ISG Provider Lens™

Workday Ecosystem

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

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Workday is aggressively aligning its business and technology strategy to build a competitive roadmap in the HCM space. Fresh executive-level inflow and trials of new corporate governance models (Co-CEO) highlight an innovative approach to leading the thought and technology leadership space. The launch of Workday Extend and the Enterprise Management Cloud is set to address the limitations of complex and bulky ERP systems. These solutions integrate AI and automation technologies with a central data core to unify and streamline enterprise data and intelligence.

Services such as advising on digital HCM transformation, implementing Workday solutions, fine-tuning systems and optimizing performance are all geared toward enhancing the overall user experience and reducing costs. These areas are among the top priorities for major enterprise clients.

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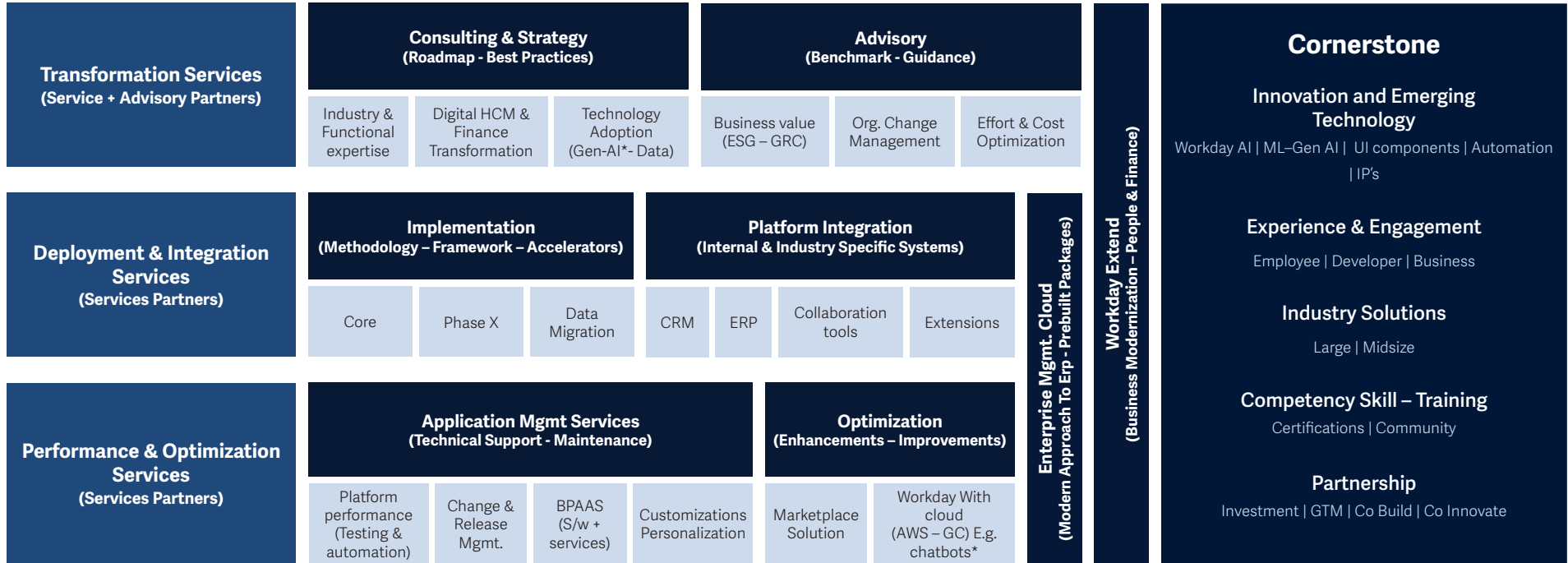
platform, focusing on areas such as payroll, time tracking and workforce management. Concurrently, it prioritizes industry-specific solutions to build more efficient processes and technology stacks, thereby simplifying and amplifying user benefits and effectively meeting enterprise needs. The demand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

Workday SKU

Quadrants

Service Segments

Transformation Services (Service + Advisory Partners)	Consulting & Strategy (Roadmap - Best Practices)			Advisory (Benchmark - Guidance)					Cornerstone
	Industry & Functional expertise	Digital HCM & Finance Transformation	Technology Adoption (Gen-AI*- Data)	Business value (ESG – GRC)	Org. Change Management	Effort & Cost Optimization			**Innovation and Emerging Technology** Workday AI | ML–Gen AI | UI components | Automation | IP's
Deployment & Integration Services (Services Partners)	Implementation (Methodology – Framework – Accelerators)			Platform Integration (Internal & Industry Specific Systems)					**Experience & Engagement** Employee | Developer | Business
	Core	Phase X	Data Migration	CRM	ERP	Collaboration tools	Extensions		**Industry Solutions** Large | Midsize
Performance & Optimization Services (Services Partners)	Application Mgmt Services (Technical Support - Maintenance)				Optimization (Enhancements – Improvements)		Enterprise Mgmt. Cloud (Modern Approach To Erp - Prebuilt Packages)	Workday Extend (Business Modernization – People & Finance)	**Competency Skill – Training** Certifications | Community
	Platform performance (Testing & automation)	Change & Release Mgmt.	BPAAS (S/w + services)	Customizations Personalization	Marketplace Solution	Workday With cloud (AWS – GC) E.g. chatbots*			**Partnership** Investment | GTM | Co Build | Co Innovate

