

# Workday Ecosystem

## Consulting and Strategy Services

A research report comparing provider strengths,  
challenges, and competitive differentiators

Customized report courtesy of:



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### **This study focuses on what ISG perceives as most critical in 2022 for the Workday Ecosystem in the U.S.**

A growing focus on digitalization is transforming the way businesses are changing workforce management. The global view of HCM is evolving quickly due to unprecedented global events and technological advances. This has led to an increased demand among companies for service partners with a broad list of services, encompassing tools, services and platforms. In addition, businesses are increasingly switching to a hybrid model of working. This has accelerated the need for more secure, robust and flexible systems and cloud platforms that cover the entire HCM portfolio for modern workforce and workflow management.

U.S. enterprises are adopting Workday for managing organizational processes because it includes an array of products, encompassing talent management, spending analytics, payroll and workforce management. Workday is a cloud-native HCM platform that stores enterprise data in the Workday cloud, making it secure, accessible and adaptable. The platformization wave is transforming the software-as-a-service industry into a fast-growing alternative for resource-consuming ERP platforms and other monolithic client solutions. The decentralization of enterprise setups is increasing the complexity and accessibility of organizational resources for employees in daily work. In addition, the emergence of collaboration tools is overshadowing the interpersonal communication landscape, thereby reducing human interaction and touchpoints. Hence, enterprises are looking for a comprehensive platform that seamlessly integrates all systems

# Workday - The New Age HCM SaaS Platform



## Executive Summary

and applications. Workday simplifies and connects various products to manage workforce in a world where a “hyflex” (hybrid and flexible) style of working is becoming increasingly complex.

Workday was fast to recognize these challenges and has onboarded various solutions to differentiate itself from the traditional HCM platforms and solutions. In addition, it has carefully undertaken acquisitions, with Adaptive Insights being its most significant acquisition; this has added a broad spectrum of capabilities, helping Workday scale across enterprise segments.

A strong partner ecosystem is vital to a consistent and robust growth strategy. Workday has designed its ecosystem in a way that includes critical service segments to help enterprise clients select and establish the right set of capabilities — a perfect example of a controlled ecosystem that manages almost all the

critical attributes of a product, including training, methodology and certifications. Established standards on methodology and use help maintain consistency and standard product delivery, optimum performance and availability.

This HCM ERP cloud platform assists companies in planning a future workforce, identifying talent gaps, easing communication, enabling employee interaction and gaining a unified organizational view. It allows process automation, leveraging emerging technologies such as analytics to derive deep insights and connect overall employee experience to design. For example, during the pandemic, companies faced the challenge of ensuring employee well-being. Workday developed its health-tracking software and vaccine management software for employees. Thus, Workday continues to develop its cloud platform (a Workday integration

cloud) that helps design, introduce and manage integrations to and from Workday. The underlying technology stack of Workday is embedded by an enterprise service bus (ESB) to connect pre-built connectors that integrate with third-party tools. Development tools such as Enterprise Interface Builder (EIB) and Workday Studio are leveraged to build customized solutions. Such developments in the platform are strengthening Workday's position in the market on a global scale.

