Spendflo Supercharges SaaS Procurement with Agentic AI from Adopt
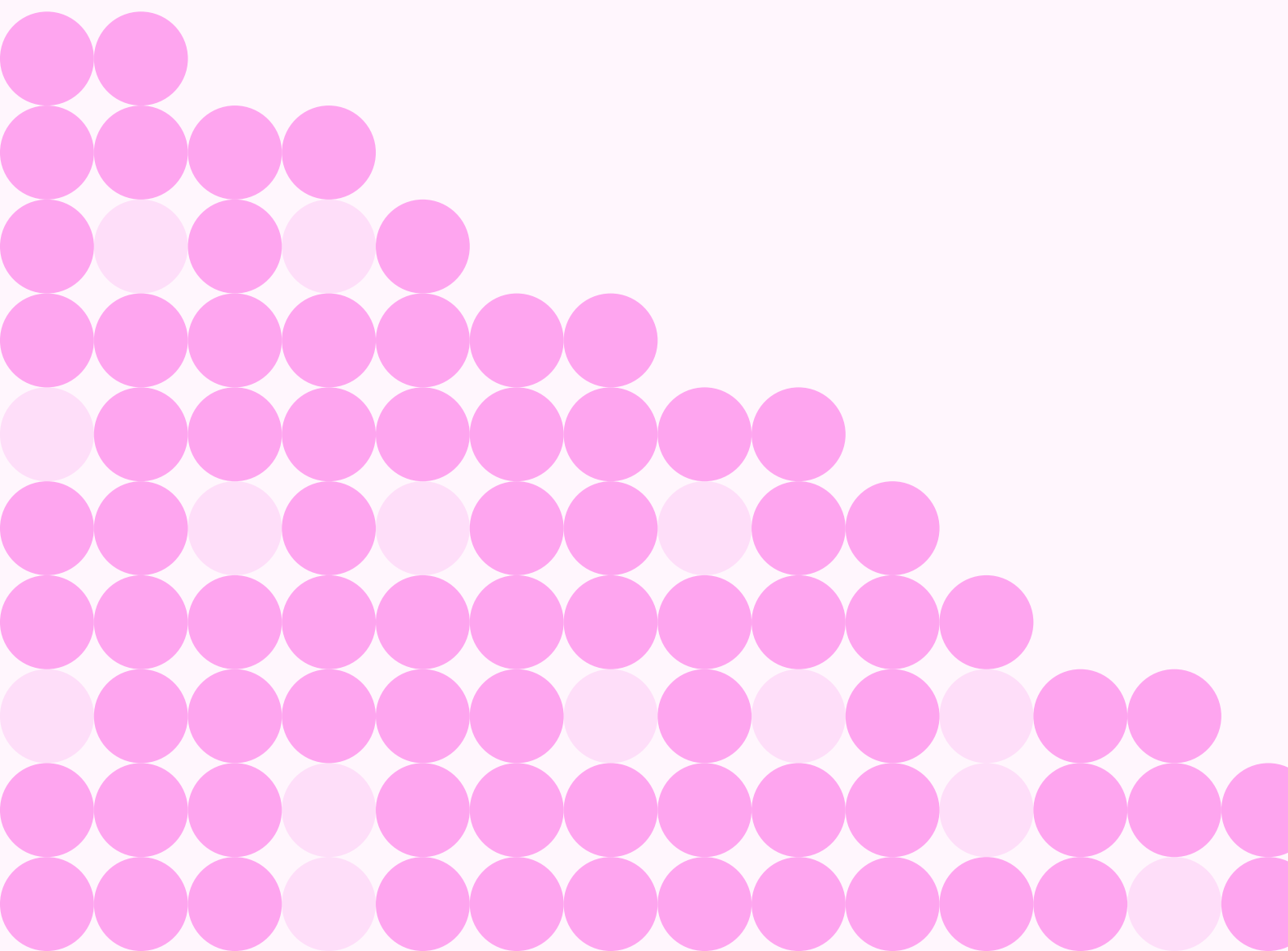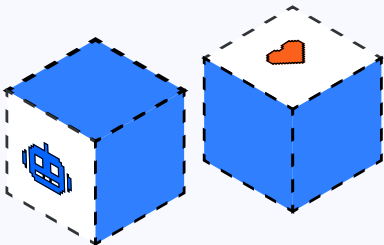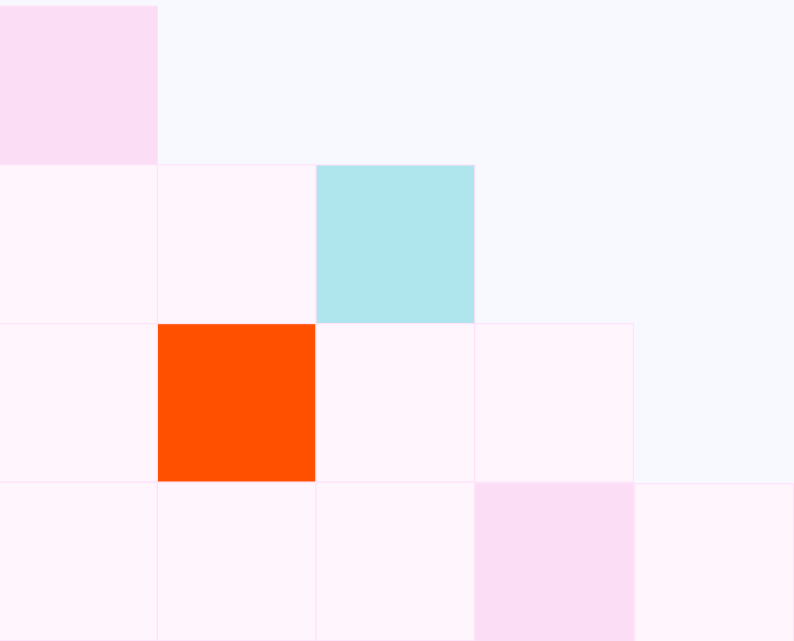
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Executive Summary

