

Metellus Partners

A Template for Making the Internal Case for a Private AI Project

An internal business case template from Metellus Partners.

Sovereign Document Intelligence · Template

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Use this to write the internal memo that gets a first, fixed-scope build approved, whether the approval sits with your own leadership, a budget holder, or a security team. Fill in each section in your own words.

1. The Problem

- Describe the workflow in one paragraph. What document-heavy task is costing your team time or creating risk today?

2. What It Is Costing You Today

- How many people are affected, and roughly how much time per week does this take?
- If you have run the numbers, such as with a search-time or rework estimate, put the total here.
- What is the cost of getting it wrong? Name an actual example, such as a compliance finding, a missed deadline, or a decision made on outdated information.

3. What "Solved" Looks Like

- Describe the outcome in plain terms. What would be different for the person doing this work?
- What would you measure to know it worked?

4. What This Requires From the Organization

- A defined document corpus.
- One workflow owner who can make decisions and answer questions during the build.
- Access to the infrastructure the system will run on.
- Sign-off from security or compliance before go-live, not after.

5. What This Does Not Require

- No in-house AI team. The build team handles the engineering.
- No long-term commitment before you see it work. A first build is scoped and time-bound, and it either earns a larger commitment or it does not.

6. The Cost of Not Acting

- Describe what continuing the current process costs over the next year if nothing changes, in time, in risk, or in both.

7. The Recommendation

- State the ask plainly. Ask for approval of a fixed-scope first build, scoped to the workflow described above, with a defined review point before any further commitment.

Metellus Partners

Metellus Partners builds private, on-premise AI systems that turn an organization's own confidential documents into instant, cited, trustworthy answers. Every system is deployed entirely inside the client's own infrastructure.

We turn the documents you can't put in the cloud into AI you can.

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