



HORIZONS REPORT

# Workday Services, 2025

**An assessment of the Workday service provider landscape**

August 2025

**Authors:**

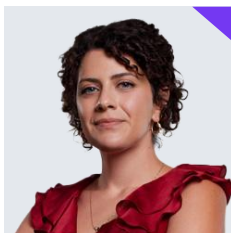
Dana Daher, Executive Research Leader  
Hridika Biswas, Associate Practice Leader

“

Success in Workday services isn't about implementation—it's about innovation. Service providers must go beyond deployment, integrating AI, automation, and domain expertise to create intelligent, adaptable enterprises.

Those that lead will redefine Workday's role, not just in HR and finance, but in shaping the future of business operations.

”



**Dana Daher**

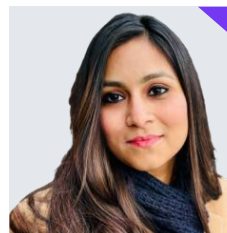
Executive Research Leader,  
HFS Research

“

Workday services are no longer just about deployment and efficiency. They're becoming the foundation for enterprise adaptability.

As organizations face evolving workforce models, financial complexity, and regulatory demands, the ability of service providers to embed intelligence, industry relevance, and cross-platform connectivity into Workday ecosystems will define their long-term success.

”



**Hridika Biswas**

Associate Practice Leader,  
HFS Research

# Contents

	Page
<b><u>SECTION 01</u></b>	
Introduction and research methodology	04
<b><u>SECTION 02</u></b>	
Market dynamics	15
<b><u>SECTION 03</u></b>	
Horizons results: Workday Services, 2025	21
<b><u>SECTION 04</u></b>	
Horizons profiles: Workday Services, 2025	24
<b><u>SECTION 05</u></b>	
HFS Research authors	42

# 1

## Introduction and research methodology

# Introduction to HFS Horizons: Workday Services, 2025

Welcome to our **HFS Horizons: Workday Services, 2025**, study. Horizons are HFS Research's [vendor evaluation research vehicle](#) designed to assess the **innovation and value potential** of provider capabilities across three distinct horizons:

## Horizon 1

The ability to optimize HR and finance functions through cost reduction, process automation, and operational efficiency. Examples include AI-driven payroll automation, intelligent workforce planning, and automated financial workflows.

## Horizon 2

**Horizon 1 +** the ability to unify HR, payroll, and financial processes through an integrated OneOffice model, ensuring real-time visibility, compliance automation, and enhanced employee experience. Examples include AI-led financial forecasting, intelligent talent management, and cross-functional data insights for HR and finance teams.

## Horizon 3

**Horizon 2 +** the ability to create an interconnected ecosystem, integrating Workday with other ERP solutions such as Salesforce, SAP, Oracle, and external compliance and ESG solutions to drive completely new sources of business value.

This research will evaluate how Workday service providers\* are helping enterprises embrace innovation and realize business value. The study examines service provider capabilities across the Workday value chain, using the '**why, what, how, and so what**' framework, providing actionable insights into the future of Workday services, AI-driven transformation, and integrated enterprise solutions.

\*HFS defines Service providers as firms that participate in one or more of Workday's partner programs, primarily focusing on delivery-oriented services such as system integration, deployment, staffing, and managed services.

# Inclusion criteria

Participation guidelines include



## Revenue

Annual Workday revenue of at least \$100 million. For pureplay boutiques, we may take decisions based on the relevance for the Workday ecosystem in line with the scope of this study rather than a revenue threshold.



## Services

An existing portfolio of Workday services that span the HFS Workday value chain.

# HFS Workday Services 2025 value chain

HFS evaluates how service providers drive innovation through Workday’s Human Capital Management (HCM) and Financial Management (FM) modules, enabling enterprises to optimize workforce planning, payroll, finance, and compliance while integrating with enterprise systems. The study assesses vendor capabilities and industry solutions that help maximize business value.

Enterprise outcomes	Workforce agility and employee experience	Financial and operational excellence	AI-powered decision intelligence	Enterprise scalability and integration
	<ul style="list-style-type: none"> <li>AI-driven workforce management for hiring, performance, and succession</li> <li>Personalized learning and career mobility with AI-driven skills intelligence</li> <li>Compensation, benefits, and payroll automation for cost optimization</li> <li>Employee sentiment tracking to improve engagement and retention</li> <li>Workforce compliance support for labor laws and payroll regulations</li> </ul>	<ul style="list-style-type: none"> <li>Real-time financial forecasting with AI-powered scenario modeling</li> <li>Payroll automation and workforce cost control for efficiency</li> <li>Integrated benefits and compensation planning for financial alignment</li> <li>Cash flow and tax compliance automation to reduce risk</li> <li>ESG and sustainability tracking for regulatory reporting</li> </ul>	<ul style="list-style-type: none"> <li>Predictive analytics and forecasting for workforce and financial planning</li> <li>Intelligent automation of workflows, approvals, and routine processes</li> <li>AI-powered anomaly detection to flag risks and inefficiencies</li> <li>Generative AI (GenAI) for decision support in HR, finance, and operations</li> <li>Continuous AI/ML evolution to enhance automation and insights over time</li> </ul>	<ul style="list-style-type: none"> <li>Seamless Workday integration with ERP, procurement, and spend systems</li> <li>Multi-vendor ecosystems with hyperscalers and internet service providers (ISVs) for scalability</li> <li>Industry-specific automation for finance, healthcare, and retail</li> <li>AI copilots, chatbots, and decision intelligence for efficiency</li> <li>Cloud-based scalability for multi-entity and global operations</li> </ul>

Service provider view	Plan	Implement	Manage	Operate	Innovate
	<ul style="list-style-type: none"> <li>Workday business case development and transformation advisory</li> <li>Cloud readiness, Workday security, and compliance assessments</li> <li>Process optimization advisory for HR and financial planning</li> <li>Change management and user adoption strategies</li> </ul>	<ul style="list-style-type: none"> <li>Workday HCM and FM deployment across global enterprises</li> <li>Payroll, benefits, and workforce cost optimization setup</li> <li>Data consulting and migration</li> <li>Workday ERP, CRM, and finance platform integrations</li> <li>Industry-specific Workday configurations ensuring regulatory and operational compliance</li> <li>Integration of ISV and third-party solutions to enhance Workday capabilities</li> </ul>	<ul style="list-style-type: none"> <li>Security and data protection, performance optimization, technical support, and SLAs</li> <li>Governance and compliance automation for HR and finance</li> <li>AI-driven Application Management Services (AMS) for Workday</li> <li>Workforce productivity analytics and automation advisory</li> <li>Release management and system monitoring</li> </ul>	<ul style="list-style-type: none"> <li>Intelligent financial reporting and workforce analytics</li> <li>Workday upgrades, AMS support, and real-time optimization</li> <li>Intelligent employee experience and payroll management</li> <li>Regulatory tracking and compliance automation</li> <li>Advanced financial ops with close automation, tax compliance, and cash flow forecasting</li> <li>Comprehensive payroll operations support, benefits administration, VMS operations, and procurement automation</li> </ul>	<ul style="list-style-type: none"> <li>AI-led workforce planning and predictive finance modeling</li> <li>ESG automation and AI-powered risk assessment</li> <li>Next-gen digital assistants for HR and finance decision-making</li> <li>Agile funding and resilience strategies with Workday</li> <li>Continuous innovation and process enhancements in Workday FM and HCM</li> <li>Building solutions on Workday Extend and the Built on Workday program</li> <li>Development of industry/geo-specific applications to enhance Workday functionality</li> </ul>

# Focus of the Workday Services Horizons study

## The future of Workday services

How are you shaping the next generation of Workday services with AI, automation, and ecosystem collaboration?

## Transformation focus

How do your Workday solutions drive efficiency, agility, and business resilience across organizations?

## Industry-specific innovation

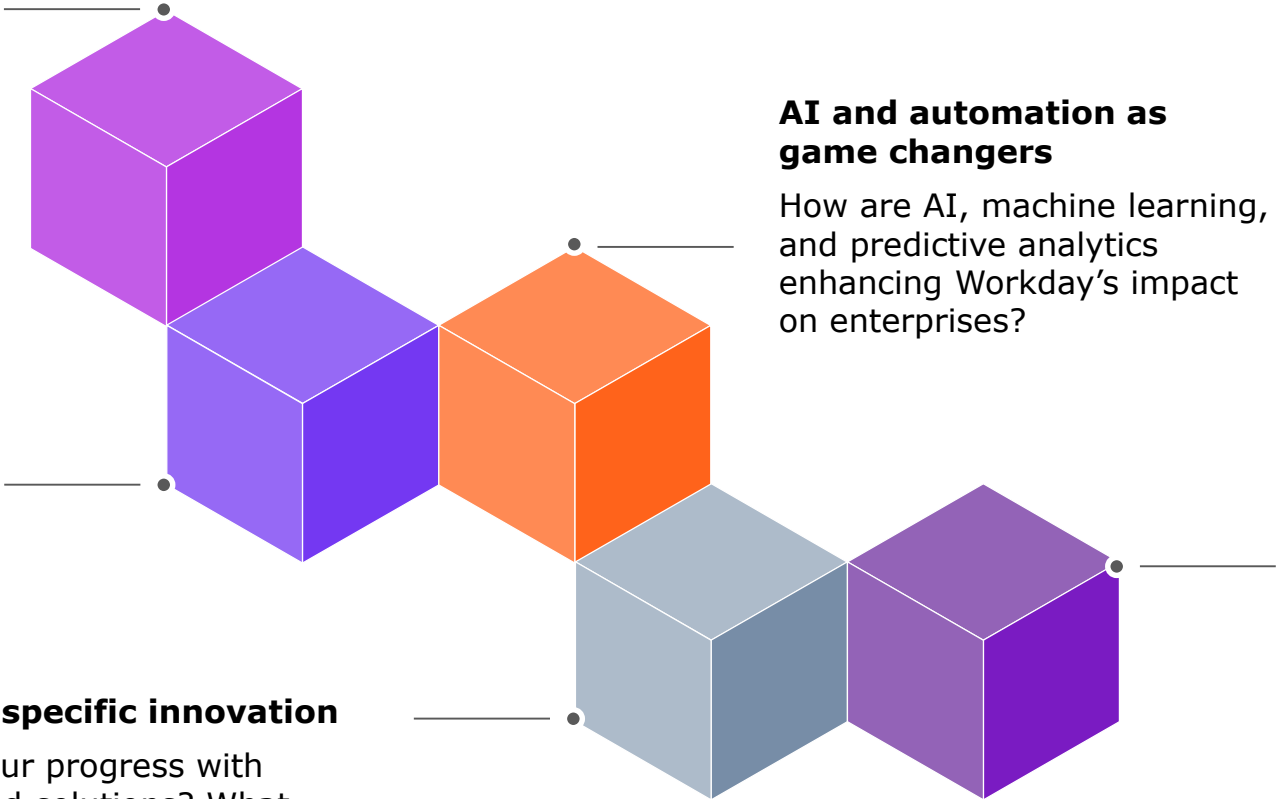
What is your progress with industry-led solutions? What are the experiences? What is on your roadmap?

## AI and automation as game changers

How are AI, machine learning, and predictive analytics enhancing Workday's impact on enterprises?

## Outcome mindset

What real-world value are your Workday services delivering in workforce experience and financial optimization?



# Executive summary (1/2)

The Workday services market is rapidly pivoting to GenAI-powered, cloud-native delivery models that extend the platform's value beyond core HCM. Service partners now pair industry-specific accelerators and Extend apps with outcome-based AMS to drive continuous feature uptake, localized compliance, and real-time analytics. Yet providers still battle legacy integration hurdles, certified-talent shortages, and post go-live adoption gaps.

To stay competitive, they're deepening hyperscaler and ecosystem alliances, investing heavily in upskilling guilds and AI-assisted configuration factories, and moving to risk-sharing, subscription-style commercial models.