Spendflo, a fast-growing AI Procurement Solution, partnered with Adopt AI to meet a growing market expectation: fast, conversational access to procurement insights. Business users increasingly wanted to ask natural-language questions —like "What's our Slack spend?" or "How is usage trending for Salesforce?"—and get answers without digging through multiple dashboards.

To speed up their AI roadmap, they partnered with Adopt AI to embed a conversational interface that could retrieve and act on procurement data, while integrating seamlessly with Spendflo's existing infrastructure. The result is a scalable, intuitive experience that empowers users and frees up internal teams to focus on core innovation.

About Spendflo

Spendflo offers a modern platform for managing the end-to-end procurement lifecycle, including purchase order management, Vendor intelligence, and negotiation services. It simplifies how employees request purchases and provides intuitive, visual approval workflows across finance, legal, procurement, IT, and security teams—eliminating bottlenecks and ensuring fast access to the tools and services they need.

Spendflo primarily serves mid-market and enterprise organizations looking to gain control over their procurement. Their customers span industries like technology, healthcare, and financial services—typically companies with distributed teams, large vendor portfolios, and complex procurement workflows. By streamlining the intake-to-procure process and surfacing actionable insights, Spendflo helps these companies reduce procurement spend, improve policy compliance, and drive procurement efficiency at scale.

The platform integrates seamlessly with Contract Lifecycle Management (CLM) tools, IT Service Management (ITSM) platforms like Jira, and other business-critical systems.

Spendflo empowers customers to:

⚙	Automate procurement workflows end-to-end	$	Track renewals and optimize spend
◔	Surface actionable usage insights	📄	Centralize contract and vendor data

Yash Kothari, Head of Product at Spendflo, leads the team's strategy for delivering intelligent, accessible, and outcome-driven experiences to customers.

The Challenge: Meeting the Demand for Conversational Interfaces with a Lean Team

With the rapid advancements in AI—particularly since the emergence of ChatGPT reset user expectations—Spendflo recognized a clear shift in how business users wanted to engage with software. Customers no longer accepted multi-click workflows or buried dashboards; they wanted answers on demand, delivered in natural language.

> **"** Our users had to click through multiple pages just to get a simple answer. That kind of experience doesn't hold up anymore—people expect to ask a question and get the answer immediately, just like they do with ChatGPT," said Yash.

