

Workday Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



Executive Summary 03

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

Platform and software modernization are revolutionizing the digital product industry. The focus is shifting from relevance to delivering a comprehensive experience at various stages of engagement for all personas interacting with the platform. The introduction and maturity of advanced models, such as large language models (LLMs) and algorithms, are expanding the possibilities for interactive and intelligent solutions that address complex challenges.

One of the most valuable capabilities in this regard is human capital management (HCM), which is a structured set of services across an organization. Technology integrations and solutions are continuously being adopted to meet the changing needs of all stakeholders, from developers to users.

The increasing integration of markets, technologies and cultures worldwide has created new opportunities and challenges for

organizations. Globalization demands an HCM platform to manage a diverse and dispersed workforce that can operate effectively in different contexts and cultures. It must also cope with competition for talent, regulatory and legal differences, and ethical and social issues arising from operating in multiple countries.

The U.S. is a competitive market with vast opportunities. It is known for its ability to adopt innovative solutions and adapt them to meet the transforming industry needs. One of the main characteristics of the U.S. market is its openness to disruption. Software platforms are continuously evolving to match the maturity of the business processes, system interoperability and user convenience. Developing technology capabilities, constantly refining processes and elevating customer experience expectations impel a coercive force on the platform vendors to stay relevant by enhancing their offerings to gain a competitive advantage.

Workday constantly updates and improves its features and capabilities to benefit customers from the latest innovations and best practices. It has a strong customer community and partner ecosystem that offers support and

Workday drives Enterprise impact by refining HCM workflows and delivering Workforce experience



Executive Summary

guidance. Workday focuses on security and reliability using a SaaS delivery model that ensures high availability, performance and data protection. It also leverages in-memory technology and cloud computing to provide real-time insights and analytics to help companies make better decisions.

Notable new features include:

- **Workday Assistant** – This AI-powered chatbot provides employees with answers to HR-related questions, such as how to change their benefits or request time off. Workday Assistant leverages NLP and ML algorithms to understand user queries and provide accurate responses.
- **Skills Cloud** – This new feature enables organizations to map their skills inventory and identify skills gaps. Skills Cloud provides a comprehensive view of an organization's skills landscape, allowing HR professionals to identify areas for improvement and create targeted training and development programs.
- **Workday Journeys** – This feature provides a personalized onboarding experience for new hires. It enables organizations to

create customized onboarding plans for each employee, guiding them through the process and ensuring a seamless transition into the organization.

Workday focuses on creating a solid technical and functional documentation library to build in-depth knowledge about the platform and transform a resource into an autodidact.

Workday Adoption Toolkit offers tools and resources that help customers drive user adoption and engagement with Workday. The Toolkit includes guides, templates, checklists, webinars and other materials covering change management, communication, training and support. Customers can use the Toolkit to plan and execute their adoption strategy and measure their results.

Workday focuses on incorporating a wider set of processes and capabilities. Thus, apprehension about technical complexity hovers as the platform expands and adds new offerings. Developing intelligent capabilities hosted on the top three hyperscalers has magnified the scope for the Workday platform to develop strategic go-to-market opportunities and improve

solution quality. Such a benefit will help enterprise clients host their workloads across cloud providers.

Workday has chosen the Google Cloud Platform for its public sector deployment, and a few modules are on Azure. It is an exciting start to new blue ocean opportunities for integrating novel solutions. This partnership is expected to drive Workday's solution maturity and increase penetration among existing customers through unique leverage and pricing structures to run the HCM platform in the cloud.

Evolving Workday Service Segments & Practices in the U.S. Market

Consulting and Strategy Services

Consulting and advisory competencies are among Workday Services partners' predefined standard offerings. In the past 12 months, we have seen a dramatic change in the transformation consulting space. Organizational change management (OCM), business technology fitment, technical architecture and process transformation converge to deliver a sustainable solution.

Enterprise clients realize the benefit of a swift transition of services led by a strong consulting practice. Consulting service goes beyond assessing, service mapping and recommending a solution. It entails improved experience delivery, operational consulting and technical expertise to redesign the technical architecture to accommodate microservices, container orchestration and cloud-native application development to impart platform resiliency. Governance, risk and compliance (GRC) and security consulting increasingly dominate the discussions because the HCM platform holds sensitive organizational information. A provider's consulting capabilities around the Workday platform and the HCM domain are crucial in transitioning enterprise clients from the incumbent HCM platform to Workday.