- 1 Horizon leaders**

The six Horizon 3 leaders (Accenture, Cognizant, Deloitte, IBM, PwC, and TCS) are setting the bar with large-scale Workday delivery, deep enterprise integration, and GenAI-powered toolkits. They combine strong platform ecosystems, vertical IP, and proven transformation track records to lead complex, multi-country programs with precision and scale.
- 2 HCM-to-ERP convergence**

Workday deals are no longer confined to core HCM. Clients now bundle financials, supply chain, professional services automation (PSA), and vertical ERP modules (e.g., student, healthcare, retail) into a single industry-cloud ERP roadmap. For service providers, this elevates the deal value but also increases the integration burden and post go-live expectations by owning cross-suite design, change management, and multi-module optimization, not just payroll and HR.
- 3 Outcome-linked commercials go mainstream**

Fixed-fee is being replaced by subscription-style 'implement-and-run' contracts that tie a portion of fees to measurable results; for e.g., 90% feature uptake, 30% payroll touch reduction, or SLA-based ticket volumes. This shifts the risk to system integrators (SIs), pushes them to invest in accelerators and AMS automation, and gives clients clearer ROI visibility.
- 4 Hyperscaler co-sell surge**

Workday, AWS, Azure, and GCP are launching three-way co-sell motions: hyperscalers fund cloud credits and AI services, SIs wrap managed support, and Workday lands SaaS subscription. Service providers should now design architectures that exploit hyperscaler AI/analytics services while ensuring tight security and cost governance.

# Executive summary (2/2)

- 5 Real-time finance and integrated planning**

Workday's Accounting Center, Financial Management, and Adaptive Planning are now sold as one integrated finance cloud: high-volume operational data streams into a real-time sub-ledger for daily close, while the same platform powers rolling forecasts, scenario modeling, and spend controls. CFOs gain a single source of truth, faster reconciliations, and margin/ESG dashboards, making finance transformation the new growth engine alongside HCM.
- 6 Talent and workforce strategies**

Certified Workday skills remain scarce, especially across Extend, Prism, Adaptive Planning, and complex integration domains. Top vendors are building 'guild' programs, low-code configuration factories, and near-shore academies to certify consultants in 60–90 days. Those without scalable talent pipelines will struggle to take on multi-suite or global programs.
- 7 Privacy and pay-transparency compliance**

GDPR, CPRA, and expanding pay-equity rules are pushing clients to demand embedded compliance accelerators in the form of auto-anonymization layers, pay-gap dashboards, and rapid regulatory-change packs. Providers that can demonstrate repeatable compliance playbooks win bids; those that can't add risk to large, multi-country rollouts.
- 8 Employee experience (EX) as a board metric**

EX is no longer HR's pet project. Boards now demand Skills Cloud analytics, sentiment dashboards, and AI chat agents to reduce service friction. Providers must blend UX design, analytics, and GenAI to deliver tangible EX KPIs—for e.g., self-service deflection rates and onboarding NPS, at every release.
- 9 Vendor-ecosystem consolidation**

A wave of acquisitions (boutiques with Extend IP, regional payroll specialists) and joint Workday Labs ventures is reshaping the partner landscape. Clients gain one-stop global partners and richer IP catalogs but risk vendor lock-in and reduced niche competition. Selecting a partner now means evaluating M&A stability and IP roadmaps as much as certifications.
- 10 Voice of customers and partners**

Enterprises value Workday's scalable, out-of-the-box framework that avoids costly customizations but still ask providers for more proactive guidance and deeper expertise in modules such as Adaptive Planning to unlock the platform's full potential. Partner alliances praise Workday's roadmap for 'future-proofing HR and finance.' Yet they urge vendors to step up joint go-to-market visibility and strengthen GSI collaboration, making the platform better represented in large pursuits.

# 17 service providers have been evaluated in this report



Note: All service providers are listed alphabetically

# Sources of data

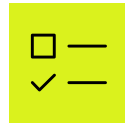
This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of the participating organizations covered in our study. Sources are as follows:



## Briefings and information gathering

HFS conducted detailed **briefings** with the engineering R&D leadership from each vendor.

Each participant submitted a specific set of **supporting information** aligned with the assessment methodology.



## Reference checks

We conducted reference checks with **14 active clients and 11 active partner references** of the study participants via surveys and interviews.



## Other data sources

**Public information** such as news releases and websites.

**Ongoing interactions, briefings, virtual events**, etc., with in-scope vendors and their clients and partners.

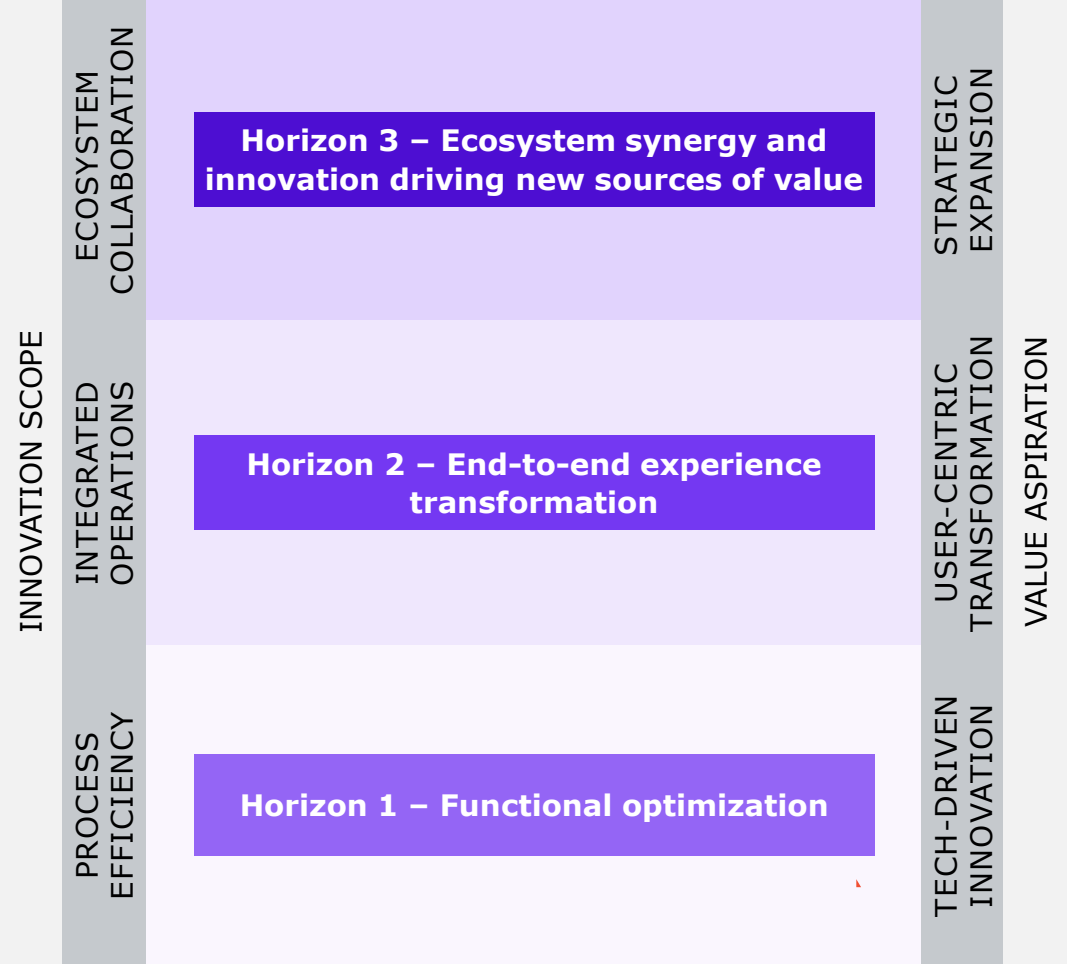
# Horizons assessment methodology

The “HFS Horizons: Workday Services, 2025” research report evaluates the capabilities of service providers across a range of dimensions to understand the **why, what, how, and so what** of their Workday services offerings. Our assessment will be based on input from clients, partners, and employees, augmented by analyst perspectives. The following illustrates how we will assess their capabilities:

← Distinguishing service provider characteristics →

Assessment Dimension	Assessment sub-dimension	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
<b>Value proposition: The why?</b>  (25%)	<ul style="list-style-type: none"> <li>• Strategy and roadmap</li> <li>• Clarity of vision for Workday services and nature of outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to drive <b>functional optimization outcomes</b> with selective core Workday capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 1 +</li> <li>• Ability to drive real <b>business, experience-led outcomes and stakeholder experiences</b> while achieving enterprise-wide transformations</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 2 +</li> <li>• Ability to drive <b>ecosystem synergy</b> through Workday’s integration with broader enterprise platforms to unlock new sources of value</li> </ul>
	<ul style="list-style-type: none"> <li>• Differentiators – why clients work with you</li> </ul>			
<b>Execution and innovation capabilities: The what?</b>  (25%)	<ul style="list-style-type: none"> <li>• Breadth and depth of services across the Workday value chain</li> <li>• Strength of talent pool</li> </ul>	<ul style="list-style-type: none"> <li>• Strong <b>implementation capabilities</b></li> <li>• Deep expertise in Workday deployments driving speed and efficiency</li> <li>• Offshore-focused with strong technical skills</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 1+</li> <li>• Ability to support clients in their <b>end-to-end</b> Workday transformation journey</li> <li>• Global capabilities with strong consulting and domain expertise across the Workday portfolio</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 2 +</li> <li>• Strategy and execution capabilities at scale</li> <li>• Leveraging Workday to create 360-degree views of customers to drive <b>new experiences</b></li> <li>• Driving interoperability between Workday and enterprise systems to create an integrated AI-driven ecosystem</li> </ul>
	<ul style="list-style-type: none"> <li>• Innovative solutions (industry-specific, ESG etc.)</li> </ul>			
<b>Go-to-market strategy: The how?</b>  (25%)	<ul style="list-style-type: none"> <li>• What transformation outcomes are you pitching to clients?</li> <li>• Nature of investments in your Workday business (M&amp;A, training, R&amp;D)</li> </ul>	<ul style="list-style-type: none"> <li>• Strong technical and capability focus</li> <li>• Proven expertise in Workday-driven process optimization</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 1+</li> <li>• Proven and leading-edge <b>proprietary assets</b>, including <b>industry-led solutions</b></li> <li>• Clear <b>articulation of the transformation outcomes</b></li> <li>• Capability to deliver end-to-end transformation with ongoing multi-year managed services</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 2 +</li> <li>• Driving <b>co-creation with clients</b> and ecosystem partners</li> <li>• Effectively <b>envisioning outcomes</b> and providing business assurance for Workday transformation</li> </ul>
	<ul style="list-style-type: none"> <li>• Co-innovation and collaboration approaches with customers and partners including creative commercial models</li> <li>• Assuring outcomes</li> </ul>			
<b>Market impact: The so what?</b>  (25%)	<ul style="list-style-type: none"> <li>• Scale and growth of Workday business – revenue, clients, and headcount</li> <li>• Proven outcomes showcasing transformation through Workday</li> <li>• Voice of the customer</li> </ul>	<ul style="list-style-type: none"> <li>• Referenceable and satisfied clients for the ability to execute technology transformation</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 1+</li> <li>• Referenceable and satisfied clients with successful enterprise-wide transformation outcomes</li> </ul>	<ul style="list-style-type: none"> <li>• Horizon 2 +</li> <li>• Referenceable and satisfied clients driving new business models and operational agility with Workday</li> </ul>

# HFS Horizons for Workday services



### Horizon 3 – Ecosystem synergy and new value creation

- Horizon 2 + the ability to drive ecosystem synergy through collaboration, integrating Workday with broader enterprise systems to create new sources of business value
- Thought leadership that helps clients define their vision for intelligent automation, data-driven decision-making, and future-ready enterprises
- Leveraging Workday’s full capabilities to build a unified enterprise view, enhancing agility and responsiveness
- Enabling continuous innovation to help enterprises stay at the forefront of AI, automation, and data-driven transformation
- Driving co-creation with clients and partners as long-term innovation partners
- Facilitating cross-platform innovation, ensuring seamless integration of Workday within complex multi-cloud and enterprise ecosystems
- Referenceable and satisfied clients successfully driving new business models, efficiencies, and growth through Workday-powered ecosystems

### Horizon 2 – End-to-end experience transformation

- Horizon 1 + the ability to drive real business transformation, user experience enhancements, and operational efficiency, creating a seamless enterprise experience
- Clear articulation of how Workday solutions drive automation, insights, and workforce productivity
- Global capabilities with strong consulting expertise in enterprise transformation and intelligent automation
- Proven and leading-edge proprietary assets, including AI-driven decision-making and industry-specific best practices
- Capability to deliver end-to-end transformation with ongoing multi-year managed Workday services
- Referenceable and satisfied clients that successfully enhance business operations and align technology with strategy

### Horizon 1 – Functional optimization

- The ability to drive functional optimization, improving efficiency, compliance, and automation through Workday’s core capabilities
- Strong implementation and managed services expertise, ensuring smooth deployment and operational stability
- Scalable delivery models with robust Workday expertise and support
- Referenceable and satisfied clients achieving tangible business impact and measurable improvements

# 2

## Market dynamics

# Top challenges for Workday implementations in 2025

## Trouble integrating legacy systems

1

Organizations often face difficulties connecting Workday with aging legacy platforms and fragmented data sources. These integration hurdles lead to delayed timelines, inconsistent data flow, and increased rework, especially in global or multi-system environments.