In response, Spendflo initiated the development of a conversational interface in November 2024. The opportunity was clear, but so were the trade-offs. With product and engineering teams laser-focused on delivering core platform enhancements, layering in an AI-powered interface that met enterprise-grade standards for accuracy, compliance, and system integration required thoughtful prioritization.

> **"** We had a clear vision for what we wanted: a robust, enterprise-ready conversational layer tightly integrated with our platform," Yash explained. "Rather than dilute focus, we made a strategic decision—build where we differentiate, and partner where we accelerate. The right partner could help us go to market faster without compromising quality."

The Solution: Adopting Agentic AI with Confidence

In early 2025, after a series of technical discussions and a vision session with Adopt AI CEO Deepak Anchala, Spendflo found its solution. Adopt's platform provided a secure, production-ready conversational layer that integrated within Spendflo's existing APIs and data boundaries—respecting existing permissions, governance, and enterprise controls.

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> "The aha moment was realizing we didn't need to rewrite anything," said Yash. "Adopt could plug right into our stack—multi-tenancy, RBAC, all of it."
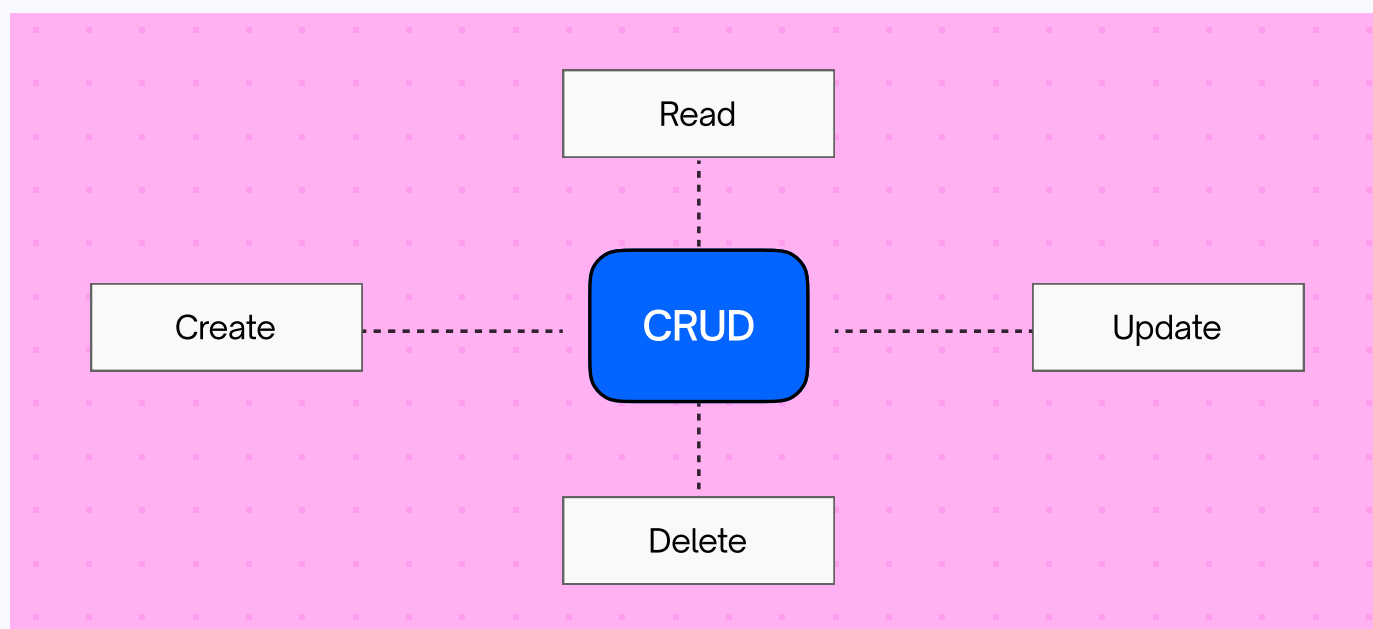
Adopt AI supports full CRUD (Create, Read, Update, Delete) capabilities through Spendflo's existing APIs. This enables users to complete actions—like creating a request or retrieving a contract—directly from the conversational interface, without additional navigation.

