

Workday Ecosystem

The study assesses providers for their
Workday service portfolio and functionalities.

Customized report courtesy of:

Deloitte.

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Transforming European enterprises with Workday

The European market is undergoing a significant transformation with the adoption of cloud-based HR and financial management solutions. This transition is driven by the need for enhanced operational efficiency, regulatory compliance and improved employee experiences (EX). Workday, a leader in this space, offers a comprehensive suite of cloud solutions that enable enterprises to achieve significant flexibility, scalability and cost-efficiency. The shift toward cloud-based platforms is not only about technological advancement but also about strategic business transformation. By leveraging advanced analytics, ML and robust security measures, Workday is helping organizations across Europe streamline their operations, make data-driven decisions and foster a culture of innovation and sustainability.

As European businesses navigate the complexities of digital transformation, they face unique regional challenges, including diverse regulatory environments, varying cultural norms and the need for localized solutions. Workday's ability to provide tailored functionalities that meet these specific needs makes it a preferred choice for many enterprises. Additionally, the role of system integrators and consulting firms cannot be overlooked, as they bring essential expertise and support to ensure the successful implementation and optimization of Workday solutions. These firms offer deep industry knowledge, technical expertise and strategic guidance, enabling organizations to maximize the value of their Workday investments.

The following summary delves into key trends, challenges, and strategic approaches that are shaping the adoption of Workday solutions and its partner ecosystem in Europe. It highlights how Workday's capabilities, combined with the support of experienced partners, are driving significant improvements in operational efficiency, regulatory compliance, employee engagement and overall business agility.

Workday's
cloud solutions
enhance **efficiency,**
compliance and
engagement for
European enterprises.



Accelerated cloud adoption and integration:

The European market is rapidly embracing cloud-based HR and financial management solutions, driven by the need for flexibility, scalability and cost-efficiency. Workday's cloud platform is at the forefront of this transformation, enabling enterprises to streamline operations, reduce IT infrastructure costs and enhance data accessibility. Workday's robust security measures and compliance with industry standards bolster this trend, allowing organizations to respond swiftly to market changes, improve inter-departmental collaboration and enhance overall business agility.

Consulting firms and system integrators are pivotal in facilitating this transition. They leverage their extensive experience and Workday-certified expertise to provide comprehensive deployment and integration services, ensuring smooth transitions from legacy systems to cloud platforms. Their industry-specific tools and accelerators further enhance the implementation process, making it quick and efficient for clients to adopt Workday solutions.

Enhanced data analytics and real-time reporting:

Advanced data analytics and real-time reporting are becoming essential for decision-making. Workday's analytics tools provide deep insights into workforce performance, financial metrics and operational efficiency. The integration of ML models helps predict trends and identify potential issues before they escalate, enabling businesses to make data-driven decisions, optimize resource allocation and achieve strategic objectives effectively.

Third-party firms enhance Workday's analytics capabilities by integrating proprietary tools and frameworks. These firms offer additional layers of data analytics and predictive insights, helping clients unlock the full potential of their Workday investments and make informed decisions.

Elevating employee experience and engagement:

Improving EX is a top priority for organizations in Europe. Workday's user-friendly interface and mobile capabilities ensure employees can access information and perform tasks from anywhere, enhancing their overall experience. Features such as personalized

dashboards and self-service options empower employees, leading to high job satisfaction, increased productivity and better talent retention.

External experts focus on enhancing these employee-centric features. Their structured approaches and industry-specific accelerators ensure that Workday implementations are tailored to meet the unique needs of different sectors, supporting clients in creating a seamless and engaging EX.

Ensuring security and compliance: Security and compliance remain critical concerns for European organizations. Workday continuously updates its platform to comply with new regulations and implements advanced security protocols to protect sensitive data. The platform's comprehensive audit trails and reporting features help organizations meet compliance requirements, reducing the risk of data breaches, avoiding regulatory penalties and building trust with stakeholders.

Specialized firms further enhance security and compliance capabilities. These firms provide a range of post-go-live support, ensuring ongoing

compliance and operational efficiency. Their local expertise helps clients navigate complex regulatory landscapes, ensuring their Workday implementations meet all necessary legal requirements.

Optimizing Workday Extend: Workday Extend allows organizations to create custom applications that integrate seamlessly with Workday's core HCM and financial management solutions. This capability is crucial for European enterprises looking to tailor Workday's functionalities to their unique business needs and processes. By leveraging Workday Extend, companies can build applications that address specific regulatory requirements, streamline unique workflows and enhance user experiences without compromising the integrity of the core system.

Providers play an essential role in maximizing Workday Extend's potential. Their expertise in developing and deploying custom applications ensures that clients can fully leverage this tool to enhance their operational efficiency and meet specific business objectives. The ability to extend Workday's capabilities through custom applications provides European organizations



with a flexible, scalable solution that evolves with their changing needs.

Addressing regional challenges with strategic solutions: European organizations face unique challenges associated with data migration, customization and user training. Global system integrators (GSIs) address these challenges with automated tools, modular approaches and comprehensive training programs, ensuring smooth transitions, tailored solutions and maximum ROI. Workday's localization features, including language support and region-specific compliance functionalities, cater to the diverse European market, enhancing user adoption and satisfaction.

Industry leaders also play crucial roles in addressing these challenges. Their industry-leading delivery frameworks and extensive experience with Workday ensure that clients receive tailored solutions that meet their specific business needs. Strategic investments and local market expertise further enhance the customization and localization of Workday solutions across Europe.

Emphasizing regulatory compliance:

Compliance with regional regulations such as GDPR is a major focus for European organizations. Workday incorporates robust compliance tracking features and regular updates to ensure adherence to changing regulations. The platform provides tools for data anonymization, consent management and compliance reporting, helping organizations avoid hefty fines and protect their reputation. Specialized consulting firms provide additional support in this area. Their deep understanding of regulatory environments and security tools helps clients maintain a strong compliance posture, ensuring that they can quickly adapt to new regulatory requirements and maintain compliance.

