ProcureAbility
a Jabil company



Enabling Smarter Procurement Intake and Decision Workflows

How a Global Financial Services Organization Streamlined Intake-to-Procure Workflows and Strengthened Governance with Zip

CLIENT

Global Financial Services Organization

SECTORS

Financial Services and Insurance

SOLUTION

Intake-to-Procure Orchestration with Zip

Executive Summary

A global financial services organization launched a Source-to-Pay (S2P) transformation to improve procurement efficiency, governance, and visibility across its intake-to-procure process. However, fragmented intake channels, disconnected systems, and overly complex approval workflows created delays, manual intervention, and limited process transparency across approximately 17,000 annual non-catalog requests.

ProcureAbility partnered with the client organization to implement Zip (procurement orchestration platform) as a centralized intake and orchestration layer, redesigning workflows, and rationalizing controls to reduce friction while maintaining governance alignment.

The transformation reduced intake-to-procure control points by 42% and approval routing complexity by 81%, while improving workflow transparency, reducing manual intervention, and establishing a scalable foundation for future procurement transformation.



Client Overview

The client is a global financial services organization providing insurance, annuities, employee benefits, and asset management solutions to individual and institutional customers worldwide.

As part of a broader S2P transformation, the organization sought to improve procurement efficiency and governance across its intake-to-procure process. As procurement activity scaled, fragmented intake channels, disconnected systems, and complex approval workflows created delays and limited visibility, prompting the organization to streamline intake-to-procure orchestration and strengthen governance.

Business Challenges

The organization operated within a highly regulated procurement environment requiring coordination across multiple business functions, systems, and approval stakeholders. Over time, procurement processes became increasingly fragmented and difficult to manage at scale.

Key challenges included:

- **Fragmented Intake Experience:**
  Multiple intake channels created inconsistent user experiences, incomplete information capture, and delays in routing requests to the stakeholders.
- **Misaligned Approval Sequencing:**
  Approval workflows were not aligned to information readiness, requiring manual intervention and slowing procurement decisions.
- **Disconnected Systems and Manual Validation:**
  Procurement, risk, and IT review processes operated across disconnected systems, requiring stakeholders to manually validate and reconcile information. This increased administrative burden and created process inefficiencies.
- **Excessive and Redundant Controls:**
  Multiple approval checkpoints added complexity and process friction without materially improving governance or reducing enterprise risk exposure.
- **Limited Process Visibility:**
  Stakeholders lacked real-time visibility into request status, increasing follow-up activity and making bottlenecks difficult to identify and proactively manage delays.
- **High Manual Effort in Non-Catalog Procurement:**
  Workflow complexity and inconsistent intake information increased manual effort across approximately 17,000 annual non-catalog requests, contributing to longer processing times.

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ProcureAbility Solution

ProcureAbility partnered with the client to redesign the intake-to-procure process and implement Zip as the centralized orchestration and intake platform integrated with existing procurement and risk systems.

Rather than simply digitizing existing workflows, the engagement focused on rationalizing governance controls and re-architecting approval sequencing to improve efficiency while maintaining compliance and oversight.

Key elements of the solution:

- **Control Rationalization Framework:**
  ProcureAbility conducted a structured review of 12 distinct control points embedded throughout the intake-to-procure lifecycle. Each control was evaluated based on:
  - Control intent and business purpose
  - Alignment to enterprise governance policies
  - Risk management requirements
  - Overall value contribution versus operational friction

  As a result, five control points were eliminated and remaining approvals were re-sequenced to occur at more effective points within the workflow.
- **Workflow Orchestration:**
  Zip was configured to connect and coordinate actions across multiple legacy procurement and risk systems, enabling a more cohesive intake-to-procure experience and reducing manual workflow intervention.
- **Policy-Based Approval Routing:**
  Approval flows were redesigned using configurable business rules to dynamically route requests based on category, risk profile, and procurement requirements.
- **Structured Intake Configuration:**
  Dynamic intake forms were implemented to ensure required information was collected upfront before routing requests through downstream workflows.
- **Real-Time Status Visibility:**
  The solution provided requesters and stakeholders with end-to-end visibility into request progress across connected systems, improving transparency and reducing follow-up activity.
- **AI-Powered Context Enablement:**
  An AI-enabled context library was incorporated to surface relevant procurement guidance and contextual information based on user questions and request attributes.

Results Achieved

The Zip implementation delivered measurable operational simplification and established a scalable foundation for future procurement transformation initiatives.

42%

Reduction in control points across the intake-to-procure process

81%

Reduction in approval routing complexity

2,100+ Hours

Estimated annual time savings from workflow optimization and reduced manual intervention

17,000+

Annual non-catalog requests supported through improved orchestration processes

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Value Delivered

Through the implementation of Zip and the redesign of the intake-to-procure process, the organization established a more scalable, transparent, and governance-aligned procurement operating model.

- **Established a scalable orchestration blueprint** to support broader Source-to-Pay transformation initiatives
- **Reduced manual workflow adjustments** and follow-up activity through improved sequencing logic
- **Increased procurement efficiency** by simplifying approval orchestration and intake management
- **Eliminated redundant and misaligned approvals** without increasing enterprise risk exposure
- **Balanced governance, compliance, and operational efficiency** within a highly regulated procurement environment
- **Improved stakeholder transparency** with real-time request visibility across systems

The client particularly valued ProcureAbility's ability to simplify operational complexity while maintaining alignment to enterprise governance and risk management requirements.

Learn More

Discover how ProcureAbility helps organizations **transform procurement** through intelligent intake, workflow orchestration, and digital procurement transformation solutions.

About ProcureAbility

ProcureAbility, a Jabil company, is the leading provider of procurement and supply chain services, offering advisory, managed services, digital, and staffing and recruiting solutions. For 30 years, we have focused exclusively on helping clients elevate their procurement and supply chain functions.

We combine leading methodologies, analytics, market intelligence, and industry benchmarks with our uniquely flexible and customizable service delivery model. Global organizations of all sizes trust ProcureAbility to transform their procurement operations, drive growth, and reimagine what's possible.

Let ProcureAbility help you reimagine your procurement and supply chain capabilities. For more information, visit us at www.ProcureAbility.com.

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