Implementation and Integration Services

The Workday implementation process is improving technically and operationally. Increasing the development of accelerators and other IP to complete the implementation process is deeply rooted in the Workday technical services practice. Partnerships



with testing platforms like TOTAL TaaS™ with prebuilt automated testing solutions for all primary Workday modules have accelerated deployment. Personalization and customization are critical asks by enterprise clients due to their increasing familiarity with the Workday Extend offering that helps build an application on top of the Workday platform. This enables enterprise functions to integrate and connect various internal and external systems, resolving information flow challenges. The service partners focus on serving the entire Phase 1 and Phase X implementations as a continuum. Workday's platform is in the next phase of maturity, where after implementing the core HCM platform, the natural course of scale is implementing other financial, analytics, talent management and payroll. Agile methodologies have also gained prominence in Workday implementation trends. Workday service partners are adopting these project management practices, enabling faster adaptation to changes, improved communication among team members and better documentation and process efficiency.

Workday Managed Services

Workday customers need ongoing support to maintain and optimize their systems and address issues that arise during normal operations. Post-deployment support quality heavily depends on resources, certifications and maintenance experience to ensure the smooth functioning of the platform. Application management services (AMS) deal with platform break-fix, design and development services. Change and release management are continuous activities that need administered execution, as these should not disrupt the platform. These are complex but routine activities that ensure the latest updates and features are incorporated into the Workday platform.

Using managed services in the Workday ecosystem previously was less popular due to ambiguity in the Workday partner ecosystem. Partners were contentious about the inclusions in this space due to limited-service offerings in the Workday AMS space. The ISG Workday team formed the blueprint with a futuristic view and anticipated

transformation in this space. This partner ecosystem study is confident about Workday managed services, especially with the experience from studying the platform market. In this case, we have seen capabilities expand through the customization of APIs and application interfaces extended by the platform community.

In conclusion, platform and software modernization is transforming the digital product industry by shifting the focus from relevance to delivering a comprehensive experience for all personas interacting with the platform. Human capital management plays a crucial role in this transformation by providing a structured set of services across an organization. Workday, a leading HCM platform provider, continuously incorporates technology integrations and solutions to meet the changing needs of all stakeholders. The increasing integration of markets, technologies and cultures worldwide presents new opportunities and poses challenges for organizations. Workday's renewed focus on technology,

including cloud services, data management, generative AI and intelligent automation, reflects its commitment to staying relevant and competitive in the rapidly evolving market.

Workday is set to revolutionize how businesses approach their HR and finance operations by empowering organizations to achieve unprecedented efficiency and productivity. Workday will be a game-changer for the modern workplace and human capital function with its latest technology components and innovative solutions.





Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
Avaap	Market Challenger	Contender	Product Challenger
BNB	Not In	Contender	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
CrossVue	Contender	Contender	Contender
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Glyde Consulting	Contender	Not In	Not In





Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Guidehouse	Market Challenger	Market Challenger	Market Challenger
Hexaware	Not In	Leader	Leader
Huron	Leader	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader
Impact Advisors	Not In	Market Challenger	Market Challenger
Intecrowd	Product Challenger	Product Challenger	Contender
Invisors	Product Challenger	Rising Star ★	Rising Star ★
Kainos	Not In	Product Challenger	Leader
KPMG	Leader	Leader	Product Challenger
Mercer	Leader	Product Challenger	Leader





Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Preos	Contender	Not In	Not In
PwC	Leader	Leader	Leader
TopBloc	Product Challenger	Product Challenger	Product Challenger
UST	Contender	Not In	Contender



The Workday Ecosystem study focuses on **providers' ability to offer consulting, implementation and managed services for the Workday platform.**

Simplified Illustration Source: ISG 2023



Definition

The global economy faces several uncertainties, such as high inflation, tepid growth and recessionary fears. Business services are seldom immune to these challenges, the biggest concern being soaring operating costs. More importantly, human resource costs have been at an all-time high because of global phenomena, such as the “great resignation” and quiet quitting.

Technological advancements have enabled companies to shift toward automation, AI and other transformative business processes. These, in turn, have improved human resources, a core service line for every organization. Such functions have seen a drastic transformation in the manner of conducting business. Human-centric processes keep shifting to the virtual space with the digitalization of HCM workflows. There has been a need to consolidate these essential functions to extend organizational support to employees and streamline mainstream HR functions digitally. It has necessitated integrating and focusing on modernizing processes and technological developments.

With a global presence across all major markets, Workday offers tailored solutions to streamline HR functions digitally, primarily for midsize and large companies. Workday's cloud-based solutions encapsulate a complete suite of services, such as financial management, strategic sourcing, peakon employee voice, adaptive planning, analytics and reporting. Workday integrates HR applications into an enterprise management cloud platform designed to incorporate custom requirements and personalization, extending its ability to cater to exclusive needs effortlessly.