## Stuck at basic implementation

2

Many clients implement only the core HCM modules, leaving powerful tools such as Extend, Prism, and Adaptive Planning untapped. This limits strategic value, with Workday functioning more as a system of record than a driver of transformation or insight.

## Not ready for AI and automation

3

While interest in AI and GenAI-enabled tools such as Workday Illuminate is high, most organizations lack the foundational data hygiene, governance, and process alignment for activating these capabilities at scale. The result is pilot fatigue and unrealized benefits.

## Shortage of skilled Workday talent

4

The demand for certified, cross-functional Workday consultants continues to outpace supply. Scarcity is most acute in areas such as Workday Extend, Adaptive Planning, and integration expertise, slowing delivery and putting large programs at risk.

## Weak change management post go-live

5

Many implementations falter after go-live due to limited user training, weak change enablement, and resistance to process standardization. Without a strong post-launch strategy, clients lose momentum and can't fully realize their Workday investment.

## Inconsistent global rollout readiness

6

Multi-country implementations face delays due to a lack of localized content, compliance configurations, and statutory reporting readiness. Supporting regional regulations, languages, and workflows adds complexity, often underestimated during planning.

# Key trends in Workday services (1/2)

01

## GenAI-infused delivery

Service partners are baking GenAI into every phase, be it auto-generating discovery questions, code snippets, test cases, and multilingual communication. Programs for 2025 now start with an 'AI readiness' sprint and treat Workday Illuminate or vendor-built GPT copilots as table stakes.

02

## Post go-live value realization

The conversation is shifting from 'get live' to 'stay valuable.' Providers are bundling AMS, analytics, and change-adoption streams into outcome-based subscriptions that guarantee feature uptake and measurable KPIs after the first year.

03

## Industry accelerators and localized templates

Pre-configured data models, UX flows, and compliance packs for healthcare, public sector, BFSI, and retail cut deployment time by 25–40%. They're paired with deep localization toolkits for payroll, tax, and statutory reporting in priority markets.

04

## Workday Extend and built-on apps go mainstream

Extend is moving from 'nice-to-have' to a core innovation lever. Partners are launching app catalogs (conflict-of-interest checks, talent 'elevators,' sector-specific risk dashboards) that close functional gaps and lock in sticky, IP-led revenue.

05

## Talent-scarcity drives delivery innovation

With certified talent still in short supply, vendors are scaling global COEs, low-code integration hubs, and AI-assisted configuration factories. 'Boot-camp-to-billable-in-90-days' academies and cross-skilling guilds are now standards.

## Key trends in Workday services (2/2)

- 06 Ecosystem-first integrations**

Clients expect native hand-offs between Workday and ServiceNow, Salesforce, Microsoft, and cyber/ID-platforms. Co-sell motions (Workday + hyperscalers) and reusable connectors are becoming major differentiators in RFP scoring.
- 07 Outcome-centric commercial models**

Fixed-fee plus success-bonus, subscription-style implementation, and 'build-transfer-optimize' constructs are gaining ground—shifting risk to providers while promising faster payback for clients.
- 08 ESG and skills-driven HR transformation**

Sustainability dashboards, DEI analytics, and Skills Cloud-powered workforce planning are being embedded in HCM roadmaps—linking HR outcomes to board-level ESG and talent resilience goals.
- 09 Cross-suite expansion into Workday Financials and industry ERP**

Several partners (Cognizant, IBM, TCS) highlight Accounting Center, Scheduling, PSA, and industry-preconfigured Financials tenants. They're marketing 'full-ERP transformation,' not just HCM.
- 10 Hyperscaler and co-sell motions**

Vendors mention new co-sell programs with AWS, Azure, and Workday's own subscription/resell model (e.g., Cognizant's fixed-fee-plus-subscription construct). This shows how commercial innovation and cloud alliances are accelerating deals.

# 2025 strategic Workday transformation framework



## Intelligent Workday core

Infuse GenAI, Extend apps, and real-time analytics to turn Workday from a system-of-record into an insight engine.



## Continuous value and adoption

Shift focus beyond go-live with outcome-based AMS, feature uptake playbooks, and KPI-linked optimization sprints.



## Talent and delivery velocity

Close the skills gap via global COEs, AI-assisted config/test factories, and low-code integration hubs for faster releases.

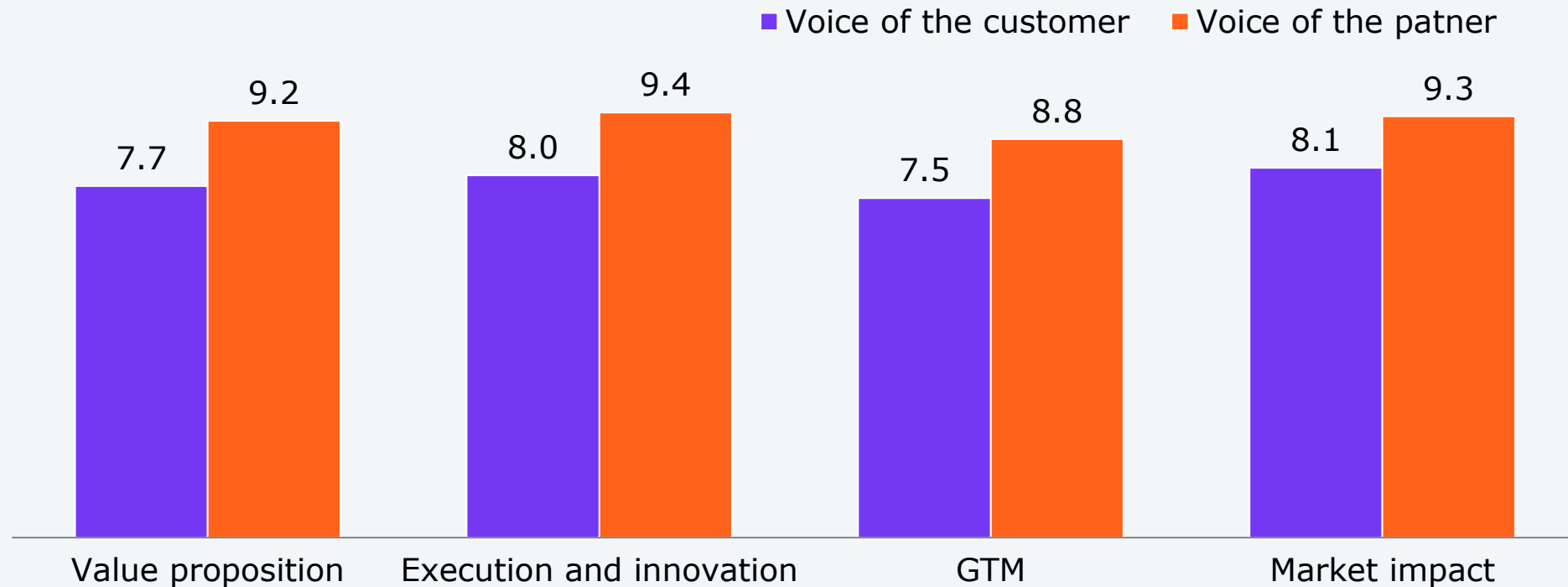


## Industry and ecosystem fit

Deploy pre-configured vertical templates, deep localization packs, and plug-and-play connectors for partners such as ServiceNow, Azure, and Salesforce.

# Clients and partners are happy with SIs' execution, innovation, and market impact; yet Workday service providers should sharpen messaging and GTM to turn delivery strength into clearer value and faster wins

## Customer and partner ratings of service providers for delivery capabilities (average of 10)



Sample: 14 customer references and 11 partner references provided as part of the survey for this report  
Source: HFS Research, 2025

# 3

## Horizons results: Workday Services, 2025

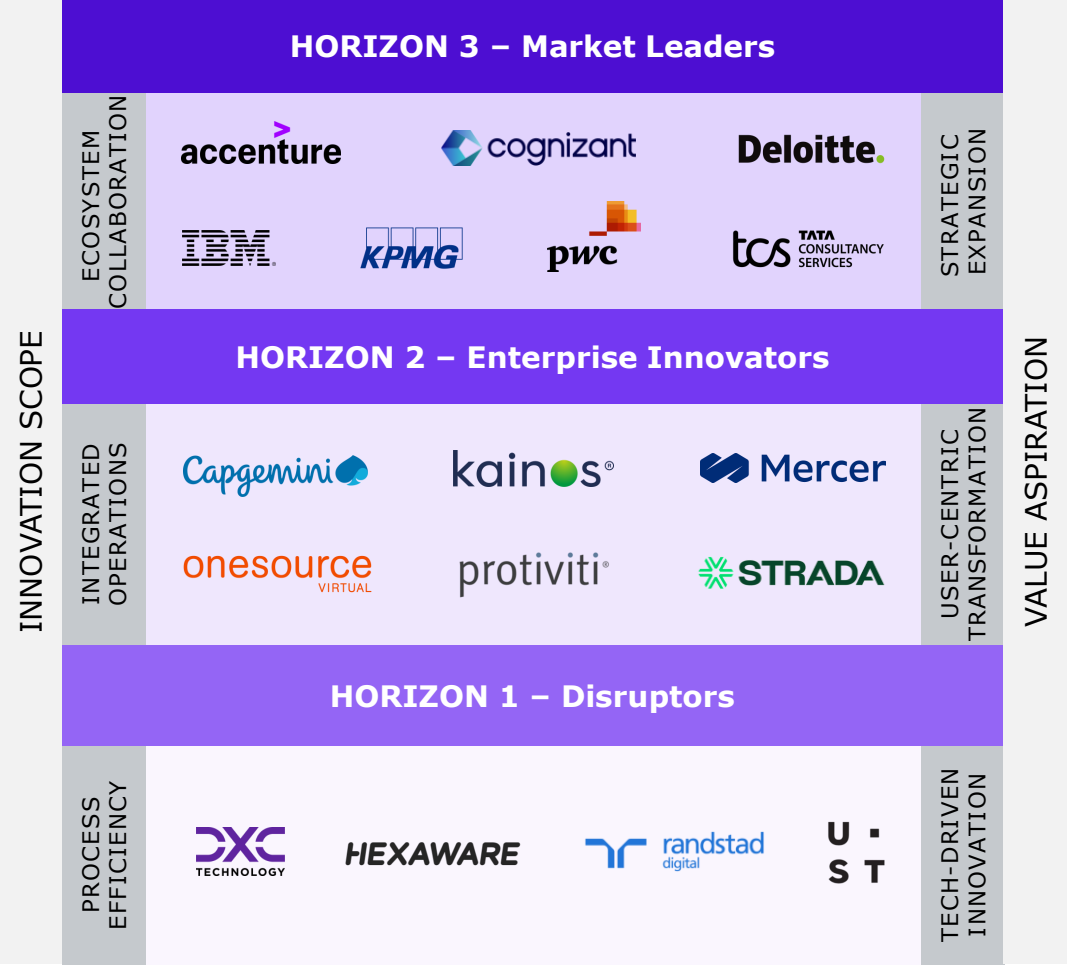
# HFS Horizons: Workday Services, 2025 – Summary of providers assessed in this report