Localized solutions for diverse markets:

Adapting solutions to meet diverse language and cultural needs across Europe is crucial. Workday offers localized functionalities, including language support and region-specific compliance features, to cater to the diverse European market. This includes payroll processing, tax regulations and benefits administration tailored to local requirements, enhancing user adoption and satisfaction.

Expert firms enhance Workday's localization capabilities. Their extensive experience with Workday implementations and comprehensive support services ensure that clients can effectively manage localized requirements. Proprietary software tools and a focus on emerging technologies further support the customization and localization of Workday solutions.

AI and ML integration: Leveraging AI and ML to drive innovation and efficiency is a growing trend in Europe. Workday integrates AI for predictive analytics, process automation and personalized user experiences. ML models improve HR and financial operations such as talent acquisition, performance management and expense forecasting, leading to improved decision-making, reduced operational costs and enhanced organizational efficiency.

Consulting firms are at the forefront of AI and ML integration. Their intelligent automation tools and AI-driven insights help clients optimize their operations and drive business value. Extensive experience with Workday and flexible support models ensure that clients can leverage AI and ML to achieve their strategic goals.

Focus on sustainability and ESG reporting:

There is an increasing focus on ESG metrics in Europe. Workday provides tools for tracking and reporting ESG metrics, helping organizations meet sustainability goals and regulatory requirements. The platform supports data collection, analysis and reporting for various ESG initiatives, promoting transparency, improving stakeholder relations and supporting corporate social responsibility.

Specialized firms enhance ESG reporting capabilities. Industry-specific tools and accelerators enable clients to effectively track and report ESG metrics, while strategic investments in sustainable technologies support clients in achieving their sustainability goals.

Overcoming cross-border and regulatory challenges: Managing operations across multiple European countries with varying regulations and practices presents challenges. Implementing centralized solutions with localized adjustments helps streamline operations while accommodating local requirements. Continuous updates and agile compliance frameworks enable organizations



Executive Summary

to stay compliant with evolving regulations. Collaboration with local experts ensures solutions are tailored to meet specific regional needs, enhancing user acceptance and effectiveness.

Specialized consulting firms provide critical support in overcoming these challenges. Their deep understanding of local regulations and extensive experience with Workday implementations ensure that clients can effectively manage cross-border operations. Comprehensive suites of services and a focus on regulatory compliance help clients navigate complex legal landscapes and maintain operational efficiency.

European enterprises will continue to embrace Workday in 2024, recognizing the significant benefits of transitioning to a cloud-based platform. This shift enables them to achieve strategic objectives more effectively, enhance operational efficiency, ensure robust compliance and improve overall employee engagement and satisfaction.





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services
Accenture	Leader	Leader	Leader
BNB	Contender	Contender	Contender
Capgemini	Product Challenger	Product Challenger	Product Challenger
CloudRock	Contender	Contender	Contender
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Hexaware	Not In	Not In	Product Challenger
HR Path	Rising Star ★	Leader	Leader
IBM	Market Challenger	Market Challenger	Leader





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services
Invisors	Product Challenger	Product Challenger	Product Challenger
Kainos	Leader	Leader	Leader
KPMG	Leader	Leader	Product Challenger
Mercer	Product Challenger	Product Challenger	Product Challenger
MHP	Contender	Contender	Contender
Preos	Contender	Product Challenger	Not In
PwC	Leader	Leader	Leader
Strada (formerly Alight)	Leader	Leader	Leader
Tietoevry	Rising Star ★	Leader	Rising Star ★
UST	Not In	Not In	Contender



The Workday Ecosystem study assesses providers' capabilities in HCM transformation, deployment, integration and Workday optimization.

Simplified Illustration Source: ISG 2024



Transformation Services

Deployment and Integration Services

Performance and Optimization Services

Definition

Workday is aggressively aligning its business and technology strategy to build a competitive roadmap in the HCM space. Fresh executive-level inflow and trials of new corporate governance models (Co-CEO) highlight an innovative approach to leading the thought and technology leadership space. The launch of Workday Extend and the Enterprise Management Cloud is set to address the limitations of complex and bulky ERP systems. These solutions integrate AI and automation technologies with a central data core to unify and streamline enterprise data and intelligence. Services such as advising on digital HCM transformation, implementing Workday solutions, fine-tuning systems and optimizing performance are all geared toward enhancing the overall user experience and reducing costs. These areas are among the top priorities for major enterprise clients.

Workday has recalibrated its partnership program with new inclusions and additions to restructure the service landscape by expanding the advisory partner pool. Workday emphasizes the integration of systems that enhance its platform, focusing on areas such as payroll, time tracking and workforce management. Concurrently, it prioritizes industry-specific solutions to build more efficient processes and technology stacks, thereby simplifying and amplifying user benefits and effectively meeting enterprise needs. The demand for marketplace solutions, customization and business processes as a service (BPaaS) is growing to cater to individual client requirements. Workday partners are shifting toward an engineering-led approach that drives innovation and experience.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services: Transformation Services, Deployment and Integration Services, and Performance and Optimization Services.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Transformation Services

Who Should Read This Section

This report is relevant to European enterprises across industries evaluating Workday transformation service providers.

In this quadrant, ISG assesses the current competitive positioning of Workday transformation service providers in Europe and shows how each provider addresses the key challenges faced in the region.

The rapid technological advancements have brought significant changes and progress to Europe. As a result, enterprises are increasingly looking to modernize their human capital management (HCM) and financial management processes to offer strong and adaptable solutions to their clients. However, European enterprises are facing challenges related to language barriers. Localization, governance, risk and compliance (GRC), and security remain prominent focus areas in Europe.

Enterprises are now looking for providers focused on establishing strategic partnerships to address security and language restrictions gaps. Providers are also investing more in M&As to build a skilled talent pool that can meet the language requirements and implement rigorous security measures at multiple organizational levels to ensure the safety and security of data and applications. In addition, enterprises are opting for providers looking to expand their presence locally in key areas, especially financial management.



Consulting leaders, including management, technology, functional and domain consulting leaders, should read this report to learn about Workday's Europe-specific solutions.



