ISG Provider Lens®

Workday Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Deloitte.

QUADRANT REPORT | OCTOBER 2025 | U.S.

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Report Author: Ashwin Gaidhani

The U.S. Workday services market has fundamentally shifted from basic implementation proficiency to a more sophisticated battleground defined by higher-value services

The Workday market in the U.S. has transcended its initial identity as a disruptive, cloud-native HCM solution to become a deeply entrenched and mature enterprise ecosystem. This landscape is defined by robust financial growth, intense competition and a significant strategic pivot from foundational platform implementation to delivering continuous, quantifiable business value. The central thesis of the market in 2025 is that Workday is no longer merely a system of record; it is being positioned as the intelligent digital core for enterprise operations, a central nervous system designed to orchestrate finance, talent and operations with unprecedented agility. This transformation is driven by a confluence of powerful trends, including the practical application of AI, the strategic imperative of a skills-based talent strategy, the evolution of the platform into an open and extensible economy and a sophisticated bifurcation of the partner services landscape, where success increasingly depends on deep specialization and innovation.

The health and maturity of the U.S. Workday market are unequivocally reflected in its strong financial performance. In FY25, Workday reported total global revenues of $8.446 billion, marking a significant 16.4 percent increase from the previous year. This growth is underpinned by a robust subscription-based model, which accounted for $7.7 billion of the total revenue, indicating a sustained influx of new customers and, critically, the expansion of services within the existing client base.

Several key factors fuel this financial momentum. Firstly, there is a clear and accelerating trend toward finance-led transformations. While Workday's initial market penetration was heavily driven by its best-in-class HCM suite, a growing number of U.S. organizations are now adopting Workday Financial Management as the cornerstone of their modernization efforts.

Enterprises seek an **intelligent, flexible and secure platform** to **manage** their **people and money**.

CFOs are championing this shift to dismantle legacy systems, gain real-time visibility into enterprisewide financial health and foster an agile, data-driven approach to financial planning and analysis. This trend signals Workday's successful expansion beyond the Chief Human Resources Officer's (CHRO) domain and into the strategic core of the C-suite.

Secondly, Workday and its partners are successfully expanding their addressable market beyond the Fortune 500. There is a concerted effort to penetrate the medium enterprise space, where specialized partners are offering more agile deployment methodologies and tailored commercial models to attract a new wave of clients. This market penetration is crucial for long-term growth.

Finally, growth is being driven by a land and expand strategy within the existing customer base. The most mature Workday clients are deepening their investment by adopting a wide array of modules, including Workday Adaptive Planning, Spend Management and Prism Analytics. This trend is reflected in the substantial commitments indicated by typical deal structures.

For midmarket to large enterprise clients in the U.S., average annual deal sizes range from $300,000 to well over $1 million, with comprehensive sales and implementation cycles spanning nine to 18 months, highlighting that a Workday deployment is a major strategic and financial undertaking.

The core strategic drivers reshaping the market

The market's evolution is not merely financial; it is driven by powerful strategic imperatives that are reshaping how businesses operate and compete.

1. The ascent of practical and agentic AI: AI has moved from a marketing buzzword to a tangible and central value driver within the Workday ecosystem. The focus is squarely on the practical application of AI and ML to solve real-world business problems. A key development is the rise of agentic AI, where AI agents are being designed to autonomously execute complex, multistep tasks. For instance, in talent acquisition, an AI agent could source candidates, conduct initial screenings and schedule interviews, freeing human recruiters to focus on strategic engagement. This is being applied across the platform to automate financial processes, identify operational inefficiencies, deliver predictive forecasts and provide personalized learning and career recommendations to employees. This push is creating immense demand for services that help clients implement these features and ensure their data is clean and structured enough for the AI to be effective, fostering a new emphasis on data governance and explainable AI to build user trust.

2. The human-centric imperative encompassing skills, talent and experience: In a fiercely competitive U.S. labor market, talent management has become a paramount strategic priority, and Workday is positioned as an essential tool in this battle for talent. This is evident in the widespread adoption of a skills-based talent strategy. Organizations are moving away from rigid, job-based roles toward a more dynamic understanding of their workforce centered on skills.

By leveraging tools such as the Workday Skills Cloud, companies can identify current skillsets, predict future needs and establish an internal talent marketplace. This approach facilitates internal mobility, addresses skills gaps through targeted development and ultimately improves employee retention by demonstrating clear pathways for career growth. This strategy is intrinsically linked to enhancing the overall EX. The goal is to provide a seamless, intuitive and personalized digital journey for every employee, from onboarding to career development, mirroring the consumer-grade experiences they are accustomed to in their personal lives.

3. The evolution into an open platform economy: One of the most significant long-term strategic shifts is Workday's evolution from a closed, monolithic application into an open, extensible platform ecosystem. This transition is primarily driven by two key initiatives: Workday Extend and the Workday Marketplace.

Workday Extend, a low-code/no-code PaaS, empowers both customers and partners to build their own custom applications and business processes directly on the Workday data core. This capability has unleashed a wave of innovation, allowing organizations to address unique business challenges and fill functional white space without resorting to fragile, out-of-system integrations.

The Workday Marketplace serves as an enterprise app store, where partners can list and sell these *Built on Workday* solutions. This creates a virtuous cycle: it generates new revenue streams for partners, increases the value and *stickiness* of the Workday platform for customers and fosters a collaborative community of innovators.

The bifurcated and highly competitive services landscape

The maturity of the market has given rise to a sophisticated and highly competitive partner services landscape, rendering the one-size-fits-all implementation partner obsolete. The ecosystem has largely bifurcated into distinct archetypes, each with a unique strategy for capturing market share.

1. The strategy of global systems integrators (GSIs): The largest consulting firms operate at the upper end of the market, positioning Workday as the technological pillar of massive, end-to-end business transformation projects. Their strategy goes beyond merely implementing Workday; they aim to integrate it into a client's broad strategic objectives. They differentiate themselves through deep, industry-specific expertise, developing proprietary accelerators and frameworks for verticals such as financial services, healthcare and the public sector. These GSIs work closely with Workday to penetrate new markets, such as the complex U.S. Federal space. For them, a Workday project often serves as a strategic entry point that leads to significant downstream revenue from change management, process re-engineering and other high-value advisory services.

2. The agility of specialized boutique leaders: In contrast to the scale of the GSIs, a vibrant segment of specialized boutique firms competes through focus, speed and business model innovation. These partners develop deep expertise in specific domains, whether in a particular industry vertical (such as Professional Services), a complex business process (for example, global payroll) or a target market (such as medium enterprises). The partners differentiate themselves by their agility, offering rapid deployment methodologies that enable them to complete projects in a fraction of the time required by traditional implementations. Furthermore, they are disrupting legacy commercial models with innovative offerings such as fixed-fee pricing for support, providing clients with predictable costs and a high-touch service experience.

3. The disruption of IP-led innovators: A third, and increasingly influential, category of partners differentiates itself through technology and intellectual property (IP). These firms operate more like software companies than traditional consultancies. Their core strategy revolves around building and selling proprietary software products—often delivered as Workday Extend applications—that enhance or supplement native Workday functionality. These products address specific needs, such as automated testing, compliance auditing and advanced document management. These IP-led innovators are often at the vanguard of the ecosystem, embracing Workday's newest technologies, including agentic AI, and building the first wave of solutions that demonstrate their potential.

