

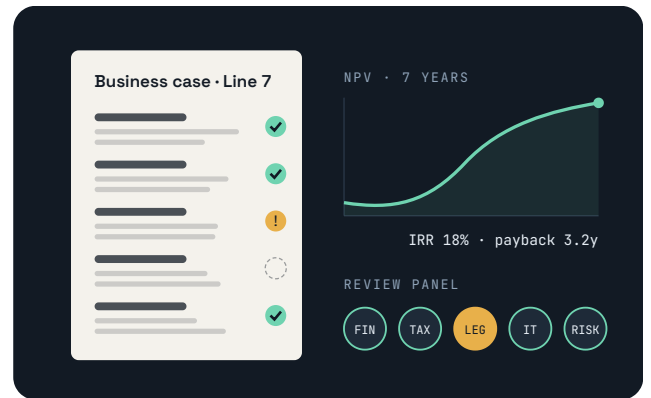
FINANCE & GOVERNANCE · CAPITAL ALLOCATION

○ SEEKING DESIGN PARTNERS

Business Case Copilot

Every business case meets your finance manual before the investment committee does.

Business Case Copilot is an AI workspace for managers in €100M–€10B companies. Case owners talk or chat their case into shape, inside your own template and policies. A specialist AI panel challenges it before submission, and an optional approval flow logs every decision. The product is designed and open to design partners.



— THE PROBLEM

Cases arrive incomplete and stall in review

Case owners in operations, commercial, supply chain and IT rarely know the finance rules. Cases arrive with the wrong hurdle rate, missing risks and no sensitivity analysis. Finance and FP&A rewrite them, review loops drag on, and cases across business units cannot be compared. Capital gets allocated with a weak audit trail and a real risk of funding the wrong things.

“Finance rewrites half of them, and review goes back and forth for weeks.”

HEAD OF FP&A

3–6 weeks of review loops per case, estimated in our concept work

3+ review rounds per case today, per our concept baseline

50–150 pages in a typical finance manual case owners are expected to apply (estimate)

— WHY BUY

Grounded in your rules, challenged like a committee

General AI assistants write fluent text, yet they ignore your finance manual and offer no review, workflow or audit trail. Business Case Copilot is designed to read your own policy and template, apply them while the case is written, and review it the way your investment committee would.

✓ Your finance manual becomes an editable, checkable rulebook

✓ Each panel finding cites the policy clause behind it

✓ NPV, IRR and payback calculated in code, consistently

— TRUST & DATA

✓ Designed with a separate environment per customer, holding its own manual, template, rules and encryption keys.

🔒 Customer data is never used to train models; a data processing agreement is part of the design.

🕒 EU data residency is the intended standard, with AI Act transparency documentation and an ISO 27001 / SOC 2 path planned.

WHO IT IS FOR

CHANNEL PARTNER

For finance consultancies and PE operating teams reselling it

Bring a governed business case standard to every client

- Add a repeatable product to FP&A and capital allocation advisory work, sold by you.
- PE operating teams can roll one standard across several portfolio companies at once.
- Recurring annual licence per client; we build and run the platform.

GROWING FIRM

For €100M–€500M companies and boutique finance consultancies

Investment committee discipline without adding finance headcount

- Case owners get guided through your rules instead of waiting for finance to rewrite.
- A boutique can extend its services with case coaching and panel review at scale.
- Start with one department, often IT or PMO, and widen from there.

ENTERPRISE & LARGE CONSULTANCY

For €1–10B groups and large consultancies

One standard for capital allocation across every business unit

- Comparable cases across business units, in one template and one rulebook.
- Approval routed by role and amount, with a full audit trail.
- Planned SSO, Teams and SharePoint links fit existing ways of working.

HOW IT WORKS

01

Set up

Upload your finance manual and business case template and set roles. AI turns the manual into an editable rulebook and maps the template.

02

Co-create

Talk or chat the case into shape and add quotes, data and plans. AI interviews you, drafts sections and builds the financial model.

03

Panel review

Submit the case. Specialist AI reviewers for finance, tax, legal, IT, risk and strategy return a scored review and a fix list.

04

Revise

Work through the findings with AI support and resubmit until the case is ready for approval.

05

Approve

Optional routing by role and amount. Approvers approve, reject or return; everything is logged and exported in your own template.

WHAT YOU GET

01

Policy rulebook

Your finance manual turned into rules, thresholds and required sections you can edit.

02

Voice and chat

Build the case in conversation, with supporting documents feeding the draft.

03

Review panel

Specialist AI reviewers score the case and cite the policy clause behind each finding.

04

Calculations in code

NPV, IRR, payback and sensitivity calculated deterministically, outside the language model.

05

Approval flow

Role- and threshold-based routing, optional, with every step logged.

06

Your template

Export the finished case to your own Word, Excel or PowerPoint template.

COMMERCIALS

PRICING

Annual licence per organisation, scaled by the number of business cases. Case owners are occasional users, so there are no seat fees. Tiers are being shaped with design partners.

HOW TO START

Become a design partner. Share your finance manual and template, shape the rulebook and review panel with us, and help define a paid pilot.

AVAILABILITY

Concept: designed, not yet built. We are seeking design partners among €100M–€10B companies, finance consultancies and PE operating teams.