD, RFM, CDJ
B2B2C	Hybrid: company sells to company that sells to consumer	Combination adapted to the flow

Understanding the difference between B2B and B2C is fundamental because it determines how AI agents are configured to facilitate the business's situational awareness. In B2B, the agent needs to understand an opportunity qualification process with multiple decision-makers and stages defined by methodologies like MEDDIC or MEDDPICC. In B2C, the agent must respond to consumer behavior: what attracts them, what problem they are trying to

solve, what their value as a customer is, and where they are in the decision journey. In B2B2C models, both flows coexist and agents must identify which context they are operating in.

> The BAAF® Framework is not intended to guide the implementation of these methodologies, but to highlight the need for their use as a foundation for a successful AI implementation.

3.2 L2 — Digital Business Connectors

The second level identifies, maps, and connects all digital assets of the business. This is the most critical step of the framework: the digital connectors in L2 are the ones that provide the data necessary for L3 to perceive, comprehend, and anticipate.

Digital connectors include:

- Internal and external APIs
- Operational and analytical databases
- Communication channels: WhatsApp, Email, Voice (Amazon Connect)
- Forms and data capture points
- CRM, ERP, and management systems
- Third-party services: payments, logistics, healthcare, etc.
- Real-time events and webhooks
- MCP links (Model Context Protocol): a standard protocol that enables AI agents to connect directly with tools, services, and external data sources

Table 7: Examples of Digital Connectors by Business Type

Connector	B2C (Dental Clinic)	B2B (Enterprise Sales)
Communication channel	WhatsApp for appointment confirmation	Corporate email + Amazon Connect for calls
CRM	Patient history and treatments	Opportunity pipeline with MEDDIC stages
API	Online scheduling system	Integration with client's ERP for quotations
Database	Clinical records and visit frequency	Interaction and contract history
Webhook	Notification when patient completes a form	Alert when a lead opens a commercial proposal
MCP	AI agent connection to calendar and medical records	AI agent connection to CRM, email, and documents

The L2 analysis produces the business digital asset map — a deliverable that is a prerequisite for any AI agent implementation. This map enables the AI Deployment Team — developers, product owner, and commercial team — to have clarity on the available digital assets, the scope of agent deployment, and the level of situational awareness required. At AI-Driven and AI-Automated maturity levels, agents must also have operational visibility over connectors: what data is available, what channels they can use, and how to respond to the loss of availability of a digital connector.

> The BAAF® Framework is not intended to guide the technical implementation of digital connectors, but to highlight the need for their identification, mapping, and integration as a foundation for AI agents to maintain connection with the business.

3.3 L3 — Situational Awareness

The third level implements the concept of Situational Awareness, originally taken from aviation and formalized by Mica Endsley.

The concept of Situational Awareness was developed in the context of military aviation, where pilots must make critical decisions in real time with changing information and multiple variables. In a business environment, AI agents face an analogous challenge: they must interpret business signals, comprehend their meaning in context, and anticipate the next state to act or recommend actions before it is too late.

Table 8: Situational Awareness Levels (Endsley)

SA Level	Description	Key Question
Perception	Capture of signals and data from the environment	What is happening right now?
Comprehension	Interpretation of the meaning of the data	What does what I'm seeing mean?
Projection	Anticipation of the next state	What will happen if I don't act?

Table 9: Examples of Situational Awareness Applied to Business

SA Level	B2C Example (Dental Clinic)	B2B Example (Enterprise Sales)
Perception	The patient has not confirmed their appointment within 24h	The lead has not responded to the follow-up email in 5 days
Comprehension	High no-show risk based on history	The opportunity may be losing priority against the competition
Projection		

SA Level	B2C Example (Dental Clinic)	B2B Example (Enterprise Sales)
	Send a WhatsApp reminder with an option to reschedule	Alert the salesperson for direct contact and check if the Champion (see Glossary) is still active