> Enterprises seek a unified data core and single source of truth, with actionable, real-time analytics and insights, superior UI and enhanced business process agility and standardization. The future of the Workday ecosystem in the U.S. will be shaped by the deepening integration of AI across all facets of the platform, an increasing demand for hyperspecialized services and the continued expansion of the open platform economy.

Provider Positioning

	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Accenture	Leader	Leader	Leader	Leader
Active Cyber	Not In	Contender	Contender	Product Challenger
Avaap	Contender	Product Challenger	Product Challenger	Product Challenger
Capgemini	Product Challenger	Contender	Contender	Contender
CapTech	Contender	Contender	Contender	Not In
CloudRock	Contender	Not In	Not In	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
Commit Consulting	Not In	Product Challenger	Contender	Not In
CrossVue	Product Challenger	Product Challenger	Product Challenger	Rising Star ★
Deloitte	Leader	Leader	Leader	Leader

Provider Positioning

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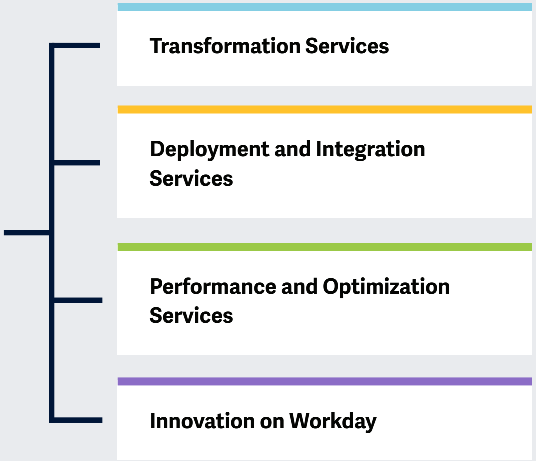
	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
DXC Technology	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
ERPA	Contender	Contender	Contender	Contender
Glyde Consulting	Contender	Contender	Not In	Not In
Guidehouse	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Hexaware	Product Challenger	Leader	Leader	Product Challenger
Huron	Leader	Leader	Leader	Leader
IBM	Leader	Leader	Market Challenger	Leader
Impact Advisors	Not In	Market Challenger	Contender	Not In
Intecrowd	Contender	Product Challenger	Contender	Product Challenger
Invisors	Leader	Leader	Leader	Leader

Provider Positioning

	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Jade Global	Product Challenger	Product Challenger	Product Challenger	Contender
Kainos	Rising Star ★	Rising Star ★	Leader	Leader
KPMG	Leader	Leader	Leader	Leader
Mercer	Leader	Product Challenger	Product Challenger	Product Challenger
PwC	Leader	Leader	Leader	Leader
Skillcentrix	Product Challenger	Product Challenger	Contender	Contender
Slalom	Product Challenger	Product Challenger	Product Challenger	Contender
Strada	Leader	Leader	Leader	Leader
TopBloc	Leader	Leader	Leader	Leader
UST	Product Challenger	Product Challenger	Product Challenger	Product Challenger

The Workday study focuses on the **road map of Workday and its service partners** to provide intelligent **HCM and financial management.**



Simplified Illustration Source: ISG 2025

Definition

The Workday Transformation Services quadrant evaluates providers based on their capabilities in Workday consulting, strategy and advisory services, with an emphasis on digital HCM transformation, adoption of emerging technologies and organizational change management. Providers are assessed on their ability to deliver comprehensive digital workforce strategies, seamless integration of the Workday platform and effective management of technology-driven organizational changes. A key differentiator for providers is their ability to leverage AI-driven enhanced solutions such as Workday Illuminate, integrated with predictive analytics, intelligent process automation, GenAI and agentic AI to optimize UX, streamline HR operations and boost workforce productivity within the Workday ecosystem. Leaders in this quadrant assist clients with accelerating their digital transformation and speeding up time to value by addressing industry-specific challenges.

Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/ solutions: Transformation Services, Deployment and Integration Services, Performance and Optimization Services and Innovation on Workday

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.

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.

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.

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 valuable for service providers offering transformation services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy professionals

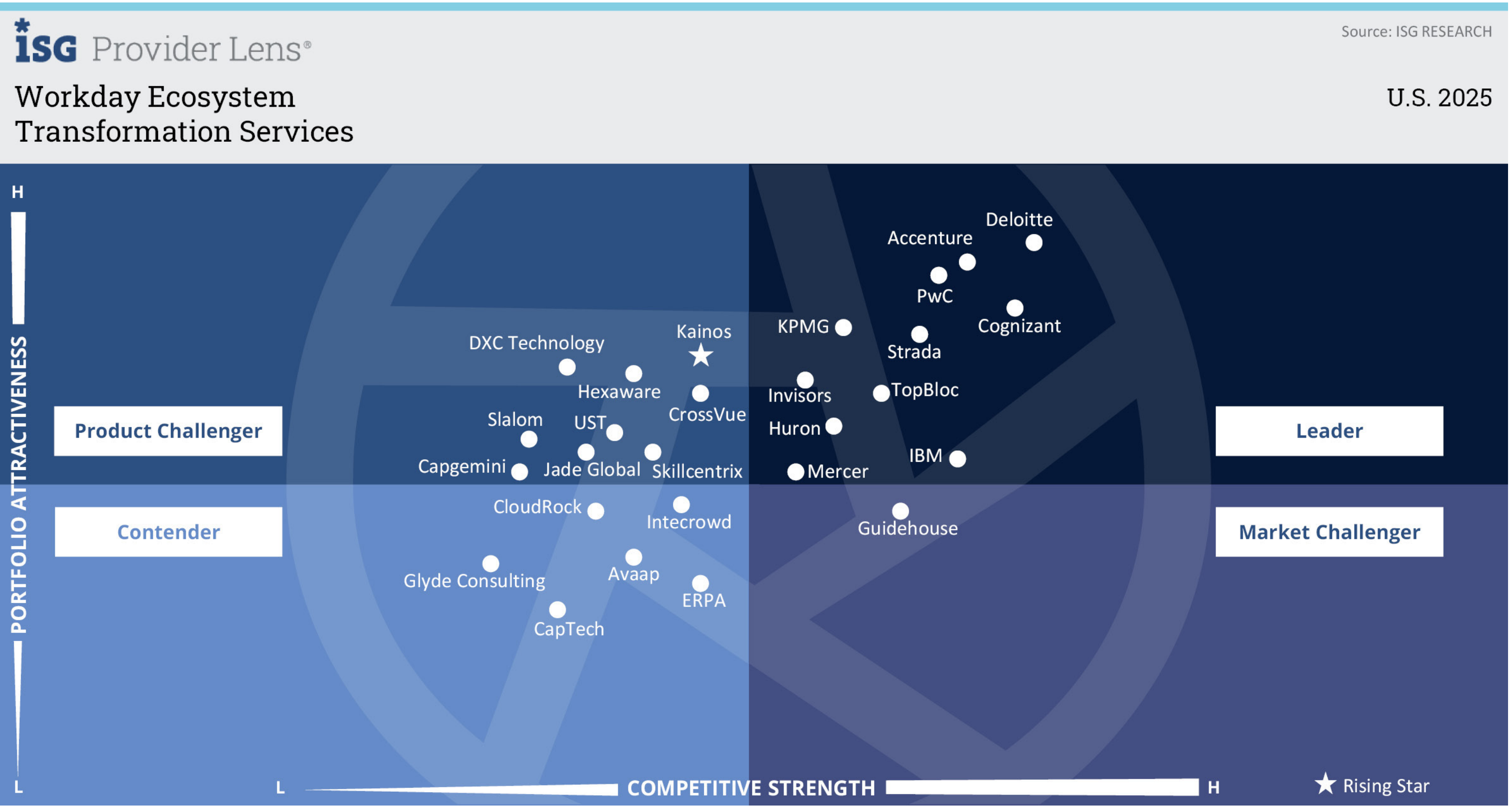
Should review this report to gain insights into evolving trends in Workday transformation services. It will help them choose the right partner for a long-term road map on the Workday platform. These providers support enterprises in the development of a digital acceleration strategy, aiding them in selecting the appropriate Workday products tailored to their specific needs in accordance with their organization's size and goals.