This study evaluates the partner network's service maturity, technical competency and the depth and breadth of its understanding of the service lifecycle on the Workday platform, encompassing not only a specific product but also the modules. In addition to the evaluation mentioned above criteria, the following also applies to the service providers of all quadrants:

- Unique differentiators
- Economic stability
- Market position



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions — Consulting and Strategy Services, Implementation and Integration.

Services Managed Services

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

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

Our study serves as the basis for important decision-making regarding 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.





Consulting and Strategy Services

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. that are evaluating providers of Workday consulting services.

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

Organizations in the U.S. are using Workday consulting services to adapt to the changing competitive landscapes and latest business models for technical and functional reasons. This has resulted in the growing demand for financial management and human capital management (HCM) support. Enterprises are concentrating on ramping up new capabilities that align with Workday focus areas such as Finance, Adaptive Planning, Peakon, and Workday Extend. Workday Extend and Workday Peakon are two new platforms that are picking up pace and are experiencing increased demand in the U.S.

Enterprises continue to focus on HCM transformation and are currently developing frameworks, solutions, or tools to address and streamline HR-related business issues and processes. Clients opt for service providers that predominantly focus on Governance risk and compliance (GRC) advisory and consulting. Software providers in the U.S. region continue to align their strategy with an emphasis on technology including cloud services, data management, generative AI, and intelligent automation. Intelligent automation in particular highlights the importance of technology in consulting services.



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



Consulting leaders, including management, technology, functional and domain consulting leaders, should read this report to learn about U.S.-specific Workday offerings.



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





This quadrant evaluates service providers that offer **Workday advisory and consulting services** for assisting enterprise clients **in optimizing processes** and onboarding the Workday platform for HCM solutions.

Ashwin Gaidhani



Definition

This quadrant evaluates the Workday consulting and strategy service providers that transform the HR services landscape to improve the service philosophies toward sustainable, effective and resilient business operations using Workday solutions, products and platforms. The Workday advisory and consulting services help enterprise clients develop a road map for HR process transformation to meet business objectives. This quadrant assesses providers' expertise in driving transformational initiatives to deliver a robust execution plan, 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 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, service and technology.

Eligibility Criteria

- 1. Use of reference assessment models, frameworks and templates:** Use of best practices in opportunity identification and assessments for current and new Workday competencies; availability of frameworks, tools and templates for the Workday adoption roadmap.
- 2. Experience in defining and evaluating human resources management system (HRMS) landscape:** Capability to design HR service transformation strategy and a long-term road map integrating functional services.
- 3. Industry knowledge, domain practices and Workday portfolio:** In-depth knowledge of Workday product portfolio (HRMS, financial management, payroll, analytics, Extend and HCM services) and related functionalities, processes, workflows, tools and platforms.
- 4. Digital business transformation competency:** Focus on diverse and HR-wide portfolios and expertise in industry-specific functional process and strategy consulting.
- 5. Business tools and technology expertise:** Must have Workday platform certifications, accreditations (hyperscalers and third-party software) and capabilities to predict long-term technology developments and prescribe timely solutions using expertise and partnerships.
- 6. Experience in organizational and technology change management:** Principles and guidance to ensure compliance with regulatory and governance frameworks.
- 7. Resource competency and relevant certifications:** Workday certified (Workday Pro) resource pool with expertise in building solutions.



Observations

Workday consulting has grown considerably in the U.S., with various enterprises adopting its cloud-based solutions, including Human Capital Management (HCM), Financial Management and Adaptive Planning. Workday has become a preferred HCM platform among enterprise clients focusing on improving experience and engagement across its ecosystem, including partners, software vendors and technology service providers.

- Workday Customer Success Plan (Accelerate) is a personalized service that helps enterprise clients achieve their business goals with Workday. The focus is directed toward user connection with the platforms and related modules. Self-guided and self-paced solutions help resources understand Workday offerings and functionalities deeper. These (accelerate) plans provide guidance, best practices and recommendations to help customers optimize their Workday configuration, performance and usage.

- Workday's current focus for enterprises across the U.S. is directed toward developing Adaptive Planning and Prism Analytics. Enterprises want to develop these tools with Workday to automate processes seamlessly and efficiently.
- Workday Payroll has become a prominent focus area for many enterprises across the U.S. Automating payroll processes makes it easier for businesses to secure their data while saving time and ensuring efficiency.
- Enhancing and automating Workday services have enabled enterprises to opt for these services across the U.S. because Workday provides ongoing support, maintenance, updates and enhancements.

From the 28 companies assessed for this study, 20 have qualified for this quadrant, nine being Leaders and no Rising Star

accenture

Accenture's Workday solutions are enhanced by an appropriate framework design and its thorough understanding of the client environment and through an in-depth analysis of assets and methodologies. Its automation and data analytics ensure the right skills are available.

