

Workday Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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Workday develops and innovates platform offerings for seamless and personalized experiences

The success of any business depends on its ability to adapt to changes in the market and address the needs of customers and stakeholders. In today's rapidly evolving business landscape, organizations must clearly understand their goals and objectives and have a comprehensive strategy to achieve them. As a result, the attention to human capital management (HCM) functions is growing. Experience, convenience and mobility are the key driving factors in building a strong familiarity between the stakeholders and HCM processes. Workday is aggressively crafting a strategy to connect and meet these business and customer demands by listening to its partner ecosystem and constantly adding new features, programs and functionalities.

In addition to having a clear vision, businesses must have a strong understanding of their target market. Europe is a crucial market for Workday, where its popularity and adoption are growing due to its integrability. Workday focuses on a few crucial offerings such as adaptive planning and payroll management, which include understanding customers' needs, preferences, behaviors and the competitive landscape in which customers operate. By leveraging data and analytics, organizations can gain valuable insights into their customers and markets to inform their strategy and decision-making.

Workday leads the enterprise cloud applications space for finance and HR and has seen rapid growth in its customer base across Europe, the Middle East and Africa (EMEA) and beyond. Workday's increasing adoption in 2023 is also a testament to its strong presence and reputation in the region. It works with over more than 2,000 customers headquartered in Europe, including over 40 percent of the Financial Times Stock Exchange 100 Index (FTSE100) and German Stock Market Index (DAX40) companies and more than 30 percent of the French Stock

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



Market Index (CAC40) firms. Workday has also invested in expanding its sales capacity and partner ecosystem in the region and supporting local communities through its social impact initiatives.

Another critical element to achieving business success is having a strong leadership team. ISG sees that large consulting firms and global system integrators (GSIs) are building Workday leadership teams, delivery centers and practice teams in the EU, indicating a rise in the Workday platform adoption.

HCM entails the effective management of an organization's people-related processes, including recruiting, hiring, training and retaining employees. It involves people with diverse needs, expectations, skills and personalities. Moreover, HCM faces various external and internal challenges that require constant readaptations and innovations. It has become increasingly complex due to factors such as globalization, technological changes and evolving workforce dynamics. ISG has observed a set of challenges that require a comprehensive and strategic approach to HCM.

- **Talent acquisition and retention:** Finding and retaining talent are significant challenges. They involve identifying individuals with the right skill sets that fit the company's culture. Organizations must also strive to keep this talent pool engaged and prevent them from leaving. Workday has launched products around talent management that include talent optimization and acquisition, covering the full recruitment and talent acquisition lifecycle.
- **Workforce diversity and inclusion:** Organizations today are expected to have diverse and inclusive workforces. This goes beyond diversity in race and gender but also in age, culture, religion and others. Managing a diverse workforce requires understanding individuals' needs, preferences and cultural nuances.
- **Training and development:** Keeping up with the rapidly changing technology requires periodic employee training. Companies must ensure their workforce remains up to date with the latest tools. Career progression is crucial; therefore, Workday offers the learning management capability as part of its talent management module, which helps design, develop and deliver a personalized learning experience and drives skill adoption.
- **Employee engagement:** Engaged employees are more productive, but increasing their engagement is challenging. Employees feel engaged when satisfied with their jobs and believe in the company's mission and values. To enrich employee experience and engagement, Workday products and solutions collect feedback and data through surveys, helping employers hear the pulse of the enterprise ecosystem and work on improvising employee relationships.
- **Compliance with regulations:** Organizations may find adhering to local, national and international labor laws challenging. Workday offers a complete set of financial and operational solutions that align with the corresponding operating region. Payroll and financial management are a few customizable products for enterprise clients.
- **Data security/privacy:** With the digitalization of HR processes or HCM software, organizations must ensure the security and privacy of employee data. The Workday HCM platform offers emerging technology capabilities like AI and automation to address data security and privacy needs.
- **Workforce planning and analytics:** Organizations need data-driven decisions regarding workforce planning. In most cases, the workforce includes the extended vendor ecosystem and contractual engagements, which are complex to manage. Workday's workforce management solutions include workflows and functionalities that capture performance, productivity and many other attributes, driving healthy workforce practice.
- **Change management:** Companies must manage organizational change effectively to ensure the conformance of all stakeholders. This helps in the seamless onboarding of capabilities and functionalities of any new technology and enterprise platform. Workday service providers offer comprehensive change management support during Workday onboarding projects across all



enterprise portfolios, including technology, organizational and technical change management.

