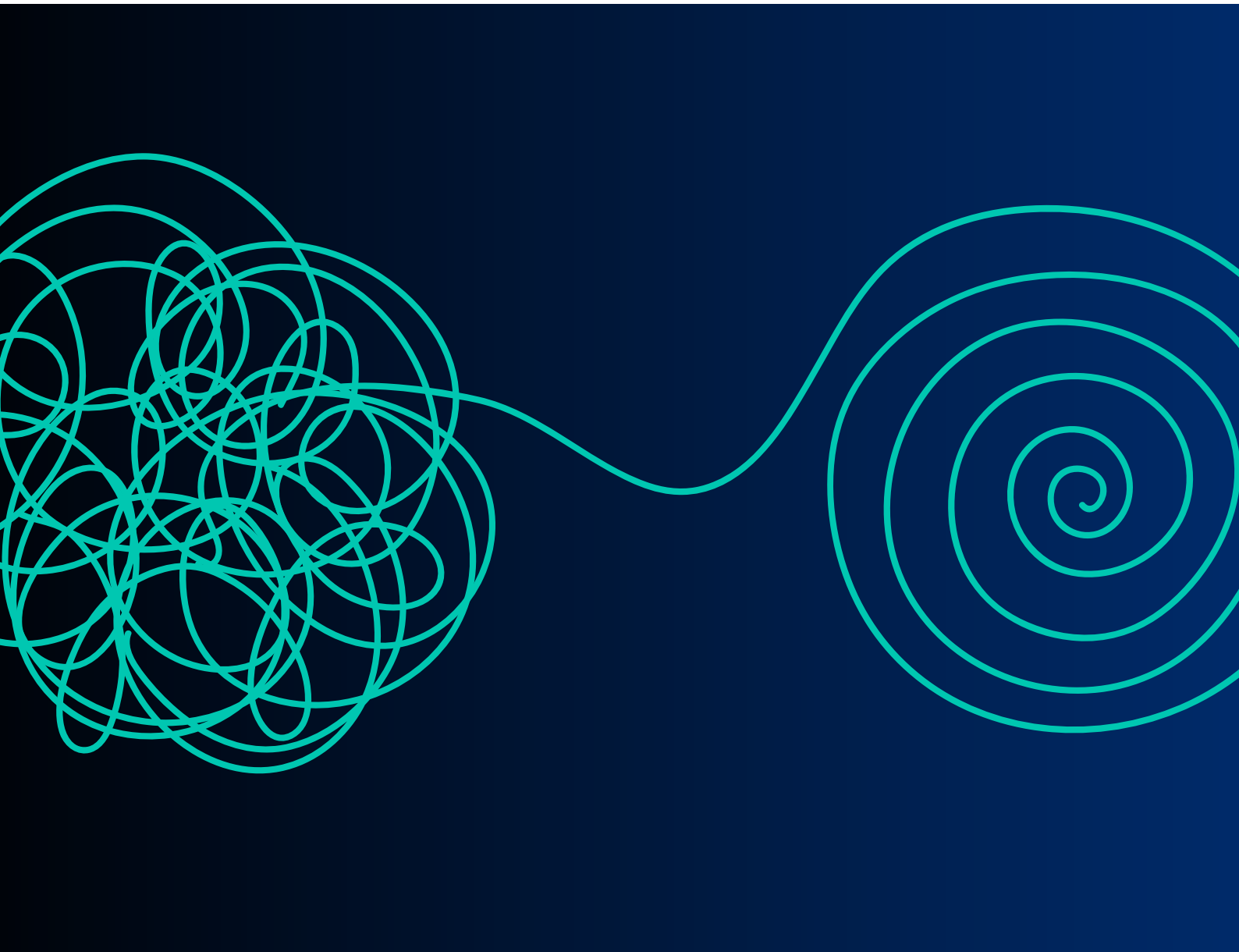
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DEEP VALUE PROCUREMENT AI

Intake Management Maturity - from Chaos to Control



Every CPO Needs to Assess Their Intake Management Now

Intake management is increasingly becoming the missing link in a CPO's quest for greater savings and spend optimization. You can have the best suppliers, the tightest contracts, and the most competitive deals, but if your intake process is broken, the rest of it will fall short. Modern procurement leaders face growing pressure from a new generation of users who expect a seamless, consumer-like experience. As procurement processes become more complex, failing to streamline and optimize intake management risks diminishing returns on even the best tech investments.