Alight

Alight provides services across six functional areas: people experience; time tracking; HCM; finance; planning and budgeting reporting; and analytics. It powers these services with accelerators, automated testing, AMS, optimization, reporting and analytics.

cognizant

Cognizant offers a complete lifecycle of services, including an in-house advisory services practice and proprietary tools. It also provides strategic roadmap development, governance planning, phased technology deployments, M&A support and continuous improvement cycles.

Deloitte

Deloitte offers collective learnings, best practices and accelerators to enable Workday transformations for the biggest customers across multiple industries. It helps clients to automate key processes, unify data and boost employee engagement and satisfaction.



Consulting and Strategy Services



Huron's consulting approach consists of evaluating and empowering change by end-to-end assessment, designing a scalable and tactical roadmap and crafting a business case to get buy-in from stakeholders. Its consulting services contributed most of its revenue.



IBM's full-stack observability enables it to continuously monitor Workday's application performance by leveraging its comprehensive suite of databases and APIs. Powerful dashboards and visualizations contextualize interactions, while actionable insights facilitate timely responses.



KPMG's solutions enable C-level executives to work through the complexity of their business. KPMG's holistic approach encompasses the entire Workday lifecycle, from inception to launch and post-implementation. This helps achieve expected outcomes and improve performance.

Mercer

Mercer offers a mix and match of Workday solutions. For instance, it supplements Workday Financial Management with Workday Adaptive Planning for planning and budgeting, Workday Inventory for supply chain management and Prism Analytics for reporting and analytics.



PwC's Business-eXperience-Technology (BXT), agile methodology, end-to-end testing, data-driven design and deployment accelerators offer unparalleled client experience. Its digital risk team helps anticipate and address risks to offer maximum client reassurance.



Cognizant



"Cognizant's strengths are a well-defined foolproof blueprint, change management practices and systems integrity."

Ashwin Gaidhani

Overview

The Cognizant Workday Practice has helped many Fortune 500 companies and large- and medium-sized organizations transform their businesses. The Workday practice was formed in 2020 through the acquisition of Cognizant, a leading global finance and HR transformation consultancy and the longest-tenured workday service partner. Its Workday Practice has more than 1,874 employees and generated over \$249 million in revenue. Cognizant has product expertise spanning all Workday applications. It provides end-to-end solutions across every stage of its Workday transformation, from initial planning deployment to post-deployment support.

Strengths

Comprehensive, foolproof blueprint ensures consistency: Cognizant is intensely focusing on its strategy. The comprehensive systems strategy helps align vision with strategic goals, plan cloud transformation, evaluate M&A and divestiture readiness and get deployment buy-in from key stakeholders. It recommends steps for a seamless migration.

Change management practices ensure a smooth transition: Cognizant is the only partner with an in-house Workday-focused change management and training practice. Its Workday-certified and Prosci®-trained change management experts apply a structured and flexible methodology to help clients successfully manage the change.

Focus on systems integrity: Workday will feed data to multiple internal and external systems and receive data in turn. The company identifies all the data touchpoints and system exchanges from the outset. Since incorporating additional integrations in the middle of the implementation will impact project timelines and costs, Cognizant prevents this at the initial stage of systems design.

Caution

Cognizant is an established Workday partner. However, it needs to pursue midsize organizations more aggressively to scale its business and maintain a strong foothold in the human resources IT consulting services market.





Implementation and Integration Services

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. that are evaluating Workday implementation and integration services providers.

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

Workday is a preferred HCM platform among U.S. enterprise clients that want to improve experience and engagement across their ecosystem, including partners, software vendors and technology service providers.

A main priority is integrating and developing Workday Extend, which enables organizations to create new capabilities without requiring IT resources and complex technologies. The new inclusions are App Builder, low-code/no-code visual capability and Workday Graph API, which

is expected to be available to Workday Extend customers soon. Workday Peakon is a crucial package to capture and evaluate employee experience critical for the current times.

Enterprises in the U.S. are increasingly seeking Workday partners to gain experience with emerging technologies, such as automation, AI and ML to drive effective integration.

Enterprises seek service providers with robust governance skills to ensure that implementation and integration projects are well executed with collaborative interactions at minimum costs and efficiency. Technological innovations in HCM platforms influence the pace of Workday platform adoption in the U.S.



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



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



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





This quadrant assesses software providers offering **Workday Implementation and integration services** to modernize HCM processes. Enterprises are seeking to consolidate and connect internal and external systems for seamless enterprise value.

Ashwin Gaidhani



Implementation and Integration Services

Definition

This quadrant evaluates service providers specialized in implementing and integrating Workday products. Typically, Workday defines the implementation methodology, which the partners follow. Competency and experience in implementing and integrating the Workday product suites using broad software tools are essential evaluating factors. The quadrant also examines the 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 deliver accurate and faster results. Their Workday implementation capabilities include designing a roadmap, creating data migration strategies, modernizing processes, deploying hybrid and multicloud environments, ensuring data security, and developing governance protocols followed by integrating with other enterprise applications, systems, and processes.