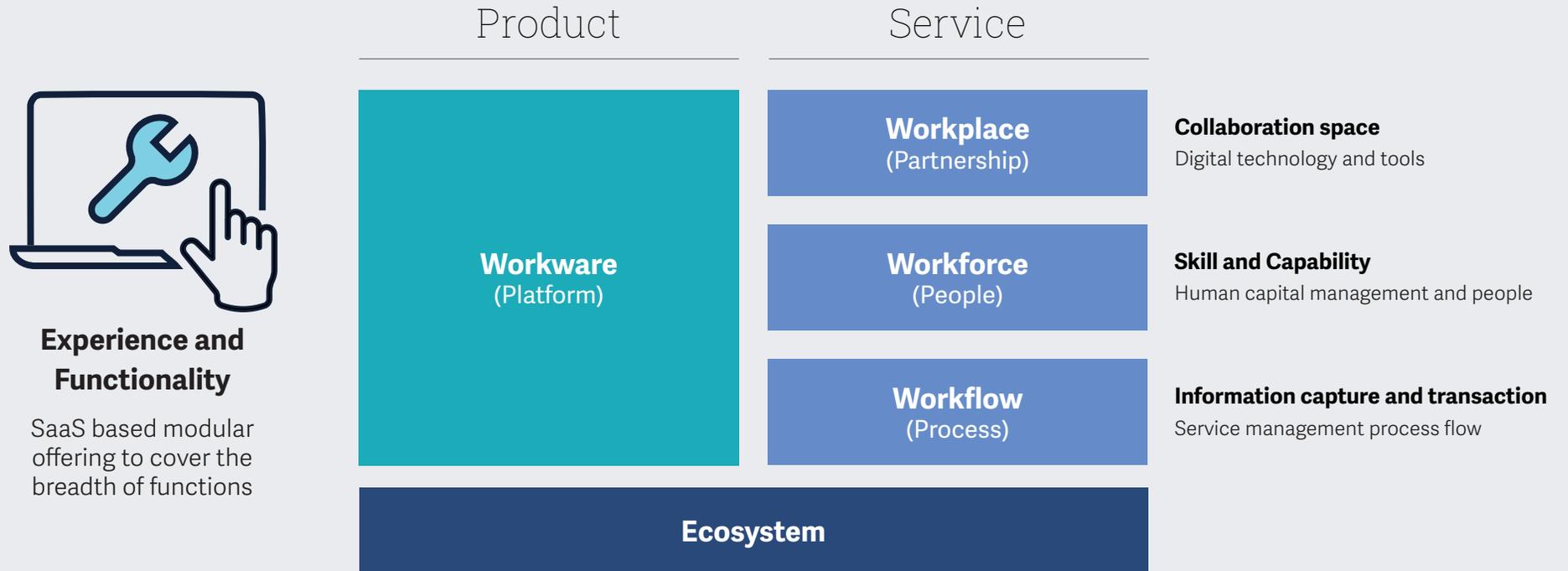
Changing business dynamics require process transformation by using proven and proprietary frameworks through consulting services. Organizational change management and execution methodologies are critical to adopting the new technology. Service providers are offering business, domain and technology consultants to guide enterprise clients across business verticals to

institutionalize the Workday platform. Consulting services are becoming the norm and are engaged in the initial stages to ensure process optimization and value realization. The product-centric consulting services cover the configuration of the hosting technology and the array of Workday products, covering areas such as finance, analytics and HCM with the intent to refine current processes, identify required skills and improve outcomes.

Workday service partners in the U.S. focus on implementation and integration services to manage the entire deployment lifecycle. However, the growing adoption of the platform is simultaneously driving the interest of global system integrators and consulting firms to build a comprehensive service portfolio, including managed and advisory services.



**Figure 1: Workdesign Constituents– The Architecture of Work**



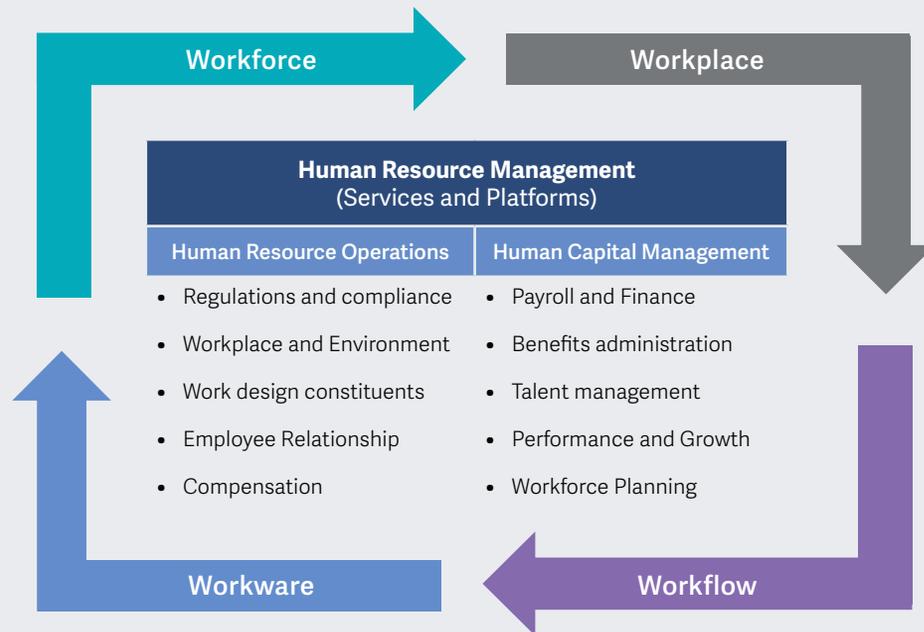
Global system integrators (GSI), boutique workday services firms and early partners of Workday have evolved with the platform by constantly refining implementation and deployment methodologies. This service segment constitutes a critical phase, outsourced by Workday to its certified partners that are eligible to lead and drive the implementations of the Workday platform.

