

# Unlock efficiency: How intake and orchestration transform procurement

By Nikhil Gaur

Every day, organizations receive numerous requests for new contracts, renewals of existing licenses or vendor agreements. But where do those requests go? Too often, they disappear into a black hole of email threads and manual follow-ups, which stalls business and creates friction. This is not only inefficient. It is a significant risk.

That is why intake and orchestration (I&O) software has become the fastest-growing segment in procurement technology. I&O bolsters traditional source-to-pay (S2P) systems with user-friendly interfaces, integrations with other systems and features that facilitate collaboration.

In this paper, we address the following:

- What I&O software does in more detail
- Why it is becoming so popular
- How it interacts with contract management
- Where the market is going

## **Intake and orchestration: Your key to smarter agreement processes**

Legacy S2P software can be difficult to learn and configure, which means users often require training from IT before they understand how to properly make requests. This can lead to low adoption, increased costs, inefficiencies and resistance to change. Dependency on IT can slow down the onboarding of new users, while frustration with complex UIs leads some users to revert to manual processes, such as email and spreadsheets, which can lead to data quality issues in turn.

### **No-code simplicity**

Intake management software, however, generally offers intuitive front ends and modern no-code user interfaces with drag-and-drop workflow builders and robust communication features. Ease of use is a major reason the market is growing. The modern and intuitive UIs of intake management software typically require minimal training for casual users. Some organizations purchase packaged I&O programs, but others rely on I&O functionality inside existing procurement and S2P systems.

### **The single front door**

Intake software manages the process people use to submit requests to procure products or services. Some intake examples include a user submitting a purchase request, creating a statement of work or checking the status of a contract renewal.

### **Smart routing**

Once a request is made, the system routes it to the proper people or applications based on pre-configured rules, completing the intake process. Orchestration is the ongoing management of this request, including its actual completion. In many cases, these tasks are completed in other solutions (perhaps even multiple). Many users may not need to access the I&O software's user interface directly, as requests can be submitted from Slack, Teams, email or any other communication channel the organization already uses. This leads to much higher employee adoption.

## One unified collaboration hub

Orchestration software typically includes robust, bidirectional integrations, allowing most users to view the status of a request without leaving the tool and, in some cases, even complete the request. Moreover, these systems can be configured to notify users when a request has been stuck due to pending approvals, and some can even reassign approvals based on whether an employee is out of the office or working on other projects.

## Why intake and orchestration go hand-in-hand

As they are inherently linked, intake management and orchestration are usually packaged together by software providers. Organizations that use I&O software report increased efficiency and high ROI as primary benefits, as the solutions allow users to spend more time on higher-value tasks.

## Transformative impact across the organization

Overall, this software solves critical pain points related to a lack of centralization, inefficient processes, poor collaboration across departments and rigid or difficult workflows that lead to rogue operations and noncompliance. Currently, many teams struggle with these challenges due to fragmented tech stacks and non-user-friendly software. To address this, organizations across industries and of all sizes have begun to adopt I&O software due to its ease of use (and subsequent end-user adoption), rapid implementations and its propensity to connect stakeholders, even outside of procurement.

## How does contract management software factor in?

Contract management, a critical aspect of the S2P process, is one of many areas that have been affected by the rise of intake and orchestration software. For example, creating new contracts is a common intake use case.

Contract management software usually supports this with contract templates, clause libraries and so on, and this is sufficient for many organizations. Organizations that manage high volumes of contracts or procurement teams that are not always in lockstep with legal departments and the latest contract terms, however, could benefit from more flexibility around contract creation. One example I&O use case that impacts contract management is renewals. In fact, missed renewals are one of the main reasons organizations seek to use technology in the first place.

While contract management software and contract repositories have improved visibility, the actual execution of a contract renewal (and the offboarding process for an expiration) often requires cross-departmental approvals, collaboration with the other parties and the use of data from external sources. Some contract management providers offer this, but it is much easier for an I&O tool to address renewals in a holistic fashion. Beyond simply surfacing that a renewal is upcoming, the collaborative nature of I&O software means that renewals get addressed on time and without having to send reminder emails to approvers.

## What's next for intake and orchestration?

Currently, AI is the main focus of most – if not all – intake and orchestration providers. AI is already present in most of these solutions, whether behind the scenes or as part of the user experience. The routing of requests, for example, is sometimes rules-based, but it can leverage AI. The same applies to workflow configuration. Most notably, AI chatbots and agents are becoming popular for intake processes in particular.

While specific use cases vary by the software provider, agents are a point of emphasis for many of their roadmaps. As a primary benefit of intake and orchestration technology is efficiency, it is logical that AI agents will serve as another method to expedite S2P and adjacent processes.

## About Docusign

Docusign brings agreements to life. Nearly 1.7 million customers and more than a billion people in over 180 countries use Docusign solutions to accelerate the process of doing business and simplify people's lives. With intelligent agreement management, Docusign unleashes business-critical data that is trapped inside of documents. Until now, these were disconnected from business systems of record, costing businesses time, money, and opportunity. Using the Docusign Intelligent Agreement Management platform, companies can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM). For more information visit <http://www.docusign.com>.

©Spend Matters. All rights reserved.