Gartner research highlights this urgency: without a cohesive intake strategy, companies face low adoption, high maverick spend, and poor compliance. These challenges strain resources and reduce visibility—undermining the strategic impact that procurement teams aim to achieve.

Here's why you can't afford to overlook your intake management maturity:



End-User Demand:
Today's workforce expects easy, device-agnostic, and intuitive workflows. A fragmented, bolt-on intake process frustrates users and increases support costs.



Strategic ROI:
When intake is merely a "form-filling" exercise or a bolt-on system, adoption plummets, compliance suffers, and maverick spend escalates. These inefficiencies waste the potential of procurement to deliver business value.



Data and Visibility:
A seamless, integrated intake process provides insights that drive smarter sourcing, policy compliance, and strategic procurement decisions.

For CPOs, optimizing intake management is the key to elevating procurement's role within the organization, securing returns on investments, and enhancing end-user satisfaction. This assessment will reveal where your organization stands on the maturity curve and what steps you should take to achieve a strategic, AI-driven intake solution.

The Intake Management Maturity Journey: From Basic to Optimized

As you progress through the maturity curve of intake management, the value to both the end-user and the procurement team amplifies exponentially. Here's a look at each maturity level:

LEVEL 1

Initial (Manual & Fragmented)
Manual processes lead to high friction, low satisfaction, and minimal control over spend. Compliance is inconsistent, and end-users often bypass procurement due to cumbersome procedures.

LEVEL 2

Basic (Semi-Automated with Limited Guidance)
Some automation reduces the burden on procurement teams, but policies are inconsistently enforced, and users are still required to navigate multiple steps. Adoption is moderate, but maverick spend remains a concern.

LEVEL 3

Intermediate (Guided & Partially Integrated)
With guided workflows and partial integration, users find the process more accessible, leading to higher adoption. Maverick spend reduces, and procurement gains visibility, allowing for more informed decision-making.

LEVEL 4

Advanced (Automated, Integrated, & Insight-Driven)
At this level, procurement sees near-total spend under management, high compliance, and streamlined processes. Users appreciate a seamless, intuitive system that adapts to their needs, boosting satisfaction.

LEVEL 5

Optimized (Strategic, Predictive, & AI-Driven)
The ultimate stage of intake sophistication, where AI-driven insights and seamless integration transform procurement from a process-driven function to a strategic asset. Compliance is near-perfect, user satisfaction is high, and procurement drives strategic value through data-driven decisions.

Intake Management Maturity Assessment

Understanding where your organization stands on the intake management maturity curve is critical for unlocking the full potential of your procurement function. This assessment will help you evaluate the current state of your intake processes, uncover areas for improvement, and provide a roadmap to elevate your procurement outcomes. Answer each question honestly to see how well your intake management aligns with your strategic goals and to identify steps that could bring you closer to an optimized, AI-driven intake experience.

1 User Experience & Accessibility

How do employees currently interact with your Source-to-Pay (S2P) system for procurement requests?

A Through an advanced, conversational, GenAI-powered intake solution integrated within our S2P system
B Through a built-in, basic intake form within our S2P system
C Using a standalone, bolt-on intake system that integrates with our S2P/ERP
D Primarily through manual methods like emails or spreadsheets

How accessible is your current intake management solution?

A Fully accessible across platforms, including mobile and MS Teams
B Partially accessible (only web-based)
C Limited accessibility (requires login to separate systems)

How user-friendly is your current procurement intake system for non-procurement teams?

A Extremely easy; requires minimal training
B Moderately easy; some training needed
C Challenging; extensive training required

How often do business users need to log in to procurement software to make routine purchases?

A Never, all processes are accessible via integrated platforms like MS Teams
B Occasionally
C Regularly

2 Process Automation & Compliance

What is the current level of automation in routing procurement requests through your system?

A Fully automated, routing and tracking are seamless
B Partially automated, with manual intervention in some areas
C Mostly manual, using emails or spreadsheets

How effective is your current system in guiding users to follow procurement policies?

A Very effective; includes guided purchasing for compliance
B Moderately effective
C Limited; relies on user knowledge of policies

How does your current intake system support compliance with company policies?

A Policy compliance is built into the workflow, with automated checks
B Policies are partially integrated; some checks require manual effort
C Policies are not integrated into the intake process

3 End-User Demand Insights & Process Efficiency

How well does your system capture data on end-user procurement demand and expectations?