Workday's partnerships with firms covering advisory, services, software, payroll and adaptive offerings is based on their compliance, experience, maturity and certified resources. Concurrently, providers and enterprises are looking to partner with independent software vendors, offering exclusive solutions that complement Workday's portfolio, encompassing payroll, time tracking and attendance management. Because Workday is a cloud-based HCM system that ensures a secure, automated and seamless flow

of data, alongside technical expertise, it has become popular in the U.S. Many leading service providers and enterprises have partnered with Workday for these advanced cloud-based services to manage their workforces. The Workday Enterprise Management Cloud offering is far more advanced than the legacy ERP systems companies are currently using.

Managed services are a significant part of post-deployment practices because Workday systems require specific expertise and experience to administer. Also, Workday updates occur twice a year, requiring teams to manage the updates and the consequent changes in Workday products. Enterprise clients have started to outsource Workday platform management to firms with the required expertise. Third-party software, certified by Workday, requires maintenance, and service providers have built capabilities and expertise to support third-party software.

**Figure 2: Workdesign Constituents**  
**Human capital management** is the collective value of an organizational workforce's capabilities, knowledge, and skills.



## Executive Summary

Workday EXTEND is a developer-centric platform that helps enterprise clients build custom solutions on the platform. This arrangement allows companies to offer subscription services for specific situations, thus driving different consumption models and engagement types. The U.S. market is seeing an increase in demand for managed services due to use of a plethora of third-party tools for payroll, tax and financial management. Workday management services, encompassing consulting and implementation, are seeing a rapid spike in the U.S and the rest of the world.

Workday has enabled seamless HR functioning, reducing paperwork and digitalizing almost all HCM processes. Workday continues to develop applications and software to collaborate with many software and service providers, building industry and function-specific solutions. Workday is not only pervasive

in the business sector; it is also gaining traction in the education sector. In the U.S., federal institutions are also collaborating with Workday to manage personnel and maintain records to derive analytical reports.

In short, as Workday continues to provide a plethora of options and services, we will be witnessing an increase in demand for the platform in the coming years, making its future bright.

**Workday has increased HR efficiency by digitalizing all HCM processes.**



## Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
Avaap	Contender	Contender	Product Challenger
Capgemini	Product Challenger	Product Challenger	Product Challenger
Collaborative Solutions	Leader	Leader	Leader
CrossVue	Contender	Contender	Contender
Deloitte	Leader	Leader	Leader
DXC	Product Challenger	Product Challenger	Contender
Glyde Consulting	Contender	Not In	Not In
Guidehouse	Market Challenger	Market Challenger	Product Challenger
Hexaware	Not In	Leader	Leader

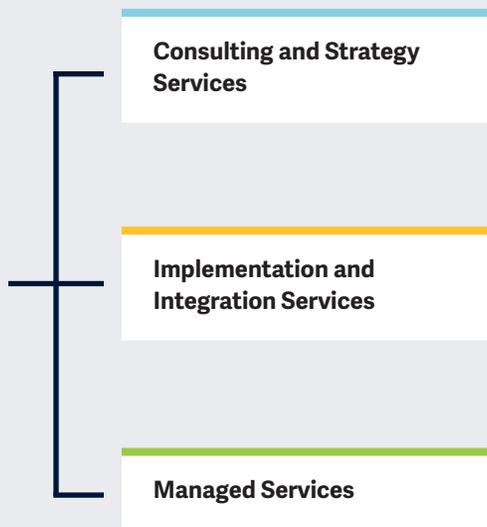


 Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Huron	Leader	Rising Star ★	Rising Star ★
IBM	Market Challenger	Product Challenger	Market Challenger
Intecrowd	Contender	Contender	Contender
Invisors	Rising Star ★	Product Challenger	Product Challenger
KPMG	Leader	Leader	Product Challenger
Mercer	Product Challenger	Product Challenger	Product Challenger
Moss Adams LLC	Contender	Not In	Not In
OneSource Virtual	Product Challenger	Leader	Leader
PwC	Leader	Leader	Leader
TopBloc	Product Challenger	Product Challenger	Product Challenger



The ISG study focuses on the critical facets of the Workday ecosystem in the U.S. in 2022.