Hence, companies must leverage technology, data analytics and innovative practices.

Enterprise clients are reacting positively to Workday's functionalities, promoting its adoption in 2023. They see value in partnering with trusted vendors offering a comprehensive suite of cloud applications that are scalable, secure and innovative.

Consulting and Strategy Services

As European markets are rapidly acclimating to the Workday platform, the business consulting and advisory capabilities of Workday Services Partners play a crucial role in helping enterprises adopt new functionalities and modules. These enhancements complement the existing systems and expand the coverage of systemic data. Business technology fitment, technical architecture and process transformation converge to deliver a sustainable solution integral to the European client diaspora. Their capabilities are not limited to assessment, service mapping and

solution proposition but extend to delivering an improved experience through operational consulting and technical expertise. Their expertise is used to redesign the technical architecture to support microservices, container orchestration and cloud-native application development for platform resiliency. Localization, governance risk and compliance (GRC) and security consulting are predominant areas for Workday consulting in Europe. The consulting capabilities around the Workday platform, the HCM domain and competitive solution providers are crucial in transitioning enterprise clients from incumbent HCM platforms to the Workday platform.

Implementation and Integration Services

Workday engagements consist of new core implementations and Phase X projects. While the implementation methodology is standardized across the Workday ecosystem, unique technical expertise with legacy systems, cloud and new third-party applications set service providers apart. Integrating Workday with the existing legacy systems and other cloud-based solutions is becoming common and requires advanced technical competencies.

In Europe, integrating and managing third-party payroll systems are crucial for businesses. Large global systems integrators (GSIs) and Workday Services Partners are building these competencies to serve the European market. As Workday enhances its product offerings, consultants are helping organizations leverage new functionalities and expand their platform use.

Workday service providers are expanding their partner ecosystems by establishing technology partnerships with local firms to extend their service competency. These partnerships aim to serve Phase 1 and Phase X implementations as a continuum. With Workday's platform maturing, organizations are implementing additional financial, analytics, talent management and payroll modules atop the core HCM platform. Agile methodologies have gained prominence in Workday implementation trends, with service partners adopting practices that improve project management, communication, documentation and process efficiency.

Managed Services

Workday users require post-deployment support to optimize their systems and address issues that arise during normal operations. The quality of support relies heavily on services providers' resources, certifications and maintenance expertise. Application management services (AMS) handle platform break-fixes, design and development. Change and release management are continual activities that require careful execution to avoid disrupting the platform. These complex but routine activities must be carried out to incorporate the latest updates and features into the Workday platform.

Managed services in the Workday ecosystem were less popular last year due to ambiguity in the offering portfolio. Partners had disagreements on what managed services should be included due to limited service offerings in the Workday AMS space. ISG's own Workday team has built a blueprint with a futuristic view and anticipates transformation in this space. The Workday partner ecosystem reviewed in this study is confident about this space, especially with the experience of



Executive Summary

studying the platform market. We have seen capabilities expand through API customizations and application interfaces extended by the platform community. Workday Extend, a Workday offering that helps enterprises create related apps, is one of the fastest-growing Workday portfolios and comes with an additional license. Clients are willing to experiment with tailor-made apps for their businesses. Once these apps are designed and launched, they will likely be accepted as standard.

Enterprise clients are reacting favorably to the Workday platform in 2023, recognizing the benefits of moving to a cloud-based platform to achieve strategic objectives.



 Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
BNB	Contender	Contender	Contender
Capgemini	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Hexaware	Not In	Product Challenger	Leader
HR Path	Product Challenger	Contender	Contender
IBM	Market Challenger	Leader	Leader



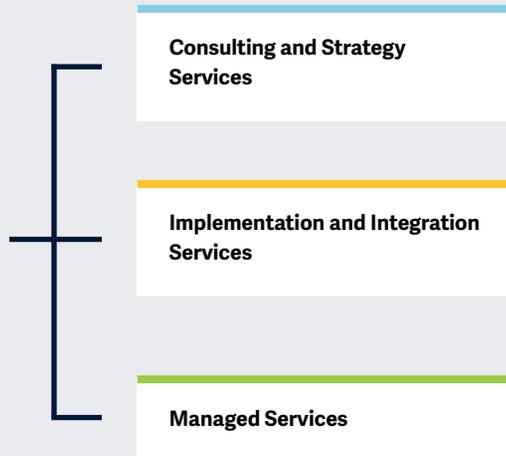
 Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Invisors	Product Challenger	Contender	Product Challenger
Kainos	Leader	Product Challenger	Rising Star ★
KPMG	Product Challenger	Leader	Product Challenger
Mercer	Product Challenger	Rising Star ★	Product Challenger
MHP	Contender	Contender	Contender
Preos	Contender	Product Challenger	Not In
PwC	Leader	Leader	Leader
Three Plus Consulting	Contender	Contender	Contender
Tietoevry	Product Challenger	Leader	Product Challenger



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. For businesses, these challenges make soaring operating costs the biggest concern. 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.

HR functions are undergoing a drastic transformation in the manner of conducting business. Human-centric processes continue to shift to the virtual space by digitalizing HCM workflows. The continuous need to consolidate these essential functions to extend organizational support to employees and streamline mainstream HR functions digitally 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 the complete suite of Financial Management, Strategic Sourcing, Peakon Employee Voice, Adaptive Planning, Analytics and Reporting and more. Workday integrates HR applications into an enterprise management cloud platform. The platform is designed to incorporate custom requirements and personalization to extend its ability to cater to exclusive requirements 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 just a specific product but all modules. The following evaluation areas also apply to the service providers in 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 and Managed Services.

This ISG Provider Lens™ study offers IT decision makers with 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 in terms of 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 European enterprises across industries evaluating Workday consulting and strategy service providers.

In this quadrant, ISG assesses the current competitive positioning of Workday consulting and strategy service providers in Europe and shows how each provider addresses the key challenges faced in the region.

European enterprises realize the importance of Workday consulting services for optimizing and transforming their HCM and financial management processes to deliver sustainable solutions. Some enterprises prefer their evaluation services from vendor-agnostic consulting providers. Localization, governance, risk and compliance (GRC), and security consulting remain prominent areas for Workday consulting in Europe.

Enterprises are investing in adopting new functionalities and modules to deliver an improved client experience. The digitization of HCM software and HR processes has led to enterprises focusing on data privacy and security. Providers are employing rigorous security measures at multiple organizational levels to ensure the safety and security of data and applications.



Business leaders, including CHROs, CFOs, payroll and financial leaders, that focus on driving business outcomes 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 Workday's Europe-specific solutions.