A Comprehensive insights available in real-time
B Basic data available but requires manual analysis
C Minimal to no data captured

How does your intake process address maverick spend?

A Strong controls with clear visibility and prevention
B Limited control; occasional maverick spend occurs
C Minimal control; maverick spend is a significant issue

How frequently does your procurement team need to answer queries about procurement policies or workflows?

A Rarely, as the system includes clear guidance
B Occasionally
C Frequently; guidance is unclear or absent

4 Integration & Orchestration with Existing Systems

How well does your intake management system integrate with other enterprise applications?

A Fully integrated, including S2P, ERP, and CRM systems
B Partially integrated with some manual intervention
C Not integrated

Is your intake solution embedded within your S2P system or is it a bolt-on solution?

A Fully embedded with conversational and GenAI-powered capabilities within S2P
B Fully embedded within S2P but lacks advanced capabilities
C Bolt-on solution that integrates with our S2P/ERP
D No dedicated intake solution

How effective is your system in adapting workflows to route requests to the appropriate software?

A Very effective; uses intelligent orchestration based on request type
B Moderately effective; some requests require manual redirection
C Limited; requests are manually routed

5 Reporting, Analytics, & ROI

What level of reporting capabilities does your intake management system provide?

A Comprehensive, real-time analytics on demand, compliance, and process efficiency
B Basic reporting with limited customization
C Minimal reporting; relies on manual data compilation

How confident are you in the ROI of your current intake management solution?

A Highly confident; has led to measurable gains in compliance and adoption
B Somewhat confident; limited measurable impact
C Low confidence; minimal impact seen

How often does the intake management solution require manual intervention in workflows or data corrections?

A Rarely, the process is highly automated
B Occasionally
C Frequently

6

Support & User Assistance

How well does your intake system address common user queries without procurement team intervention?

A Excellent; provides self-service options and automated guidance
B Fair; answers some questions but often requires follow-up
C Poor; users frequently rely on procurement team intervention

Does your intake management system provide support for both intake and orchestration capabilities?