Simplified Illustration Source: 2022

### Definition

Business services are enabled by technologies and functional services focusing on organizational attributes revolving around human resources, which is a core service line at enterprises. The organizational function has recently seen a drastic transformation due to a new way of doing business. Most human-centric processes have shifted to the virtual space. Critical corporate functions such as financial management, enterprise planning, payroll, talent acquisition, learning and development and employee benefits have been digitized. Workday has tactically aligned itself with the organization and corporate portfolios, addressing all functions. There's a critical need to consolidate all these essential functions that extend organizational support for the employees. These services are vital and continuous in nature and help organizations build their human

capital maturity and create a sustainable roadmap of human resources to cater to current and future needs.

Workday's platform includes products and solutions that improve workflows and system connectivity. Employee-centric workflows, simplified user interfaces and integration with internal and external systems have revolutionized how HR operates. Workday consolidates all the functions in the form of products, hosts them on one single SaaS platform and integrates them for seamless operations. Also, Workday consolidates all employee-centric services and processes into a vertical product line that helps and simplifies complex processes.

However, an ecosystem is built on the foundation of a strong partnership. Many internal and external systems are expected to connect and extend the operating experience. Thus, Workday is continuously upgrading and upscaling



its key initiatives to enhance its platform capabilities. Workday community, pro certification programs, Workday Integration Cloud platform, enterprise service bus (ESB) and Workday Studio are its key offerings that are continuously evolving in terms of features and capabilities to enable faster time to value. The service segments that are part of the product onboarding lifecycle such as consulting, implementation and managed services are driven by a closely associated partner network.

This study evaluates the service maturity and technical competency of the partner network and the depth and breadth of their understanding of the service lifecycle on the Workday platform, encompassing not just a specific product but all modules. This report evaluates the overall expertise, experience and comprehensive knowledge of providers in Workday platform.

In addition to the above-mentioned evaluation criteria, the following apply to all the quadrants:

- Unique differentiators
- Economic stability
- Market position

### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: Consulting and Strategy Services, Implementation and Integration Services and Managed Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on a regional market

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information

from these reports to evaluate their existing vendor relationships and potential engagements.



### Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

**Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

**Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider is classified as a Rising Star.

### Number of providers in each quadrant:

ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 20 (some exceptions are possible).



 **Provider Classifications: Quadrant Key**

**Product Challengers** offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

**Leaders** have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

**Contenders** offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

**Market Challengers** have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

**Not in** means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





# Consulting and Strategy Services

### Who Should Read This

This report is relevant to all enterprises across industries in the U.S. for evaluating providers of Workday consulting services.

In this quadrant, ISG highlights the current market positioning of providers offering Workday consulting services to enterprises in the U.S. and shows how each provider addresses the key challenges faced in the region.

Enterprises in the U.S. are focused on sourcing Workday consulting services to adapt to changing competitive landscapes and new business models for technical and functional reasons. This has resulted in a growing demand for products such as financial management and human capital management (HCM) that provide agility and business insights to support and drive change. In the case of M&As, enterprises have been emphasizing consulting

services to analyze data integration from legacy on-premises systems for a smooth transition.

Enterprises continue to seek reference assessment models, tools and frameworks to address HR-related business challenges. They look for providers that offer a long-term roadmap for process transformation and integration functionalities. These providers are developing consulting solutions to deliver real-time data and help enterprises make strategic decisions more quickly. They help clients achieve digital transformation by delivering user-focused design and organizational change management.



**Business leaders**, including chief human resources officers, CFOs, payroll, and financial leaders who focus on driving business outcomes and organizational objectives through Workday solutions, should read this report to understand the trends and developments in Workday offerings.



**Consulting leaders**, including management, technology, functional and domain consulting leaders, should read this report to learn about U.S.-specific solutions provided by Workday. The report also highlights providers' prowess in successfully conducting consulting assignments for the specific requirements of enterprises in the U.S.