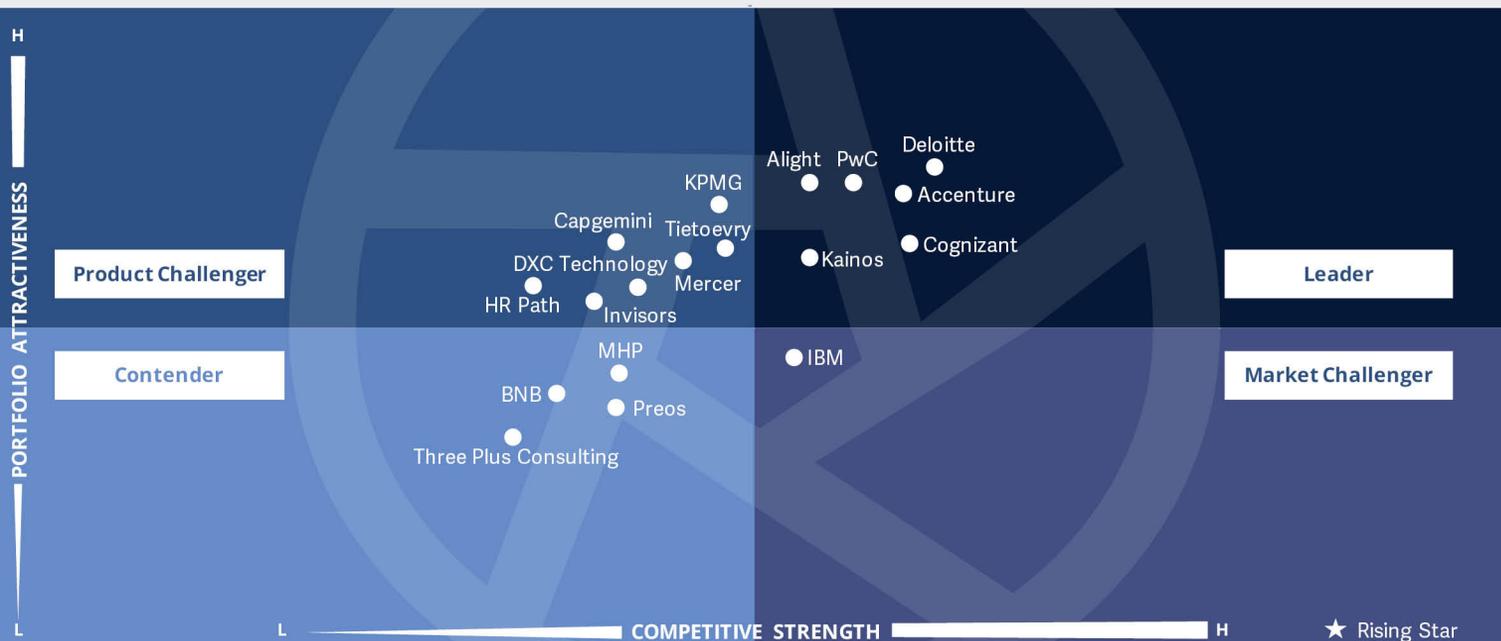
Digital transformation leaders who spearhead initiatives to build a future-proof organization should read this report to know how services providers design Workday solutions and map them to respective technologies.



ISG Provider Lens™
 Workday Ecosystem
 Consulting and Strategy Services

Source: ISG RESEARCH

Europe 2023



This quadrant evaluates the ability of a service provider to deliver a **comprehensive Workday consulting competency for modernizing HCM processes**. This analysis also covers guidance and **support on optimizing services across the Workday portfolio**.

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. Workday advisory and consulting services help enterprise clients develop a roadmap for 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 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 roadmap integrating functional services
- 3. Industry knowledge, domain practices and Workday portfolio:** In-depth knowledge of the Workday product portfolio (HRMS, Financial Management, Local & Global Payroll, Analytics & Reporting, Workday Extend and HCM) 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 (with 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

In 2023, the Workday consulting space in Europe is anticipated to experience rapid growth as more organizations adopt Workday's cloud-based solutions for finance, HR and planning.

- **Growing demand for Workday services:** As more and more organizations adopt Workday's suite of HCM, financial management and other related solutions, the demand for consulting services to assist with its implementation, integration, customization and ongoing support is also increasing. This demand drives the need for consulting teams to possess knowledge of competing platforms and work on designing a founding architecture from an IT standpoint.
- **Implementations across multiple countries:** Many multinational organizations operating in Europe are implementing Workday across multiple countries to streamline their HR and financial processes. Workday and HRMS consulting capabilities supported by a team of experts in multi-country support and

deployment models are in high demand. Compliance with local regulations and localization services are highly sought after.

