

Workday Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

Deloitte.

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Report Author: Ashwin Gaidhani

Workday continues to transform, innovate and deliver platform solutions for a seamless experience

The U.S. market is a dynamic landscape of rapid technological advances and evolving business strategies. Consequently, cloud-based HR and financial management solutions are becoming indispensable for enterprises aiming for flexibility, scalability and cost-efficiency. Workday offers comprehensive solutions that not only streamline operations but also drive significant strategic advantages. The transition to cloud-based platforms has become critical for the digital transformation of U.S.-based companies, enabling them to enhance operational efficiency, ensure compliance and improve EX.

The robust Workday platform, fortified by advanced analytics, ML and stringent security components supports enterprises in navigating the complexities of the modern business environment. Consulting firms and system integrators play a crucial role in this ecosystem

as they provide essential expertise and support to ensure the successful implementation and optimization of Workday solutions. These firms bring deep industry knowledge, technical expertise and strategic guidance to the table, enabling organizations to maximize the value of their Workday investments.

The report explores key trends, challenges and the strategic approaches of providers shaping the adoption of Workday solutions in the U.S. 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.

Accelerated Cloud Adoption and Integration

The U.S. market is rapidly embracing cloud-based HR and financial management solutions, driven by the need for flexibility, scalability and cost-efficiency. The Workday cloud platform leads this transformation, enabling enterprises to streamline operations, reduce IT infrastructure costs and enhance data accessibility. With robust security components and compliance with industry standards,

Workday's cloud
solutions enhance
compliance,
engagement and
efficiency for
U.S. enterprises.



Executive Summary

Workday allows organizations to swiftly respond to market changes, improve inter-departmental collaboration and enhance overall business agility. Consulting firms and system integrators play a vital role in this transition by providing deployment and integration services that ensure seamless transitions from legacy systems to cloud platforms. Their industry-specific tools and accelerators enhance the implementation process, enabling rapid and efficient adoption of Workday among clients.

Enhanced Data Analytics and Reporting

Advanced data analytics and real-time reporting are becoming essential for strategic decision-making. Workday's analytics tools offer deep insights into workforce performance, financial metrics and operational efficiency. The integration of ML models helps predict trends and identify potential challenges proactively. The use of advanced analytics empowers businesses to make data-driven decisions, optimize resource allocation and achieve strategic objectives efficiently. By leveraging Workday's powerful analytics and reporting tools/components, along with the

expertise of service partners in implementing these solutions, organizations can gain a comprehensive view of their operations, enabling improved planning and forecasting.

Improved EX and Engagement

Enhancing EX is a top priority for modern organizations. Workday's user-friendly interface and mobile capabilities allow employees to access information and perform tasks from anywhere, thus improving their overall experience. Personalized dashboards and self-service options further empower employees and boost engagement. Positive EX translates into high job satisfaction, increased productivity and more assured talent retention. Consulting firms and system integrators contribute to this space by implementing Workday's user-friendly interface and mobile capabilities and developing personalized dashboards and self-service options that empower employees and boost engagement.

Security and Compliance

Ensuring data security and regulatory compliance remains a critical concern for

organizations. Workday continuously updates its platform to comply with evolving regulations and implements advanced security protocols to protect sensitive data. Comprehensive audit trails and reporting features aid organizations in meeting compliance requirements. Enhanced security and compliance measures mitigate the risk of data breaches, avoid regulatory penalties and build trust with stakeholders. Consulting firms and system integrators play a significant role by implementing advanced security protocols and ensuring that organizations stay updated with evolving regulations in their Workday deployments.

Optimizing Workday Extend

Workday Extend is an integral component of the Workday platform, allowing organizations to build custom applications that seamlessly integrate with Workday's core functionalities. This capability provides businesses with the flexibility to address unique operational needs and extend the functionality of their Workday environment. By leveraging Workday Extend, companies can create tailored applications that enhance their business processes, improve

UX and drive innovation. Consulting firms and system integrators play a crucial role in maximizing the potential of Workday Extend. They help organizations identify opportunities for custom applications, develop and deploy these applications and ensure they are seamlessly integrated with existing Workday solutions. This support enables businesses to enhance their operational capabilities, streamline processes, and achieve greater efficiency.

Challenges and GSI Strategies

Data Migration

Migrating data from legacy systems to Workday can be complex and time-consuming. Global system integrators (GSIs) use automated tools and structured frameworks to streamline the data migration process, ensuring accuracy and minimizing downtime. They provide end-to-end support, from planning to execution, ensuring a smooth transition. The use of automated data conversion accelerators that offer thousands of automated validations ensures data integrity and smooth migration.