IT and technology professionals

Should read this report to learn about industry-specific Workday solutions and providers' prowess in undertaking consulting projects for diverse industries and functions. This understanding will provide insights into the way service providers design Workday solutions and leverage their ecosystem to seamlessly run the platform with third-party systems.

Business and financial leaders

Focused on driving business outcomes should read this report to understand the design frameworks, evaluation methodologies, and process maturity and complexities associated with Workday adoption across industries. This report provides a view of unique and successful use cases across industry verticals, highlighting a provider's domain knowledge and capabilities.



The service providers in this quadrant **show great diversity in their outlooks** for **enterprise transformation through Workday** and the resources they apply to help clients achieve it.

Ashwin Gaidhani

Definition

The Workday Transformation Services quadrant evaluates providers based on their capabilities in Workday consulting, strategy and advisory services, with an emphasis on digital HCM transformation, adoption of emerging technologies and organizational change management. Providers are assessed on their ability to deliver comprehensive digital workforce strategies, seamless integration of the Workday platform and effective management of technology-driven organizational changes. A key differentiator for providers is their ability to leverage AI-driven enhanced solutions such as Workday Illuminate, integrated with predictive analytics, intelligent process automation, GenAI and agentic AI to optimize UX, streamline HR operations and boost workforce productivity within the Workday ecosystem. Leaders in this quadrant assist clients with accelerating their digital transformation and speeding up time to value by addressing industry-specific challenges.

Eligibility Criteria

1. Have the ability to identify opportunities to develop **new Workday competencies** using **best practices** and to create an **adoption road map with frameworks, tools and templates**
2. Can evaluate the HR **management landscape to design service transformation strategies, set up road maps** and provide in-depth, industry-specific knowledge of the Workday product portfolio
3. Focus on **digital business transformation competencies and have expertise in industry-specific functions and strategic consulting, including ESG** and **GRC**
4. Possess Workday platform certifications to **predict long-term technology developments** and adoption to ensure **timely delivery of solutions** using **expertise** and **partnerships**
5. Have change management experience and a **Workday-certified resource pool** with solution-building expertise.

Observations

Most service providers in the Transformation Services quadrant can be classified as either Workday specialists or enterprise transformation specialists. While providers in each category follow different paths, they achieve similar results. Consulting and advisory firms typically focus on HR transformation and overall enterprise transformation, viewing Workday as a tool to facilitate big changes. A few of these companies may offer alternatives to Workday, such as Oracle HCM, SAP SuccessFactors, even though they also maintain Workday practices and certifications. In contrast, Workday specialists prioritize the platform first and show more flexibility in tailoring it to the client's needs, sometimes with less emphasis on comprehensive transformation.

Recognizing these distinctions is important so enterprise clients can decide which service provider qualities they value most. Most providers, even Leaders, are not equally strong in specific Workday knowledge or in their approach and methodology for transformation planning.

This quadrant features a wide range of niche specialists with expertise in various industries and client company sizes. There is also diversity in consulting approaches, with some providers specializing in fast and highly structured engagements, while others are more accommodating of the client's preferred pace.

The technological transformation occurring within the Workday platform is not as apparent in Transformation Services as it is in the other quadrants. While service providers are informing clients about how AI can support transformation and improve operations, AI is not yet widely used in the consulting process. However, some providers effectively leverage analytics to assess clients' needs and determine optimal future states.

From the 30 companies assessed for this study, 27 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture has a well-established and comprehensive Workday consulting practice with recent successes in AI developments and the public sector.

Cognizant positions itself as a transformation consultancy with a full suite of advisory services, including strategic road mapping and OCM. It is actively engaged in co-sell and referral programs with Workday to drive new subscriptions and SKUs, indicating a strong collaborative GTM approach.

Deloitte is a powerhouse in the Workday ecosystem, underscored by its designation as the 2025 Workday Global Partner of the Year. As a Titanium sponsor of Workday events, the firm maintains high visibility and a deep strategic relationship with Workday.

Huron is a Workday specialist known for its expertise in the healthcare, higher education, nonprofit, business services and public sectors.

IBM views Workday as a tool to facilitate organizational transformation and guides clients through the possibilities via its consulting process.

Invisors has developed accelerators for several niche industries, such as gaming, architecture and engineering, law, research and other professional services, that are often overlooked by most Workday partners.

KPMG brings a big-picture view and specific Workday insights to consulting engagements.

Mercer

Mercer's development of proprietary tools such as Mercer Accelerate™ and Mercer Assure + Change is a strategic move to complement the firm's consulting strengths with tangible technological assets. These tools address key client concerns around speed of deployment and post-go-live risk.

PwC's large tax practice provides tax consulting expertise to its clients, which is crucial for Workday Financials and payroll tax, ensuring compliance and optimal configuration. This includes solutions such as the Pillar 2 Extend Solution for global minimum tax compliance.

Strada offers a full range of Workday services, but its primary market identity is that it is a leader in simplifying complex, multicountry workforce management and payroll operations.

TopBloc is solely focused on Workday and won the 2025 Workday Business Impact Partner of the Year award for its transformative client outcomes.

Kainos (Rising Star) brings a heavy Workday focus, a full scope of services and a broad technology portfolio to transformation consulting and Workday planning projects.

Leader

"Deloitte's balanced strategy lies in providing sector-specific solutions and focusing on achieving business outcomes by addressing critical workforce and finance priorities."

Ashwin Gaidhani

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries and in 700 offices. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. The U.S. has a large concentration of certified Workday consultants, including 977 practitioners (over 700 HCM and more than 400 FINS certified). It has a strong position in healthcare in North America, where it has secured nine new logos, implementing comprehensive strategies, including those related to pricing and marketing.

Strengths

Scale and depth of certified talent: A talent pool of over 3,560 certified personnel enables Deloitte to concurrently support multiple large-scale global transformations — a scale rarely seen among its competitors. For large enterprises, where the availability of certified talent is a primary criterion for vendor selection, Deloitte's ability gives it a significant competitive advantage.

