



Workday HCM IT Services – PEAK Matrix™ Assessment and Market Trends – Workday: Redefining HR for Digital Transformation

Application Services (AS)

Market Report – June 2017 – Preview Deck

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

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Background of the research

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- As enterprises aim to achieve agility, flexibility & mobility, and optimize cost, SaaS-based solutions have witnessed rapid adoption across industries, geographies, and enterprise functions. Modernization of employee experience and management is considered vital for enterprises' digital transformation and is leading to an exponential growth of Human Capital Management (HCM) platform providers
- Many enterprises are replacing their existing HCM platforms and legacy systems in favour of Workday, making it one of the fastest growing SaaS-based HCM platforms. This success can be attributed to three differentiators of Workday – a customer-centric product positioning, extensive partner ecosystem, and continuous investments in innovation
- In this research, we present a benchmarking assessment of 10 leading Workday IT service providers plotted on the proprietary Everest Group PEAK Matrix, along with their detailed profiles. Each service provider profile comprises details of service capabilities, scale of operations, and domain investments
- The assessment is based on Everest Group's annual RFI process for the calendar year 2017, direct interaction with leading Workday service providers (including pure-play HCM service providers and boutique firms), client reference checks, and analysis of the Workday HCM IT services market

Scope of this report

- **Services:** Workday HCM IT services
- **Geography:** Global
- **Service providers:** 10 leading Workday HCM IT service providers

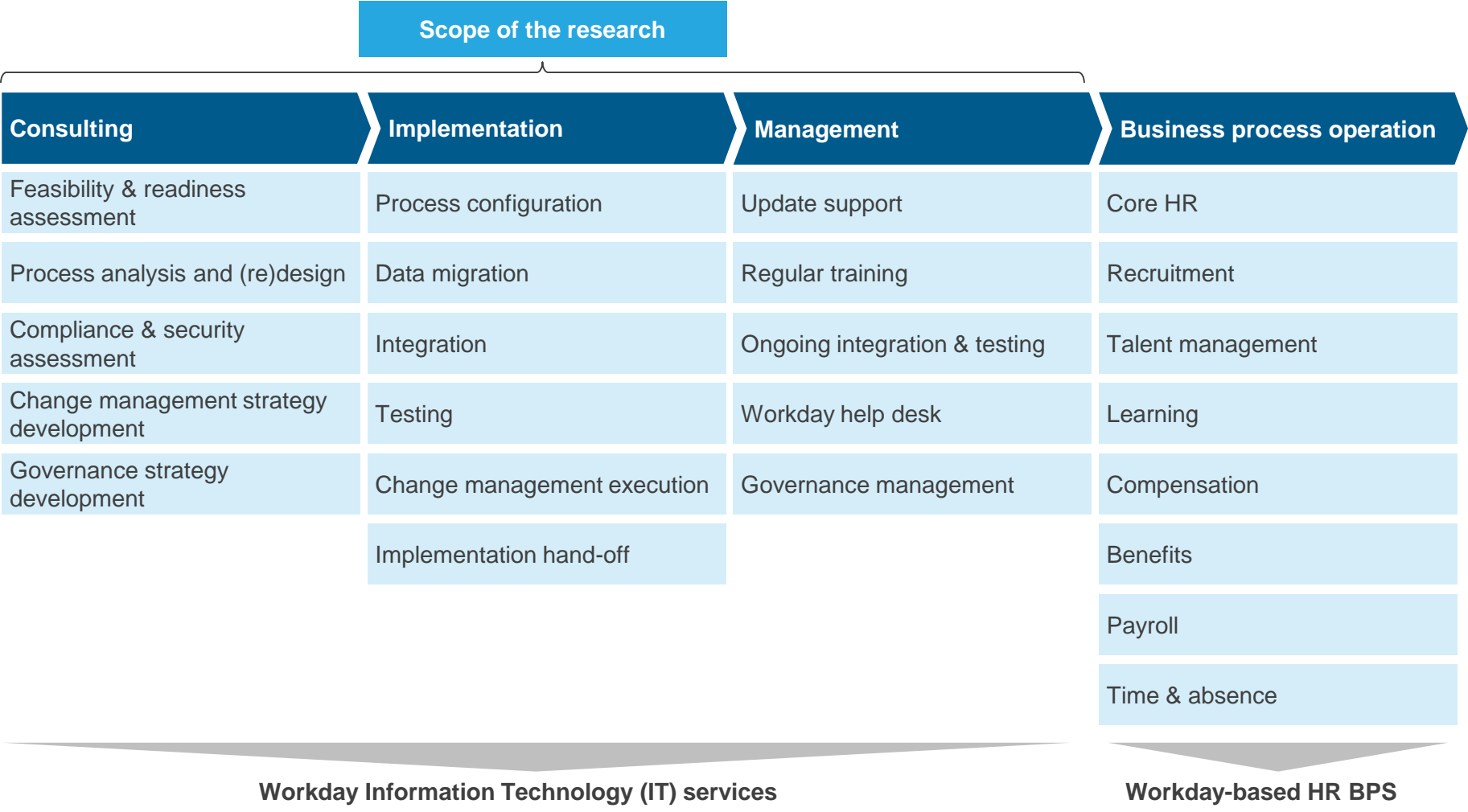
This report includes the profiles of the following 10 service providers on the Workday HCM IT services PEAK Matrix:

- **Leaders:** Accenture, Deloitte, IBM
- **Major Contenders:** Alight Solutions, Mercer, OneSource Virtual, PwC
- **Aspirants:** everBe, Hexaware, NGA HR

Everest Group's Workday-based HR process value chain

Workday services value chain

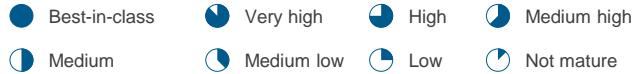
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This Workday HCM IT services provider compendium report has 10 service provider profiles, focusing on their service suite, scale of operations, and domain investments

Delivery capability assessment of Workday HCM IT services providers

Measure of capability / market success:



Service provider	Delivery capability						Market success
	Scale	Scope	Domain expertise & innovation	Delivery footprint	Buyer satisfaction	Overall	
Service Provider 1	Medium high	Medium high	High	High	High	High	High
Service Provider 2	Medium high	Medium high	High	High	High	High	High
Service Provider 3	Medium high	Medium high	High	High	High	High	High
Service Provider 4	Medium high	Medium high	High	High	High	High	High
Service Provider 5	Medium high	Medium high	High	High	High	High	High
Service Provider 6	Medium high	Medium high	High	High	High	High	High
Service Provider 7	Medium high	Medium high	High	High	High	High	High
Service Provider 8	Medium high	Medium high	High	High	High	High	High

Service Provider 1 | Workday HCM IT services overview

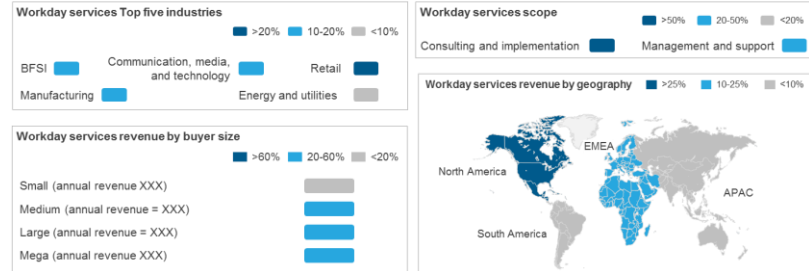
Strengths

- Service provider 1 is visualized as an enabler for HR transformation and customers appreciate its contribution in supporting change management for the organization
- Cost reduction, improving flexibility & agility, and growth of top line are some of the returns customers have realized and appreciate Service provider 1 for

Areas of improvement

- Clients expect Service provider 1 to bring in more value add and innovation in the engagement by leveraging knowledge of HR processes and its domain expertise
- Market interactions suggest clients view Service provider 1 as an expensive service provider

Overview of the Workday services practice: Service provider 1 leverages its consulting heritage to offer end-to-end services to customers. Complementing the HR and FM modules with in-house IP, Service provider 1 has the largest pool of Workday certified resources. Service provider 1 is Workday's Titanium partner and strengthened its offering portfolio with acquisition of Company B in 2016



Service Provider 1 | Workday services investments

IoT investments (representative list)	
Investment theme	Details
Research and development	• XXX: XXXXXXXXXXXXXXXXXXXXXXXXXX
Proprietary solutions	• XXX: XXXXXXXXXXXXXXXXXXXXXXXXXX
Acquisitions	• XXX: XXXXXXXXXXXXXXXXXXXXXXXXXX
Partnerships	• XXX: XXXXXXXXXXXXXXXXXXXXXXXXXX
Training and certifications	• XXX: XXXXXXXXXXXXXXXXXXXXXXXXXX

Source: Everest Group (2017)

Application services research calendar

Published
 Current

Topic	Release date
Application Services – Annual Report 2016: “No DevOps No Digital”	May 2016
Independent Testing Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium	June 2016
IT Application Services Automation: Think Benefits, Not Costs	November 2016
Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?	January 2017
Upcoming Contract Renewals – Application Services	February 2017
Application Services – Annual Report 2017: Artificial Intelligence (AI) in SDLC? There is a Long Journey Ahead	April 2017
Independent Testing Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium	May 2017
IT Automation in Application Services – PEAK Matrix™ Assessment for Service providers	June 2017
Workday HCM IT Services – PEAK Matrix™ Assessment and Market Trends – Workday: Redefining HR for Digital Transformation	June 2017
Contracting for Agile	Q3 2017
Application Modernization Services – PEAK Matrix™ Assessment and Market Update	Q4 2017
IT Automation in Application Services – PEAK Matrix™ Assessment for Products/Solutions	Q4 2017

Additional research recommendations

The following documents are recommended for additional insight into the topic covered in this research. These documents either provide additional details, or complementary content that may be of interest

- 1. Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?** ([EGR-2017-4-R-2077](#)); 2017. Insights from our research reveal that almost 50% of the enterprises are dissatisfied with their service providers, whose average performance score as strategic partners is merely 5 on 10. Whereas service providers meet the technical requirements stated in the agreement, in reality, they seldom meet customer expectations on the softer engagement aspects. The enormous gap between the stated and the unstated expectations leaves the majority of customers discontented with their service providers
- 2. IT Application Services Automation: Think Benefits, Not Costs** ([EGR-2016-4-R-1998](#)); 2016. In this era of digitalization, enterprises need to be agile in order to deliver innovative products and services to their customers. As they look for new ways to reduce costs and improve productivity, they are leveraging emerging concepts such as automation and cognitive intelligence. These concepts, though not entirely new, are gaining traction in the context of application services, as enterprises look beyond their traditional lever of labor arbitrage for cost reduction

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About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

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