Service providers (alphabetical order)	HFS point of view
<b>Accenture</b>	Blends deep functional expertise and enterprise integration for Workday programs anchored in complexity and scale
<b>Capgemini</b>	Enables Workday delivery with BPO depth and industry focus
<b>Cognizant</b>	A balanced blend of advisory depth, scalable talent, and tool-led execution that defines the Workday approach
<b>Deloitte</b>	Brings structure, strategy, value, and scale to Workday deployments
<b>DXC Technology</b>	Hybrid-ready Workday execution with compliance at core
<b>Hexaware</b>	Phase X strength supports Workday beyond initial implementation
<b>IBM</b>	Fuses Workday with advanced automation, AI assistants, and a broader enterprise stack to deliver scalable and future-ready transformation
<b>Kainos</b>	Pure-play precision, purpose-built for Workday success
<b>KPMG</b>	Business-led Workday transformation powered by industry accelerators and agentic innovation

Service providers (alphabetical order)	HFS point of view
<b>Mercer</b>	Blends transformation strategy with adaptive support to drive long-term Workday value
<b>OneSource Virtual</b>	A specialist in running Workday at scale for mid-sized enterprises
<b>Protiviti</b>	Blends Workday with risk, cyber, and data to enable cross-functional transformation
<b>PwC</b>	Leverages industry-aligned IP, strong financials, and GenAI accelerators to drive value
<b>Randstad Digital</b>	Drives adaptive workday transformation through people-first models and modular AMS through a developing partnership
<b>Strada</b>	Builds on the Alight heritage to deliver Workday-native payroll and operational services at scale
<b>TCS</b>	Industry-specific solutions and advisory depth anchor the Workday proposition
<b>UST</b>	Engineering and GenAI-first rigor brings cross-platform innovation for Workday delivery

Note: All service providers are listed alphabetically

# HFS Horizons: Workday Services, 2025



### Horizon 3 – Ecosystem synergy and new value creation

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### Horizon 1 – Functional optimization


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Note: All service providers within a Horizon are listed alphabetically.  
 Source: HFS Research, 2025

# 4

## Horizons profiles: Workday Services, 2025


# Accenture: Blends deep functional expertise and enterprise integration for Workday programs anchored in complexity and scale

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
	<ul style="list-style-type: none"> <li>• <b>Full-suite Workday capability with deep functional expertise:</b> Accenture delivers across the Workday spectrum with proven deployment depth in multi-country, multi-entity environments. It has experience with multi-country deployments and end-to-end transformations, particularly in HR and finance-led initiatives.</li> <li>• <b>Use of Workday Extend to address functional gaps:</b> Accenture has developed custom apps using Workday Extend to support client-specific requirements such as tailored workflows, localized validations, and policy-based logic, where standard configurations fall short.</li> <li>• <b>Industry reference models and configurations:</b> Accenture has developed pre-configured tenants and solution blueprints for select industries such as healthcare, technology, and financial services, offering clients a starting point that reflects standard sector practices.</li> <li>• <b>Experience integrating Workday in multi-system environments:</b> Accenture has supported clients in integrating Workday with broader enterprise systems such as SAP, ServiceNow, and legacy platforms, using tools such as Workday Studio, MuleSoft, and Workato, depending on client context.</li> <li>• <b>Experience delivering complex, large-scale transformations:</b> Accenture has supported large organizations in implementing Workday across multiple regions and functions. For instance, it worked with a global aerospace and defense company to re-implement Workday HCM and Financials across 60+ countries, addressing legacy system challenges and improving process standardization.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Clarifying platform-specific vision within broader transformation narrative:</b> Accenture often leads with enterprise-wide digital transformation, which can make its Workday-specific vision, especially around the platform’s evolution (e.g., agentic AI, skills-based architecture), less distinct in client-facing messaging.</li> <li>• <b>Need for stronger thought leadership on Workday-first strategy:</b> While Accenture excels at cross-platform thinking, clients evaluating Workday as a strategic system of record may seek deeper articulation on how Workday’s role will evolve in a multi-vendor enterprise tech stack.</li> <li>• <b>Balancing horizontal AI expertise with Workday-native innovation:</b> Accenture has robust enterprise AI capabilities, but its Workday-native AI and automation narrative is still catching up with peers that are publishing tools, apps, and repeatable agent use cases more visibly within the Workday ecosystem.</li> </ul>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, Microsoft, Google, AWS, Salesforce, ServiceNow</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 850+</li> <li>• <b>Key clients:</b> Salesforce, Cisco, Sky, State of Rhode Island</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> ~4,000</li> <li>• <b>Number of delivery and innovation centers:</b> 50+ globally</li> <li>• <b>Locations of centers by major geos:</b> 6 innovation centers across US, Canada, Mexico, India, Portugal, Philippines</li> </ul>	<ul style="list-style-type: none"> <li>• GenWizard: GenAI platform for transformation powered by Workday</li> <li>• Workday Extend App Catalog: AI, automation and industry-specific extensions</li> <li>• Industry accelerators for retail, tech, financial services, health, and public sector</li> <li>• Packaged solutions built on Workday: Internal SOX, Skills Engine, etc.</li> </ul>

# Cognizant: A balanced blend of advisory depth, scalable talent, and tool-led execution that defines the Workday approach

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b>	<b>Development opportunities</b>
	<ul style="list-style-type: none"> <li>• <b>Established and deep partnership with Workday:</b> Cognizant has been a Workday partner since 2007, with a uniquely embedded 360-degree relationship as a client, implementation partner, and co-innovator. Its ongoing role in piloting new SKUs and co-creating apps under the 'Built on Workday' program reinforces its credibility and influence.</li> <li>• <b>Tool-enabled, scalable delivery model:</b> A mature delivery framework supported by proprietary tools such as EXL (AI-powered data conversion), Impact (automated payroll validation), and the Synergy MIS system improves efficiency, quality, and speed. Clients have achieved 99.99% payroll match rates and a 40% reduction in manual data efforts.</li> <li>• <b>Embedded advisory and agentic readiness:</b> Cognizant combines change strategy with a future-facing advisory lens, using its Human-Trusted AI framework to assess enterprise maturity and readiness for agent-based workflows. It collaborates with Workday on Illuminate and agent use cases, helping clients navigate native vs. third-party agent decisions.</li> <li>• <b>Flexible support and commercial options:</b> Service delivery includes dedicated, shared, and hybrid post-prod models tailored to client needs. The subscription-based pricing model is a clear differentiator, spreading transformation costs across implementation and ongoing support.</li> <li>• <b>Client and partner kudos:</b> A client commended Cognizant's strong partnership and skilled resources for their Workday HCM practice. A partner talked about how Cognizant brings the big-picture strategy and innovation to Workday services.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Need for clearer tool adoption metrics:</b> While Cognizant offers a rich suite of tools and accelerators, the external articulation of client adoption levels and cross-industry impact remains limited, hindering visibility into ROI for buyers.</li> <li>• <b>Limited ecosystem integration positioning:</b> Although technically capable, Cognizant's interoperability messaging with platforms such as Salesforce, ServiceNow, and legacy ERPs seems less prominent, an area worth strengthening for platform-agnostic clients.</li> <li>• <b>Limited presence in SMB and digital-only segments:</b> Despite its subscription-based pricing, Cognizant's portfolio and delivery focus still skew toward large enterprises and multi-phase transformations. Penetration into small-to-midmarket clients with leaner, faster SaaS expectations is relatively modest.</li> <li>• <b>Client and partner critiques:</b> A client would like the firm to continue driving new tool adoption and better onboarding of new team members. A partner wants to see more competitive pricing of services.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>		
<b>HORIZON 1 – Disruptor</b>		

<b>Partnerships</b>	<b>Mergers and acquisitions (2020–2025)</b>
<ul style="list-style-type: none"> <li>• Workday, MuleSoft, ServiceNow, Microsoft, Azure, AWS</li> </ul>	<ul style="list-style-type: none"> <li>• 2022: OneSource Virtual's AMS arm</li> </ul>

<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 2,100+</li> <li>• <b>Key clients:</b> Global hospitality and travel company, global apparel company, US federal agency, all based in the US</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday-specific headcount:</b> 2,000+</li> <li>• <b>Number of delivery and innovation centers:</b> 10+ across India, Philippines, US, Mexico, UK</li> </ul>	<ul style="list-style-type: none"> <li>• EXL AI-driven data-conversion suite</li> <li>• Impact automated payroll-validation (99.99% match)</li> <li>• Synergy MIS delivery cockpit</li> <li>• Built-on-Workday apps (wellness leave, Accounting Center accelerators)</li> </ul>

# Deloitte: Brings structure, strategy, value, and scale to Workday deployments

<b>HORIZON 3 – Market Leader</b>
<b>Deloitte.</b>
<b>HORIZON 2 – Enterprise Innovator</b>
<b>HORIZON 1 – Disruptor</b>

Strengths	Development opportunities
<ul style="list-style-type: none"> <li>• <b>Enterprise-scale functional leadership:</b> Deloitte brings broad and deep capabilities across Workday HCM, Financials, Adaptive Planning, Extend, and Prism Analytics. With one of the largest certified Workday teams globally, it's a trusted partner for complex, multi-functional transformations.</li> <li>• <b>Finance-first transformation vision:</b> Unlike peers focused on system modernization or ops efficiency, Deloitte ties Workday into a strategic 'Finance in a Digital World' framework that supports continuous close, real-time insights, and rolling forecasts that align directly with CFO priorities.</li> <li>• <b>Robust integration and middleware IP:</b> Deloitte's proprietary integration templates enable secure, scalable connectivity between Workday and platforms such as SAP, Oracle, Salesforce, and ServiceNow.</li> <li>• <b>Governed self-service experience:</b> Deloitte enhances Workday's native self-service with a role-aware UX, embedded audit trails, and data lineage tracking. This balances empowerment and governance, which are particularly valued in regulated or compliance-driven industries.</li> <li>• <b>Innovation-led operate services:</b> Its Next-Gen Operate model supports proactive release management, analytics-led optimization, and agile feature adoption, moving beyond traditional AMS to help clients continuously realize value across Workday's semiannual update cycles.</li> <li>• <b>Track record in complex global programs:</b> Deloitte has led some of the largest Workday deployments, including multi-country M&amp;A integrations and a 100+ country HCM replacement for a tech major, positioning it strongly for clients with high operational complexity and workforce scale.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Premium pricing:</b> Deloitte's pricing model is typically at the high end of the market. While justified by value focus and delivery, scale and IP, it can deter cost-sensitive or midmarket buyers, especially those comparing multiple significant SI proposals.</li> <li>• <b>Layered delivery complexity:</b> Due to Deloitte's layered internal structure, clients in large global programs sometimes experience slow decision-making and opaque governance, impacting delivery agility and responsiveness.</li> <li>• <b>Innovation visibility gap:</b> Although Deloitte has a strong IP portfolio, its innovation story is not always well-articulated to clients. The IP can be underleveraged due to limited front-line awareness.</li> <li>• <b>Resource continuity at scale:</b> In peak cycles, clients have cited delays or turnover in key Deloitte resources, which affects continuity, knowledge retention, and stakeholder relationships in multi-phase rollouts.</li> </ul>


Partnerships	Mergers and acquisitions (2020–2025)
<ul style="list-style-type: none"> <li>• Workday, AWS, Google Cloud, Salesforce, ServiceNow, Genpact, OneSource Virtual, Anthropic</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