Comprehensive transformation services portfolio: Deloitte offers a spectrum of transformation services, including the Innovate to Operate framework, for continuous improvement and Deloitte *Ascend*™ for intelligent automation, as well as robust planning and analytics advisory services. This broad portfolio allows it to engage with clients on an expansive strategic plane, encompassing everything from foundational process redesign in finance and HR to advanced AI and data strategy.

Award-winning, industry-focused innovation: Deloitte has a proven and recognized track record of developing industry-specific solutions, including a suite of accelerators covering banking, healthcare, higher education and technology. This track record demonstrates a core strength in translating deep industry knowledge into tangible, value-added offerings that resonate with industry-specific challenges.

Caution

Deloitte's extensive breadth of services and established portfolio of methodologies are suitable for large-scale, complex transformations. It might occasionally be seen as less agile, compared with focused boutique or pure-play Workday partners, for niche or emerging Workday-specific strategic advisory needs.

Deployment and Integration Services

Who Should Read This Section

This report is valuable for service providers offering **deployment and integration services** in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Technology leaders

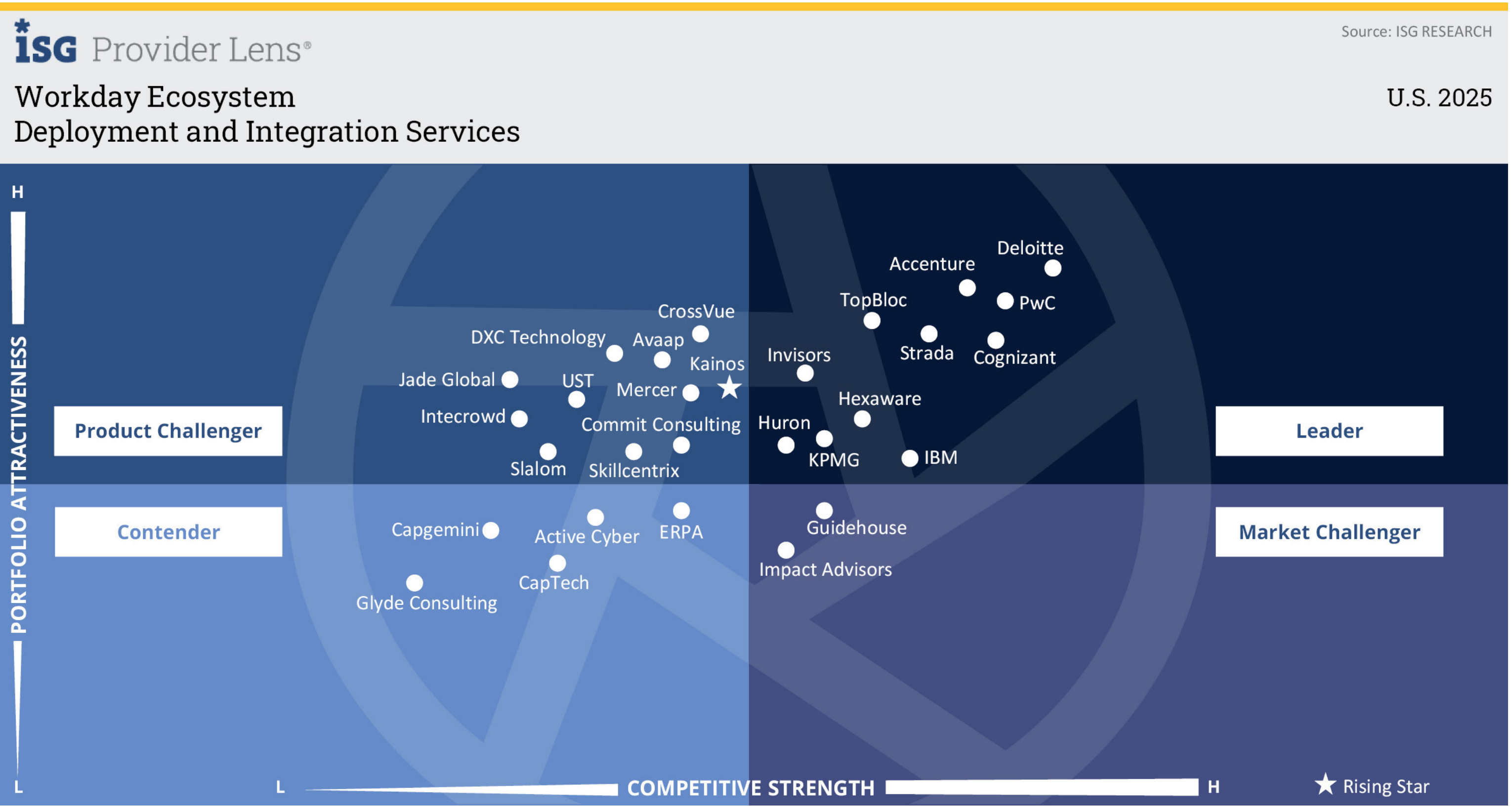
Should read this report to better understand the latest technological trends aligned with Workday features, functionalities and components. This report will help them identify a suitable provider that can tailor the Workday platform to meet their specific needs in terms of configuring modules and workflows to align with business processes and goals.

Engineers and architects

Responsible for Workday implementations can use this report to understand the developments in Workday and the support available to build tools or accelerators. This report provides insights into the strengths and shortcomings of providers in the platform deployment and integration space in terms of data migration support, automation capabilities and portfolio of accelerators and templates for seamless implementation, among other capabilities.

Business leaders

Should read this report to identify the right system integration partner that would help them meet business requirements through Workday implementations. The report provides insights on the training and change management support a provider can offer, which is a critical aspect of choosing the right implementation partner for successful project delivery and overall post-implementation support.



Service providers continue to release **deployment accelerators, automated testing capabilities, software connectors** and support services to help clients quickly transition to Workday.

Ashwin Gaidhani

Definition

The Workday Deployment and Integration Services quadrant assesses providers on expertise in core and phase X implementations; data migration practices; and integrations with CRM, ERP and complementary enterprise systems. Evaluation metrics include a provider's proven methodologies for accelerated deployments, accuracy and reliability of data migration tools, seamless interoperability across enterprise platforms, and scalable integration frameworks. Providers are distinguished by their innovative AI integrations for data validation and automated deployment testing, including the use of GenAI solutions that enhance system configuration, data integrity and real-time connectivity for efficiency and minimal disruptions during Workday deployments.

Providers with deep functional knowledge and a strategic assessment of deployment readiness to address unique industry challenges and process requirements, while ensuring successful change management, have a competitive edge in the Workday ecosystem.

Eligibility Criteria

1. Can deploy new features on the **Workday platform** and **Integration Cloud**
2. **Have the ability to integrate, align, develop, optimize** and test Workday products across various modules
3. Offer expertise in **diverse system integrations and migrations with ERP, SAP, CRM** (ServiceNow) and **internal collaborative systems** (such as Microsoft Teams and Slack)
4. Provide **maintenance support** and **installation services; offer upgrades;** and handle **patch** and **lifecycle management**
5. **Use emerging technologies** such as **automation, data science, AI, ML** and **cognitive computing** to enable digital transformations and drive implementations

Observations

This quadrant features diverse approaches and accelerators that service providers use to plan and execute Workday implementations. The implementation and integration assets of service providers are notably more Workday-specific than some pre-implementation consulting services. This focus allows well-organized rollouts that can be completed quickly with minimal disruption. Service providers frequently share success stories of smooth deployments that enable clients to quickly adopt Workday and realize its benefits.