Customization and Scalability

Customizing Workday solutions to fit unique enterprise needs, while maintaining scalability, is a significant challenge. GSIs leverage modular approaches and scalable architectures to customize Workday solutions to specific business requirements and ensure that these solutions can scale and evolve with the concerned organization. Comprehensive implementation solutions include Workday HCM, Workday Financial Management and adaptive planning deployment accelerators that allow businesses to maintain long-term scalability and flexibility.

User training and adoption

Ensuring smooth adoption among end-users and maximizing RoI is crucial. GSIs provide comprehensive training programs and continuous support to help users become proficient with Workday. They develop change management strategies to facilitate adoption and drive user engagement. By integrating industry best practices into advisory services for

digital transformation, GSIs maximize RoI and enable real transformation within organizations. In 2024, the Workday ecosystem is characterized by trends such as an increase in cloud adoption, the use of data analytics, a focus on EX and concerns about security and consequent measures. GSIs play a crucial role in addressing the challenges associated with these trends, where they leverage their expertise to provide tailored solutions that drive business value. As organizations continue to navigate the digital transformation landscape, the strategic adoption of Workday solutions, supported by experienced GSIs, will be pivotal to achieving operational excellence and gaining a competitive advantage. Consulting firms and system integrators are integral to this environment and play an important role in enhancing Workday's capabilities, ensuring successful implementation and optimizing UX.

In conclusion, the adoption of Workday solutions in the U.S. is driven by the need to provide strategic guidance, technical expertise and comprehensive support to

help organizations navigate the complexities of digital transformation. This, in turn, leads to significant improvements in operational efficiency, regulatory compliance, employee engagement and overall business agility.

U.S. enterprises continue to embrace Workday in 2024, recognizing the significant benefits of transitioning to the cloud-based platform. This shift enables them to achieve strategic objectives 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 |
| Active Cyber | Not In | Contender | Contender |
| Avaap | Contender | Product Challenger | Product Challenger |
| Capgemini | Product Challenger | Product Challenger | Product Challenger |
| CapTech | Contender | Contender | Contender |
| CloudRock | Contender | Contender | Not In |
| Cognizant | Leader | Leader | Leader |
| CrossVue | Product Challenger | Rising Star ★ | Product Challenger |
| Deloitte | Leader | Leader | Leader |
| DXC Technology | Product Challenger | Product Challenger | Product Challenger |
| ERPA | Contender | Contender | Not In |





Provider Positioning

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| | Transformation Services | Deployment and Integration Services | Performance and Optimization Services |
|------------------|-------------------------|-------------------------------------|---------------------------------------|
| Glyde Consulting | Contender | Contender | Not In |
| Guidehouse | Market Challenger | Market Challenger | Market Challenger |
| Hexaware | Not In | Leader | Leader |
| Huron | Leader | Leader | Leader |
| IBM | Market Challenger | Leader | Market Challenger |
| Impact Advisors | Not In | Market Challenger | Market Challenger |
| Invisors | Leader | Leader | Leader |
| Jade Global | Contender | Product Challenger | Product Challenger |
| Kainos | Not In | Product Challenger | Leader |
| KPMG | Leader | Leader | Product Challenger |
| Mercer | Leader | Product Challenger | Product Challenger |





Provider Positioning

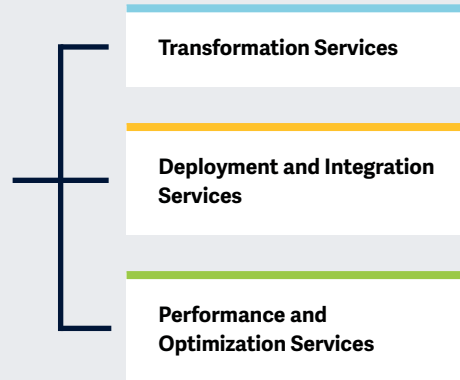
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| | Transformation Services | Deployment and Integration Services | Performance and Optimization Services |
|--------------------------|-------------------------|-------------------------------------|---------------------------------------|
| PwC | Leader | Leader | Leader |
| Skillcentrix | Rising Star ★ | Product Challenger | Product Challenger |
| Slalom | Product Challenger | Product Challenger | Product Challenger |
| Strada (formerly Alight) | Leader | Leader | Leader |
| TopBloc | Leader | Leader | Leader |
| UST | Product Challenger | Contender | Contender |



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

Simplified Illustration Source: ISG 2024



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 X (spell out the number of quadrants; do not use a digit) quadrants for services/solutions: 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/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the U.S. 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 enterprises across industries in the U.S. for evaluating providers of Workday transformation services.