Key clients	Global operations and resources	Flagship internal IP
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 800+</li> <li>• <b>Key clients:</b> GEHA, ChristianaCare, Plymouth Rock</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 2,000+ across Workday modules</li> <li>• <b>Number of delivery and innovation centers:</b> 160+ globally</li> </ul>	<ul style="list-style-type: none"> <li>• InvestAcceleration</li> <li>• Sector-specific Workday templates</li> <li>• Embedded risk and compliance monitoring</li> <li>• Chatbot frameworks</li> <li>• Workday Prism Analytics accelerators</li> <li>• Target Operating Model (TOM) blueprints</li> </ul>

# IBM: Fuses Workday with advanced automation, AI assistants, and a broader enterprise stack to deliver scalable and future-ready transformation

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b>		<b>Development opportunities</b>
	<ul style="list-style-type: none"> <li>• <b>Strong integration of Workday with broader IBM capabilities:</b> IBM leverages its broader stack (watsonx, Maximo, MuleSoft, and deep Microsoft and ServiceNow partnerships) to position Workday within a composable enterprise architecture. Its integration of Workday with IBM Maximo is particularly powerful in asset-intensive public sector and utility clients.</li> <li>• <b>AI-infused delivery via IBM Consulting Advantage:</b> IBM brings a unique differentiator with its proprietary Consulting Advantage platform, embedding role-based GenAI assistants across Workday implementation phases (e.g., discovery, configuration, localization, testing). These AI tools deliver up to 10% productivity gains, reduce risk, and enhance consistency in global rollouts. IBM has also integrated AI into its Change Management offering, boosting Workday adoption and reducing the need for extensive consulting hours.</li> <li>• <b>Deep ERP transformation and process optimization expertise:</b> IBM goes beyond implementation to re-architect HR and finance models, enabling process redesign, advanced analytics, and automation in complex environments.</li> <li>• <b>Structured Rediscovery and Optimization frameworks:</b> Post-implementation tools such as Rediscovery and AskHR help align tenants with business KPIs and guide ongoing optimization through automated assessments and benchmarks.</li> <li>• <b>Client and partner kudos:</b> A client lauded IBM’s strong project delivery, backed by skilled resources and a collaborative partnership approach. A partner believes the firm brings a deep SME bench, strong knowledge base, and consistent project execution.</li> </ul>		<ul style="list-style-type: none"> <li>• <b>Need for sharper Workday-only differentiation:</b> While IBM’s broader consulting and AI capabilities are clear, its Workday-specific story gets diluted in enterprise-wide transformation messaging at times, partly due to Workday’s evolving Illuminate roadmap to support large enterprise clients. Clients may struggle to isolate IBM’s Workday value from its larger ecosystem offering.</li> <li>• <b>Client enablement still heavily consultant-driven:</b> IBM’s AI assistants help junior consultants accelerate implementation time but haven’t yet fully evolved into client-facing enablement tools. As a result, clients remain reliant on consultants for post-live optimization and AI roadmap planning.</li> <li>• <b>Strengthen cross-platform connectivity messaging:</b> IBM can highlight its existing cross-platform value by better communicating its Workday integration narrative with tools such as Maximo, SAP, and watsonx.</li> <li>• <b>Broaden Workday-aligned technical solutioning:</b> IBM has strong technical capabilities overall. However, better packaged, Workday-native solutions (beyond assistants and integrations) for augmenting the current Built on Workday apps can help clients better visualize IBM’s value within the Workday stack.</li> <li>• <b>Client and partner critiques:</b> A client wants clearer visibility into IBM’s long-term Workday services and platform innovation roadmap. A partner seeks clearer ownership alignment, expectation alignment from sales to delivery, and tighter contractor oversight to avoid disruptions.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>			
<b>HORIZON 1 – Disruptor</b>			
<b>Partnerships</b>		<b>Mergers and acquisitions (2020–2025)</b>	
<ul style="list-style-type: none"> <li>• Workday, MuleSoft, ServiceNow, Microsoft, Maximo</li> </ul>		<ul style="list-style-type: none"> <li>• Acquired DXC's Japan practice including contractual obligations</li> </ul>	
<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>	
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 1,400+ workday engagements</li> <li>• <b>Key clients:</b> Siemens AB InBev, Panasonic – State of Oregon, J&amp;J, Novartis</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> ~2,000</li> <li>• <b>Number of delivery and innovation centers:</b> 20+ across India, CEE, LATAM, North America</li> </ul>	<ul style="list-style-type: none"> <li>• IBM Consulting Advantage role-based GenAI assistants</li> <li>• Rediscovery and AskHR post-live optimization tools</li> <li>• watsonx AI testing and localization packs</li> </ul>	


# KPMG: Business-led Workday transformation powered by industry accelerators and agentic innovation

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b>	<b>Development opportunities</b>
	<ul style="list-style-type: none"> <li>• <b>Industry-aligned IP and accelerators:</b> KPMG delivers deep vertical focus through Powered Enterprise-based accelerators for the healthcare, banking, insurance, retail, and government sectors. These come with prebuilt data models, workflows, and compliance tools to speed up deployment and reduce risk.</li> <li>• <b>Strategic vision rooted in business value, not just tech deployment:</b> KPMG’s Workday vision centers on full enterprise transformation, not just HCM or finance implementation. The programs are designed to tie Workday delivery directly to measurable business outcomes such as financial close acceleration, payroll error reduction, and workforce planning accuracy. This business-led focus is reinforced through fee-at-risk models and outcome-tracking frameworks embedded from the start.</li> <li>• <b>Scalable, certified talent base:</b> With more than 1,400 certified Workday professionals and delivery hubs across India, Mexico, and Europe, KPMG offers a globally scalable model. Its teams average over four years of experience and are cross-trained across multiple modules.</li> <li>• <b>AI-enabled and agentic delivery fabric:</b> The firm leverages internal role-based agents (e.g., Close Companion), GenAI tools (aIQ Chat, automated design capture), and Workday Illuminate to accelerate delivery and enhance consultant productivity.</li> <li>• <b>Partner kudos:</b> A partner highlighted KPMG’s use of AI and GPTs to deliver predictive insights, faster decisions, and improved efficiency across the enterprise.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Proprietary AI solutions still evolving:</b> During client implementations, KPMG enables Workday’s native AI capabilities (i.e., journal insights) and implements recently added solutions (Evisort) and third parties (Auditoria). However, solutions that plug into the Workday Agent System of Record are still in the early stages.</li> <li>• <b>Limited ESG/finance integration at scale:</b> KPMG is building momentum around ESG-related reporting and sustainability services (e.g., financed emissions, grants management). However, much of its ESG traction is still centered on HCM, with limited large-scale finance-linked ESG use cases delivered to date.</li> <li>• <b>Partner critique:</b> A partner would like Workday to go deeper with vertical-specific enhancements built on top of Workday Financial Management to address sector needs.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>		
<b>HORIZON 1 – Disruptor</b>		


<b>Partnerships</b>	<b>Mergers and acquisitions (2020–2025)</b>
<ul style="list-style-type: none"> <li>• Workday, Auditoria.ai, Microsoft, AWS, Evisort</li> </ul>	<ul style="list-style-type: none"> <li>• Selective bolt-ons in tax/ESG analytics (no large SI deals)</li> </ul>

<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 600+ Workday specific deals</li> <li>• <b>Key clients:</b> Tyson Foods, Panda Restaurant Group, Whataburger, Memorial Healthcare System, Children’s Wisconsin, Brown &amp; Brown, University of Queensland, Summit Health, Alcon, Spectris</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 1,400+</li> <li>• <b>Number of delivery and innovation centers:</b> 3</li> </ul>	<ul style="list-style-type: none"> <li>• Powered Enterprise industry model tenants</li> <li>• GenAI toolset (testing, design capture)</li> <li>• Close Companion finance role-based agent</li> <li>• Fee-at-risk outcome tracker</li> </ul>

# PwC: Leverages industry-aligned IP, strong financials, and GenAI accelerators to drive value

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b>		<b>Development opportunities</b>
	<ul style="list-style-type: none"> <li>• <b>Robust finance transformation and tax integration capabilities:</b> With ~50% of its Workday portfolio rooted in financials, PwC demonstrates substantial finance process depth. The firm couples Workday Financials with domain-rich tax and compliance solutions (e.g., Pillar Two, transfer pricing, tax depreciation), addressing key regulatory needs for multinationals.</li> <li>• <b>Differentiated AES (Application Evolution Services) managed services model:</b> The AES offering goes beyond break-fix support to include innovation, adoption services, and roadmap enablement. The firm recently helped clients switch providers to tap into its innovation-led post-deployment model.</li> <li>• <b>Innovative use of GenAI and agentic capabilities:</b> PwC leads in applying GenAI across the Workday lifecycle—with accelerators for testing, configuration workbooks, and document drafting. Its Testing Genie and Agent OS solutions enhance implementation efficiency and insight generation, with measurable improvements such as 70–80% automation of policy-driven configs.</li> <li>• <b>Deep industry IP and model tenants across commercial sectors:</b> PwC offers industry-specific model tenants and pre-built integrations (Guidewire for insurance, Tips and Tokens for gaming and hospitality, and tax compliance modules for financial services) that extend Workday’s native capabilities and accelerate time-to-value across banking, healthcare, consumer, and professional services.</li> <li>• <b>Client kudos:</b> Clients acknowledge its experienced talent, proven playbooks, and flexibility to scale and tailor implementations, especially in finance and project-centric environments.</li> </ul>		<ul style="list-style-type: none"> <li>• <b>Heavy reliance on advisory teams for strategic execution:</b> PwC’s strength lies in blending business and tech strategy. However, its value delivery can be heavily consultant-led, particularly when the Workday team must lean on broader PwC advisory units for execution continuity or decision acceleration.</li> <li>• <b>Client enablement tools not always front and center:</b> While PwC emphasizes transformation coaching and strategic advisory, tools that empower clients to self-serve post-deployment (e.g., dashboards, training kits, adoption analytics) are not as visible or standardized across engagements.</li> <li>• <b>Underdeveloped reporting and CPQ capabilities in services contexts:</b> A client has flagged reporting limitations and CPQ (configure-price-quote) gaps.</li> <li>• <b>Selective innovation visibility across geographies:</b> While PwC is strong in GenAI innovation and has demonstrated use cases in North America and selected industries, the rollout of these innovations (e.g., Testing Genie, Agent OS) is less visible across smaller markets and delivery centers. Global consistency in asset enablement could enhance delivery maturity.</li> <li>• <b>Client critiques:</b> Clients suggested improvements in onboarding, product-specific knowledge, and operational understanding.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>	<b>Partnerships</b> <ul style="list-style-type: none"> <li>• Workday, Microsoft, AWS, Google Cloud</li> </ul>		<b>Mergers and acquisitions (2020–2025)</b> <ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>
<b>HORIZON 1 – Disruptor</b>	<b>Key clients</b> <ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> ~800</li> <li>• <b>Key clients:</b> Wellstar, Mohegan Sun, Hinge Health, El Camino Health, Key Bank, Indigo Agriculture, Resolution Life, Beazley, TRUMPF, Puma, Dun &amp; Bradstreet, Sumitomo Drive Technologies, ConocoPhillips</li> </ul>	<b>Global operations and resources</b> <ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 2,000+</li> <li>• <b>Number of delivery and innovation centers:</b> 160+ centers globally</li> </ul>	<b>Flagship internal IP</b> <ul style="list-style-type: none"> <li>• Testing Genie and Agent OS GenAI accelerators</li> <li>• Tax and compliance modules (Pillar Two, transfer-pricing)</li> <li>• Sector model-tenant library (insurance, gaming, hospitality)</li> </ul>