- **Enhancement and optimization:** The new approach in consulting is to improve Workday performance, usability and adoption by providing focused consulting and best practice sharing through ongoing support, maintenance, updates and enhancements. Consulting engagements in the Workday space are increasing in length to address Workday optimization projects that include overall technology consulting.
- **Driving innovation with Workday Extend:** Workday service partners customize and personalize the experience around Workday solutions. They also help customers access innovation from other partners and vendors that integrate with Workday.

From the 28 companies assessed for this study, 18 have qualified for this quadrant, with six being Leaders.

accenture

Accenture focuses on four segments, namely Financial Management (Cloud ERP), Human Capital Management, Value-led Platform Services, and Education, Government and Nonprofit. The offerings for these segments consist of skills-based organization, Workday Peakon and Media and Hi-Tech quote to cash (Q2C).

Alight

Alight's USP is its ability to leverage its expertise to suggest turnkey advice and improvements tailored to clients' needs. It closely studies the client's current systems, identifies gaps and suggests appropriate solutions.

cognizant

Cognizant's software development life cycle (SLDC) support includes change management, providing subject matter expertise, working with limited resources and project and time management support.

Deloitte

Deloitte focuses on business outcomes while enhancing its UX. Its Project Management Office framework is considered one of the best in the services industry. Its unique selling point (USP) is a live model that is improved regularly through iterations based on client feedback.

KAINOS &CO

Kainos integrates data, AI and cloud platforms to design services for a superior solutions delivery. Depending on client preferences, it can scale the project up or down or fast-track it for a faster turnaround time. Clients attest to Kainos' control, execution competency engagement and involvement in the projects.

pwc

PwC's Workday approach starts with an extensive analysis of clients' needs and then designing an executable roadmap with clearly defined milestones. The company also optimizes costs for clients and lowers the TCO to deliver a high ROI.





“A comprehensive blueprint, a robust change management process and foolproof data integration have ensured Cognizant’s success.”

Ashwin Gaidhani

Cognizant

Overview

The Cognizant Workday Practice has helped many Fortune 500 companies and large and mid-sized organizations transform their businesses. It was formed in 2020 through the acquisition by Cognizant, a leading global finance and HR transformation consultancy. The practice has more than 1,874 employees and generated over \$249 million in revenue. Its Workday Advisory Services includes strategy, organizational change and training, finance, HR and student technology deployment. Cognizant continues to grow its European Workday practice and has recently expanded outside the U.K. and Ireland into new markets such as DACH, Continental Europe and The Nordics in 2023.

Strengths

End-to-end consulting services offer compelling support: Cognizant provides strategic roadmapping and governance planning services, phased technology deployments, M&A support and continuous improvement cycles. It aligns deployment and optimization efforts with the clients’ broader initiatives and offers actionable roadmaps to prepare the client for the launch.

Across-the-spectrum product expertise: The Cognizant Workday Practice has wide product expertise spanning all Workday applications. Services for these applications include adaptive planning based on the industry and planning type (for example, Financial and Workforce). In Europe, it has deployed over 200 projects, of which 91 are

Phase 1 deployments and the remainder of which have been post-production projects. Under the Workday Skilled Classification, the company has designed a five-cycle application implementation methodology to enable client autonomy. Cognizant is also one of the first and few major partners to offer packaged Prism solutions.

Systems design and data integration — Cognizant’s USP: Workday feeds data to multiple internal and external systems and receives data. Cognizant identifies all data touch points and system exchanges at the initial stage of systems design to prevent additional integrations during the implementation, which may adversely impact project timelines and costs.

Caution

Cognizant is an established and leading Workday Services Partner. However, it could focus on enhancing its innovation and technology consulting services. This approach would encompass a broad consulting portfolio, including midsize enterprise transformation, to scale its European business.





Implementation and Integration Services

Implementation and Integration Services

Who Should Read This Section

This report is relevant to European enterprises across industries that are evaluating Workday implementation and integration service providers.