The providers must also be able to integrate Workday products and offerings 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. These are usually part of the Workday software partner ecosystem.

Eligibility Criteria

1. **Use of predefined solutions and templates and expertise in the successful implementation of Workday platforms:** Predefined solutions and accelerators for Workday product deployment.
2. **Ability to deploy Workday platform:** Ability to design solutions based on reference architecture, align prevailing technical environment and deploy new features, modules and enhancements on the Workday platform and the Workday Integration Cloud.
3. **Ability to integrate and map Workday products:** Application development, optimization and testing services across Workday modules (HCM, financial management, analytics, planning, payroll and other modules).
4. **Expertise in diverse systems integration and migration:** Experience in integrating with ERP, SAP, CRM (ServiceNow) and internal collaborative systems (Microsoft Teams, Slack, etc.) for Workday and HCM.
5. **Ability to offer maintenance and support:** Installations, upgrades, new feature/module release management, migration, patch management, lifecycle management of instances and Workday release management.



6. **Expertise in working with emerging technologies and Workday:** Capability to work with APIs, automation, data science, AI/ML and cognitive computing to enable digital business transformation and drive implementations and integrations with major hyperscalers.
7. **Size and capabilities of regional delivery teams:** Diverse set of certified expertise (adoption kit) and resource pool to manage implementation and integration through various stages.



Observations

Workday has been continuously expanding its suite of applications beyond core HR and financials. Organizations in Europe are exploring the implementation of additional modules, such as Workday Recruiting, Workday Learning, Workday Planning and Workday Prism Analytics to further enhance their HR and finance processes. Enhancing the UX and providing mobile access to Workday have become significant trends.

Workday implementation often involves integrating with existing systems and migrating data from legacy platforms. Workday consultants with expertise in integration frameworks, data migration strategies and middleware technologies are sought after to ensure a smooth transition.

- **Continuous deployment and post-go-live support:** Workday operates on a continuous deployment model, meaning that new features and updates are released regularly. Organizations need consultants that can

provide ongoing support, help them leverage new functionalities and ensure system optimization post go-live.

- **Integration with third-party systems:** In Europe, organizations are implementing integrations with other third-party enterprise systems, including payroll providers, talent management solutions, time and attendance systems and learning management systems. They intend to create a unified ecosystem and streamline data flows.
- **Implementation dashboards:** Workday service providers are developing and extending their reporting capabilities to gain insights into various aspects and stages of Workday implementations. This significantly increases transparency, trust and control on projects while averting business-impacting scenarios.

From the 28 companies assessed for this study, 21 have qualified for this quadrant with 8 being Leaders and 1 Rising Star

accenture

Accenture's end-to-end implementation capabilities include program and change management, process and configuration design, customization to local legal requirements, integration with third-party vendors, data migration, implementation and post-go-live support.

Alight

Alight's point of view consists of baseline tenants and workbooks that it communicates through workshops and training. It has a library of over 290 reusable integrations. Its data conversion accelerator executed 4,100 automated validations, generating over 350 reports.

cognizant

Cognizant's integration consultants are Workday certified. Technical teams work together to deliver the best service to clients. The staff holds more than 300 Workday certifications and over 450 Workday-specific integration tool certifications that reduce build time.

Deloitte

Deloitte's core competency is its continuous client engagement, multi-industry exposure and domain expertise. Moreover, it understands regional nuances, which it combines with its global practice to deliver significant benefits to the client.



Implementation and Integration Services



Hexaware's five-pillar implementation framework includes project scoping, interacting and collaborating with stakeholders and gathering inputs, prototype design, MVP demo and assessing outcomes by sharing a high-level project plan through the "your way" approach.



IBM's full platform deployment capabilities facilitate real-time data access and updates. Clients can align people to financial performance while ensuring continuous engagement and support via Workday. It can rapidly expand workflow capabilities to the cloud.



KPMG developed a suite of technology services that enable the functional transformation to support the client's implementation needs. These include process mining, data solutions, automation and testing. KPMG offers well-documented practices, a vast talent pool and accelerators.



PwC's Business-eXperience-Technology (BXT) agile methodology drives iterative, rigorous solution reviews throughout the program. End-to-end testing ensures quality deliverables. This approach substantially reduces turnaround time and generates fresh insights.

Invisors

Invisors (Rising Star) is a boutique Workday consulting firm and a niche player in the ecosystem. Its competitive differentiation stems from the high individual attention each project receives. It builds deep interpersonal relationships with clients, fostering loyalty.