Digital transformation leaders, who spearhead initiatives to build a future-proof organization, should read this report to know how service providers design Workday solutions and map them to respective technologies.



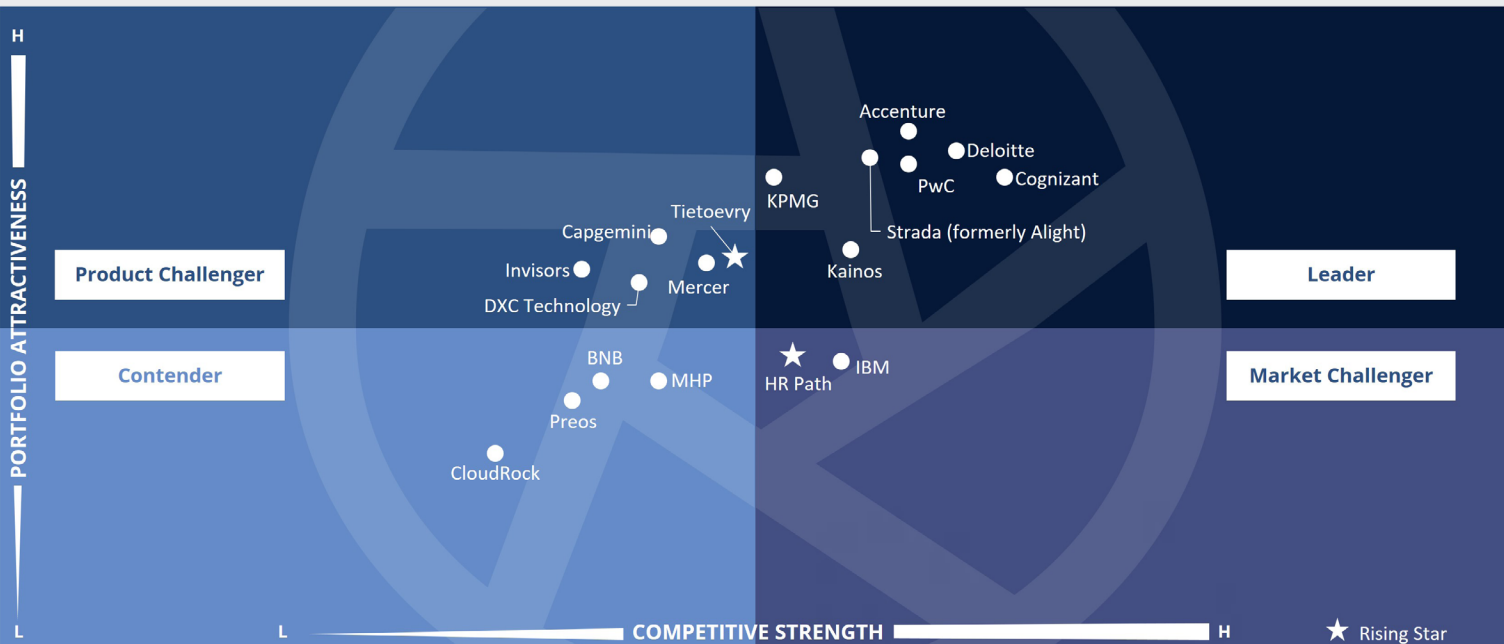
Business leaders, including CHROs, CFOs, payroll and financial leaders, who focus on driving business outcomes, should read this report to understand the trends and developments in Workday offerings.



ISG Provider Lens™
 Workday Ecosystem
 Transformation Services

Source: ISG RESEARCH

Europe 2024



This quadrant evaluates service providers that offer **Workday transformation services**. It assesses providers' capabilities to deliver **consulting** and **advisory** services to **modernize** the HCM solution.

Gaurang Pagdi



Transformation Services

Definition

This quadrant evaluates Workday-accredited advisory and service partners that transform the HR services landscape by improving HCM practices and processes using Workday solutions, products and platforms. The partners offer services that help enterprise clients develop a roadmap for HCM and financial process transformation.

This quadrant assesses providers' expertise in driving transformational initiatives to deliver a robust execution plan, organizational change management and business value (environment,

social and governance (ESG) and governance, risk and compliance (GRC), which certified consultants then administer. It also evaluates their approach to migrating and reforming processes by analyzing business, functional and technical requirements using custom assessment kits aligned with the practices prescribed by Workday. The service providers covered in this quadrant help enterprise clients of all sizes understand the changing market trends and design the best models for business and service through technology adoption that aligns with the enterprise's objectives.

Eligibility Criteria

1. Identify opportunities for **new Workday competencies** using **best practices** and creating **an adoption roadmap with frameworks, tools and templates**
2. **Evaluate the human resource management (HRMS) landscape to design HR service transformation strategies and road map integration** and provide in-depth knowledge of the Workday product portfolio (financial management, payroll, analytics, Workday Extend and HCM services) and industry expertise
3. Focus on **digital business transformation competencies** and **expertise in industry-specific functional processes and strategy consulting, including ESG and GRC areas**
4. Hold Workday platform certifications to **predict long-term technology developments** and adoptions to prescribe **timely solutions using expertise and partnerships**
5. Have change management experience and offer **Workday-certified resource pool** with solution-building expertise



Observations

Workday service providers offer a comprehensive approach to digital transformation, showcasing a blend of technological innovation, industry-specific solutions and strategic frameworks. Each provider leverages Workday's capabilities to address various business challenges, driving operational efficiency, cost reduction and enhanced EX. These services are characterized by a deep understanding of industry needs, a robust delivery framework and the integration of advanced automation and AI tools.

Providers offer extensive transformation services, spanning financial management, human capital management (HCM) and specific solutions for the education sector, government entities and non-profit organizations. The delivery frameworks employed are designed to be flexible, scalable and value-driven, ensuring that the unique objectives of each customer are met. These frameworks incorporate proprietary methodologies and proven practices that result in high project success rates and optimized business outcomes.