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

- **Transformation Services**
- **Deployment and Integration Services**
- **Performance and Optimization Services**

Simplified Illustration Source: ISG 2024
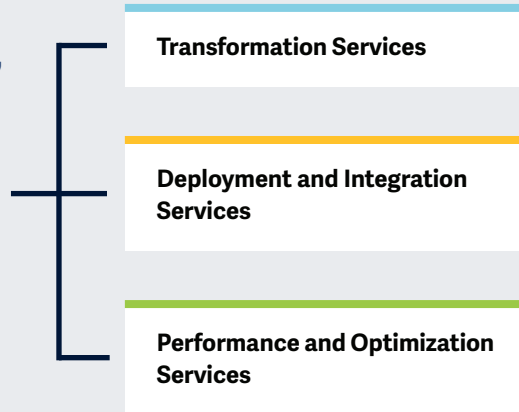
The ISG Provider Lens™ Workday Ecosystem study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including Europe and the U.S.

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

Transformation Services

Definition

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

This quadrant assesses providers' expertise in driving transformational initiatives to deliver a robust execution plan, organizational change management and business value {environment, social and governance (ESG) and governance, risk and compliance (GRC), which certified consultants then administer. It also evaluates their approach to migrating and reforming processes by analyzing business, functional and technical requirements using custom assessment kits aligned with the practices prescribed by Workday.

The service providers covered in this quadrant help enterprise clients of all sizes understand the changing market trends and design the best models for business and service through technology adoption that aligns with the enterprise's objectives.

Eligibility Criteria

1. Identify opportunities for **new Workday competencies** using **best practices** and creating an **adoption roadmap with frameworks, tools and templates**

2. Evaluate the **human resource management (HRMS) landscape to design HR service transformation strategies and road map integration** and provide in-depth knowledge of the Workday product portfolio (financial management, payroll, analytics, Workday Extend and HCM services) and industry expertise

3. Focus on **digital business transformation competencies and expertise in industry-specific functional processes** and **strategy consulting, including ESG** and **GRC areas**

4. Hold Workday platform certifications to **predict long-term technology developments** and adoptions to prescribe **timely solutions** using **expertise** and **partnerships**

5. Have change management experience and offer **Workday-certified resource pool** with solution-building expertise

Deployment and Integration Services

Definition

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

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

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

Eligibility Criteria

1. Deploy new features on the **Workday platform** and **Integration Cloud**

2. **Integrate, map, develop, optimize** and test Workday products across modules (HCM, financial management, analytics, planning and payroll)

3. Offer expertise in **diverse system integration and migration with ERP, SAP, CRM** (ServiceNow) and **internal collaborative systems** (such as Microsoft Teams and Slack)

4. Offer **maintenance, support** and **installation services; upgrades; and new feature release, patch** and **lifecycle management**

5. Work with emerging technologies such as **automation, data science, AI, ML** and **cognitive computing** to enable digital transformation and drive implementations

Performance and Optimization services

Definition

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

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

Eligibility Criteria

1. Support, optimize and enhance **Workday HCM, financial management, analytics, Enterprise Interface Builder** (EIB), **Workday Extend, data load, reporting** and **security**

2. Conduct **Workday release management, install new packages** based on the release schedule and manage **controlled changes** to the environment via **change management**

3. Deliver **Workday maintenance support** and maintain a bug-free environment

4. Support testing of **Workday integration code base**, including **third-party systems (BPaaS)**, to ensure the availability and maintenance of the Workday platform and its complimentary software

5. Build **strong partnerships** with **technology integration providers** and **critical third-party software providers** (Accu-Time Systems, ADP), covering the breadth of AMS-related portfolio.

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Workday Ecosystem 2024:

Quadrant	Europe	U.S.
Transformation Services	✔	✔
Deployment and Integration Services	✔	✔
Performance and Optimization Services	✔	✔

The research phase falls in the period between April and August 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2024.

Milestones	Beginning	End
Survey Launch	April 24, 2024	
Survey Phase	April 24, 2024	May 22, 2024
Sneak Previews	August 2024	September 2024
Press Release & Publication	September 2024	

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2024 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the Europe and 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 April 2024, 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.

Contacts For This Study

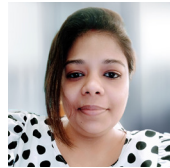### Study Sponsor

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

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Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

1Finance Partners	Cognizant*	Impact Advisors*	Protiviti
Accenture*	Commit Consulting	Intecrowd*	PwC*
Active Cyber	CrossVue*	Invisor*	Skillcentrix
Advise Now	Deloitte*	Jade Global	Slalom
Albida	DXC Technology*	Kainos*	Strata Information Group
Alchemy	ERPA	KPMG*	SuccessDay B.V
Alight*	EZECloud Consulting	Macro Solutions	Three Plus Consulting
Analyze Consulting	Genpact	Macrospect	Tietoevry*
Armanino	Grant Thorton	Mercer*	TMF Group
Avaap*	Groundswell	MHP	TopBloc*
BGSF	Guidehouse*	Oakland Consulting Group	UST*
BNB*	Hexaware*	OneSource Virtual	VirtualResource
Business Integration Partners	HR Path	Premier International	
Capgemini*	Huron*	Preos*	
CapTech Ventures	IBM*	Promateus	

About Our Company & Research

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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

For more information, visit isg-one.com.

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APRIL, 2024

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