# TCS: Industry-specific solutions and advisory depth anchor the Workday proposition


<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b>	<b>Development opportunities</b>
	<ul style="list-style-type: none"> <li>• <b>Strong foundation in advisory-led transformation:</b> TCS emphasizes an advisory-first approach, co-creating transformation roadmaps with clients that span strategy, readiness, execution, and sustainment. Its structured maturity model (via the Josh Bersin partnership) strengthens business case design and transformation alignment.</li> <li>• <b>Domain-specific IP and Crystallus framework:</b> The Crystallus platform enables the delivery of verticalized Workday solutions for retail, life sciences, banking, and more. These include seasonal hiring automations, agent incentive processing, and wellness-linked leave automation, driving faster deployment and contextual relevance.</li> <li>• <b>Mature tools and delivery accelerators:</b> TCS offers a robust suite of tools such as DataSure for high-accuracy data migration, integration dashboards for failure monitoring, and Opkey for Workday test automation. These tools enhance deployment speed, testing accuracy, and integration reliability</li> <li>• <b>GenAI-driven talent and experience innovation:</b> TCS integrates GenAI in real use cases such as copilot onboarding, AI-driven interview coaching, and employee query assistants. These are prioritized through the firm’s GenAI decision framework and embedded in client and internal operations.</li> <li>• <b>Client and partner kudos:</b> Clients laud TCS’ technical and product knowledge and flexibility. A partner noted its ability to consistently apply deep industry expertise and deliver with precision to achieve high-quality outcomes.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Relative under-index on strategic co-innovation with Workday:</b> While TCS builds on Workday Extend and Illuminate, its innovations remain largely client-specific rather than ecosystem-defining. There's room for more visible, scalable solutions on the Workday marketplace.</li> <li>• <b>Workday Financials offering still scaling:</b> Despite its momentum in financial transformation (notably in BFSI and tech), TCS is still building functional breadth and repeatable IP in finance compared to its established HCM strengths.</li> <li>• <b>Stabilize delivery by reducing turnover in key roles:</b> Offshore attrition and role rotation impact delivery continuity. The firm is reinforcing stability through better career pathing and succession planning while minimizing transition friction in long-term Workday accounts.</li> <li>• <b>Client and partner critiques:</b> A client would like TCS to be less transactional and more strategic in engagements. A partner felt it should offer more tailored solutions and proactively anticipate client needs instead of relying solely on requirements gathering.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>		
<b>HORIZON 1 – Disruptor</b>		

<b>Partnerships</b>	<b>Mergers and acquisitions (2020–2025)</b>
<ul style="list-style-type: none"> <li>• Workday*, Microsoft Azure, SAP, ServiceNow, Josh Bersin Academy, Oracle, UKG, CSOD, Salesforce</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 200+</li> <li>• <b>Key clients:</b> Johnson &amp; Johnson, Boeing, HPE, Veolia, USAA, Primark, John Wiley, Cisco, ABB, McKesson, SHV Holdings, Dupont, Galderma, LBG</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 1,800+</li> <li>• <b>Number of delivery and innovation centers:</b> 25 across India, Mexico, Poland, Philippines, US, Japan, London, Netherlands</li> </ul>	<ul style="list-style-type: none"> <li>• Crystallus: Verticalized Workday solutions</li> <li>• DataSure: High-accuracy migration tool</li> <li>• Observability Cockpit</li> <li>• Fast forward enabled with Opkey</li> </ul>

\* TCS has submitted the partnership application for Sales, Services and Innovation Track to Workday. This is under review for the approval process.


# Capgemini: Enables Workday delivery with BPO depth and industry focus

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Integrated BPO + Workday operations:</b> Capgemini is uniquely positioned to combine Workday implementation with HR BPO services, gaining an operational edge in long-term transformation programs. This is particularly useful for clients aiming for ongoing operational efficiency beyond just deploying Workday.</li> <li>• <b>Strength in complex, regulated environments:</b> Capgemini demonstrates consistent strength in compliance-heavy industries such as pharma, education, and retail. Its use of industry-specific accelerators helps fast-track implementations while managing risk and regulatory complexity.</li> <li>• <b>Change management embedded in delivery:</b> The firm bakes organizational change management directly into its deployment methodology rather than offering change management as a parallel or optional service. This helps clients mitigate adoption risks early, especially in large or culturally fragmented organizations.</li> <li>• <b>Outcome-led messaging:</b> Capgemini anchors its Workday delivery around a 'simplify, disrupt, innovate' philosophy, framing transformation not just as a system replacement, but as a chance to reimagine HR and finance from day one.</li> <li>• <b>Sector-specific delivery:</b> Capgemini deployed Workday HCM for a major North American university, cutting manual processes by 40% and streamlining budgeting. The scope included technical implementation, compliance alignment, and user training, demonstrating strong execution in complex, regulated environments such as higher education.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Limited mindshare in Workday-led deals:</b> Despite its capabilities, Capgemini is not at the top of mind among CxOs when Workday is the anchor platform. Buyers often gravitate toward Accenture, Deloitte, or PwC due to their stronger brand pull and thought leadership in the Workday ecosystem.</li> <li>• <b>Inconsistent regional depth:</b> While Capgemini has solid footing in Europe and parts of North America, its APAC and LATAM Workday delivery depth is uneven. To match market demands, the firm should focus on rapidly building out its capabilities in APAC and Latin America.</li> <li>• <b>Workday Financials capabilities:</b> While developing its Workday Financials capabilities, Capgemini should be more proactive in obtaining delivery authorization to ensure fast and smooth implementations.</li> </ul>
		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• AWS, Microsoft Azure, Salesforce, Oracle, SAP, ServiceNow, and Google Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> Not disclosed</li> <li>• <b>Key clients:</b> Multinational aerospace companies, telecom giants, large automotive firms, BFSI companies, European public sector organizations, global pharmaceutical companies, multinational energy and utilities firms</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 250+</li> <li>• <b>Number of delivery and innovation centers:</b> Germany, US, India, Australia, France, Nordics, UK</li> <li>• <b>Locations of centers by major geos:</b> Shared above</li> </ul>	<ul style="list-style-type: none"> <li>• Deployment accelerators</li> <li>• AMS toolkits</li> <li>• Automation and AI assets</li> <li>• Operating model frameworks</li> <li>• Reliable AI Solution Engineering (RAISE)</li> <li>• Testing toolkits</li> </ul>

# Kainos: Pure-play precision, purpose-built for Workday success

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Pure-play Workday focus drives depth and consistency:</b> Kainos’s exclusive focus on Workday enables deeper platform expertise, faster adoption of new features, and consistent delivery quality unlike broader SIs juggling multiple platforms.</li> <li>• <b>Triple-certified Workday specialist:</b> Kainos is the only partner globally with all three Workday certifications (Services, Software, and Extend), giving it access to APIs, co-innovation roadmaps, and native deployment models. This enables tighter alignment with Workday’s platform strategy than most other partners.</li> <li>• <b>Productized tools built on Workday:</b> Unlike firms that repackage accelerators externally, Kainos has developed and commercialized Smart Test, Smart Audit, and EDM, which are certified tools built natively on the Workday platform and distributed via the Workday Marketplace. These are full-fledged, co-sellable SaaS assets embedded in client environments.</li> <li>• <b>Measurable value through internal and client deployments:</b> Having deployed Workday internally, Kainos uses its own transformation story, cutting monthly close times, automating financial processes, and improving forecast accuracy as a live reference architecture for clients navigating finance modernization.</li> <li>• <b>Workday-first culture with agile delivery:</b> With over a decade of exclusive Workday focus, Kainos maintains consistently high delivery quality, low consultant churn, and agile client engagement models, especially in testing, compliance, and AMS. This differentiates it from larger players that seem to struggle with delivery depth and team continuity.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday-only model limits cross-platform integration breadth:</b> While Kainos excels within the Workday ecosystem, clients needing deep integration with non-Workday systems (e.g., SAP, Oracle, Salesforce) may require additional partners, especially for broader enterprise architecture needs.</li> <li>• <b>Limited brand equity in the global SI arena:</b> Despite a strong reputation within the Workday community, Kainos lacks broad brand recognition across general IT or digital transformation circles, potentially affecting executive mindshare during multi-vendor partner evaluations.</li> <li>• <b>Global co-sell and support scaling still in progress:</b> As demand for its marketplace tools grows through Built on Workday, Kainos should expand pre-sales engineering, tier-2 support, and partner enablement capabilities globally to ensure consistency without diluting delivery quality.</li> <li>• <b>Emerging vertical solutions still gaining maturity:</b> Although Kainos is well-positioned to develop industry-specific apps via Workday Extend, its vertical offerings (e.g., in public sector and healthcare) are still in early stages compared to providers with mature compliance packs or embedded industry IP.</li> </ul>
		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, AWS, Azure, ServiceNow, Salesforce</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 450+</li> <li>• <b>Key clients:</b> Booking.com, Netflix, Primark, Sun Life, KION Group</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 1,700+</li> <li>• <b>Number of delivery and innovation centers:</b> 15+ global offices that supported deployment in 40+ countries</li> </ul>	<ul style="list-style-type: none"> <li>• Smart Test, Smart Audit, Employee Document Management (EDM-certified tools on Workday Marketplace)</li> <li>• Smart Shield</li> <li>• Smart Suite</li> </ul>

# Mercer: Blends transformation strategy with adaptive support to drive long-term Workday value

**HORIZON 3 – Market Leader**

**HORIZON 2 – Enterprise Innovator**




**HORIZON 1 – Disruptor**

Strengths	Development opportunities
<ul style="list-style-type: none"> <li>• <b>End-to-end transformation with the ‘infinity loop’ model:</b> Mercer delivers Workday programs across a continuous strategy–deployment–betterment cycle. This positions it as an implementation partner and a long-term transformation advisor, guiding clients from initial vision to post-deployment optimization.</li> <li>• <b>Transformation-as-a-Service Model (TaaS):</b> Mercer’s TaaS offering blends AMS support with strategic coaching, digital roadmapping, AI enablement, and outcome tracking, creating a more adaptive and value-focused post-live support model than traditional break-fix AMS alone.</li> <li>• <b>Strong client experience, governance, and bench strength:</b> With a global team of 400+ Workday specialists, 1,600+ certifications, and 98% SLA adherence, Mercer demonstrates mature delivery governance and deep expertise. Its unified global Workday contract and partner ecosystem supports consistency across regions.</li> <li>• <b>Agentic and co-innovated AI solutions:</b> The proprietary AI Pathmaker framework, co-innovation around Workday Extend tools, and enterprise-ready assistants such as Aida and data conversion bots enhance the firm’s GenAI-led delivery. This ensures AI use is practical, scalable, and Workday-aligned.</li> <li>• <b>Client and partner kudos:</b> Clients value Mercer’s resource quality and collaborative spirit, particularly its service managers and consultants for being responsive to evolving needs and invested in long-term partnership success. A partner commended its availability during implementation to meet client deadlines.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Broader visibility outside healthcare and North America:</b> Despite strong assets in healthcare and some international clients, Mercer’s brand strength and vertical IP in other industries or regions (EMEA or manufacturing) are still emerging compared to larger system integrators.</li> <li>• <b>Innovation story needs more client-embedded use cases:</b> While Mercer highlights strong innovation (AI Pathmaker, data clean room, and Extend apps), the connection between these assets and named client adoption (beyond case studies) remains mostly internal-facing. More externalization of IP performance or client-led success metrics can enhance proof points.</li> <li>• <b>Consistency in AMS and post-go-live support quality:</b> While the TaaS model is a strong differentiator, a client noted variability in traditional AMS performance, particularly around responsiveness, ticket resolution, and communication.</li> <li>• <b>Coaching-heavy model may limit self-sufficiency:</b> The transformation model is effective, but a greater balance with toolkits, templates, and self-service resources can improve client enablement and scale.</li> <li>• <b>Client and partner critiques:</b> A client seeks more competitive pricing and clearer value articulation in commercial proposals. A partner mentioned a need for better GTM planning with partners beyond Workday.</li> </ul>

Partnerships	Mergers and acquisitions (2020–2025)
<ul style="list-style-type: none"> <li>• Workday, AIDA AI, AWS, Google Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