"By acquiring OSV's professional services, Cognizant has significantly boosted its competence and growth trajectory, and leapfrogged into a leadership position in Workday implementation and integration."

Ashwin Gaidhani

Cognizant

Overview

The Workday practice was formed in 2020 through the acquisition of Cognizant, a leading global finance and HR transformation consultancy and the longest-tenured workday service partner. The Cognizant Workday Practice has helped many Fortune 500 companies and large- and medium-sized organizations transform their businesses. Its Workday Practice has more than 1,874 employees and generated over \$249 million in revenue. Its balanced process model offers industry best practices and a faster deployment timeline. A prescriptive approach and configuration design help meet client needs. Cognizant helps efficiently plan, configure and implement projects. It assists in assimilating data after a merger or acquisition and dominates the market in the U.S. with its unique methodologies, models and approach.

Strengths

Proprietary Cynergy methodology:

Cognizant built its proprietary Cynergy methodology based on over a decade of experience in the industry and best practices from hundreds of clients. Cynergy has three unique process models. Cognizant identifies the appropriate Cynergy process model for the client and integrates existing applications with Workday. It agrees on a clear and complete project scope to guide deployment and aligns the stakeholders.

Cynergy Xcelerate process model enables rapid deployment:

This prescriptive model uses a preconfigured tenant, which helps deploy the single cloud-based system in a condensed timeline. This generates a high ROI with the flexibility to make system improvements once in production.

Balance deployment mitigates short and long-term risks:

The company's balanced process model offers industry best practices that can support a relatively faster deployment timeline. The prescriptive approach with business process and configuration design elements help meet client requirements. Its vast industry experience and leading practices power the project's ongoing knowledge and system ownership transfer.

Caution

Cognizant has built a formidable team of experts across its Workday portfolio. Now it must focus on consolidating the implementation methodologies and assets to build a strong value delivery proposition directly impacting the delivery, experience and deployment speed attributes.





Managed Services

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. that are evaluating Workday managed services providers.

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

Migration to cloud-based platforms is currently on the rise in the U.S. This has pushed enterprises toward seeking service providers that provide end-to-end Workday managed services ranging from pre-deployment stage to post-deployment support. Service providers currently focus on providing flexible support at any stage of the Workday journey instead of limiting the services to only certain phases. The two other current major focus areas are expanding post-production operational capabilities, and ongoing customer success management to increase customer satisfaction and retain a growing customer base to bolster future deployment processes.

ISG has observed that enterprises are moving from older HR platforms to new and advanced HCM platforms, leading to accelerated growth in the competitive managed services market. Most of these enterprises are seeking end-to-end managed service providers for an effective and optimal Workday service at a lower cost.