In this quadrant, ISG highlights the current market positioning of providers offering transformation services to enterprises in the U.S. and underlines how each provider addresses the key challenges faced by enterprises in the region.

Enterprises in the U.S. are actively opting for transformation services to adapt to the changing competitive landscape and new business models in terms of functions and technology use. This active approach has led to a growth in demand for support for financial management (FM) and human capital management (HCM). Additionally, they are leveraging GenAI, AI, and ML to enhance capabilities in areas such as finance and HR through adaptive planning and Workday Extend. Workday Extend has found increased acceptance and is experiencing a high demand among enterprises in the U.S.

Enterprises are actively focusing on an innovative approach to HCM transformation to remain competitive. They are actively developing frameworks, solutions or tools to address HR-related issues and streamline processes. Software providers in the U.S. are actively aligning their strategy with an emphasis on technology, including cloud services, data management, GenAI, innovation and automation. They are reimagining their approach to various platforms and tools to streamline processes while providing robust security to enterprises. In addition, providers are looking to expand their advisory offerings to include more system-agnostic services focused on business transformation. The active emergence and use of GenAI presently underscore the significance of technology in consulting services.



Consulting leaders seeking advisory services, including management, technology, functional, and domain leaders, should read this report to learn about providers and their U.S.-specific Workday offerings.



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



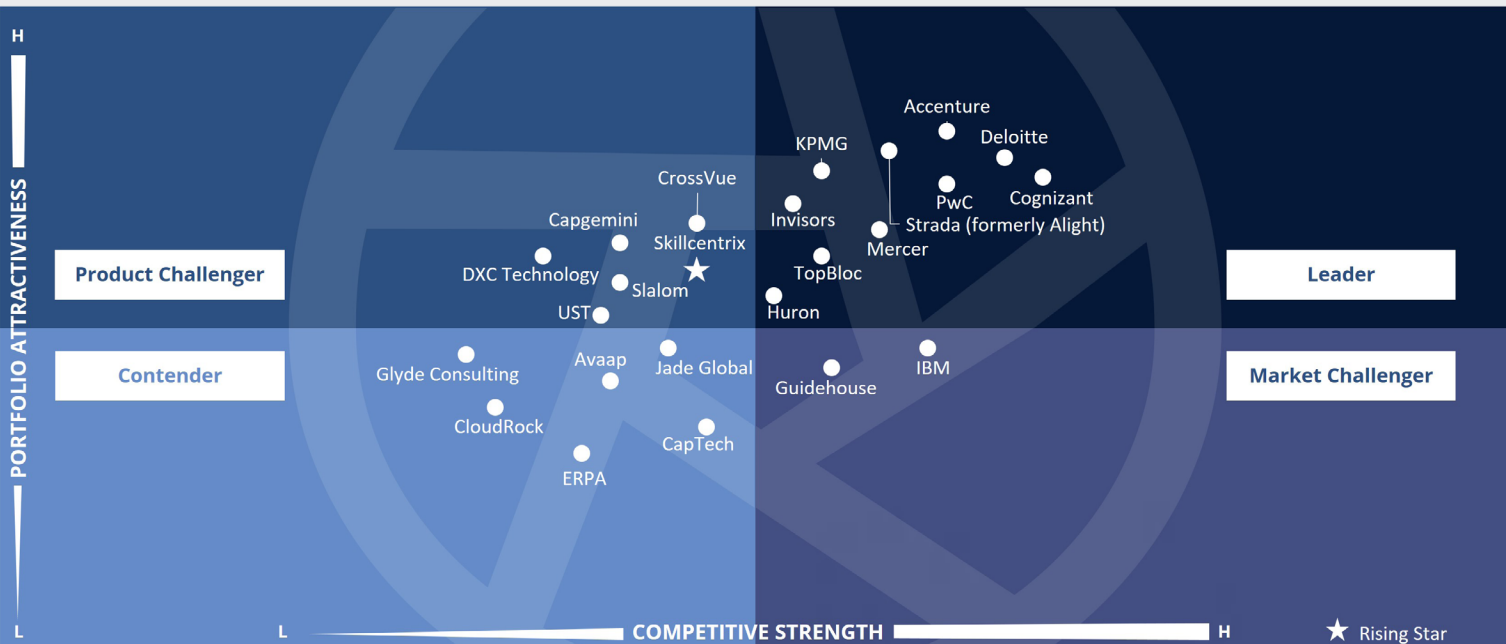
Business leaders, including CHROs, CFOs, payroll and financial leaders, focused on driving business outcomes, should read this report to understand the trends guiding providers with their Workday offerings.