Key clients	Global operations and resources	Flagship internal IP
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 400+</li> <li>• <b>Key clients:</b> ASM Global, Stanley Black &amp; Decker, VHA Home Healthcare, FDJ United, Riverview Health</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 400+</li> <li>• <b>Number of delivery and innovation centers:</b> 8 across US, Canada, Mexico, France, Italy, Germany, Poland, India</li> </ul>	<ul style="list-style-type: none"> <li>• Infinity Loop strategy-deploy-betterment cycle</li> <li>• TaaS (Transformation-as-a-Service) AMS</li> <li>• AI Pathmaker + data clean room</li> <li>• Coaching road-mapping analytics</li> </ul>

# OneSource Virtual: A specialist in running Workday at scale for mid-sized enterprises

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Workday-native BPaaS pioneer:</b> OneSource Virtual (OSV) delivers payroll, tax, and accounts payable services directly to the client’s Workday tenant, offering real-time execution, zero data handoffs, and built-in compliance. This Workday-native operations model is unmatched in the ecosystem.</li> <li>• <b>Operating model built around shared ecosystem value:</b> Rather than compete on implementation or AMS, OSV works alongside deployment partners such as Collaborative Solutions through its OneTeam partner program. This allows clients to assemble best-fit combinations across the lifecycle, making it more of a Workday operator than integrator.</li> <li>• <b>‘Run-as-a-Service’ for mid-market and growth-stage Workday customers:</b> OSV helps mid-sized and maturing organizations run Workday day-to-day without compromising control over their tenant or data, addressing the internal resource challenge they often face in handling operational complexity.</li> <li>• <b>Voice-of-the-user feedback embedded in service delivery:</b> OSV uses structured tools such as CXone Feedback Management to track post-interaction sentiment, train agents, and iterate processes. This feedback loop supports continuous service refinement, which is rare in payroll/tax operations firms.</li> <li>• <b>Credibility as a Workday customer and co-creator:</b> OSV itself runs on Workday and has driven measurable impact, reducing billing cycles by 60%, cutting close times from 30 to 8 days, and eliminating \$325,000+ in annual manual effort. Its ‘we use what we sell’ narrative deepens platform expertise and customer empathy.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Narrow functional scope post-divestiture:</b> Since selling its deployment and AMS arms to Collaborative Solutions, OSV’s services are now limited to operations (BPaaS). Clients seeking end-to-end Workday transformation will need to coordinate across multiple partners.</li> <li>• <b>Atmosphere not yet positioned as independent IP:</b> While the platform powers much of OSV’s automation, it’s not offered as a standalone product or integration-ready tool, potentially limiting its ecosystem value beyond OSV-delivered services.</li> <li>• <b>Global payroll expansion still in progress:</b> OSV’s core strength lies in North America and parts of Europe. Its global payroll delivery capabilities are not yet mature across all regions, posing limitations for multinational organizations with complex international payroll needs.</li> <li>• <b>Limited functional flexibility compared to global BPOs:</b> OSV does not offer multi-platform payroll support or broader HR service delivery (e.g., contact centers, talent admin). It’s tightly bound to the Workday ecosystem by design.</li> </ul>
		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, CloudPay, Equifax, Experian, Safeguard Global, ServiceNow, Salesforce</li> </ul>	<ul style="list-style-type: none"> <li>• Divested its AMS/deployment arm to Cognizant in 2022 under the Collaborative Solutions brand</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 1,100+</li> <li>• <b>Key clients:</b> CarepathRx, Innisfree Hotels, Purple</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 850+</li> <li>• <b>Number of delivery and innovation centers:</b> US, Ireland</li> </ul>	<ul style="list-style-type: none"> <li>• CXone Feedback Management</li> <li>• Inspect and Insight</li> <li>• Atmosphere (automation platform, not externally marketed)</li> <li>• AI and ML capabilities for managed accounts payable and earned wage access (via myFlexWallet)</li> </ul>


# Protiviti: Blends Workday with risk, cyber, and data to enable cross-functional transformation

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Controls-first delivery for regulated environments:</b> Protiviti is the rare Workday partner with deep governance, risk, and compliance, internal audit, and SOX expertise, embedding configurable controls, audit readiness, and risk frameworks directly into Workday configurations. This makes it especially suited for healthcare, BFSI, and energy clients with heavy compliance mandates.</li> <li>• <b>Operating model re-design, not just tech deployment:</b> Unlike implementers focused on system delivery, Protiviti provides future-state modeling, realigning HR and finance roles, processes, and governance structures before touching configuration. This business-first mindset differentiates it in transformation-focused programs.</li> <li>• <b>Hybrid delivery through the Robert Half talent network:</b> As a subsidiary of Robert Half, Protiviti can scale Workday teams with finance, HR, and technology contractors, blending consulting with staff augmentation. This gives clients flexibility in building internal capabilities alongside external delivery.</li> <li>• <b>Cross-functional programs blending Workday, risk, cyber, and data:</b> Protiviti often delivers Workday as part of broader enterprise programs, linking it to security audits, data governance, and compliance transformation. This approach resonates with boards and risk committees, not just CIOs or CHROs.</li> <li>• <b>Strategic fit for mid-market and highly regulated enterprises:</b> Protiviti is best suited for clients that want to modernize Workday while staying secure, audit-ready, and strategically aligned, particularly those that don't want generic Workday rollouts.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>New entrant to the Workday Partner Network (2024):</b> As a newly designated formal Workday Services Partner, Protiviti should grow a deep bench of certified consultants and large-scale delivery case studies to enhance its credibility in competitive, greenfield deals.</li> <li>• <b>Limited global delivery infrastructure:</b> Protiviti's delivery model is still concentrated in North America, with emerging capabilities elsewhere. This presents challenges for clients requiring 24/7 support, localization, or multi-country rollouts.</li> <li>• <b>Not yet a full-stack Workday player:</b> Protiviti excels in advisory, compliance, and optimization but has a lighter presence in core HCM and Financials implementations, especially compared to tier-1 players. Clients seeking industry-specific accelerators or rapid-launch solutions may need to supplement Protiviti with another partner.</li> </ul>
<p>protiviti®</p>		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, ServiceNow, Azure, AWS, Salesforce, Robert Half (parent company)</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> Not disclosed</li> <li>• <b>Key clients:</b> US Midwest hospital system, Fortune 100 and Fortune 500 clients</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> Not disclosed</li> <li>• <b>Number of delivery and innovation centers:</b> 90+ offices across 25 countries</li> </ul>	<ul style="list-style-type: none"> <li>• Compliance-first Workday configurations</li> <li>• Integration of SOX/internal audit tools with Workday</li> </ul>


# Strada: Builds on its Alight heritage to deliver Workday-native payroll and operational services at scale

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Workday-native operations at scale:</b> Strada executes payroll, benefits, and HR operations directly within the client’s Workday tenant. This eliminates third-party systems, ensures real-time visibility, and enables seamless compliance and delivery, which few partners can replicate at scale.</li> <li>• <b>Co-branded partnership with Workday:</b> The firm powers Workday Payroll, a unique co-branded offering spanning 60+ countries. This deep integration with Workday’s roadmap elevates Strada beyond a typical SI or BPO vendor.</li> <li>• <b>Intelligent payroll and benefits automation:</b> This solution combines AI, machine learning, and partner solutions such as Nayya to automate compliance, personalize benefits, and preempt payroll anomalies. It’s among the few Workday partners embedding GenAI at the operations layer, not just the implementation.</li> <li>• <b>Full lifecycle support with global reach:</b> With 1,000+ Workday projects (including 200+ in finance), Strada provides advisory, deployment, and post-go-live services. Its strength lies in stabilizing and optimizing large-scale implementations, particularly in complex, multi-country environments.</li> <li>• <b>Global payroll transformation for a multinational manufacturer:</b> Strada enabled a large global manufacturer to unify HR and payroll operations across multiple countries using Workday Payroll. The initiative delivered a standardized, automated payroll model that improved accuracy, reduced manual effort, and enhanced global visibility.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Brand recognition post the Alight spin-out:</b> Despite its strong delivery track record, Strada is still building visibility under its new name. Some prospects may not immediately associate it with the legacy expertise it brings from Alight.</li> <li>• <b>Limited strategic advisory depth:</b> Compared to firms such as Deloitte and Protiviti, Strada’s offering is stronger in execution than in upstream strategy. Clients needing operating model design, or HR/finance transformation consulting may need supplemental advisory support.</li> <li>• <b>Under-utilized innovation narrative:</b> Strada has strong automation and GenAI capabilities but hasn’t yet fully packaged or marketed them as standalone IP. More visible branding of the proprietary frameworks could help it stand out in crowded RFPs.</li> <li>• <b>Talent retention and cultural transition:</b> The firm needs proper alignment between legacy practices and evolving cultural expectations. Inconsistent work-life balance and promotion transparency could challenge retention in high-demand Workday roles if not addressed proactively.</li> </ul>
		
<p><b>HORIZON 1 – Disruptor</b></p>		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, Safeguard Global, CloudPay, Equifax, Experian, myFlexWallet, AWS, Azure, Salesforce, ServiceNow</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 1,000+ projects completed</li> <li>• <b>Key clients:</b> Prysmian Group, White Cap, Butte County</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 8,000+ globally</li> <li>• <b>Number of delivery and innovation centers:</b> Services 33+ countries with hubs in US, UK, Ireland, India, APAC</li> </ul>	<ul style="list-style-type: none"> <li>• AI/ML-based payroll automation</li> <li>• Benefits anomaly prediction tools</li> <li>• Built 80+ Workday Extend apps</li> <li>• Overpayment recovery toolkit</li> <li>• Workday testing automation</li> </ul>

# DXC Technology: Hybrid-ready Workday execution with compliance at core

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Legacy integration depth across complex IT landscapes:</b> Unlike firms with pure-play cloud focus, DXC Technology (DXC) thrives in hybrid environments. Its ability to integrate Workday with legacy ERP, HR, and workflow systems (e.g., SAP, PeopleSoft, ServiceNow) is a core strength, especially in the public sector, where modernization is incremental, not greenfield.</li> <li>• <b>Virtualized go-lives and remote deployment proficiency:</b> DXC has repeatedly delivered fully remote Workday rollouts, often in highly distributed or resource-constrained environments. This execution model, honed during the pandemic, is now a competitive advantage for clients seeking virtual delivery without compromise.</li> <li>• <b>Public sector specialization with deep compliance sensitivity:</b> Where competition leads in pharma and finance-led transformation, DXC owns a niche in government-grade implementations, especially in the UK and ANZ. Its experience with procurement constraints, unionized workforces, and data sovereignty laws is unique among tier-1 players.</li> <li>• <b>Unified, non-branded delivery methodology for cost predictability:</b> DXC operates with a pragmatic, no-frills framework that combines project planning, testing, and change management in a single, integrated lifecycle. It may not have branded accelerators like peers, but this approach appeals to clients that value transparency over flash.</li> <li>• <b>Public sector HCM + payroll transformation:</b> DXC delivered Workday HCM and Payroll for a UK government agency, achieving a virtual go-live and high adoption—highlighting its strength in compliance-heavy, legacy-integrated environments.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Muted brand presence in Workday RFPs:</b> DXC isn't yet considered a top contender in high-value Workday bids. While it's respected in government and healthcare pockets, it lacks the ecosystem-wide visibility and deal flow that peers routinely attract.</li> <li>• <b>Innovation messaging not yet market-facing:</b> DXC has useful IP and operational frameworks that are largely internally oriented. Without externally branded accelerators or demo-able GenAI use cases, it's harder for buyers to connect with the innovation potential.</li> <li>• <b>GenAI execution not yet operationalized in Workday delivery:</b> While DXC is making meaningful AI moves, its GenAI story is still forward-looking in the Workday context. To compete effectively, the firm should go from R&amp;D to real-world use cases, such as release readiness bots, predictive AMS, or AI-assisted training modules.</li> <li>• <b>Commercial industry penetration is limited:</b> DXC has fewer visible Workday case studies in commercial sectors. Expanding into areas such as BFSI, technology, and manufacturing will require focused wins and industry-relevant credentials.</li> </ul>
<p><b>HORIZON 1 – Disruptor</b></p>		
		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• AWS, Microsoft, Google Cloud, Oracle, SAP, ServiceNow, Red Hat, VMware, Salesforce, IBM, Dell</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> Not disclosed</li> <li>• <b>Key clients:</b> Volkswagen, United Airlines, Ferrovial, Syngenta</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday-specific headcount:</b> NA</li> <li>• <b>Number of delivery and innovation centers:</b> Not disclosed</li> </ul>	<ul style="list-style-type: none"> <li>• DXC Accelerate</li> <li>• DXC My Workday</li> <li>• Proprietary deployment methodology</li> </ul>