In this quadrant, ISG highlights the current market positioning of Workday implementation and integration service providers in Europe and shows how each provider addresses the key challenges faced in the region.

Enterprises in Europe are focusing on adapting to the rapid changes caused by technological advancements. They are increasingly leveraging the Workday platform, including Adaptive Planning, Workday Planning and Workday Prism Analytics and other elements, to enhance their HR and finance processes. Enterprises are optimizing the Workday interface and platform to simplify processes and ensure employees can access Workday's features and functionalities on mobile devices — a trend largely gaining traction and popularity in Europe.

Enterprises seek service providers with robust governance skills to ensure that implementation and integration projects are well executed with collaborative interactions at minimum costs. They prefer a local point of contact with European legal and regulatory knowledge for seamless and compliant implementation and integration.

Technology stacks and business service landscapes influence the pace of the Workday platform adoption. The European market demand for implementation and integration services has considerably increased owing to the SaaS platform's high modularity, compatibility and economic value that benefit business objectives in every dimension.



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



Engineers and architect head responsible for Workday implementations in enterprises can use this report to understand the developments in Workday solutions and support building 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 service providers' **technical and technological prowess** in **executing Workday Core and Phase X implementations**. The capabilities include the **data migration and integration expertise** that help connect modern focused systems.

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, machine learning 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



Implementation and Integration Services

Observations

Workday has been continuously expanding its suite of applications beyond core HR and finance. European organizations are exploring the implementation of additional modules such as Workday Recruiting, Workday Learning, Workday Planning and Workday Prism Analytics to enhance their HR and finance processes. Enhancing the platform UX and providing mobile access to Workday have become significant trends. Enterprise clients focus on optimizing the Workday interface to simplify processes and ensure employees can access Workday's features and functionalities on mobile devices.

Here are some points of emphasis and trends in this quadrant.

- **Integration and data migration:** Workday implementation often involves integrating existing systems and migrating data from legacy platforms. Hence, Workday consultants with expertise in integration frameworks, data migration strategies and middleware technologies are in high demand to ensure a smooth transition.
- **Continuous deployment and post-go-live support:** Workday operates on a continuous deployment model, regularly releasing new features and updates. Organizations need consultants to provide ongoing support, help them leverage new functionalities and ensure system optimization after the go-live.
- **Integration with third-party systems:** Workday's open architecture allows seamless integration with various third-party systems. It allows European organizations to implement integrations with other enterprise systems, such as payroll providers, talent management solutions, time and attendance systems and learning management systems, creating a unified ecosystem and streamlining 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, 19 have qualified for this quadrant with eight being Leaders and one a Rising Star.

accenture

Accenture's go-to-market strategy comprises design thinking frameworks, preconfigured solutions on the myConcerto digital platform, change management accelerators and dashboards. These support integration services and predictive analytics solutions.

Alight

Alight supports the following Workday applications: Financial Management, HCM, Adaptive Planning, Payroll and Automated Testing. It provides a unified, agile HR and global payroll solution that enables organizations to pay their entire workforce.

cognizant

Cognizant's Global Delivery Center offers post-implementation advisory and consulting services and end-to-end project strategies with resources in multiple time zones. Its global support model offers 35 percent more access to consultants for quick resolutions.

Deloitte

Deloitte brings its deep understanding of HCM and financial services industry vertical and domain expertise, knowledge of the Workday suite and a diverse talent pool. Its core competence is its global presence that helps capture regional nuances and offer customized solutions.



Implementation and Integration Services



IBM has deep expertise and takes a phased approach to guide clients based on their profile, complexity and budget. It leverages its project and change management skills and full-platform approach to synergize finance and HR processes.



KPMG's services focus on HR transformation. It is currently focusing on developing the HR NextGen program together with Workday to deliver impactful implementation solutions in Europe.



PwC's expertise spanning assurance, tax and advisory services differentiates it from its peers. With a strong team of business and IT professionals, PwC delivers dynamically evolving solutions based on changing client needs.



