

Workday Ecosystem

A report analyzing the strengths and competitive positioning of Workday service provider partners



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Workday's commitment to innovation, its adaptability and its ongoing focus on product enhancement have enabled it to stay ahead of competition, attract new clients and expand its market presence. Currently, Workday has a share of more than 40 percent in the cloud HCM market, primarily driven by its ability to ensure superior UX. Despite the complexity of customization, Workday's modern user interface and focus on customer satisfaction set it apart from its competitors.

The recent Spring 2025 release, with over 350 new features along with innovations such as Workday Illuminate, Workday Orchestrate and AI agents for HR and finance, is going to revolutionize the way digital HCM services are delivered by its partners and consumed by enterprise clients. These new solutions leverage AI to streamline tasks, enhance decision-making and transform business processes, reinforcing Workday's commitment to innovation and enhanced UX.

Workday's partnerships with industry leaders such as Salesforce and Equifax have strengthened its market position. These partnerships have expanded Workday's HCM capabilities on these platforms, ensuring seamless integration with Workday modules.

In mid-2024, Workday introduced the Built on Workday program to leverage generative AI (GenAI) and agentic AI, enhancing its HCM and finance solutions. This initiative empowers partners to develop specialized applications, enabling Workday to offer increasingly comprehensive and tailored solutions and also opening new revenue streams for partners. Additionally, in September 2024, Workday, in collaboration with key service partners such as Accenture, CrossVue, Deloitte, Invisors, Kainos, KPMG, Mercer and PwC, launched the Industry Accelerator program, featuring 12 preconfigured solution accelerators.