***ISG Provider Lens™**
Workday Ecosystem
Transformation Services

Source: ISG RESEARCH

U.S. 2024



This quadrant assesses service providers offering **Workday transformation services**, evaluating their capabilities to deliver **consulting and advisory services to modernize HCM**.

Ashwin Gaidhani



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 transformation services have significantly expanded in the U.S. as many businesses now use cloud-based solutions for financial management (FM), human capital management (HCM) and adaptive planning. Workday has also invested in developing industry-specific solutions by utilizing its expertise and knowledge in the U.S. It is also focused on building a talented team to support these efforts. Some of the developments noted in this space include:

- Workday plans to expand its base in finance management among Fortune 500 companies and double its financial growth. It plans to further leverage AI and ML to build a robust platform.
- Workday is focusing on helping U.S. enterprises optimize and transform their Workday Skills Cloud, which involves supporting CXs in transitioning into a skill-first mindset, with a focus on talent optimization.

- Workday is developing its Adaptive Planning and Prism Analytics solutions across the U.S. for enterprises seeking these solutions to automate processes seamlessly and efficiently. The insights modeling and analytics functions of these solutions will accelerate Workday's product road map within the next two to three years. This is expected to lead to increased adoption of Workday's financial management solutions.
- Workday is focusing on talent acquisition to help clients understand business skills and requirements. The company is also focused on increasing M&A activities to create robust platforms and solutions to streamline processes.

From the 34 companies assessed for this study, 24 qualified for this quadrant, with 10 being Leaders and one Rising Star.

accenture

Accenture drives transformative outcomes by leveraging its expertise in integrating finance and HR capabilities within the Workday platform. This synergy empowers organizations to swiftly change and execute their strategies effectively.

cognizant

Cognizant's strong foothold in the government and education sectors and innovative packaged solutions underscore its prowess in handling complex transformation projects. It excels in Workday transformation by using proven accelerators and pre-built intellectual property assets.

Deloitte.

Deloitte excels in driving significant business changes with strategic Workday solutions. Its ability to tailor these solutions to industry-specific needs showcases Deloitte's expertise in delivering comprehensive, scalable results.

HURON

Huron offers Workday transformation services with deep industry expertise, innovative delivery methods and strong client partnerships. The company's agile approach and commitment to continuous improvement result in efficient, scalable and customized solutions for clients.

Invisors'

Invisors' absolute focus on Workday enables it to have the knowledge and experience it needs to deliver highly customized and effective transformation strategies to clients.

KPMG

KPMG, with over 16 years of experience and a strategic partnership with Workday, excels in transforming HR and finance functions by providing unified HCM and FM solutions. Its structured approach, which includes enhanced insights, reduces risks and drives business value for clients.



Transformation Services

Mercer

Mercer specializes in business transformation through its extensive knowledge in HR and finance and comprehensive Workday implementation services.



PwC's holistic approach ensures that HR and financial transformations are seamlessly integrated through scalable technology solutions that evolve with an organization and unlock significant business value.

Strada (formerly Alight)

Strada (formerly Alight) with its comprehensive services suite, excels in technology, process and configuration solutions, addressing strategic challenges in the public sector and the financial services, retail, professional services and healthcare industries.

TopBloc

TopBloc distinguishes its Workday transformation services by facilitating industry-leading time-to-value Workday deployments. A boutique approach and focus on client-specific needs have positioned it as a trusted partner for Workday solutions.

Skillcentrix

Skillcentrix (Rising Star) leverages its exclusive focus on the Workday customer base, unique client engagement model, long-term partnership strategy and close collaboration with Workday to deliver exceptional transformation services in the talent and skills space.



Deloitte



"A leader in the Workday partner ecosystem, Deloitte excels in supporting complex transformations with proven offerings and also provides industry-leading Workday solutions covering risk advisory and compliance, cybersecurity and taxation."

Ashwin Gaidhani

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. Deloitte leverages its industry experience and innovative approaches to accelerate digital transformations. Its Momentum Express approach, a part of the Workday Fast Forward methodology, uses pre-configured solutions for quick, high-quality implementations. It has successfully served several Workday clients - from complex transformation projects for global enterprises to pre-configured transformation projects for local, midsize companies across industries.