TietoEvry brings deep market and regulatory knowledge as a Nordics partner, which ensures compliance with local laws. Its services encompass the entire spectrum of Workday apps and leverage the cloud, AI and DevOps to deliver the best client experience.

Mercer

Mercer (Rising Star) has extensive expertise in major HR areas such as job architecture, compensation, change management and communications. It uses best-in-class proprietary tools for assessment, evaluation and governance, global reach and offshore projects.





“Cognizant’s proprietary methodology, Cynergy, helps clients to go live on time and within budget, resulting in rapid and balanced deployment.”

Ashwin Gaidhani

Cognizant

Overview

The Cognizant Workday Practice has helped many Fortune 500 companies and large and mid-sized organizations transform their businesses. It was formed in 2020 through the acquisition by Cognizant, a leading global finance and HR transformation consultancy. The practice has more than 1,874 employees and generated over \$249 million in revenue. Cognizant’s unique Cynergy deployment model and its Prosci®-trained Change Management team enable rapid and balanced core and phase X deployment, resulting in faster turnaround time and cost reduction. The company’s EU business is stable and strong; however, recent macroeconomic turbulence has impeded the business.

Strengths

Strong implementation team with a proven track record:

The company leverages its Workday-certified integration consultants that hold over 300 Workday certifications and over 450 Workday-specific integration tool certifications. The functional and technical teams work together and use various templates and accelerators to reduce engagement and build time.

Balanced deployment mitigates short and long-term risks:

Cognizant has a balanced process model that follows industry best practices for a faster deployment timeline. The prescriptive approach with business process and configuration design elements help meet client requirements. The company’s vast industry experience powers knowledge transfer.

Continuous client engagement throughout

SLDC: Cognizant supports clients with comprehensive integration update status throughout the engagement phase. For instance, it offers the SCARF (Student Academics, Records and Foundations) configurable connector. It also provides an integration health check and field impact analyzer. A client noted that Cognizant has deep knowledge of the Workday ecosystem, enabling the company to deploy high-caliber resources on demand.

Caution

Cognizant must build a focused strategy with its newly added expertise from its latest acquisition to expand its coverage in the European market. The company needs to insulate itself against these headwinds and prepare for the growing competition in the European space.





Managed Services

Who Should Read This Section

This report is relevant to European enterprises across industries that are evaluating Workday managed service providers.

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

Managed service providers' quality, availability and agility define the degree of seamless support and maintenance to European organizations. Service providers are currently working on strengthening the post-production support capabilities and business process services for existing Workday customers in the region. They also want to make managed services less transactional and cost-effective, thus improving customer expectations.

Enterprises in Europe require service providers to administer Workday operations and resolve operational challenges by periodically coordinating service activities and reporting and forecasting service demands. Security is a top priority; therefore, service providers must follow best practices to secure organizational data. Workday managed services continue gaining traction across Europe, with many enterprise clients seeking these services. ISG sees a rise in customized and personalized Workday modules.



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 should read this report to understand how Workday managed service providers maintain their credibility and service quality.



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





The quadrant assesses service providers with a **broad set of post-deployment services**, including **change management, system performance optimization, proactive monitoring** and application management services (AMS).

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 the 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 and others), covering the breadth of an AMS-related portfolio
- 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

Many European organizations opt to outsource their Workday support and maintenance tasks to MSPs. These MSPs specialize in providing ongoing Workday and third-party software support, system monitoring and administration. Workday MSPs are expanding their service offerings beyond the standard support and now provide additional services such as system enhancements, configuration changes, report development, integration management, data governance and compliance support.

- **Continuous improvement and optimization:** Workday MSPs are increasingly focusing on helping organizations maximize the value of their Workday investment. They engage in continuous improvement initiatives, identify optimization opportunities and implement best practices to enhance system efficiency and UX.
- **Global and multi-entity support:** Many European organizations operate globally or have multiple entities across different countries. Workday MSPs support this trend

by offering multicountry implementations and managing the complexities of operating in multiple regulatory environments.