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

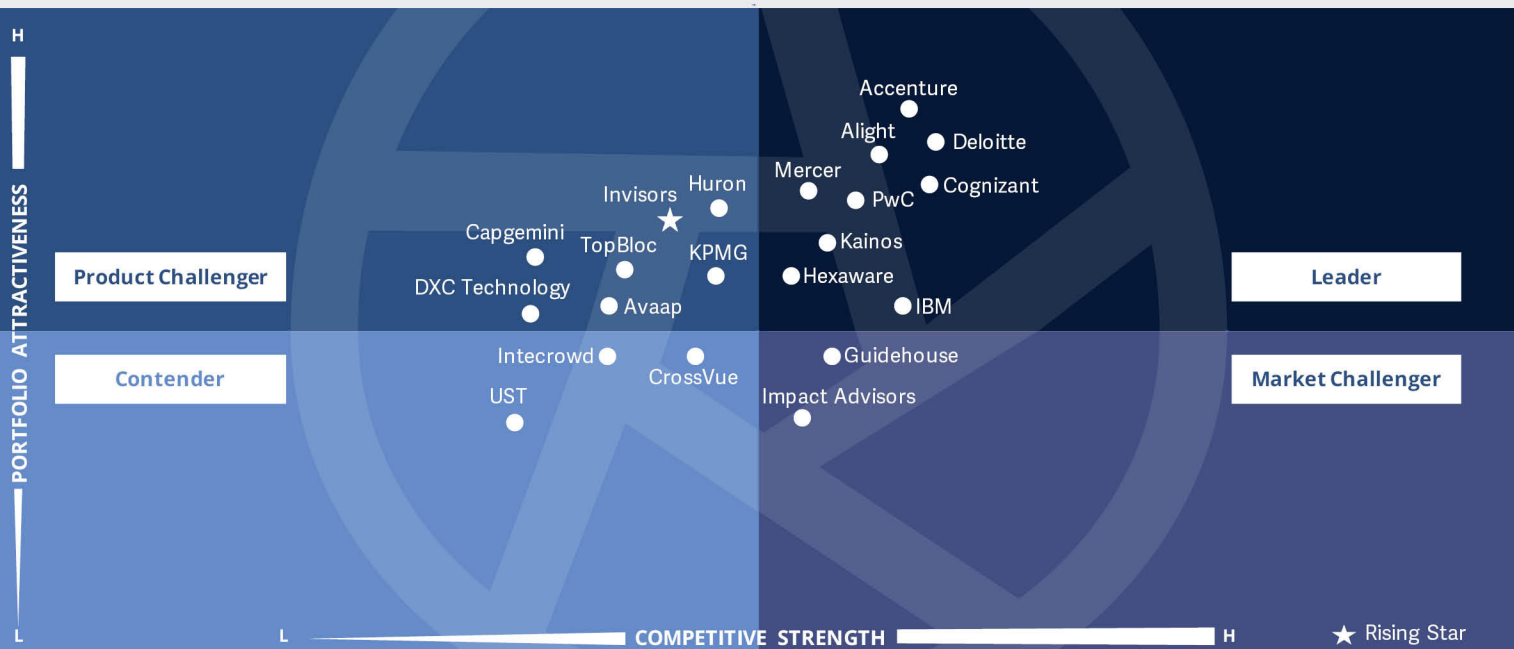


Operations and delivery leaders who are responsible for employee experience, business planning and financial management should read this report to understand how Workday managed service providers retain their credibility and service quality.



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





This quadrant assesses providers that are **modernizing their Workday application management** portfolios to manage the platform. The managed services cover **change, release and event management** plus managing **third-party software and related business processes**.

Ashwin Gaidhani



Managed Services

Definition

This quadrant analyzes providers specialized in offering managed services to maintain and support Workday products. The study focuses on providers that support enterprise clients with technical and operational tasks such as customization, personalization and configuration. These complement the Workday platform as part of the designed setup and address clients' requirements to accomplish specialized tasks. Additional competencies include provisioning, administering, monitoring and accessibility to ensure continuous operations across all Workday modules and related services. They also include incorporating platform customizations and personalization based on the enterprise clients' demands, changing demographics and social and corporate compliance policies.

The study evaluates the providers' technical and operational ability to support process improvements through regular change and release management processes. This involves application management services (AMS) for the client's internal and external systems. The providers are also evaluated based on their

ability to provide a broad spectrum of diverse applications, offer post-implementation and operational process support and modernize Workday services. The quadrant examines the providers' global reach, depth of Workday product portfolio and breadth of industry and technology coverage.

Eligibility Criteria

1. **Provide core support for Workday portfolio:** Experience in managing and maintaining Workday products but not limited to functions such as HCM, financial management, analytics, enterprise interface builder (EIB), data load, reporting and security, including processes, workflows and applications.
2. **Enable change and release management:** Experience in Workday release management and installation of new packages based on the release schedule; expertise in managing controlled changes to the environment through change management.
3. **Offer application maintenance services:** Comprehensive experience in delivering Workday maintenance support, developing technical solutions that support HRMS functional processes and Workday packages, and maintaining a bug-free environment.
4. **Offer integrated internal and external support:** Must support testing of Workday integration code base, including Studio, EIB and third-party systems, to ensure the availability and maintenance of the Workday platform.
5. **Strong partnership ecosystem:** Partnership with technology integration providers and critical third-party software providers (Accu-Time Systems, ADP et al.) covering the breadth of AMS-related portfolio.



Managed Services

6. **Competent in platform-as-a-service:** Expertise in working with Workday's Integration Cloud platform and integrating it with client's offerings, including monitoring and management aspects of the Workday platform.
7. **Competent in customization and personalization:** Expertise in designing, developing, deploying and enhancing customized solutions to meet business requirements.



Observations

Programs, initiatives and partnerships drive Workday's enterprise client engagements and education. Workday Pro, Workday Privacy Program and Explorer are a few programs that develop Workday competency within enterprise clients' organizations. Explorer helps address unique requirements and familiarize clients with Workday functionalities post-launch. These programs empower clients with the knowledge to use Workday features and modules optimally. Workday builds a strong, controlled partner network to ensure the platform product team effectively manages quality-of-service capabilities. The partner network comprises large global system integrators (GSI), independent software vendors and consulting firms that are constantly evolving.

- The Workday portfolio is predominantly undergoing transformation by its partners introducing services that enhance their complementing specialized services, such as business processes. These service segments

include professional services, application management services (AMS) and consulting and advisory.

- One of the main developments in post-deployment support is the Workday Community, which allows customers to access resources, share best practices and collaborate with other Workday users and experts. The Workday Community includes forums, blogs, videos, webinars and events. 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.

