

Metellus Partners

A Scorecard for Evaluating Document Intelligence and Private AI Vendors

A vendor evaluation template from Metellus Partners.

Sovereign Document Intelligence

July 2026

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Use this scorecard in any vendor conversation, whether you are comparing one vendor or several. Score each question based on what the vendor can show you, not just what they claim. A vendor that cannot demonstrate an answer directly should be scored low on that question, regardless of what they say.

1. Where Your Data Lives

- Does the system run entirely inside your own infrastructure, or does part of it call out to a vendor-hosted service?
- Does any document content, embedding, or log ever leave your network, including for troubleshooting or model improvement?
- Can the system run fully disconnected from the internet if your policy requires it?
- What happens to your data and your access if you end the contract? Is deletion documented and verifiable?

2. Whether You Can Trust the Answers

- Does every answer show which source document, and which section or page, it came from?
- Can a reviewer open the cited source and confirm the answer matches it, in one click?
- Does the system say when it does not have a confident answer, rather than guessing?
- Is there a built-in way to flag a wrong answer and see it corrected?

3. Security, Access, and Audit

- Is access controlled by role, down to the individual document or folder, not just by user account?
- Is there a complete log of every question asked, every document touched, and every answer given?
- Can that log be produced, in a readable form, for an internal audit or an external examiner?
- Does the vendor integrate with your existing identity and access system, or does it require a separate login?
- Will the vendor complete your internal security review, and what documentation do they provide before you ask?

4. Fit With Your Compliance and Validation Requirements

- Can you explain, in plain language, how the system reached a given answer, in a way that satisfies your own reviewers?
- Does the vendor have direct experience with your specific regulatory environment, not just AI in general?

- Is a qualified person required to review an answer before it is treated as final, and does the system support that step?
- When a source document changes, such as a new policy or specification version, how quickly is that reflected, and how do you know the old version is retired?

5. How the Engagement Actually Works

- Is the first engagement scoped and time-bound, with a defined outcome, or open-ended?
- Will you see a working system on your own documents before committing to a larger contract, or only a generic demo on sample data?
- What specifically do you receive at each milestone, and who confirms it was delivered?
- After deployment, can your own team operate and maintain the system, or does every change require the vendor?

6. Whether the Vendor Understands Your Work

- Has the vendor built this for organizations with your specific document types and workflow, or are they adapting a general-purpose tool?
- Will you have a single point of contact who understands your workflow, or a rotating support queue?
- Can the vendor name the specific regulatory or business pressure driving your need for this, in your own terms?

How to Score It

Score each question 0, 1, or 2. A 2 means the vendor demonstrated it, not just described it. A 1 means they described it credibly but did not show it. A 0 means they could not answer, avoided the question, or gave an answer that did not hold up. Add the totals within each section before comparing vendors. A vendor that scores well elsewhere but poorly in Section 1, Where Your Data Lives, has a problem that a good score in every other section cannot fix. Data that has already left your network cannot be brought back. This scorecard is neutral. Use it on any vendor you are evaluating, including us.

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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