- **Proactive monitoring and issue resolution:** Workday MSPs adopt proactive monitoring tools and practices to identify and resolve potential issues before they impact system performance. They offer 24/7 monitoring, incident management and rapid response to minimize disruptions and ensure system availability.
- **Change management and user adoption:** Successful Workday implementation goes beyond technical aspects; it involves effective change management and user adoption strategies. Organizations recognize the importance of providing training and support to end-users, ensuring a smooth transition and user acceptance of the Workday platform.

From the 28 companies assessed for this study, 18 have qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture's strong partnerships help support global, regional and large and midsize projects. It has a limited presence in small businesses. With strong adherence to budgets and project milestones, Accenture's change management capabilities optimize client costs.

Alight

Alight has cross-functional expertise, spanning value engineering and go-live support to ongoing services. In addition to AMS, Alight's optimization architects help clients with strategic roadmap development, thus increasing accuracy, security, agility and optimizing response time.

cognizant

Cognizant's USP is its high-value target consulting, Prism Analytics and Adaptive Insights. It also does not charge startup fees, locked-in rates or penalties, and limits on

leveraged hours. Its scalable services facilitate shifting hours and on-demand and unplanned assistance.

Deloitte

Deloitte has a highly structured approach to offering its post-implementation support, which has won a loyal client base. In addition to outstanding aftersales services, it offers competitive TCO in this quadrant.

HEXAWARE

Hexaware focuses on four key outcomes for its Workday practice, namely improved collaboration across the client's organization, a single, reliable source of truth, swift data exchange for real-time decision-making and scalable solutions tailored to the client's business needs.



Managed Services



IBM's Workday Continuum offerings comprise an array of post-go-live services tailored for organizations of all sizes, their levels of complexity and maturity. Clients can leverage IBM Watson for advanced analytics and quick resolutions.



PwC offers flexible Workday support services tailored to client needs. It provides end-to-end, full-service application management, with application support in specialized turnkey projects. Its assurance, tax and advisory services further accentuate its capabilities.



Kainos' (Rising Star) deliveries surpass expectations. The in-depth Tenant Health Check by Kainos identifies opportunities for system improvement, realigns them to meet clients' current needs and addresses user adoption issues to improve efficiencies.





“Cognizant’s managed services include strategic roadmap development, post-deployment governance and comprehensive change and training services.”

Ashwin Gaidhani

Cognizant

Overview

The Cognizant Workday Practice has helped many Fortune 500 companies and large and mid-sized organizations transform their businesses. It was formed in 2020 through the acquisition by Cognizant, a leading global finance and HR transformation consultancy. The practice has more than 1,874 employees and generated over \$249 million in revenue. Cognizant provides business advisory for tenant analysis, business process mapping and optimization services. Its complementary value services ensure continuous innovation, business process improvement and user adoption. The company’s managed service quality and costs have received positive feedback from European clients.

Strengths

Technology and tools to support managed services: Cognizant provides tenant analysis and planning services. Its integrations, reporting and dashboards consist of advanced reporting, security orchestration, automation and response (SOAR) and enhance managed services to deliver postproduction services across all functional areas. Cognizant has a follow-the-sun service delivery model to serve global enterprise clients.

Comprehensive AMS portfolio: The AMS portfolio comprises the following: Workday release management, which includes services such as incident and service requests and application support; enhancement and change requests, including break-fix management, change requests for the

current configuration, enhancement requests for new functionality and event support; incident and service requests, including prioritized incident management, service requests for data, code, or configuration changes, and problem management with root cause analysis; a global delivery service model that supports offshore, regional and local operations to meet client needs; service management, which comprises governance, KPI management, status reviews and Workday liaison services with Kaizen; applications support that focuses on triage support tickets, security and password management, and client-specific SOPs.

Caution

Cognizant can expand its local talent pool to enhance its European presence and client base. It could also focus on building a strategy to expand managed services that include third-party software.





Appendix

The ISG Provider Lens™ 2023 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the Europe 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





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
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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™

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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