Proprietary technology plays a crucial role in Workday deployment and serves as a key differentiator among service providers. Deployment accelerators tailored to specific industries and Workday modules are areas of intense competition among providers. Prebuilt integrations with other enterprise software solutions represent another area where providers compete and enterprise clients benefit from streamlined rollouts.

From the 30 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture's work in AI extends into its Workday activities, helping the firm complete implementations and integrations more quickly through new automating methods.

Cognizant claims a 100 percent deployment success rate and offers both prescriptive Launch deployments and consultative Enterprise deployments. The firm leverages proprietary tools and methodologies partially gained through the Collaborative Solutions acquisition.

Deloitte develops implementation accelerators across various industries such as insurance, investment management and healthcare. It deepens investments in verticalized solutions with preconfigured platforms and assets, often integrating AI capabilities.

Hexaware has more than 5,500 prebuilt Workday integrations that reduce deployment time and extend the platform's reach across enterprise operations to help clients gain more value.

Huron successfully applies analytics to make data-driven recommendations about Workday solution architecture and configurations.

IBM's technology prowess and Workday-specific assessment and implementation offerings help it deliver smooth, optimized deployments.

Invisors has well-developed implementation processes for the entire Workday suite, with a strong emphasis on data migration.

KPMG offers tools and automation that accelerate Workday deployments and remain in place post-go-live to reduce support requirements.

PwC commits to an outcome-driven engagement model, focusing on achieving measurable business results rather than just technology implementation, which is well supported by numerous case studies.

Strada has completed over 1,200 Workday deployments across more than 150 countries. As one of Workday's first global resellers, Strada simplifies the contracting process for customers, offering a single point of contact and contract for Workday and Strada services.

TopBloc excels at applying automation to take time, risk and effort out of data conversion, configuration and other Workday deployment tasks.

Kainos (Rising Star) combines a broad range of Workday implementation tools and methodologies with the flexibility that allows clients to set their own pace for deployment.

Deloitte

Leader

"Deloitte leverages the expansive capabilities of its broader firm, bringing in cybersecurity, tax, global mobility, payroll and BPO expertise to provide end-to-end services beyond typical Workday implementations."

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. For deployment and integration, Deloitte's *Workday Fast Forward* approach uses pre-configured solutions to accelerate deployment. Deloitte has facilitated over 7,500 integrations and provides expertise in integrating Workday with various third-party systems such as Guidewire, Vertex and ServiceNow. Its acceleration package with Workday helps clients foster integrations to public cloud environments with cloud providers such as AWS and Google Cloud.

Strengths

Accelerator framework: A cornerstone of Deloitte's implementation strength is a well-defined, pre-configured framework, Workday Fast Forward, built on leading practices and designed to accelerate deployment timelines and ensure scalability. For clients that prioritize efficiency, predictability and a low-risk path to go-live, this structured approach is highly attractive.

Library of industry-specific accelerators: Deloitte has invested substantially in creating a portfolio of outcome-focused, industry-specific Workday accelerators. Offerings such as InsureAcceleration for the insurance sector and AccelerateHealth for the healthcare sector are a few examples. This capability allows Deloitte's implementation teams to begin projects from a position of deep industry relevance, significantly reducing the time required in the design and discovery phases, thereby accelerating time-to-value.

Successful client engagement: Deloitte claims green ratings for 97 percent of its active projects. Its engagement with ChristianaCare Health System, which involved an initial HCM transformation followed by a strategic expansion to include Workday Financials, is an example of the company's ability to manage complex, multiphased, full-suite deployments to build lasting client relationships.

Caution

Deloitte has a sharp focus on business process re-engineering and large-scale change. With the growing midmarket client base, the company can focus on rapid, agile deployment for clients prioritizing speed-to-value above all else.

Performance and Optimization Services

Who Should Read This Section

This report is valuable for service providers offering **performance and optimization services** in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Operations and delivery leaders

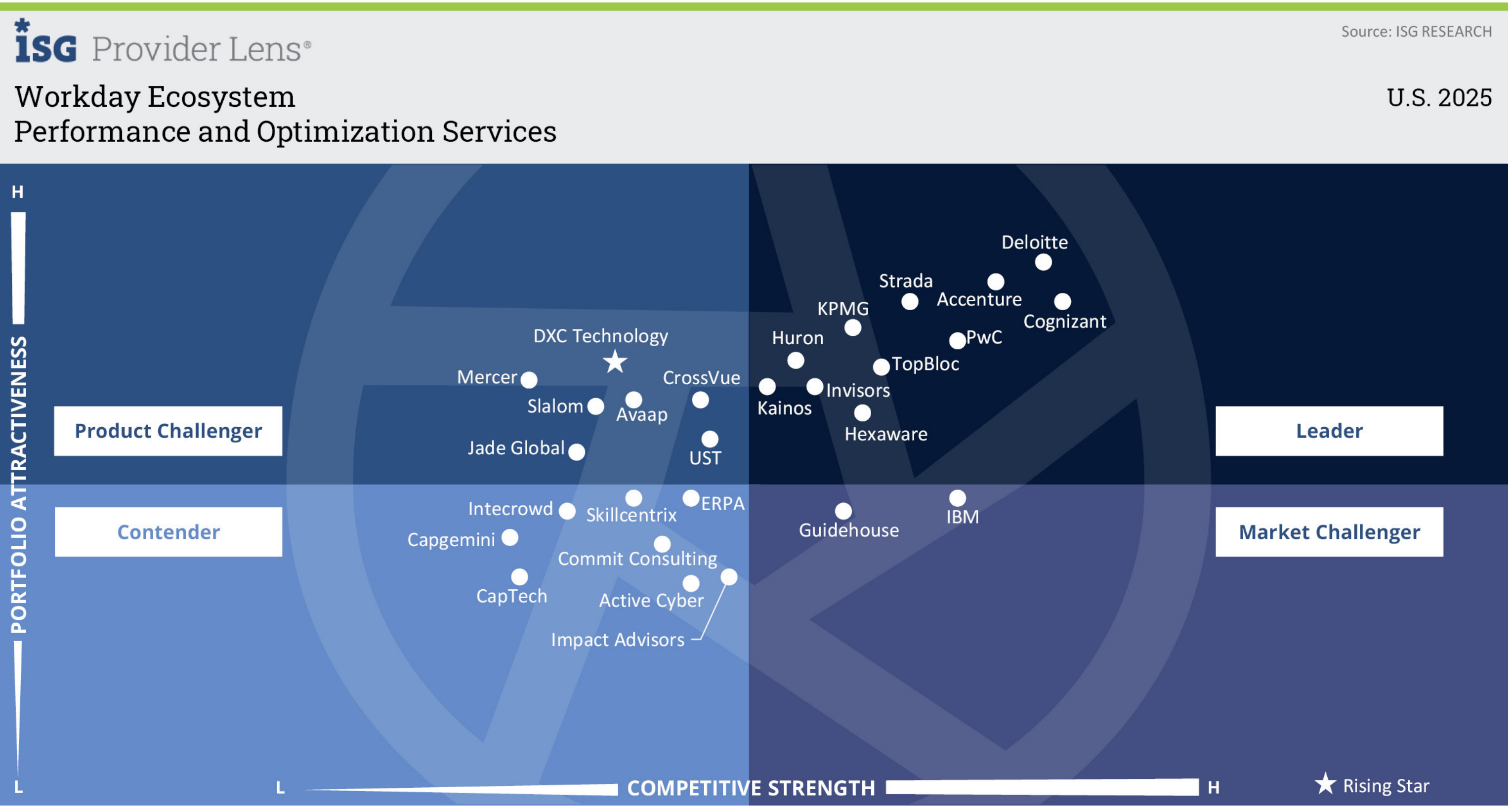
Overseeing EX, business planning and financial management should read this report to comprehend how Workday service providers maintain their service quality and credibility. The report offers insights into providers' delivery centers, certified resources and cost-optimization strategies that ensure the Workday platform operates without any disruption.