Automation plays a crucial role in the digital transformation services provided by Workday service providers. Intelligent automation tools facilitate seamless scenario creation, data management and execution during deployment phases and beyond. Specific accelerators cater to different organizational roles, enhancing workforce skills, improving hiring processes, securing access and optimizing revenue operations. This automation-driven approach ensures that transformation services not only streamline processes but also provide actionable insights and real-time data analysis.

Additionally, Workday's partners bring a wealth of experience and expertise to the table, often backed by decades of industry practice and a significant presence among Fortune 100 companies. Their platforms integrate AI to drive intelligent predictions, automate tasks and improve engagement, demonstrating tangible results such as increased health plan enrollment rates and optimized payroll operations across multiple countries.

The methodologies and tools developed by these providers are designed to ensure robust compliance, effective change management and

seamless integration of existing applications with Workday. These comprehensive services encompass the entire digital transformation journey, from strategic planning and risk management to implementation and ongoing support. By leveraging industry-specific tools, accelerators and proprietary software, these providers enable clients to maximize their return on investment and achieve sustained growth and operational excellence.

In summary, the transformation services provided by Workday's partners exemplify a strategic blend of advanced technology, industry expertise and flexible delivery frameworks. These services are pivotal in helping organizations navigate their digital transformation journeys, offering practical operational benefits and accelerating the adoption of modern technologies to future-proof their business models.

From the 34 companies assessed for this study, 19 qualified for this quadrant, with seven being Leaders and two Rising Stars.

accenture

Accenture combines its industry practices, proven solutions and ecosystem connectors with Workday enterprise management cloud to transform business processes for its customers.

cognizant

Cognizant is the longest-tenured partner for Workday, with a road map focused on industry challenges, platform enablement, global expansion, efficiency, transformation services and expertise utilization for business challenges.

Deloitte.

Deloitte is the leader in enterprise digital transformation. It offers collective learnings, best practices and accelerators to enable Workday transformations for large enterprises across multiple industries.



Transformation Services

Kainos

Kainos combines cloud platforms, AI and data to deliver innovative solutions, offering scalability and quick turnaround time for project implementations.



KPMG makes significant investments in the training, credentials and talent development of Workday Powered Enterprise. The company has been recognized with Workday's Partner Industry Innovation award and has asserted strong partnerships with other technology companies within the Workday ecosystem.



PwC has extensive experience in finance and HR transformation, helping customers become future-ready for every possible scenario. Its Workday solutions rely on its HR and finance capabilities, domain understanding and demonstrated ability to achieve the desired outcome.

Strada (formerly Alight)

Strada (formerly Alight) aims to assist clients in reaching their full potential and maximizing the commercial value of their Workday implementations. Strada blends industry-leading technology with experience-backed services to deliver demonstrable results globally.

Tietoevry

Tietoevry (Rising Star) provides transformation services with industry-specific expertise. It takes a comprehensive approach, covering strategy, implementation and continuous improvement, to offer tailored, thorough and innovative Workday solutions.

HR Path

HR Path (Rising Star) excels in Workday transformation services with its comprehensive approach, covering all stages from implementation to optimization. It has a large team with deep expertise across industries, a global presence and local support, ensuring tailored, efficient and effective solutions.





"Deloitte is one of the largest and most established partners with proven transformation expertise, making it a strong contender in the Leaders' category."

Gaurang Pagdi

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 457,000 employees across over 700 offices in more than 150 countries. In FY23 the company generated \$64.9 billion in revenue, with Consulting as its largest segment. Deloitte is a leader in enterprise digital transformation and in the Workday Partner ecosystem. Across the Global Delivery Network (GDN), it has served various Workday clients, from complex transformation projects for global enterprises to pre-configured transformation projects designed for local, midmarket companies.

Strengths

Comprehensive end-to-end Workday HCM and financial offerings: Deloitte designs, implements and integrates Workday HCM solutions, spanning the full worker lifecycle, reshaping the future of HR and delivering sustained value and meaningful work experiences. It helps its clients modernize and transform finance, offering real-time insights and value. This enables the client organizations to evolve rapidly. With its finance in a digital world approach, Deloitte helps clients that leverage its Workday practice accelerate digital transformation, futureproof their business model and address ever-evolving customer needs, thereby driving high revenue growth.

Real-time insights:

Deloitte enables clients globally to gain a competitive edge by transforming strategy into actionable insights. Leveraging detailed analysis, Deloitte provides the context behind the numbers and enhances clients' ability to respond to business changes.

Industry-centric tools and accelerators:

Deloitte offers solutions, tools and accelerators to specific industries such as educational institutions; government entities; life science and healthcare; financial services; consumer goods; and technology, media and telecom. These industry-specific solutions help accelerate its clients' digital transformation and deliver impact to value faster. It leverages Workday Extend to innovate industry-specific use cases and incorporate AI/Gen AI services.

Caution

Deloitte provides a comprehensive HCM transformation services portfolio skillset. However, it should continue to invest in developing a talent pool of certified Workday experts who are also cross-skilled in other technologies such as cloud and GenAI. This will further enhance its hybrid workday skill competency and strengthen its position in the market.





Deployment and Integration Services

Deployment and Integration Services

Who Should Read This Section

This report is relevant to European enterprises across industries evaluating Workday deployment and integration service providers.

In this quadrant, ISG highlights the current market positioning of Workday deployment and integration service providers in Europe and how each provider addresses the key challenges faced in the region.

European enterprises have begun to realize the importance of integrating various technologies such as generative AI (GenAI), AI and ML into solutions to enhance financial management processes and drive HCM transformation. The European market has shown openness to adopting the latest technologies to develop strong and automated platforms or tools that can improve HR processes across businesses.

Moreover, enterprises seek to expand their reach within the large enterprises (LE) CX base, focusing on financial management. Along with prioritizing the latest technologies, businesses have come to understand the significance of GRC. They are choosing providers with robust governance skills to ensure well-executed

deployment and integration projects with collaborative interactions while minimizing costs. They prefer a local point of contact with a solid understanding of European legal and regulatory requirements to ensure seamless and compliant deployment and integration.