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



**ISG** Provider Lens™  
 Workday Ecosystem  
 Consulting and Strategy Services

Source: ISG RESEARCH

U.S. 2022



This quadrant assesses service providers that offer **Workday advisory and consulting services**, helping enterprise clients **optimize processes and onboard the Workday platform** for HCM functions.

Ashwin Gaidhani



### Definition

This quadrant evaluates the Workday consulting and advisory service providers that transform the human resource services landscape to create sustainable, effective and resilient business operations through Workday solutions, products and platforms. The Workday advisory and consulting services help enterprise clients develop a human resource process transformation roadmap to meet business objectives. Providers' experience in driving transformational initiatives to deliver a robust execution plan, administered by certified consultants, will be examined. Also evaluated will be their approach to migrating and reforming processes by analyzing business, functional and technical requirements using custom assessment kits aligned with practices prescribed by Workday. These service providers help enterprise clients of all

sizes understand the changing market trends and design the best models for business, service and technology.

### Eligibility Criteria

- 1. Use of reference assessments models, frameworks and templates:** Best practices in opportunity identification and assessments for current and new Workday competencies. Availability of frameworks, tools and templates for Workday adoption roadmap.
- 2. Experience in defining and evaluating HRMS landscape:** Capability to design HR service transformation strategies and long-term roadmaps integrating functional services.
- 3. Industry knowledge, domain practices and Workday portfolio:** In-depth knowledge of the Workday product portfolio (HRMS, financial management, payroll, analytics and HCM services) and related functionalities, processes, workflows, tools and platforms.
- 4. Digital business transformation competency:** Focus on diverse and HR-wide portfolios and expertise in industry-specific functional process and strategy consulting.
- 5. Business tools and technology expertise:** Workday platform certifications, accreditations (from hyperscalers and third-party software providers) and capabilities to predict long-term technology developments and prescribe timely solutions leveraging expertise, partnerships and experience.
- 6. Experience in organizational and technology change management:** Principles and guidance to ensure compliance with regulatory and governance frameworks.
- 7. Resource competency and relevant certifications:** Workday-certified (Workday Pro) resource pool with expertise in building solutions.



### Observations

Workday adoption in the U.S. is at its peak and gathering traction among all enterprise segments. Consulting firms have realized the criticality of the Workday implementation process to ensure a successful transition from the current HCM process to Workday, by considering the attributes of the people, processes and platforms involved. All Workday advisory partners, including established consulting firms, have developed a framework around Workday. Technology change management and cloud transformation are integral to the consulting services. During the analysis, ISG observed that the U.S. is yet to completely incorporate consulting services into the Workday practice. Consulting services around Workday are mainly focused on finetuning the deployment strategy, guidance on phased execution strategy and determining the requirements of the current and

the anticipated state. These services help customers have the confidence to seamlessly transition current processes onto the Workday platform, thus setting on the course of HR transformation.

**Focus on change management:** The services focus primarily on organizational, behavioral, and technology change management as this has become the primary focus area of every organization, aiming to improve HCM for organizational growth.

**Skilled personnel with advisory firms:** Certified consultants with adept knowledge of workday modules are an asset to consulting firms; they build and design roadmaps for Workday adoption.

**Need to stay apace with Workday updates:** Providers need an increasing focus on customers and a better understanding of their workforces due to the constant updates in the Workday tools and

software. Technology consulting is an integral part of all workday advisory projects, aimed at providing a better experience of the SaaS platforms and their various tools.

From the 28 companies assessed for this study, 20 have qualified for this quadrant with seven being Leaders and one a Rising Star



**Accenture** is a long-standing implementation and integration partner for Workday. It provides customers strategic advice on HR and finance functions by defining strategy, technology and approach to achieve the outlined business outcomes. Accenture's strategy demonstrates a strong commitment toward continuing investments on Workday. The company focuses on value realization, domain specialization in over 40 industries and solution growth.

### Alight's

**Alight's** strategy includes determining future state delivery models of value, aligning business objectives and defining KPIs, and driving home a tactical viewpoint to ensure governance and management of operational initiatives and use of suitable methodologies.



**Collaborative Solutions** was acquired by Cognizant, which has added to its industry knowledge. This positions the company as a transformation partner focused on HCM in the context of strategy, program management and organizational change management across business verticals and service lines.