From the 28 companies assessed for this study, 21 have qualified for this quadrant, nine being Leaders and one Rising Star

accenture

Accenture has one of the best-managed service suites in the industry for its Workday practice, evidenced by its budget-friendly packages and exit clauses. This has ensured transparency and cost optimization, winning client trust and repeat business.

Alight

Alight's support desk, Tenant Optimiser and flexible support hours offer a discretionary hours pool. Tenant Optimiser offers tenant assessment, while the release updater provides impact analysis, change configuration and regression testing. It provides issue triage support.

cognizant

Cognizant's portfolio comprises Workday release management services, enhancement, change requests, incident and service requests, global delivery service model and service management applications support. It also has a dedicated resource based and/or squad-based shared services model.

Deloitte

Deloitte's post-deployment support is one of the industry's best and most transparent. Its go-live support is scientific and rationalized to hold the client's hand throughout the journey. It provides quick ticket resolutions and technical assistance.



Managed Services



Hexaware's comprehensive managed services portfolio consists of application support and maintenance, service management and application operations. Application support comprises end-user enablement, chatbot support, service requests tracking and incident management.



IBM's market differentiators include ticket analytics and reports to provide insights and metrics and an integrated management tool to identify optimization trends and challenges. It also offers an automated testing tool for Workday and customer production releases.

Kainos

Kainos is a leading Workday managed services partner this year. Its rapid growth is attributed to the substantial development of its post-production services. Kainos delivers transparent deployment services and offers Workday support services, including a Workday audit platform.



PwC's comprehensive managed services portfolio consists of ticket resolution, demand management, incident/problem root cause management and application controls, driving user efficiency and continuous improvement. Its digital assets such as HRIF and accelerators, enable superior UX.

Mercer

Mercer's managed services offers a plethora of tools to optimize end-to-end Workday deployment. Mercer has a dedicated Workday-certified AMS team that is skilled in the latest Workday functionality and is dedicated exclusively to providing post-production support.

Invisors

Invisors' (Rising Star) portfolio of managed services is highly contextual, client-oriented and broad-based. Its ready reference library of resources, such as videos, blogs, quizzes and on-demand webinars, are driven by client need.





"A comprehensive support services portfolio combined with technology integration and support pronounces Cognizant's leadership position in the Workday post-deployment space."

Ashwin Gaidhani

Cognizant

Overview

The Cognizant Workday Practice has helped many Fortune 500 companies and large- and medium-sized organizations transform their businesses. The Workday practice was formed in 2020 through the acquisition of Cognizant, a leading global finance and HR transformation consultancy and the longest-tenured workday service partner. Its Workday Practice has more than 1,874 employees and generated over \$249 million in revenue. It provides tenant analysis and planning. Its integrations, reporting and dashboards go beyond advanced reporting dashboards. In the U.S., the company focuses on delivering a complete suite of scalable applications in cost-effective packages. With its latest acquisition of OSV's professional services arm, Cognizant has gained a strategic competitive advantage in the U.S. Workday market.

Strengths

Client engagement-focused application managed services: Cognizant has developed a post-implementation strategy and support model and its service suite includes integration, monitoring and health check. It has established a governance management plan, Workday adoption planning and strategy development, managing major Workday release updates, planning and managing Phase X rollouts, end-to-end management and support for Workday Platforms.

Solution delivery packages offering comprehensive and scalable support:

Cognizant's Workday full-platform post-production services provide flexibility and a knowledge transfer, which enables client self-sufficiency. Offers also include strategic roadmap development, post-

deployment governance services and comprehensive Workday organizational change and training services.

M&A technology integration and divestitures technology support:

Recognizing that the proper integration of disparate systems is critical to the success of the M&A projects, Cognizant has successfully separated critical data and technologies to eliminate their long-term negative effects. For this, it provides essential strategic planning and training.

Caution

Cognizant has a totally new set of services and an experienced staff that can support a few niche optimization and support services around the Workday platform. It must focus on aggressive storyboarding with new capabilities, case studies and functionalities.





Appendix

The ISG Provider Lens™ 2023 – 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.

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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



Author & Editor Biographies



Research Partner

Ashwin Gaidhani
Lead Analyst

Ashwin Gaidhani has a comprehensive view of Enterprise services portfolio and digital business transformation initiatives with over two decades of experience as an ISG Research Partner and subject matter expert in enterprise services and workflow management. He is presently contributing as a Lead Analyst and Author with the ISG Provider Lens™ for platforms, emerging, and digital technologies.

Ashwin comes to this work with in-depth business and technology experience revolving around service management, consulting, emerging capabilities (artificial intelligence and intelligent automation), and work design methodologies.



*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, and Oil & Gas 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.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

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 offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

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iSG

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AUGUST, 2023

REPORT: WORKDAY ECOSYSTEM