In conclusion, the demand for deployment and integration services in the European market continues to rise due to the high popularity, compatibility and economic value of the SaaS platform, which benefits business objectives in every dimension.



Technology leaders should read this report to understand the latest technology trends and patterns aligned with Workday features, functionalities and components.

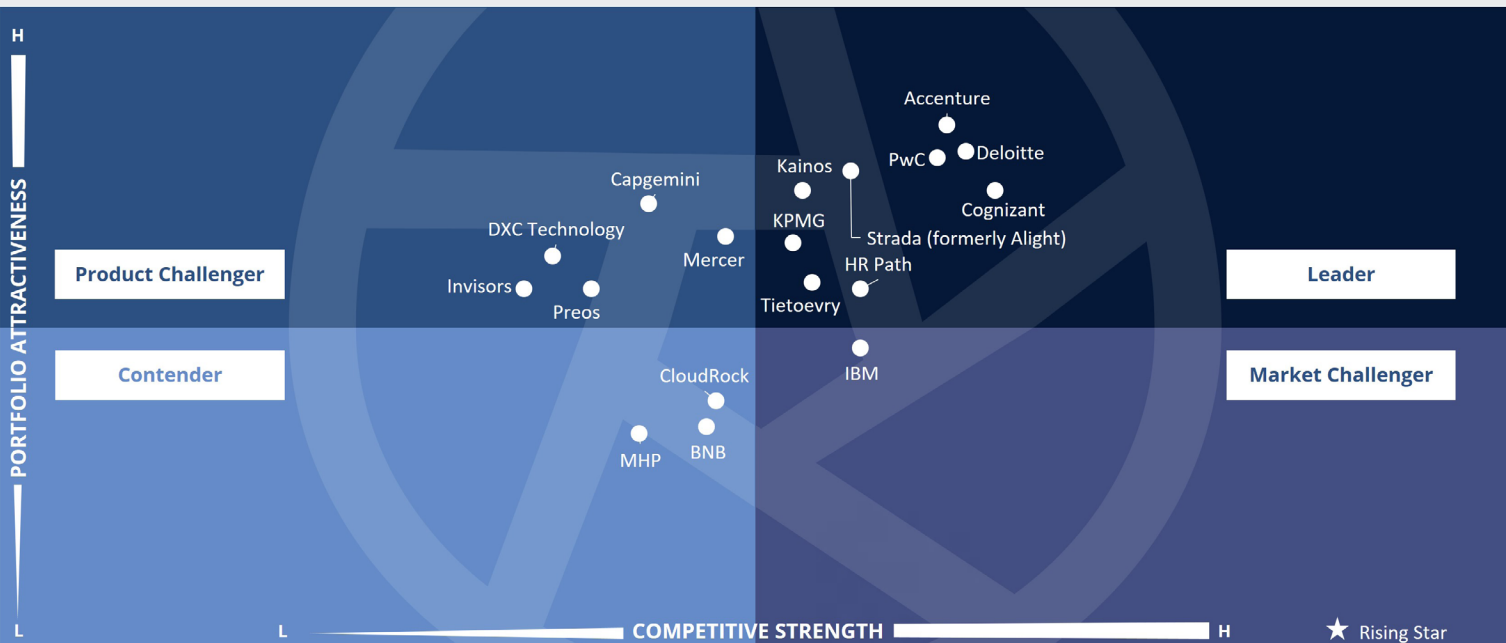


Engineers and architect heads responsible for Workday implementations in enterprises can use this report to learn the developments in Workday solutions and support building various tools or accelerators.



Business leaders, particularly CFOs and CHROs, should read this report to identify the right system integration partner that meets business requirements through Workday implementation.





This quadrant assesses providers that offer implementation and integration services by evaluating their **methodology** and **framework**, including internal and **industry-specific systems**, to ensure comprehensive and effective **digital transformation**.

Gaurang Pagdi

Deployment and Integration Services

Definition

This quadrant evaluates Workday-accredited service partners specialized in implementing and integrating Workday products. Typically, Workday defines the implementation methodology that the partners must follow. Competency and experience in implementing and integrating Workday product suites using broad software tools are essential evaluating factors. The quadrant also examines providers' ability to develop accelerators and components that drive efficiency and quality of implementation.

Providers are increasingly focusing on modernizing initiatives that drive innovation by developing and enhancing proprietary tools and delivering accurate and faster results. Their Workday implementation capabilities include designing a roadmap, creating data migration strategies, modernizing processes, deploying Workday on hybrid and multicloud

environments, ensuring data security and developing governance protocols. These functions are followed by integration with other enterprise applications, systems and processes. Providers must also be able to integrate Workday products and offerings, such as Enterprise Management Cloud and Workday Extend, with internal systems such as ERP, CRM, collaboration tools and third-party solutions. These systems often act as an extension of a few critical HCM domain functionalities that complement and complete the value chain.

Eligibility Criteria

1. Deploy new features on the **Workday platform** and **Integration Cloud**
2. **Integrate, map, develop, optimize** and test Workday products across modules (HCM, financial management, analytics, planning and payroll)
3. Offer expertise in **diverse system integration and migration with ERP, SAP, CRM (ServiceNow) and internal collaborative systems** (such as Microsoft Teams and Slack)
4. Offer **maintenance, support and installation services; upgrades; and new feature release, patch and lifecycle management**
5. Work with emerging technologies such as **automation, data science, AI, ML and cognitive computing** to enable digital transformation and drive implementations



Deployment and Integration Services

Observations

The deployment and integration services provided by Workday's partners offer a strategic blend of advanced technological capabilities, industry-specific solutions and robust implementation frameworks. These services address diverse client needs, ensuring efficient digital transformation across various sectors. The integration services feature pre-defined modules, strategic investments in industry-specific solutions, global expertise and deployment accelerators that streamline processes and maximize ROI.

Providers utilize pre-defined modules covering a comprehensive suite of services, including Workday HCM, financial management, adaptive planning, payroll and analytics. These modules are supported by adaptive planning deployment accelerators, planning templates, case studies and pre-built IP tailored for industries such as retail, technology and financial services. This structured approach ensures rapid deployment with minimized risks and optimized outcomes.