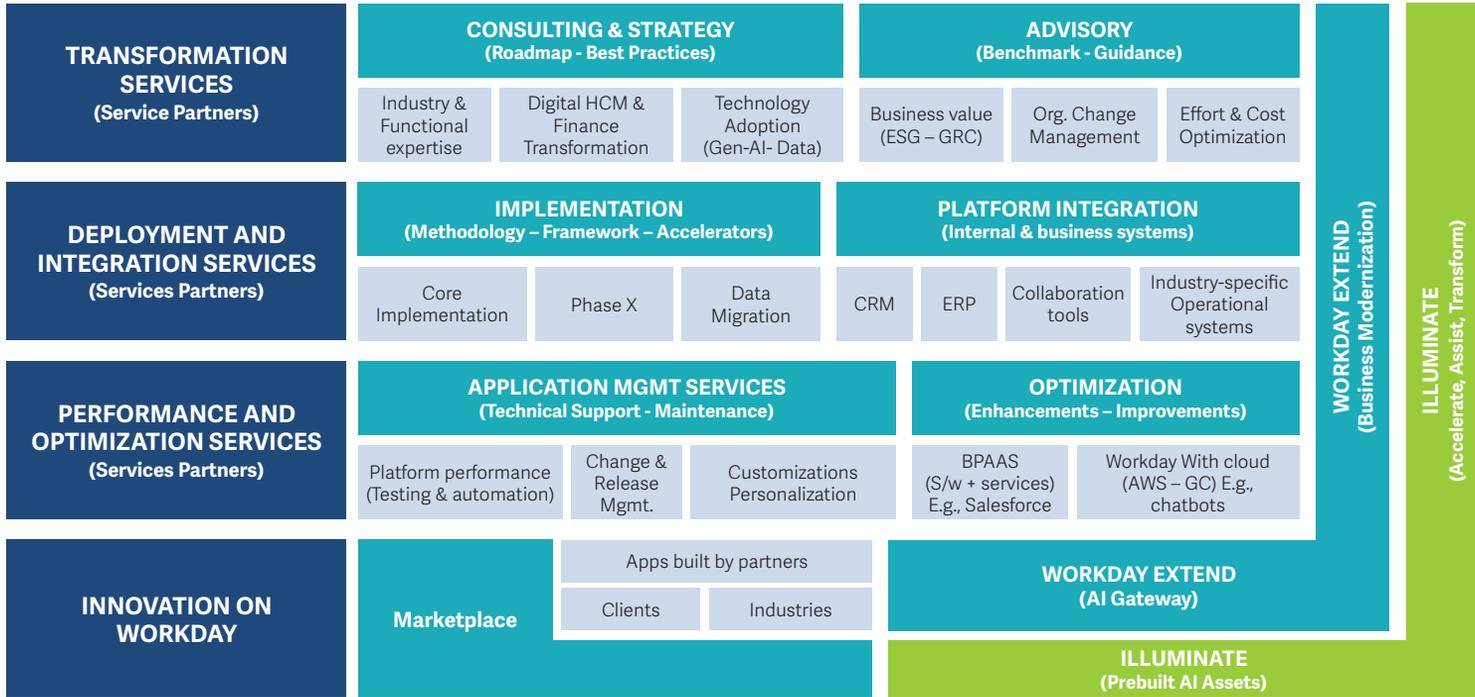


QUADRANTS

SERVICE SEGMENTS

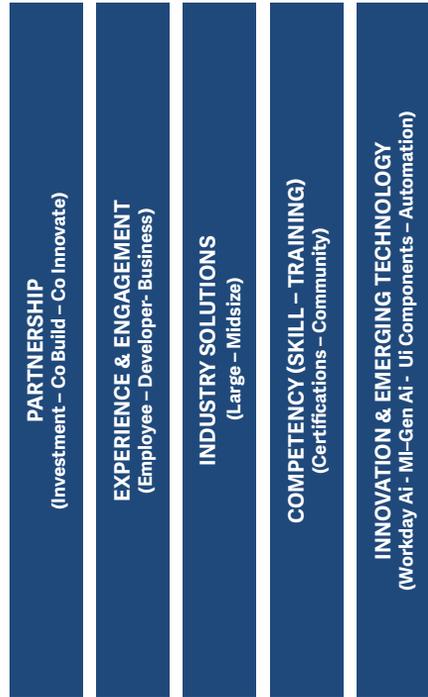
CORNERSTONES

WORKDAY SKU



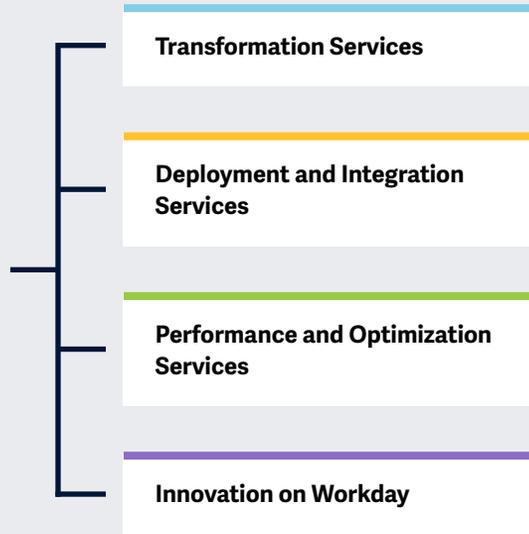
WORKDAY EXTEND
(Business Modernization)

ILLUMINATE
(Accelerate, Assist, Transform)



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



Scope of the report

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 the U.S., Europe and APAC markets

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

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



Deployment and Integration Services

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



Performance and Optimization Services

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 application management services (AMS) portfolio



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



Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Workday Ecosystem — 2025:

Quadrant	U.S.	Europe	APAC
Transformation Services	✓	✓	✓
Deployment and Integration Services	✓	✓	✓
Performance and Optimization Services	✓	✓	✓
Innovation on Workday	✓	✓	✓



The research phase falls in the period between April and May 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

Milestones	Beginning	End
Survey Launch	April 14, 2025	
Survey Phase	April 14, 2025	May 15, 2025
Sneak Preview	August 2025	September 2025
Press Release & Publication	September 2025	

The collection of client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) as CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 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!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Workday Ecosystem IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research published in 2025. For more information, refer to the [Buyers Guide research schedule](#).

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

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

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



Contacts For This Study

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Pagdi

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Megha
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Anuj
Sharma

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and APAC**



Shreemadhu
Rai B

**Senior Project
Manager**



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 QCRT 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.

ISG Advisors to this study



Anoop
Chawla

**Director, Human Capital
Management**



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.

* Rated in previous iteration

Accenture*	Coreteam	Groundswell	Kognitiv
ABeam Consulting	CrossVue*	Guidehouse*	KPMG*
Aberdeen Services	Datacom	Helios Consulting Inc.	Macro Solutions
Active Cyber LLC*	Deloitte*	Hexaware Technologies*	Makse Group
Advise Now SAS	DXC Technology*	Hitachi Solutions	Mercer*
Alchemy	E1 Consulting LLC	HR Path*	MHP Management- und IT-Beratung GmbH*
Amaris	Engineering Ingegneria Informatica	Huron*	Mivada Pty Ltd
Armanino LLP	EnterpriseMarketdesk	IBM*	OneSource Virtual
Avaap*	ERPA*	Impact Advisors*	Precision Task Group Inc.
BNB*	EZECloud Consulting	Inetum	Premier International
Capgemini*	Fusion 5	Infosys	Preos Talent Limited*
CapTech Ventures, Inc.*	G-Able	Intecrowd	Protiviti Inc.
CloudRock	Genpact	Invisors*	PT. Metrodata Electronics, Tbk
Cognizant*	Glyde Consulting LLC*	Jade Global Inc.*	PwC*
Commit Consulting	Grant Thornton LLP	Kainos*	Qmetrix



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* Rated in previous iteration

Randstad Digital

Samsung SDS Co., Ltd.

Shearwater

Skillcentrix LLC*

Slalom*

Strada (Alight)*

Symali

Syssero, Inc

The Groove

Tietoevry*

TopBloc, LLC*

UST*

WD Assist LTD



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.

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

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

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.





APRIL, 2025



BROCHURE: WORKDAY ECOSYSTEM