Strengths

Tools and accelerators to drive innovation:

Deloitte offers industry-specific solutions, tools and accelerators, covering higher education; government; life sciences and healthcare; financial services and insurance; technology, media and telecom; and consumer markets. It facilitates the digital transformation of its clients' enterprises and delivers rapid impact to value. Deloitte also uses Workday Extend to innovate industry-specific use cases and to incorporate AI/ GenAI services.

HCM and finance transformation: Deloitte designs, implements and integrates Workday HCM solutions, delivering sustained value and meaningful work experiences. The company is helping its clients modernize finance through real-time insights and value

to bring about rapid transformation. Deloitte enables the use of digital technologies in finance through its Workday practice. It accelerates digital transformation to future-proof clients' business models and address evolving customer needs, driving high revenue growth.

Advancing planning and analytics: Deloitte enables clients worldwide gain an edge over their competitors. It helps them transform strategy into actionable insights, leveraging analysis to provide context behind numbers and equipping them with the ability to respond to business changes.

Caution

Deloitte should continue to enhance its innovation strategies within the transformation services space to stay abreast with market trends and adapt to evolving client needs to bolster its position as a market leader.





Deployment and Integration Services

Deployment and Integration Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers of Workday deployment and integration services.

In this quadrant, ISG highlights the current market positioning of providers offering Workday deployment and integration services in the U.S. and underlines how each provider addresses the key challenges faced by enterprises in the region.

Workday has gained a strong foothold in the human capital management (HCM) market in the U.S. Enterprises in the region are focused on enhancing EX and engagement across their organizations. There is much emphasis on M&A to build partnerships to create robust and innovative platforms that not only streamline processes but also ensure the right governance of technologies. The primary focus of enterprises and providers alike is on integrating and developing Workday Extend. With the emergence of GenAI, enterprises are now looking for providers that can leverage this advanced technology and offer new approaches to creating platforms or solutions.

The challenge with GenAI is that providers are yet trying to determine how to best integrate the technology with their solutions and address the consequent security concerns. To this end, providers are taking the support of Workday's GenAI governance practice to implement the technology, while prioritizing enterprise data security. Technological advances in the HCM space will continue to shape the adoption and integration of the Workday platform in the U.S.



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



Engineers and architects responsible for Workday implementations can use this report to understand the developments in Workday solutions and the support available to build tools or accelerators.



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





This quadrant assesses providers that offer deployment and integration services, where it evaluates their **methodologies** and **frameworks**, including proprietary and **industry-specific systems** that ensure comprehensive and effective **digital transformation**.

Ashwin Gaidhani



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

Workday is expanding its range of applications beyond core HR and is now concentrating on using GenAI, AI and ML to develop automated, robust platforms that streamline processes in U.S. enterprises. Workday is currently focusing on creating industry-specific solutions (using the mentioned technologies) and providing these solutions to clients who are seeking automation through offerings such as Workday Extend, Orchestrate and Prism Analytics to streamline business processes. Some of the developments noted in this space include:

- Workday is automating processes to integrate with existing systems and migrate data. The company is enhancing its expertise in integration frameworks, data migration strategies and middleware for a smooth transition.
- The U.S. is experiencing a surge in demand for deployment and integration services; many businesses are increasingly choosing Workday to support business expansion.

- Service providers are creating industry-specific reports and dashboards to improve on the Workday-provided reports, thus providing enterprise leaders with actionable data based on their own experience deploying Workday. Prism Analytics and Accounting Center are becoming standard Workday offerings in client engagements, rather than exceptions. Service providers are also increasing their global capabilities.
- Workday service providers in the U.S are extending their reporting capabilities to gain insights into various aspects and stages of Workday implementations. For enterprises, this significantly increases transparency, trust and control on projects, while averting scenarios that can have an adverse impact on business.

From the 34 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture's prowess in deployment and integration is highlighted by its ability to drive interoperability and transformation through seamless integration of Workday with other cloud platforms.



Cognizant's Workday deployment and integration services are anchored by its proprietary Cynergy™ methodology, which enhances efficiency and ensures adherence to best practices. It excels in deployment and integration through rigorous standards and proprietary tools.

Deloitte.

Deloitte distinguishes its Workday deployment and integration services through its ability to unify complex data environments and automate critical processes using proprietary solutions. It has won the 2024 Workday Partner Innovation Awards in key verticals.

HEXAWARE

Hexaware's deployment and integration approach is underpinned by a robust change management framework, HexValidate, which ensures compliance with all Workday updates through comprehensive monitoring and testing.