A Yes, supports both fully
B Partially supports both
C Only supports intake

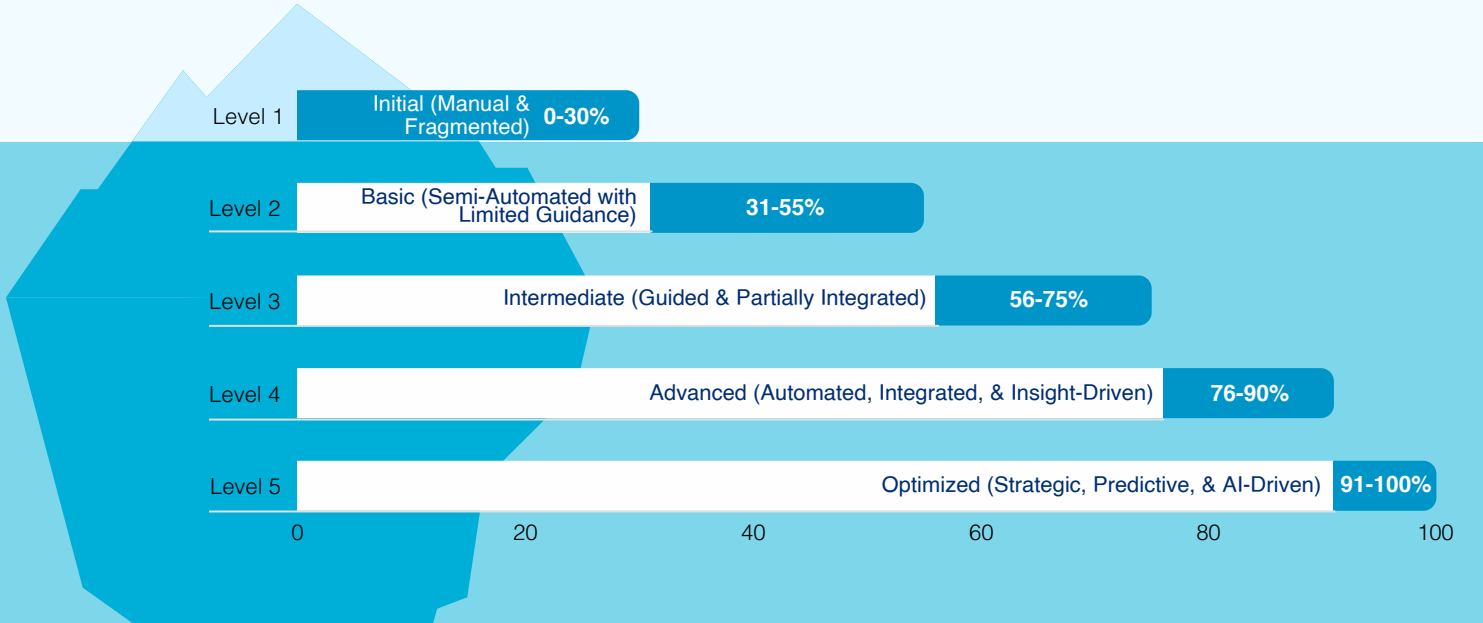
Scoring Mechanism

Assign points to each response option based on its alignment with the maturity model. Here's the scoring breakdown:

- Advanced GenAI-powered features, full integration, and automation **(Answers A) – 5 points**
- Basic integrated features with some automation **(Answers B) – 3 points**
- Bolt-on, limited integration, or partially manual processes **(Answers C) – 1 point**
- Manual-only processes or no intake solution **(Answers D) – 0 points**

Total Score Calculation

Sum the points for each response and divide by the total possible score (18 questions x 5 points = 90 points) to determine the percentage. Based on the score percentage, companies are placed within one of the following maturity levels:



What Your Results Mean & Next Steps

Your assessment score reveals where your organization currently stands and what steps are critical to advancing to the next level. Here's what each score range indicates and what you should consider as next steps.

LEVEL 1-2

Foundational to Basic (0-55%)
What It Means: Your intake management process is largely manual, causing friction and limiting procurement's effectiveness. User satisfaction is low, and maverick spend is common. Next Steps: Begin by introducing foundational automation and basic policy guidance. Explore solutions that simplify end-user interactions and encourage compliance through embedded controls.

LEVEL 3

Intermediate (56-75%)
What It Means: With some guided automation, your intake process is becoming a more effective tool for both users and procurement, but there are gaps in integration and orchestration. Next Steps: Prioritize a solution with embedded, GenAI-driven capabilities to enhance compliance and visibility. Invest in further automation and explore integrations that streamline workflows and data flow across platforms.

LEVEL 4

Advanced (76-90%)
What It Means: Your intake process is well-automated and integrated, delivering significant user satisfaction and compliance. The process runs smoothly, but predictive analytics could unlock even greater value. Next Steps: Consider adding AI-driven analytics and customized reporting capabilities to anticipate procurement needs and continuously improve policy compliance. Aim to refine the user experience with platform-agnostic access.

LEVEL 5

Optimized (91-100%)
What It Means: Congratulations! Your intake management system is a strategic asset that drives both user satisfaction and procurement insights. GenAI and predictive analytics provide a seamless experience and robust compliance. Next Steps: Focus on continuous optimization and data-driven policy adjustments. Track performance metrics regularly to sustain your success, and explore opportunities to leverage your insights for even broader organizational impact.

Conclusion

Whether you're just beginning your intake management transformation or advancing toward an optimized system, this assessment provides a roadmap to enhance your procurement processes. By understanding your intake management maturity, you're taking the first step toward making procurement an efficient, strategic function that drives business impact. Reach out to explore how our solutions can help elevate your intake processes to the next level.



ZYCUS
DEEP VALUE PROCUREMENT AI

Zycus, recognized by Gartner and Forrester as a leader in procurement technology, empowers teams to unlock deep value through its comprehensive Source-to-Pay (S2P) solutions. At the heart of our S2P solution is the Merlin AI Agentic Platform, which orchestrates intelligent AI agents to deliver simplified, efficient, and compliant processes.

The Merlin Intake Agent offers business users unparalleled ease of use, increasing adoption rates and significantly reducing non-compliant spending.

For procurement teams, Merlin Autonomous Negotiation Agent handles tail spend autonomously, securing additional savings, Merlin Contract Agent helps draft compliant contracts and reduces risks by actively monitoring them, and the Merlin AP Agent further enhances efficiency by automating invoice processing with exceptional speed and accuracy.

With the flexibility and autonomy of Merlin AI agents, teams can seamlessly guide workflows or delegate routine tasks for autonomous execution. Uncover the full depth of value and achieve procurement excellence with Zycus' AI-powered S2P solutions.

