

Metellus Partners

A Worksheet for Scoping Your First Document Intelligence Project

A project scoping worksheet from Metellus Partners.

Sovereign Document Intelligence · Template

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Fill this out before you talk to any vendor, including us. It forces the internal thinking that vendor conversations often skip past, and it will make every vendor conversation shorter and more useful.

1. The Document Corpus

- What set of documents does this project cover? Name the actual document types, such as specifications, SOPs, policies, complaint records, or batch records, not just "our documents."
- Roughly how many documents, and how many pages or words is that in total?
- Where do these documents live today, and in what format?
- How often do they change, and who is responsible for the current version being the right one?

2. The Workflow and the Question It Costs You

- What specific question does someone have to answer using these documents, on a recurring basis?
- Who asks that question, and how often?
- How long does it currently take to get a reliable answer?
- What happens when the answer is wrong, outdated, or takes too long? Name an actual missed deadline, a failed audit finding, or a delayed decision that happened because of it.

3. The People

- Who owns this workflow today, and who would own the system going forward?
- Who would use it day to day?
- Who else has to approve this before it can go live? Name the function, such as security, compliance, IT, or legal.

4. The Constraints

- Can any part of this data leave your network? If not, is that because of a regulation, a contract, or an internal policy?
- What systems does this need to work with, such as your identity and access system or your document management system?
- What validation, audit, or review requirements apply to anything that touches this workflow?

5. What Success Looks Like

- If this project works, what changes for the person doing the workflow?

- What would you look at 90 days in to know whether it worked?
- What is the minimum outcome that would justify continuing past a first build?

6. A Few Honest Questions

- Is there one person who owns this problem and can make decisions about it, or is ownership unclear?
- Are your documents already in a usable digital form, or do they need significant cleanup first?
- Do you have budget authority for a first, fixed-scope build, or does that need to be secured first?

If you cannot answer most of Section 6 yet, that is useful information. It means the next step is internal, not a vendor conversation.

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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