Huron leverages its expertise in Workday and deploys a comprehensive suite of Workday tools to assist clients in transforming complex systems and processes to prepare for future M&A.



IBM excels in integrating Workday solutions with third-party systems, providing advisory services for customer data integration. It ensures rapid solution development and maximum RoI with Workday Extend.



Deployment and Integration Services

Invisors'

Invisors' deployment and integration strategy is thorough, starting with a foundational understanding of a client's business and extending to precise execution of requirements. It uses proprietary tools to ensure smooth data migration as needed for seamless Workday integrations.



KPMG's Workday deployment and integration services are characterized by a structured, risk-reducing approach that accelerates implementation and drives speed to value.



PwC's extensive use of proprietary tools and continuous training programs ensure that its consultants are abreast with Workday's latest features and best practices. It leverages proprietary tools and a structured approach to ensure seamless and compliant integrations.

Strada (formerly Alight)

Strada (formerly Alight) Workday deployment approach is differentiated by its preparedness, proprietary tools and comprehensive integration capabilities. It brings together Workday integrations, client architecture and best practices for smooth platform transitions.

TopBloc's

TopBloc's comprehensive Workday deployment integration strategies, utilizing tools such as Workday Studio and Workday APIs, are tailored to meet specific client needs, facilitating real-time data flow and informed decision-making.

CrossVue

CrossVue (Rising Star) leverages its human capital and financial management expertise to help clients optimize business functions and navigate complex change initiatives successfully. It merges innovation with technical expertise to enhance efficiency using Workday's tools.





"Deloitte develops implementation accelerators to enable digital transformation and fast delivery of impact and value for its clients."

Ashwin Gaidhani

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 by utilizing innovative tools and methodologies, tailored to meet industry-specific requirements. It capitalizes on its expansive global network to implement Workday solutions, with a strong focus on expanding its reach beyond the U.S. to tap into other markets.

Strengths

Advise, Implement and Operate (A-I-O)

Model: Deloitte's integrated and outcome-based services include end-to-end solutions for organizations, guiding them on key issues and strategies, simplifying implementation, operating core services and functions, and ensuring a continuous advantage. Its operating model offers several benefits such as enabling cost optimization, offering full life cycle services, deriving insights, fostering increased collaborations, ensuring accelerated time to market and bringing about risk mitigation.

Industry-leading accelerators: Deloitte, a part of Workday's Industry Accelerator Program, has developed industry-specific accelerators for digital transformation. These cover insurance, investment management,

healthcare, and higher education, technology, retail and banking. Deloitte's solutions such as InsureAcceleration, InstaView and Content Accounting Calculator has enabled it to earn 2024 Workday Partner Innovation Awards in three categories: Financial Services, Retail, and Technology and Media.

Focus on product innovation: Deloitte prioritizes Workday innovation, launching Invest Acceleration. This suite addresses risks such as lack of agility, complex workflows, and disparate data models, helping investment management firms maximize their business investments.

Caution

Deloitte's investments in accelerators and innovation ensure seamless, rapid deployment and integration of Workday solutions to maintain its competitive edge. Any delays or inefficiencies in these services could erode client trust.





Performance and Optimization Services

Performance and Optimization Services

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers of Workday performance and optimization services.

In this quadrant, ISG highlights the current market positioning of providers offering Workday performance and optimization services in the U.S. and underlines how each provider addresses the key challenges faced by enterprises in the region.

The U.S. is currently experiencing a surge in migration to cloud-based platforms among enterprises. They are seeking service providers that offer comprehensive Workday Performance and Optimization services, covering pre-deployment to post-deployment support. The providers are now focusing on providing flexible support at all stages of a Workday journey. Additionally, they are increasingly focusing on expanding post-production operational capabilities and on continuous success management to enhance customer satisfaction and retain their growing CX base, which is crucial for success with future deployments.

Enterprises having realized the importance of optimization services are opting for providers that aid them in transitioning from legacy HR platforms to new and more advanced HCM options. Furthermore, an increasing number of providers are reimagining post-deployment processes to ensure a smooth transition from traditional processes to automated ones. Enterprises in the region are seeking service providers that offer end-to-end post-deployment services and invest in innovation and engineering to deliver effective and optimal Workday services at reduced costs.



Operations and delivery leaders responsible for EX, business planning and financial management should read this report to understand how Workday service providers retain their service quality and credibility.