Relationship Between AI Maturity Level and Situational Awareness

Not all agents need the same scope of situational awareness. The chosen AI maturity level determines how far the agent goes in each SA dimension:

Table 10: Situational Awareness Scope by Maturity Level

Maturity Level	Perception	Comprehension	Projection
AI-Assisted	Captures basic data	Human interprets	Human decides
AI-Augmented	Captures and organizes data	Suggests interpretations to human	Presents possible scenarios
AI-Driven	Continuous real-time monitoring	Interprets autonomously	Anticipates and recommends actions
AI-Automated	Full autonomous monitoring	Interprets and decides	Anticipates and executes without intervention

Choosing the right maturity level is not just a technical decision. Section 4 elaborates on what state the organization must have at each framework level to support these maturity levels and what it implies in terms of risk tolerance.

The Role of Prompt Engineering in Situational Awareness

Prompt engineering is the mechanism through which the agent's situational awareness is configured. Through the prompt, it is defined what data the agent must perceive, what business rules it applies to comprehend context, and under what conditions it must anticipate and act. A prompt misaligned with business logic (L1) or available data (L2) produces an agent that operates without real situational awareness.

4. AI Maturity Axis

The BAAF® Framework includes an AI maturity axis as a diagnostic tool. This axis enables the AI Deployment Team — developers, product owner, and commercial team — to evaluate the current state of each framework level and determine which agent level is viable for the organization.

Table 11: AI Maturity Axis — Required State by Level

Level	Description	Who Leads	Business Foundation	Digital Connectors	Situational Awareness
AI-Assisted	AI helps the human with specific tasks	Human	Defined	Partial	Reactive
AI-Augmented	AI expands human capabilities	Human + AI	Executed	Connected	Dashboards
AI-Driven	AI leads, human supervises	AI + Human	Optimized	Real-time	Predictive
AI-Automated	AI executes autonomously	AI	AI-optimized	Self-healing	Autonomous

Business Foundation State by Maturity Level

- **Defined:** The business model and methodology are documented but not necessarily executed consistently.
- **Executed:** The methodology is applied consistently in business operations.
- **Optimized:** The methodology is continuously reviewed and adjusted based on results.
- **AI-optimized:** AI itself suggests methodology adjustments based on data.

Digital Connectors State by Maturity Level

- **Partial:** Some connectors are integrated, others operate in isolation.
- **Connected:** All critical connectors are integrated and operate with stability.
- **Real-time:** Connectors transmit data in real time with active monitoring.
- **Self-healing:** Connectors detect and recover from failures automatically without human intervention.

Situational Awareness State by Maturity Level

- **Reactive:** The agent responds only when requested.
- **Dashboards:** The agent presents organized information for the human to make decisions.
- **Predictive:** The agent anticipates situations and recommends actions.
- **Autonomous:** The agent perceives, comprehends, anticipates, and executes without intervention.

An organization does not need to reach AI-Automated. The ideal level depends on its business model, resources, and risk tolerance. Each maturity level implies greater agent

autonomy and less human intervention. The greater the autonomy, the greater the exposure to unsupervised errors: incomplete data in L2, gaps in business logic in L1, or scenarios not covered in the agent's prompt. Risk tolerance defines how much autonomy the organization is willing to accept, considering that no level of the framework is free from gaps.

Table 12: Examples of Risk Tolerance by Maturity Level

Maturity Level	B2C Example (Dental Clinic)	B2B Example (Enterprise Sales)
AI-Assisted	The agent suggests available time slots, but the receptionist confirms the appointment	The agent identifies potential leads, but the salesperson decides who to contact
AI-Augmented	The agent sends automatic reminders, but the human manages rescheduling	The agent prepares opportunity summaries with recommendations, the salesperson executes
AI-Driven	The agent reschedules appointments automatically based on history and availability, the human supervises exceptions	The agent prioritizes opportunities and assigns salespeople, the manager supervises decisions
AI-Automated	The agent manages the entire appointment cycle without intervention — if it misinterprets a patient's urgency, it may cancel a critical appointment	The agent escalates, negotiates, and closes opportunities autonomously — if it misqualifies a deal, it may lose a high-value account

5. The Feedback Loop Between Levels

The BAAF® Framework is not a static bottom-up flow model. The levels feed back into each other continuously, creating an improvement cycle that evolves with the business. This mechanism is what keeps coherence, connection, and awareness aligned over time: what L3 detects can reveal gaps in L1 or L2, and changes in L1 or L2 can expand or limit the scope of situational awareness in L3.