Strategic investments in industry-specific solutions enhance deployment services. These include intelligent automation tools, pre-built planning solutions with industry-specific use cases, and a catalog of Workday Extend apps for sectors such as education, government and commercial industries. Such targeted solutions allow for a more customized and efficient deployment process, reducing effort and cost while improving functionality.

Deployment accelerators and predefined templates are key components of integration services. Tools such as automated validation checkers, configuration change trackers and extensive integration catalogs accelerate time to value, maintain efficiency and minimize risks. Providers leverage these resources for seamless integration with third-party applications and systems, ensuring smooth transitions and optimized performance.

From the 34 companies assessed for this study, 19 qualified for this quadrant, with nine being Leaders and no Rising Star.

accenture

Accenture's experience in driving Workday innovation, both as a Workday client and the company's largest implementer, gives it a distinct vision for serving and creating markets that deliver business value with Workday at its core.

cognizant

Cognizant has successfully delivered and implemented 22 PRISM projects in EMEA. Its integration consultants are Workday certified and have implemented numerous Workday projects that help them simplify integration and significantly reduce the build time.

Deloitte.

With its continuous client engagement, multi-industry exposure and domain expertise, combined with global practice, **Deloitte** delivers significant benefits to clients.

HR Path's

HR Path's Workday offering is based on its client-centric strategy, which is customized based on each organization's unique needs. HR Path is set to transform the European market with its team of highly skilled consultants and a strong understanding of Workday's capabilities.

Kainos

Kainos stands out in Workday deployments with its proven track record of handling complex projects efficiently. Its innovative solutions and dedicated support ensure clients receive tailored, reliable and continuous assistance, maximizing their satisfaction.

KPMG

KPMG offers HR and financial management solutions in partnership with Workday. It has a strong track record of successful collaboration with vendors and industry expertise for Workday implementation and integration.



Deployment and Integration Services



PwC's Workday practice enables clients to successfully install, implement and evolve their business functions. The company has developed various customized solutions, offers a comprehensive range of financial and HR services, and has technical experience with vast geographical coverage.

Strada (formerly Alight)

Strada (formerly Alight) Worklife platform is a mobile interface that connects users to HR applications. It uses data science and AI to improve efficiency and effectiveness.

Tietoevry

With a team of certified consultants, **Tietoevry** provides a unified system for HCM and financial services, helping clients maximize their ROI.





"Deloitte's Advise-Implement-Operate (A-I-O) delivery model is a key aspect that differentiates the company from its peers and ecosystem partners."

Gaurang Pagdi

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 457,000 employees across over 700 offices in 150+ countries. In FY23 the company generated \$64.9 billion in revenue, with Consulting as its largest segment. Deloitte excels in deploying and integrating Workday solutions with advanced tools tailored to specific industries. It received the 2024 Workday Partner Innovation Awards in three categories — Financial Services, Retail, and Technology and Media — for its innovative solutions such as InsureAcceleration, InstaView and Content Accounting Calculator. It also received the DACH Workday Sales Partner of the Year award. It has 463 Workday-certified consultants in EMEA.

Strengths

Unique operating model: Deloitte's full lifecycle of integrated and outcome-based services provides end-to-end solutions for organizations. It can guide clients on key issues and strategic improvements to implementation and operates core business services and functions to embed continuous advantage. Deloitte's Operate delivery model offers several benefits such as cost optimization, complete lifecycle services, insights-driven actions, increased collaborations, accelerated time to market and risk mitigation.

Deployment accelerators to maximize ROI: Deloitte has developed accelerators specific to industries such as insurance and healthcare. These accelerators enable its clients to leverage digital transformation

capabilities and quickly deliver maximum business value. Deloitte is currently focusing on sectors such as higher-educational institutions, technology, retail and banking.

Innovation for in-house product development: Deloitte has continuously focused on product innovation and developments in the Workday practice. It recently launched InvestAcceleration, a new suite of investment management solutions with a specialized approach for implementing Workday financial management. The suite enables investment management firms to address risks and challenges, including lack of agility, complex workflows and disparate data models.

Caution

Deloitte strongly focuses on its deployment and integration offerings. It also must continue to focus on developing other Workday-related offerings to address the requirements of a broad range of clients in Europe.





Performance and Optimization Services

Who Should Read This Section

This report is relevant to European enterprises across industries that are evaluating Workday performance and optimization service providers.

In this quadrant, ISG highlights the current market positioning of Workday performance and optimization services providers in Europe and shows how each provider addresses the key challenges faced in the region.

The European market now prioritizes post-deployment services, with enterprises focusing on performance and optimization of services and processes. They seek providers offering seamless support, flexible service options at any deployment phase and enhanced post-production support capabilities for existing Workday CXs. Providers are making these services less transactional and more cost-effective to improve the CX.

European enterprises seek providers that offer customized personal modules, as the need for tailored solutions is rising. Additionally, enterprises prefer providers that are approachable and agile, offer governance and robust security, and have a local presence with language capabilities. Consequently, Workday performance and optimization services have gained traction over the years, with many enterprise clients increasingly seeking these services to streamline processes within their organizations.



Operations and delivery leaders should read this report to understand how workday performance and optimization service providers maintain their credibility and service quality.