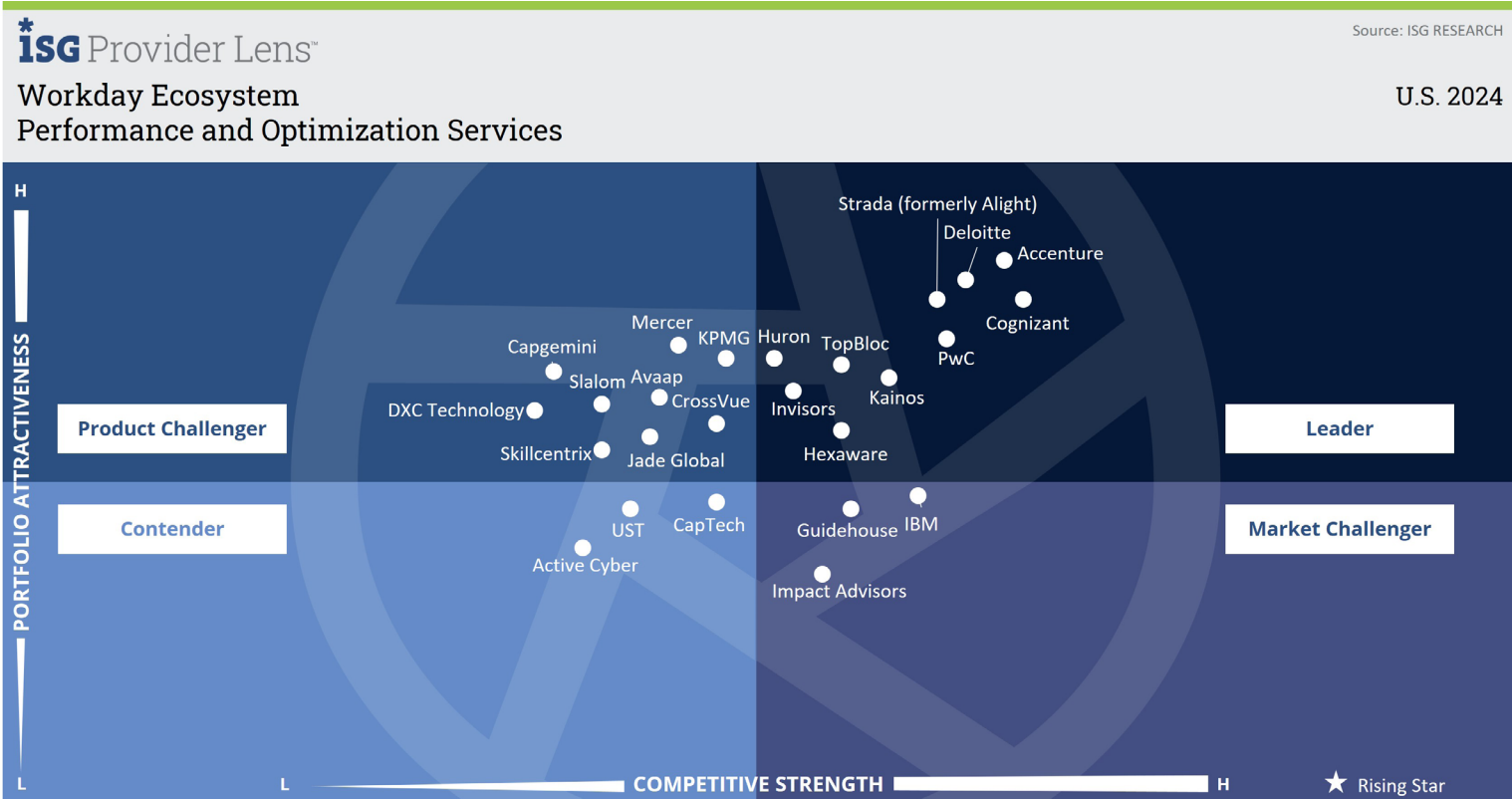


Customer success and experience leaders championing enterprises' voices in the market should read this report to analyze providers' service skills, adherence to SLAs and ability to offer customer feedback proactively.



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





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

Ashwin Gaidhani



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

Programs, initiatives and partnerships play a crucial role in driving Workday's engagement with enterprise clients. Workday has established a strong and regulated partner network to ensure that the platform product team effectively manages quality-of-service (QoS) capabilities. The partner network includes large global system integrators (GSIs), independent software vendors (ISVs) and consulting firms, all of which are constantly evolving. Some of the developments noted in this space include:

- Workday's partner-driven transformation focuses on introducing services that complement its specialized services, and include professional services, application management services (AMS), and consulting and advisory services.
- A significant development in terms of post-deployment support is the Workday Community, which comprises forums, blogs, videos, webinars and events. It enables customers to access resources, share best practices and collaborate with other

Workday users and experts. Customers can submit ideas and feedback to Workday through the community and vote on the ones they like. Workday uses this input to prioritize and deliver product enhancements and innovations.