Table 13: Feedback L3 → L1 → L2

L3 Detects	L1 Adjusts	L2 Responds
B2B: 60% of enterprise opportunities have no identified Champion	Reinforces that stage in MEDDIC and trains the commercial team	Adds mandatory field in CRM, alert trigger to salesperson via WhatsApp
B2B: High abandonment rate at quotation stage	Reviews post-proposal follow-up methodology	Creates automatic reminder flow via email and Amazon Connect

L3 Detects	L1 Adjusts	L2 Responds
B2C: Dental clinic patients don't return after the first visit	Activates RFM reactivation segment aligned to JTBD	Sends personalized WhatsApp campaign with preventive checkup offer

Table 14: Other Feedback Directions

Direction	Example	Impact
L2 → L1	CRM data reveals that B2B clients are buying with B2C behavior (low ticket, quick decision)	The business model is redefined: a B2C flow with AIDA methodology is added for that segment
L2 → L3	A new MCP connector is integrated providing access to the client's financial history	The agent can now perceive data that didn't exist before, expanding its comprehension and projection capabilities
L3 → L2	The agent detects that a notification webhook fails recurrently on Mondays	A failure point in L2 is identified that requires monitoring or redundancy
L1 → L2	The company migrates from AIDA to JTBD as its B2C methodology	Digital connectors must be reconfigured to capture data aligned to the new approach (customer jobs instead of funnel stages)

6. How to Apply the BAAF® Framework

The framework is industry-agnostic. The section below illustrates how the AI Deployment Team would apply the framework in three typical scenarios, including the recommended AI maturity level for each case:

Table 15: Scenario 1 — Dental Clinic (B2C)

Level	Concrete Application
L1 — Business Foundation	B2C model. Methodology: JTBD + AIDA. The patient "hires" peace of mind and health, not a dental procedure.
L2 — Digital Business Connectors	WhatsApp for appointments, email for reminders, web form, clinical history system via API.
L3 — Situational Awareness	Perception: Has the patient responded? Comprehension: Is there a risk of no-show? Projection: Send an early reminder.

Level	Concrete Application
Recommended maturity level	AI-Augmented — The agent sends reminders and organizes information, but clinical staff manages rescheduling and treatment decisions.

Table 16: Scenario 2 — Vehicle Dealership (B2B + B2C)

Level	Concrete Application
L1 — Business Foundation	B2C for individual purchases (AIDA), B2B for corporate fleets (MEDDIC). Same company, dual methodology.
L2 — Digital Business Connectors	CRM for opportunity tracking, WhatsApp for customer service, Amazon Connect for incoming calls, quotation form.
L3 — Situational Awareness	Perception: Did the lead qualify? Comprehension: Is it B2B or B2C? What funnel stage? Projection: Assign the right salesperson with full context.
Recommended maturity level	AI-Driven — The agent classifies leads, prioritizes opportunities, and assigns salespeople automatically. The commercial manager supervises high-value decisions.

Table 17: Scenario 3 — Enterprise Contact Center (B2B)

Level	Concrete Application
L1 — Business Foundation	B2B model. MEDDPICC applied: metrics, Economic Buyer (see Glossary), Champion (see Glossary), and decision process identified before escalation.
L2 — Digital Business Connectors	Amazon Connect as core. CRM APIs, customer database, WhatsApp Business, corporate email, ticket system.
L3 — Situational Awareness	Perception: Who is calling and what is their history? Comprehension: Is it an opportunity, a problem, or a renewal? Projection: Escalate or resolve autonomously?
Recommended maturity level	AI-Driven — The agent resolves first-level inquiries and escalates with full context. The human team intervenes in negotiations and strategic decisions.