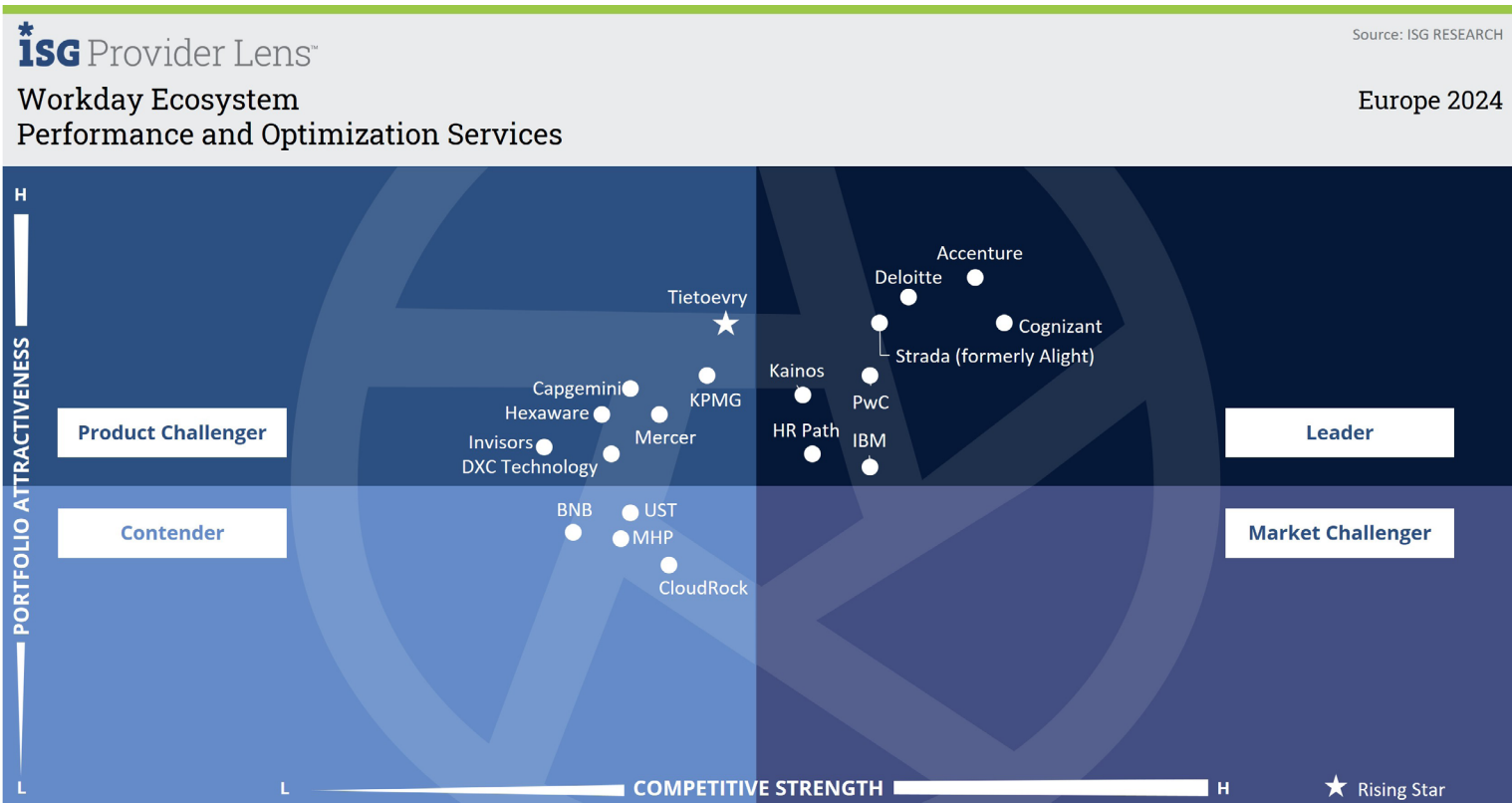


Customer success and experience leaders, championing the enterprise's voice in the market, should read this report to analyze providers' service skills and how they adhere to SLAs and proactively offer customer feedback.



Business leaders, including CHROs and CFOs, should read this report to understand Workday performance and optimization service providers' capabilities to manage and support maintenance across portfolios.





This quadrant assesses service providers that offer application management and optimization services focused on maintenance, **modernization** and **enhancement** to ensure **sustained performance** and **operational excellence**.

Gaurang Pagdi



Performance and Optimization Services

Definition

This quadrant analyzes Workday-accredited service partners specialized in offering managed services to maintain and support Workday products. The providers in this quadrant support enterprise clients with technical and operational tasks such as Workday platform maintenance. Additional competencies include provisioning, administering, monitoring and ensuring availability to maintain continuous operations across all Workday modules and related services. These providers are experts in incorporating platform customizations and personalizations based on client demands, changing demographics, and social and corporate compliance policies.

The study assesses providers' technical and operational ability to support process improvements through regular change and release management processes. This involves providing application management services (AMS) for the client's internal and external systems. Providers are also evaluated based on their ability to support a broad spectrum of applications, including Workday on the cloud, Workday Extend and modernized Workday services. The quadrant examines providers' global reach, depth of Workday product portfolio and breadth of industry and technology coverage.

Eligibility Criteria

1. Support, optimize and enhance **Workday HCM, financial management, analytics, Enterprise Interface Builder (EIB), Workday Extend, data load, reporting and security**
2. Conduct **Workday release management, install new packages** based on the release schedule and manage **controlled changes** to the environment via **change management**
3. Deliver **Workday maintenance support** and maintain a bug-free environment
4. Support testing of **Workday integration code base, including third-party systems (BPaaS)**, to ensure the availability and maintenance of the Workday platform and its complimentary software
5. Build **strong partnerships** with **technology integration providers** and **critical third-party software providers** (Accu-Time Systems, ADP), covering the breadth of AMS-related portfolio.



Performance and Optimization Services

Observations

Workday's partners employ advanced technologies and deep industry expertise to offer performance and optimization services. They provide comprehensive, data-driven solutions tailored to various industries, which significantly improve operational efficiency, reduce costs and empower workforces with new skills. They not only transform client support services through strategic investments and innovative assets but also combine technical expertise with the Workday ecosystem to optimize support services.

Workday partners develop adaptable, data-led finance solutions to meet the changing retail, technology and media business needs. These solutions can be integrated with Workday Financial Management, using intelligent automation, AI and ML to digitalize processes, reduce costs and improve operational efficiency.

Service partners offer comprehensive application management service (AMS) models that enable rapid value realization. These models, including support desk, tenant

optimizer and release updater, ensure high retention rates and long-term customer satisfaction. Automation capabilities are central to AMS, reducing testing time by up to 80 percent and increasing efficiency. They also optimize client operations and reduce efforts.