Spendflo empowers customers to:

Low-lift integration with existing APIs and systems

Conversational + actionable—not just fetch, but write

Enterprise-grade compliance with SOC 2 Type 2 and ISO certifications

Deep support and fast iteration from the Adopt team

Roadmap alignment with Spendflo's conversational interface (CI) vision

Implementation and Initial Impact: Building Together in New Territory

Implementing Adopt AI was a fast-moving and collaborative process that brought both teams into new, transformative territory. While the initial technical integration was largely seamless—requiring just one to two days of engineering to handle login flows and token access across Spendflo's multi-tenant and RBAC architecture—real value emerged during deeper collaboration.

> "This was our first time integrating a conversational interface this tightly into our user experience, and Adopt stepped up not just as a technology provider, but as a partner helping us shape how conversational AI should behave in real-world production environments," said Yash.

Unlike traditional software integrations, bringing a conversational AI agent into a business-critical workflow surfaced unique challenges—from how AI should behave in ambiguous scenarios to coordinating release cycles around live customer demos. Rather than slow down, both teams leaned into this complexity as an opportunity to co-design best practices.

As edge cases emerged—especially around multi-tenant behaviors, RBAC permissions, and timing of new feature releases—the teams worked together to resolve blockers quickly. Adopt AI's engineering team responded by expanding SDK capabilities and refining workflows, while Spendflo's QA and product teams adjusted internal cycles to align.

The result was the co-creation of new Standard Operating Procedures (SOPs) around:

Coordinated release management	Shared QA protocols
Confidence thresholds and fallback logic for the agent	Demo-readiness safeguards and user acceptance testing

"We didn't feel like a vendor and a client. We felt like one team," said Yash. "That trust and shared ownership turned a tricky implementation into something genuinely strategic."

Perceived Value: Simpler Access, Smarter Decisions

While full customer rollout had just begun at the time of this writing, Spendflo is already seeing clear value signals and treating Adopt AI as a strategic layer in their experience architecture.

Emerging benefits:

Faster time to insight: Users can simply ask questions and get answers —no need to dig for data

Higher engagement: Expecting a shift from navigation-heavy usage to co-pilot-style interaction

Accelerated roadmap: Internal teams saved months of engineering time by integrating, not building

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> "If our users can achieve their goals faster and more easily, that's the outcome we care about," Yash said.

As customer adoption grows, Spendflo plans to track engagement metrics and usage patterns across both traditional UI and the new conversational interface. Early signals are already promising.

> "We're watching to see co-pilot usage rise while traditional navigation declines. That's how we'll know we've nailed it."

Looking Ahead: A Dual-Interface Vision

Spendflo's long-term vision includes building a flexible, dual-interface experience—where users can seamlessly engage through traditional UI or a conversational agent, depending on context and urgency.

> **"** "We'll continue evolving the UI," said Yash. "But anywhere a conversational experience makes sense, we'll use Adopt."

Adopt AI will continue to support the conversational layer as part of Spendflo's evolving dual-interface experience—powering faster decision-making, better access to insights, and a more intuitive path to action for customers.

Final Thoughts: A Committed Partner for the Long Term

For Spendflo, Adopt AI has proven to be more than a vendor—it's a strategic partner helping shape how conversational AI fits into the future of enterprise software.

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> "We're not experimenting for the sake of innovation. We're here to solve real problems for our users—and Adopt has helped us do that with speed and flexibility," said Yash.

The partnership enabled Spendflo to accelerate time to value without sacrificing internal focus. Adopt AI brought a modular solution that fit within Spendflo's security framework, along with a team that collaborated closely to align with our internal standards and long-term roadmap.

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> "The roadmap is ambitious, yes—but the team is thoughtful, collaborative, and genuinely invested in making sure this works in the real world," Yash added. "We see Adopt as a long-term part of our product architecture—helping us deliver faster, simpler, and more intuitive experiences."

With agentic capabilities now embedded in the Spendflo experience, the team is better positioned to serve its customers—not just by storing critical procurement data, but by making it accessible and actionable when it matters most.