7. Glossary of Terms

Term	Definition in BAAF® Context
AI-Assisted	Maturity level where AI helps the human with specific tasks, with the human leading all decisions.

Term	Definition in BAAF® Context
AI-Augmented	Maturity level where AI expands human capabilities, suggesting interpretations and scenarios.
AI-Automated	Maturity level where AI executes autonomously without human intervention. Implies the highest risk exposure.
AI Deployment Team	Multidisciplinary team responsible for the implementation of AI agents, composed of developers, product owner, and commercial team. Evaluates the state of framework levels and determines the scope of deployment.
AI-Driven	Maturity level where artificial intelligence leads processes and the human supervises and validates.
AIDA / JTBD / RFM / CDJ	Consumer marketing and behavior methodologies applied in B2C environments.
BAAF® Framework	Three-level methodological framework to guide successful AI implementation, establishing the correct order of work: L1 → L2 → L3.
Champion	MEDDIC methodology term. Person within the buying organization who has influence, access to decision-making power, and a personal interest in seeing the solution implemented.
Digital Connectors	Term encompassing all digital assets that connect the business to its data, channels, and services: APIs, databases, CRM, webhooks, MCP links, communication channels, and third-party systems.
Economic Buyer	MEDDIC methodology term. Person with the final authority to approve the budget and make the purchasing decision.
Feedback Loop	Feedback mechanism between BAAF® levels that allows the organization to continuously learn and improve.
L1 — Business Foundation	First level. Defines the business model (B2B/B2C/B2B2C) and the applicable sales or marketing methodology.
L2 — Digital Business Connectors	Second level. Inventory and connection of all digital business assets: APIs, databases, channels, and services.
L2 Map	Document or diagram describing all active digital connectors of an organization. Critical asset for AI implementations.
L3 — Situational Awareness	Third level. The organization's ability to perceive, comprehend, and anticipate situations through AI.
MEDDIC / MEDDPICC	Opportunity qualification methodologies for enterprise B2B sales. MEDDIC: Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, Champion. MEDDPICC adds: Paper Process and Competition.

Term	Definition in BAAF® Context
Prompt Engineering	Mechanism through which the agent's situational awareness is configured: what data it should perceive, what business rules it applies, and under what conditions it should anticipate and act.
Risk Tolerance	Degree of autonomy an organization is willing to accept in its AI agents, considering that greater autonomy means greater exposure to unsupervised errors.
Situational Awareness (SA)	Concept originated in aviation (Mica Endsley). Ability to perceive the environment, comprehend its meaning, and anticipate the next state.
Technical Blueprint	BAAF® level map that defines the architecture the AI platform needs to operate aligned to the business.

8. References

Concept	Original Source	Reference
MEDDIC	Dick Dunkel & Jack Napoli, PTC (1996)	Lahoutifard, D. Always Be Qualifying: MEDDIC, MEDDPICC. MEDDIC Academy.
MEDDPICC	Evolution of MEDDIC	Whyte, A. MEDDICC: The Ultimate Guide to Staying One Step Ahead in the Complex Sale. 2020.
AIDA	E. St. Elmo Lewis (1898)	Strong, E.K. Jr. The Psychology of Selling and Advertising. 1925.
JTBD	Tony Ulwick (1991), popularized by Clayton Christensen	Christensen, C. et al. Competing Against Luck: The Story of Innovation and Customer Choice. Harper Business, 2016.
RFM	Arthur Hughes (1994)	Hughes, A.M. Strategic Database Marketing. McGraw-Hill, 1994.
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9. List of Tables

10. Intellectual Property Statement

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