Service line leaders and functional professionals

Should read this report to rationalize the suitability of Workday resources and workflows across functions. The report examines a provider's portfolio and expertise in Workday modules, including relevant use cases, providing valuable guidance to service line and functional managers in choosing the right partner.

IT leaders

Who oversee technical infrastructure and ensure a system's reliability and security posture can utilise this report to select the most dependable provider. This report assesses a provider's ability to seamlessly manage updates of the Workday platform and oversee maintenance and monitoring needs, alongside ensuring data compliance and security.



Service providers are raising the bar for what represents leadership in Workday service delivery. They are continually trying to **improve the client environment through greater automation that improves uptime,** new AI insights and add-ons that enhance Workday's scope.

Ashwin Gaidhani

Definition

The Performance and Optimization Services quadrant evaluates providers on their expertise in managing, enhancing and optimizing Workday environments that include their application management services, robust change and release management practices and effective business-specific customization capabilities. Much emphasis is placed on their ability to leverage the AWS cloud infrastructure to enhance Workday scalability, resilience, experience and operational efficiency. The evaluation also focuses on their proficiency in expanding Workday's capabilities via advanced integrations, extensions and AI-powered innovations, including automated request handling, managing and optimizing Workday Extend applications and using intelligent monitoring to proactively improve platform performance, UX and value realization.

For this quadrant, factors such as transparency, flexibility and scalability offered by providers are key evaluation criteria alongside commitment to innovation and continuous improvement.

Eligibility Criteria

1. Can support, optimize and enhance **Workday HCM, financial management, analytics, Enterprise Interface Builder** (EIB), **Workday Extend, data load, reporting** and **security**
2. Have the ability to undertake **Workday release management, install new packages** based on the release schedule and manage **controlled changes** in the environment via **change management practices**
3. Deliver **Workday maintenance support** and maintain a bug-free environment
4. Support testing of the **Workday integration code base**, including **third-party systems (business process as a service [BPaaS])** to ensure the availability and maintenance of the Workday platform and complementary software
5. **Can** build **strong partnerships** with **technology integration providers** and **critical third-party software providers** (Accu-Time Systems and ADP), covering the breadth of the application management services (AMS) portfolio

Observations

Service providers in this quadrant are highly focused on optimizing managed Workday services while encouraging clients to promptly implement updates and pursue additional upgrades, including proprietary add-on solutions developed by the providers. Future-proofing is a common theme, and leading providers proactively review client operations and recommend potential improvement paths.

Intelligent automation, self-healing capabilities and AI are prominent in Workday managed services delivery. Large, global MSPs in the market have successfully adapted their core service delivery technology to support Workday, utilizing predictive analytics and AI to ensure strong uptime through proactive troubleshooting.

There is more Workday-specific customization within Workday managed services than may be apparent. Providers have implemented client-specific and industry-specific Workday enhancements that remain unseen by competitors or the public because they have not been commercialized through the Workday Marketplace.

From the 30 companies assessed for this study, 28 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture has updated its many legacy automation and system management offerings with AI, resulting in the GenWizard suite that natively supports Workday optimization.

cognizant

Cognizant boasts the largest AMS practice in the ecosystem, supporting more than 450 AMS clients. The firm provides a full spectrum of coverage, including dedicated, squad-based shared services and staff augmentation, allowing it to tailor support for clients of all sizes.

Deloitte.

Deloitte's global Workday practice is extensive, comprising more than 3,566 Workday practitioners and over 9,291 Workday certifications. The team has delivered over 1,800 projects for more than 800 clients across over 160 countries and received the Workday Partner Industry Innovation Award four years in a row (2021-2024).

HEXAWARE

Hexaware has flexibility and features that allow clients to transition to Workday at their own pace. It has successful examples of rapid implementations and long, phased rollouts.

HURON

Huron strives for continuous improvement in managed services and has developed strong methodologies for managing Workday updates and identifying optimization opportunities.

invisors

Invisors benchmarks all its managed deployments against best practices and metrics it has developed, sharing the results to identify areas for performance improvement and cost reduction.

kainos

Kainos moves beyond simple break-fix support, focusing on proactively identifying opportunities for improvement, implementing new features and maximizing the client's return on investment in Workday.

KPMG

KPMG supports Workday clients worldwide, has codeveloped a management solution with Workday and offers defined, tiered managed services to its clients.

PwC delivers global on-demand Workday operations support focused on driving down operational costs while maintaining solution security. Its support model integrates intelligent case routing, automated knowledge-based recommendations and real-time dashboards to streamline ticket resolution.

Strada has established a significant presence in the Workday ecosystem, showcasing notable strength in AMS and platform performance optimization across the U.S. Its core competencies include a comprehensive, end-to-end service model, deep technical expertise and a focus on driving tangible business outcomes for its clients.

TopBloc is notable for its U.S.-based service delivery and flexible contract terms, allowing customers to go month-to-month with no long-term commitment.

DXC Technology (Rising Star) has progressed to become the Rising Star in Workday performance and optimization services because of its creative approach to customer engagements and strong performance record in Workday optimization and service delivery.

Leader

"Deloitte aims to move clients from just maintaining systems to continuously innovating, leveraging tools and accelerators to gain insights, accelerating time to value, reducing risks and eliminating the need to make manual efforts."

Ashwin Gaidhani

Deloitte

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte is actively expanding its *Operate offerings* that encompass application management services (AMS), optimization, innovation and outsourcing services. It acquired SimplrOps, a company specializing in automating and streamlining Workday operations and implementations, thus enhancing its managed services. The company's integrated onshore/nearshore/offshore operating model spans 35 global delivery centers, enabling high-quality and cost-effective services.

Strengths

Rebranding of Workday services: Deloitte has branded its AMS offering as *Workday Cloud Operate Services*, positioning it as a next-generation solution designed for continuous performance improvement, accelerated growth and enhanced risk management. This rebranding is a strategic move, aimed at elevating the AMS conversation from simple, reactive support to proactive, ongoing value creation, in alignment with its broad Innovate to Operate philosophy.

Vast global support infrastructure: Akin to other Global System Integrators (GSIs), Deloitte's extensive global presence and large team of certified professionals provide the critical infrastructure needed to support large corporations worldwide. It can deliver 24/7, multilingual managed services at a scale, which is a key deciding factor for multinational clients requiring seamless global support.