# Hexaware: Phase X strength supports Workday beyond initial implementation

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>• <b>Strong AMS and Phase X delivery track record:</b> Hexaware has established itself as a dependable partner for post-implementation Workday support, with strengths in AMS, module expansion, release management, and ongoing optimization. Apart from greenfield builds, clients turn to the firm to stabilize, scale, and streamline their existing Workday investments.</li> <li>• <b>AI-led testing and release automation:</b> Its proprietary Workday testing framework integrates AI to accelerate functional, regression, and integration testing, improving release readiness while reducing manual validation effort. This is especially valuable during Workday’s bi-annual update cycles, where speed and stability are key.</li> <li>• <b>Cost-efficient global support model:</b> Hexaware is known for its predictable, fixed-fee AMS pricing and centralized ‘Global Report Factory’ model, a delivery construct that enables scalable support for reporting, integrations, and data loads, often from offshore hubs.</li> <li>• <b>Expertise in Phase X enhancements:</b> Unlike firms focused on implementation, Hexaware specializes in what comes after go-live: analytics enablement, user experience upgrades, rollout of new modules (e.g., Prism and Adaptive), and data/reporting expansion. Its Phase X playbooks provide structure for iterative Workday evolution.</li> <li>• <b>Automation-first IP, light on branding:</b> While not branded like larger firms’ accelerators, Hexaware’s toolkits (such as its release management suite and testing utilities) are deeply embedded into delivery and consistently improve Workday’s agility and performance.</li> </ul>	<b>Development opportunities</b> <ul style="list-style-type: none"> <li>• <b>Limited visibility in end-to-end transformation bids:</b> Hexaware is not widely considered a go-to for large-scale Workday transformations or new implementations. This narrows its role in RFPs, where buyers want a single vendor from blueprints to go-live.</li> <li>• <b>HCM and strategic talent capabilities are thin:</b> While the focus is stronger in Financials, testing, and AMS, Hexaware is not known for leading Workday-based HR strategy, organizational design, or talent architecture, limiting its relevance in CHRO-led transformations.</li> <li>• <b>Vertical IP still evolving:</b> Hexaware serves BFSI, healthcare, and media well but lacks deeply verticalized Workday solutions (e.g., regulatory templates, industry-specific compliance frameworks) that other peers use to differentiate in regulated industries.</li> <li>• <b>Talent continuity and growth culture:</b> Client feedback suggests room for improvement in employee development and retention, which could affect delivery continuity in long-term support contracts, especially in highly customized environments.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>		
<b>HORIZON 1 – Disruptor</b>		
<b>HEXAWARE</b>		

<b>Partnerships</b>	<b>Mergers and acquisitions (2020–2025)</b>
<ul style="list-style-type: none"> <li>• AWS, Azure, Google Cloud, Salesforce, ServiceNow, Oracle, SAP, UiPath, Automation Anywhere, Crossbeam</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> Supports 400,000 workday users globally</li> <li>• <b>Key clients:</b> NA</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> Not disclosed</li> <li>• <b>Number of delivery and innovation centers:</b> Mexico, Poland, India, UK, US</li> </ul>	<ul style="list-style-type: none"> <li>• Proprietary Workday testing and automation framework</li> <li>• Release management utilities (automation-first, light on branding)</li> </ul>

# Randstad Digital: Drives adaptive workday transformation through people-first models and modular AMS through a developing partnership

<p><b>HORIZON 3 – Market Leader</b></p>	<p><b>Strengths</b></p>	<p><b>Development opportunities</b></p>
<p><b>HORIZON 2 – Enterprise Innovator</b></p>	<ul style="list-style-type: none"> <li>• <b>Talent-infused Workday delivery:</b> Randstad Digital leverages its talent DNA to scale and flex Workday teams across modules and geographies rapidly. This agility is especially valuable in post-implementation scaling, AMS, and when clients need specialized skills on short notice.</li> <li>• <b>Flexible engagement models:</b> The firm offers modular, value-driven delivery, enabling clients to ramp resources up or down with minimal friction across T&amp;M, outcome-based, or elastic delivery structures. This is distinct from larger SIs’ rigid program models.</li> <li>• <b>Early AI and automation foundations:</b> Randstad Digital is building intelligent AMS capabilities by embedding automation into testing, release readiness, and ticket resolution. While not as mature as players such as UST or Kainos, the building blocks for GenAI-integrated AMS are in place.</li> <li>• <b>Elastic delivery capacity:</b> The staffing foundation allows the firm to scale up or down based on geography, timeline, or role needs. This flexible resourcing is particularly useful during post-go-live localization or phased rollouts.</li> <li>• <b>Talent-led AMS transformation:</b> Randstad Digital supported a global automotive manufacturer in stabilizing and enhancing its Workday tenant post go-live. By blending its talent acquisition expertise with digital process advisory, it built a flexible AMS model that scaled support across regions while improving user adoption and self-service efficiency. This hybrid model helped the client reduce support tickets by 30% and accelerate release readiness cycles.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Evolving market positioning:</b> There's residual confusion between Randstad’s staffing heritage and transformation consulting. The firm requires a sharper external narrative to position itself as a serious player in tech-led ERP and SaaS transformation, not just an extension of a staffing business.</li> <li>• <b>No formal Workday partner status:</b> Without a certified Workday Services or Deployment Partner designation, access to Workday resources and co-sell opportunities may be limited, affecting client confidence in large-scale delivery.</li> <li>• <b>Low Workday brand recognition:</b> Randstad Digital lacks visibility as a core Workday transformation player. Despite the brand name, it may be overlooked in RFPs when Workday-native expertise is prioritized.</li> <li>• <b>Lack of deep Workday Financials expertise:</b> Most of Randstad Digital’s strengths lie in HCM, post-go-live support, and process optimization. However, there’s limited visible capability around Workday Financials, especially in areas such as Planning, Prism, and Adaptive Insights. This could disadvantage clients seeking end-to-end digital finance transformation on Workday.</li> </ul>
<p><b>HORIZON 1 – Disruptor</b></p> 		

<p><b>Partnerships</b></p>	<p><b>Mergers and acquisitions (2020–2025)</b></p>
<ul style="list-style-type: none"> <li>• Workday, Salesforce, ServiceNow, Adobe, Microsoft, Google Cloud, AWS, Databricks, Revature</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<p><b>Key clients</b></p>	<p><b>Global operations and resources</b></p>	<p><b>Flagship internal IP</b></p>
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 15+</li> <li>• <b>Key clients:</b> European multinational aerospace corporation, global multinational professional services company, audit assurance and consulting firm</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 100+</li> <li>• <b>Number of delivery and innovation centers:</b> 10+</li> <li>• <b>Locations of centers by major geos:</b> North America, India, Philippines, Eastern Europe</li> </ul>	<ul style="list-style-type: none"> <li>• Elastic delivery capacity models for AMSAI foundations embedded into ticket resolution and regression cycles</li> <li>• Testing automation and release readiness frameworks</li> <li>• Change management accelerators</li> <li>• Modular delivery blueprints to support agile and T&amp;M engagement structures</li> </ul>

# UST: Engineering-led and GenAI-first rigor brings cross-platform innovation to Workday delivery

<b>HORIZON 3 – Market Leader</b>	<b>Strengths</b> <ul style="list-style-type: none"> <li>• <b>Engineering-led, GenAI-native Workday approach:</b> UST stands out for embedding GenAI across testing, AMS, and user support. It’s not just implementing Workday, it’s re-engineering how Workday gets consumed, with custom AI bots for release readiness, ticket triage, and user training in the pipeline.</li> <li>• <b>SaaS++ for modular, scalable support:</b> The operating model combines XaaS delivery, modularity, and outcome-based pricing—a unique combination that helps clients seeking cost-efficient support beyond implementation, especially in Phase X and post-go-live environments.</li> <li>• <b>Dual identity – Workday customer + partner:</b> UST uses Workday internally, giving it firsthand insight into deployment, release cycles, and support challenges. This practitioner’s lens enriches its advisory, testing, and tenant optimization capabilities, giving it an edge in the partner ecosystem.</li> <li>• <b>Industry-specific tooling in healthcare and manufacturing:</b> While newer to Workday, UST brings tested compliance accelerators, analytics packs, and workflow templates for highly regulated verticals. These are rooted in its broader digital and cloud transformation experience.</li> <li>• <b>Cross-platform integration strength:</b> UST’s deep SaaS engineering DNA is its core strength. Its ability to stitch Workday into hybrid landscapes, alongside platforms such as Salesforce, Oracle, SAP, and ServiceNow, makes it ideal for enterprise clients with complex architectures.</li> </ul>	<b>Development opportunities</b> <ul style="list-style-type: none"> <li>• <b>Weak visibility of IP in Workday channels:</b> Despite developing proprietary accelerators for GenAI, automation, and Extend, UST hasn’t yet productized or showcased these effectively in the Workday Marketplace or ecosystem events, limiting its perceived innovation velocity.</li> <li>• <b>Uneven global delivery readiness:</b> While UST has a global footprint, Workday-specific delivery maturity is still ramping up in EMEA and APAC. This can impact support SLAs, localization capabilities, and multi-country transformation programs.</li> <li>• <b>Late market entry (2024 partner status):</b> UST is still in the early innings of Workday brand building. Without a portfolio of marquee deployments or long-running references, it faces a credibility gap in high-stakes RFPs, especially when competing against legacy players.</li> <li>• <b>Perception as a generalist:</b> UST’s broad enterprise IT credentials are a strength, but it risks being viewed as a generalist rather than a specialist in the Workday ecosystem. Without a longstanding Workday heritage or a focused brand presence, it may be overlooked in favor of pure-play partners with deeper Workday-native credentials.</li> </ul>
<b>HORIZON 2 – Enterprise Innovator</b>		
<b>HORIZON 1 – Disruptor</b>		
<b>U • S T</b>		

<b>Partnerships</b>	<b>Mergers and acquisitions (2020–2025)</b>
<ul style="list-style-type: none"> <li>• Salesforce, Oracle, SAP, ServiceNow (cross-platform integration).</li> </ul>	<ul style="list-style-type: none"> <li>• No recent acquisitions</li> </ul>

<b>Key clients</b>	<b>Global operations and resources</b>	<b>Flagship internal IP</b>	
<ul style="list-style-type: none"> <li>• <b>Number of Workday clients:</b> 60+ Workday deployments, 45+ active customers</li> <li>• <b>Key clients:</b> Not disclosed</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Workday specific headcount:</b> 75+ certified professionals</li> <li>• <b>Number of delivery and innovation centers:</b> Presence in 30+ countries with delivery hubs in India, US, UK, Latin America</li> </ul>	<ul style="list-style-type: none"> <li>• AI bots for release readiness, triage, user training</li> <li>• Compliance accelerators and templates</li> <li>• Workflow packs for healthcare/manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• GenAI-first testing and automation utilities</li> <li>• QE360</li> <li>• Workday readiness assessment</li> </ul>

5

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## HFS Research authors



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Dana Daher is an Executive Research Leader at HFS Research, spearheading research initiatives in emerging technologies and employee experience. With a unique blend of expertise in anthropology and IT, Dana leads cutting-edge research that shapes industry landscapes across various domains, including employee experience, Agentic AI, generative AI, diversity, equity, and inclusion (DEI), and sustainability. Her multidisciplinary background allows her to bridge the gap between strategy, people, and technology, offering a holistic perspective on today's rapidly evolving business landscape.



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Hridika's background includes seven years of experience in quantitative research and analysis with Kantar. She also serviced British American Tobacco, catering to the company's primary and secondary research needs worldwide.

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