Partners are adopting strategies such as acquisitions and partnerships to enhance capabilities and expand offerings, integrating local market expertise with global best practices. Moreover, continuous investments in innovative technologies such as AI and cloud help them develop advanced solutions. They also employ industry-specific accelerators and tools, such as pre-configuration tenants and reporting packages, to address unique challenges. Knowledge-sharing and best practice documentation further enhance client outcomes. The adoption of such approaches by Workday's partners helps ensure clients achieve operational excellence and are prepared for future challenges.

From the 34 companies assessed for this study, 20 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture distinguishes itself in the Workday performance and optimization space by integrating AI and ML, providing clients with actionable insights and improving system performance.



Cognizant has the longest-standing AMS practice in the Workday ecosystem. It has a 99 percent customer satisfaction rate and is one of the few partners offering dedicated and shared models. Cognizant offers flexible pricing models, spanning T&M to fixed-fee subscriptions.

Deloitte.

Deloitte's post-deployment services are the most transparent and trusted in the industry. They support clients throughout their entire transformation journey. The company offers quick ticket resolutions and industry-leading technical assistance.

HR Path's

HR Path's Workday experts support clients by establishing best practices, educating them about Workday features and minimizing the efforts needed to manage Workday. Its expertise gained through global operations helps clients optimize their Workday system.



IBM Workday works closely with clients to offer solutions tailored to their business needs. It equips the workforce with skills and empowers them with data, automation and AI capabilities.

Kainos

Kainos excels in optimizing Workday performance through data-driven insights, custom enhancements and continuous improvement, ensuring efficient, adaptable systems for long-term business growth.



Performance and Optimization Services



PwC's Workday performance and optimization services enhance clients' investments with advanced analytics, automated reporting and cost intelligence. Its flexible engagement models provide tailored support that boosts efficiency, reduces costs and improves performance.

Strada (formerly Alight)

Strada (formerly Alight) offers optimization services to help clients maintain efficient system operations and realize their company's potential. Its professional enablement managers and dedicated consultants specialize in post-deployment support to ensure efficient application operations.

Tietoenvy

Tietoenvy (Rising Star) offers comprehensive optimization services focusing on customer success and continuous improvement. With its local presence and an agile approach, it offers personalized support and strategic guidance to optimize Workday environments.





"A global delivery network and strong GenAI capabilities make Deloitte a Leader in the Workday Performance and Optimization Services quadrant."

Gaurang Pagdi

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 457,000 employees across over 700 offices in over 150 countries. In FY23 the company generated \$64.9 billion in revenue, with Consulting as its largest segment. Deloitte's Workday performance and optimization services are crafted to future-proof organizations by enhancing and sustaining their Workday investments. Its Application Management Services (AMS) enable swift adaptation to changes, streamline processes and integrate data enterprise-wide. Additionally, tools such as the Content Accounting Calculator reduce manual work while improving financial accuracy and compliance.

Strengths

Future-ready approach: Deloitte's Workday-certified experts and platform teams help manage operational risks and maintain the system. They also facilitate efficient incident management and defect resolution and maintain master data, security and configurations. Deloitte partners with vendors for seamless handoffs and all levels of user support. It maximizes the system value by leveraging agile, outcome-based methodologies.

Innovative delivery platform: Deloitte continuously invests in innovative technologies and their applications across different industries. Its GenAI-driven Ascend Delivery Platform assists Workday clients in accelerating their time to market while minimizing implementation costs and risks.


Deloitte develops these solutions by adopting proven implementation approaches based on industry know-how and client experience together with Workday. It has created a global delivery network, including certified Workday consultants that leverage GenAI service to address different business scenarios.

Quality assurance: Deloitte works with the Workday Delivery Assurance team to deliver high-quality and complete implementations. It enables engagement partners with tools and knowledge to implement Workday products effectively and efficiently. Deloitte's A-I-O model is known for high-quality deployments and implementation across the Workday partner ecosystem.

Caution

As Deloitte focuses on value and outcome-based services, it will benefit from revisiting its pricing strategy and adapting to flexible pricing models that would appeal to a broader client base, enhance competitiveness and meet the budget constraints and clients' needs, driving growth and market penetration.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – Workday Ecosystem study research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was conducted in the following steps:

1. Definition of Workday Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendors across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.

6. Use of the following main evaluation criteria:

- * Strategy and vision
- * Innovation
- * Brand awareness and presence in the market
- * Sales and partner landscape
- * Breadth and depth of portfolio of services offered
- * Technology advancements



Author & Editor Biographies



Lead Author

Gaurang Pagdi
Lead Analyst

Gaurang has over 22 years of experience in the Finance & Accounting (F&A) domain with expertise in the Order to Cash vertical; he has worked as a delivery leader with industry leaders in Banking, Telecom & E-Commerce; and as a Digital Transformation Consultant with a prominent F&A SaaS provider, working with clients from across industries. Gaurang's core expertise lies in delivery and business transformation, where the focus is beyond

digital transformation, like operations and talent transformation, giving him a holistic view of driving a healthy and future-ready business. As a lead analyst at ISG, Gaurang is responsible for authoring the F&A studies, taking into consideration the latest market trends and perceived future of the industry in relation to the competitive strength and offerings of the service providers.



*Enterprise Context and
Global Overview Analyst*

Swetha Tadepalli
Research Analyst

Swetha Tadepalli is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Workday Ecosystem, Oil & Gas, and Finance & Accounting platform studies respectively. Swetha has experience in the technology research industry. She carried out research delivery for both primary and secondary

research capabilities. She is also involved in authoring enterprise context and global summary reports with market trends and insights. She also supports the advisors with her research skills about the latest market developments in the industry.



Author & Editor Biographies

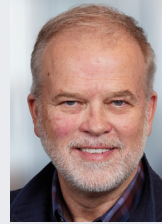


Study Sponsor

Aman Munglani
Director: Hyperscalers, Digital
Innovator Series and Custom Research

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding

CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes;. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry.

Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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