Strategic acquisition: Deloitte's acquisition of SimplrOps enables it to offer differentiated services. It leverages innovation to drive enhanced time-to-value and ensure risk reduction. Specific outcomes include a 50 percent drop in release management efforts and a 20 percent reduction in incidents and problems. SimplrOps' offering is also available as a SaaS solution for clients wanting to license directly — another example of Deloitte's keen investments to enhance client Workday experiences.

Caution

Some of Deloitte's clients do not have the technology maturity to find optimized use of Workday's advanced AI and agentic AI features as a part of their managed services. Deloitte must make calculated and outcome-oriented bets in this space to ensure it is not overcommitting in its platform optimization promises.

Innovation on Workday

Who Should Read This Section

This report is valuable for service providers offering **innovation on Workday** in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy and innovation leaders

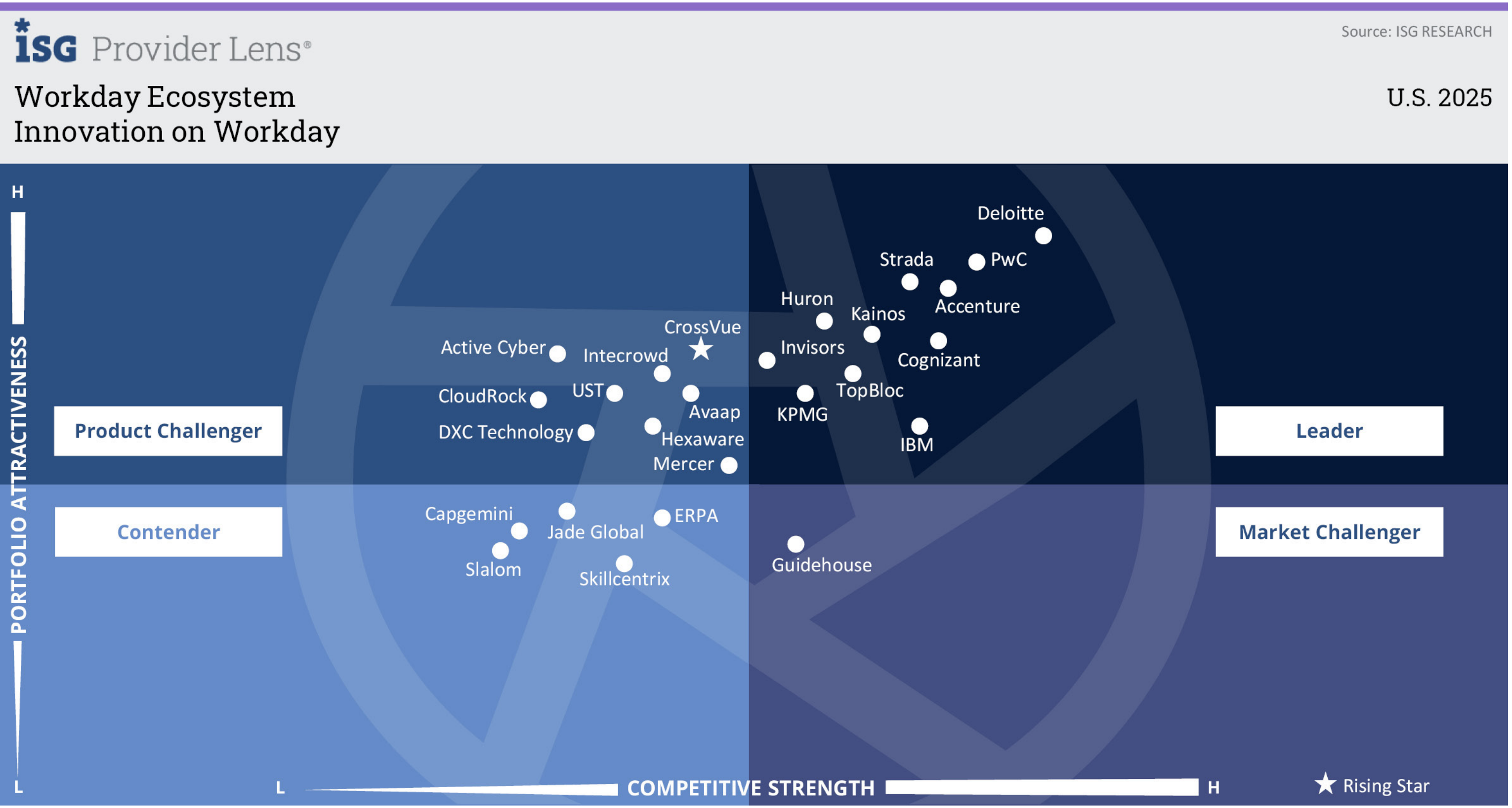
Should review this report to gain insights into how Workday facilitates digital transformation and enhances competitiveness, aiding strategic planning and long-term growth through innovation. This report explores the latest offerings and portfolio of service providers on the Workday platform, which will enable C-suite professionals to obtain a thorough understanding of the latest developments in the Workday ecosystem and determine their impact.

Technology and application development professionals

Should review this report to understand the latest features, functionalities and components of the Workday platform, along with their configuration and integration. The Workday platform has transformed from a basic HCM system into a comprehensive, AI-driven workforce management solution, offering a diverse array of functionalities, and this report highlights providers' capabilities in developing innovative solutions leveraging functionalities from Workday Extend.

Engineering teams

Including solution architects, should read this report to gain insights into software development and thus build IPs/accelerators for cloud platforms/industries by analyzing the best fit Workday solution. The report focuses on the engineering capabilities of providers with insights into their technology partner ecosystem.



Workday is a platform to transform enterprise operations, and innovation is the engine for continuous improvement. The **innovation focus is shifting** to how AI can improve the platform.

Ashwin Gaidhani

Definition

The Innovation on Workday quadrant evaluates providers based on their ability to develop custom applications on the Workday Extend platform, while leveraging AI components from Workday Illuminate. The assessment criteria include proficiency in building business modernization solutions for HCM, capabilities in integrating Workday Orchestrate for workflow automation, expertise in AI Gateway and skills in applying Workday Illuminate's Accelerate, Assist, Transform capabilities. Providers are measured on their competency in creating both client-specific and industry-focused applications and hosting them in the Workday Marketplace that covers published offerings, adoption rates, customer ratings, solution categories and depth of vertical functionality. This quadrant assesses providers based on their technical expertise, industry knowledge, innovation capabilities and overall contribution to expanding Workday Extend's core functionality, experience and modularity.

Eligibility Criteria

1. Possess **certifications** and proven technical resources skilled in **custom application development on Workday Extend**
2. Have experience in **integrating Workday Illuminate's AI capabilities,** particularly Orchestrate and AI Gateway components
3. Have **custom-developed, industry-relevant and validated applications** hosted and available in the Workday Marketplace.
4. Can highlight client references showcasing **successful deployments of Workday Extend** solutions with measurable outcomes
5. Claim a **proven track record of delivering tailored solutions** to finance and HR verticals
6. Demonstrate capability in rapidly **innovating and adapting Workday solutions** to evolving business requirements, including automation, cloud, and **Workday Extend and Workday illuminate**
7. Demonstrate compliance with Workday's standards and data privacy policies and have established application security best practices
8. Have proven expertise in **integrating** custom **Workday Extend solutions** seamlessly **with existing client systems and third-party platforms**
9. Show **expertise in creating intuitive and user-centric designs,** improving user engagement and satisfaction

Observations

AI is a clear focus area for Workday and will likely emerge as a significant differentiator between leading ecosystem performers and their competitors. However, the integration of AI within production-level Workday environments seems less widespread and mature compared to its application in other enterprise-level systems, such as ITSM, ESM and SAP. Workday may have recognized this gap, as evidenced by the introduction of the new Agent System of Record (ASOR) AI program announced in February, along with the emphasis on AI tools presented at Workday DevCon 2025 in June.

