



Suhas Bhairav

AI Capital Expenditure CapEx Business Case Review

**Practical AI workflow to evaluate capex requests
against profit goals.**

Automate capex evaluation against profit targets with
auditable, human-guarded AI workflows.

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AI-Driven CapEx Review

This guide helps finance leaders automate evaluation of hardware budget requests. It maps requests to corporate profit goals using auditable AI workflows.

Key move Set a 4-week pilot with explicit success metrics and stop criteria.

PRACTICAL CHECKLIST

- 01** Ingest capex requests: vendor, costs, lifecycles, warranties, financing terms, and project timeline.
- 02** Normalize financial fields: depreciation schedule, tax impact, capex vs opex, and discount rate.
- 03** Link to profit goals: target ROIC, hurdle rate, and horizon matching asset lifespan to strategic plans.
- 04** Run AI-driven scenario analyses: utilization, cost of capital, maintenance, replacement timing.
- 05** Produce decision-ready outputs: recommended action, required approvals, and risk flags.
- 06** Guardrails and human-in-the-loop: approvals thresholds, escalation paths, and audit logs.
- 07** Pilot plan: start with 1-2 departments, 2-4 week cycles, measure ROI and cycle time.

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Data, Tools, and Roles

Identify data sources and tool stack for AI-driven capex review. Define roles, approvals, and accountability.

Key move Ensure human sign-off for strategic capex beyond automation scope.

PRACTICAL CHECKLIST

- 01** Data sources: ERP exports, asset registry, purchase orders, depreciation schedules, and project charters.
- 02** Quality and freshness: ensure fields are up-to-date and consistent across systems.
- 03** Automation scope: data extraction, normalization, model inference, scenario generation, and output formatting.
- 04** Tools: discuss use of AI agents (Claude, ChatGPT), Excel/Sheets, ERP connectors, and BI dashboards.
- 05** Security and governance: access control, data anonymization, model versioning, and audit trails.
- 06** Roles and handoffs: who reviews results, who approves, and who owns the process.
- 07** Metrics to track: cycle time, ROI, accuracy of recommendations, and decision quality.

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Adoption, Metrics & Ownership

Plan a staged rollout with weekly increments and defined success metrics. Establish governance, ownership, and measurement to sustain AI-driven capex reviews.

Key move Keep a single source of truth for all capex AI decisions.

PRACTICAL CHECKLIST

- 01** Week-by-week rollout: start with 1 department, expand after 2 weeks if goals are met.
- 02** Automatic approvals for low-risk capex; human sign-off for high-value, strategic assets.
- 03** Data requirements: reliable vendor data, depreciation schedules, lifecycle estimates, and maintenance costs.
- 04** Guardrails: audit logs, model versioning, access controls, and vendor risk flags.
- 05** Ownership: CFO/Finance/IT liaison and a governance board.
- 06** Metrics: track cycle time, ROI, accuracy of recommendations, and decision quality.
- 07** Documentation: decisions stored in a central ledger with version control.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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