- Service providers are predominantly investing in developing CoEs around cutting-edge innovations, especially to support M&A and divestitures, by developing tools such as M&A data migration tools for enterprise clients.

From the 34 companies assessed for this study, 25 qualified for this quadrant, with 10 being Leaders and no Rising Star.



Accenture focuses on leveraging AI and ML within the Workday ecosystem to enhance client capabilities, providing actionable insights and improving overall system performance.



Cognizant's performance and optimization services are distinguished because of its use of advanced analytics, AI and ML to enhance system efficiency. Its SOAR and UAR programs offer real-time insights, allowing clients to maximize their Workday investments.



Deloitte's Workday performance and optimization services are geared toward enhancing operational efficiency for its clients through continuous innovation. Its services future-proof organizations by automating processes and unifying data to enhance accuracy and ensure compliance.



Hexaware's Workday performance and optimization services leverage innovative technologies and a mature engagement model to deliver cost-effective and efficient solutions. Its unique HexValidate platform delivers solutions for automated testing and quality control.



Huron leverages its extensive experience as a Workday Services Partner to deliver notable performance and optimization services. It focuses on building lasting partnerships, providing proactive technical problem-solving support and offering training to boost self-sufficiency.



Invisors provides robust Workday performance and optimization services, with a focus on customer enablement and proactive management, helping clients optimize their Workday use through advanced analytics and governance, as well as tailored support packages.



Kainos leverages its extensive experience as a Workday Services Partner to deliver noteworthy performance and optimization services. It focuses on building lasting partnerships, is proactive in technical problem-solving and offers training to boost self-sufficiency.



Performance and Optimization Services



PwC offers exceptional Workday performance and optimization services. Its solutions include advanced analytics, automated reporting and strategic cost intelligence — all aimed at maximizing the value of Workday investments.

Strada (formerly Alight)

Strada (formerly Alight) excels in offering flexible, scalable and ongoing support, tailored to meet clients' specific needs, regardless of the stage of their journey with Workday. Its performance and optimization services, together with flexible support, drive business outcomes.

TopBloc

TopBloc offers unique Workday performance and optimization services within the Workday ecosystem, differentiated because of flexible engagement options. Its innovative tools, such as SmartLoader and AuditPro, enhance service delivery, ensuring optimal Workday performance.





"Deloitte's continuous innovation and quality-assured delivery approach have enabled it to be a Leader."

Ashwin Gaidhani

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's Workday performance and optimization services are designed to future-proof organizations by sustaining and extending their Workday investments. Its AMS offerings and broader operate services ensure that clients can adapt rapidly to changing conditions, automate processes and unify data across an enterprise. Deloitte's robust Workday performance and optimization services bundle reduces costs and enhances client support in the U.S.

Strengths

Workday teams: Deloitte's Workday team, which includes Workday-certified experts, helps with maintenance and managing operational risks. It enables efficient incident management and issue resolution, maintains master data and configurations, and manages security. Deloitte has partnerships with vendors for seamless handoffs, supporting users at all levels.

Continuous innovation: Deloitte continuously invests in innovative technologies and applications across industries. Its GenAI-enabled Ascend Delivery Platform assists clients in accelerating their time to market and minimizing implementation costs and risks. These solutions are developed based on proven implementation approaches and


insights gained from industry know-how and client experience. Deloitte has established a global delivery network including workday certified consultants that leverages GenAI-based services for different business scenarios.

Quality assurance: Deloitte works with the Workday Delivery Assurance team to ensure comprehensive, high-quality implementations. It fortifies Workday engagement partners with the right tools and knowledge to implement Workday products effectively and efficiently. Deloitte's Advise, Implement and Operate (A-I-O) model ensures the highest quality of performance and optimization across the Workday partner ecosystem.

Caution

Deloitte should continue to prioritize improvement and proactive optimization of Workday solutions to retain its top position and remain a strong competitor and leader in the competitive landscape.





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.

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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

Ashwin Gaidhani
Lead Analyst

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and

leads the ISG Provider Lens™ research projects for the markets in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large Global System Integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.



*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

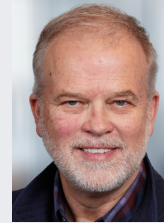


Aman Munglani
Director: Hyperscalers, Digital
Innovator Series and Custom Research

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](#).

iSG Research™

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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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