A pertinent question is whether Workday specialists, who have historically excelled in innovation, will be able to keep pace with global MSPs, GSIs, as well as technology and consulting firms, in AI development for the Workday environment.

Many of the packaged Workday enhancements currently available on the market are oriented to specific industries and processes within those sectors. There remains a considerable focus, consulting resources and available solutions related to Workday HCM than Workday Financials. Most previous innovations within the Workday ecosystem have not centered on AI. Therefore, monitoring which service providers embrace AI and the extent of ongoing innovation will be interesting developments to watch.

From the 30 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and one Rising Star.

Accenture has embraced AI for Workday enhancement and achieved good customer deployment results.

Cognizant strategically aligns its applications and custom solutions with Workday, positioning them to clients during upfront subscription sales to fill functional gaps across various verticals, geographies and customer segments.

Deloitte is a fast follower of Workday-related innovations and one of the four early developer partners for Workday Extend, with more than 50 Extend Applications in its catalogue and over 120 certified Extend consultants.

Huron has a strong track record of delivering Workday innovations. It has 18 certified solutions available on Workday Marketplace, many of which address the needs of higher education institutions.

IBM has an AI-focused HR transformation practice plus specific Workday innovation programs. The company's strategy is to use its powerful watsonx AI platform to build task-specific agents that can then be plugged into a client's Workday environment.

Invisors is a two-time Innovation Partner of the Year, demonstrating strong competency in Workday Extend and Built on Workday, including a library of 20 reusable Extend frameworks.

Kainos is tightly aligned with Workday and is orienting its technology development to produce more AI solutions and functionality for the Workday environment.

KPMG is focusing on agentic AI as a tool to bring new value to Workday implementations. It received the 2024 Workday Partner Innovation Award for the cross-industry category, a significant acknowledgment of its ability to develop and implement unique, value-added solutions for clients.

PwC's innovation strategy includes a deep industry focus, with the development of Workday model tenants for key sectors. These model tenants are robust and preconfigured with industry best practices, significantly accelerating implementation and providing solutions tailored to specific industry needs.

Strada's strength is rooted in its deep, long-standing partnership with Workday, its commitment to innovation through proprietary tools and Workday Extend applications, and its focus on delivering measurable, industry-specific outcomes for clients.

TopBloc is aggressively embracing AI and has committed to releasing multiple new AI applications and services for Workday in 2025. Its core innovation lies in productizing the implementation lifecycle and turning a traditionally service-heavy process into a more efficient, technology-driven experience for clients.

CrossVue

CrossVue (Rising Star) is building on its federal government expertise with new state and local government offerings while continuing to innovate in the private sector. The company has built both an impactful industry accelerator (BankVue) and Apps on the Workday marketplace, showcasing its ability to innovate and commercialize those solutions.

Deloitte

Leader

"Deloitte participates in all Workday early access partner programs, including those involving GenAI. It is significantly increasing investments in integrating AI (GenAI and agentic) capabilities into its verticalized solutions and delivery platforms."

Ashwin Gaidhani

Overview

Deloitte is headquartered in London, U.K. It has more than 460,000 employees across over 150 countries. In FY24, the company generated $67.2 billion in revenue, with Consulting as its largest segment. Deloitte uses Workday Extend to fill in gaps and innovate in areas where Workday's core product might not fully meet client-specific needs, especially in complex or industry-specific scenarios. Deloitte has won multiple Workday Hackathon awards for its Extend applications, such as DiviPay (2024), Fe-Fi-Fo-Feedback (2023), How YOU Doin'? (2022) and Alumni Connect (2022).

Strengths

Strategic investments and leadership in AI-driven innovation: Deloitte offers various AI-based accelerators for Workday engagements, including GenAI Lab, User Story &Test Scenario Generation, Configuration Generation, Autonomous Code, Autonomous Data, Automated Sprint/Testing Execution, and Autonomous PMO — all designed to modernize the deployment experience.

Use of industry-specific accelerators: Deloitte has developed innovative, industry-specific accelerators that are *prebuilt, out-of-the-box* ERP solutions with industry-leading practices across finance, HR and supply chain functions. The Workday HCM DNA accelerator, for example, is a proprietary, pre-configured Workday solution that streamlines delivery by accelerating timelines and reducing delivery risks, resulting in high end-user adoption.

Expanding functionalities in Workday Marketplace: Deloitte has actively developed and deployed several applications in the Workday marketplace, offering clients pre-built solutions to address specific business challenges. For instance, its Accelerate2zero app is designed to help organizations measure their carbon footprint and develop strategies to achieve net-zero emissions, while the Cash Flow Accelerator tool enhances financial planning and analysis by enabling finance teams to model cash flow at scale with much speed and flexibility.

Caution

Deloitte's strategic maturity with Workday is evident in it receiving multiple innovation awards and its role as a launch partner in Workday's Industry Accelerator program. Since Deloitte has extensive thought leadership on the Future of Work, organizational design and HR strategy, it could create a suite of Future of Work applications on Workday Extend to expand its market share and strengthen the Deloitte brand.

Appendix

The ISG Provider Lens 2025 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:
Aman Munglani

Lead Author:
Ashwin Gaidhani

Editor:
Radhika Venkatachalam

Research Analyst:
Megha Dodke

Data Analyst:
Anuj Sharma

Consultant Advisor:
Anoop Chawla

Project Manager:
Shreemadhu Rai B

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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 divided into the following steps:

1. Definition of Workday Ecosystem market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Author

Ashwin Gaidhani

Research Partner, India

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.

Research Analyst

Megha Dodke

Research Specialist

Megha Dodke joined ISG as a Research Specialist in October 2024. Based in Bangalore, India, she holds a Master's degree in Marketing and a certification in Product Strategy from the Indian Institute of Management, Kozhikode (IIM-K). Megha brings over 12 years of diverse experience in Business Research, Market and Competitive Intelligence, Sales Enablement, and Strategic Advisory across multiple industry verticals.

At ISG, Megha focuses on enterprise platform research, with a specialization in areas such as Enterprise Service Management (ESM), ServiceNow, and Workday. She has a strong track record of conducting in-depth research and analysis on emerging technologies, market dynamics, and the capabilities of IT service providers—including consulting, managed services, implementation, and innovation.

Her work supports clients through strategic advisory, briefings, workshops, and consulting engagements. Prior to this, she has worked with organizations including HP Inc., Accenture, Talent Neuron and Transparency Market Research.

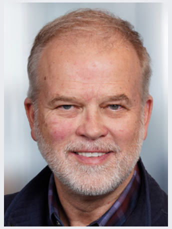
Study Sponsor

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.

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ISG

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The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens®

OCTOBER, 2025

REPORT: WORKDAY ECOSYSTEM