## Consulting and Strategy Services

### Deloitte

**Deloitte** provides consulting and implementation services for Workday's finance, HR, planning and analytics applications. Deloitte has a long-standing relationship with Workday and aligns its related practice, with attention to industry-vertical-specific nuances, encompassing banking, insurance, mining and pharmaceuticals, among others. In addition, the company offers a comprehensive accelerator toolkit that enhances performance and agility.

### Huron Consulting Group

**Huron Consulting Group** offers transformative guidance in the context of business processes, technology, organizational structures, data reporting and change management to establish a comprehensive roadmap for success. Cloud transformation is a critical focus area, and the company highlights

opportunities to improve efficiency and realign business and technology objectives.

### KPMG

**KPMG** is partnering with Workday to help clients increase productivity, optimize costs and retain top talent. It builds a cloud strategy from the scratch. KPMG leverages Workday Reporting and Prism Analytics to support the "decision pipeline" by closing the gaps between data and insights for decision-making. In addition, the company offers HCM and financial management solutions.

### PwC

**PwC** has established partnerships with companies such as Microsoft, Salesforce, and Oracle to support technical integration and migration in the Workday implementation space, with a growing

focus on accelerating transformation in segments such as HCM and financial management.

### Invisors

**Invisors** focuses entirely on Workday, supported by a strong team of consultants across change management, financial management, HCM deployments and testing services. Invisors' approach to platforms and phase X implementations is enabled by a proprietary client enablement deployment methodology.



# PwC



“PwC is enhancing its Workday portfolio and emerging as a prominent player in this space.”

Ashwin Gaidhani

## Overview

PwC is headquartered in London and operates in 156 countries. It has over 295,400 employees, with more than 750 are Workday certified experts, across 719 global offices. In FY21, the company generated \$45.1 billion (+4.9 percent YoY) in revenue, with assurance as its largest segment. In the U.S., PwC has developed proprietary tools, supporting enterprises in transforming their HCM and financial management.

## Strengths

**Industry-specific solutions and accelerators:** PwC has flexible consulting engagement models that fit seamlessly with the diverse requirements of clients, ensuring targeted results and outcomes. The company offers industry-specific templates, tools, methodologies and frameworks that help in accurately evaluating, analyzing and recommending transformative solutions to clients.

**Go-to-market strategy comprises broad-based offerings:** PwC's go-to-market strategy comprises broad-based offerings, encompassing finance

and HR transformation, next-level HR, platforms, Prism analytics and adaptive planning. Both HR and finance seamlessly integrate with the other functions on integrated platforms, and use analytics, data warehouses and databases for insights.

**A full stack of consulting experts:** PwC has many practitioners and practical strategists with expertise in consulting. The company launched BxT (business-experience-technology) methodology, a linchpin of its global consulting approach, that combines expertise from various spectrums to accelerate the development of innovative solutions, tailored to client needs.

## Caution

PwC has a good portfolio of Workday services around all stock keeping units (SKUs). However, retaining top consulting expertise has become more complex in the Workday space, particularly for integrated systems and platforms. In addition, a talent competition for emerging technologies (such as the cloud, AI and machine learning), combined with business and consulting abilities is becoming increasingly common. Therefore, PwC must expand its resource pool to offer consulting services locally to lead phase one implementations.





# Appendix

The ISG Provider Lens™ 2022 – Workday Ecosystem 2022 analyzes the relevant service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Workday Ecosystem 2022 market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers and vendors on capabilities and use cases
4. Leverage ISG's internal databases, advisor knowledge and experience
5. Use of Star of Excellence CX-Data
6. Detailed analysis, evaluation of services and service documentation based on the facts and figures received from providers and other sources.
7. Use of the following key evaluation criteria:
  - \* Strategy and vision
  - \* Innovation
  - \* Brand awareness and presence in the market
  - \* Sales and partner landscape
  - \* Breadth and depth of portfolio of services offered
  - \* Technology advancements



## Author & Editor Biographies



*Lead Author*

**Ashwin Gaidhani**  
**Research Partner**

Ashwin Gaidhani has a comprehensive view of IT shared-managed services portfolio and digital business transformation initiatives with approximately two decades of experience. As an ISG Research Partner and subject matter expert in the field of enterprise services and digital technologies, he is presently contributing as a Lead Author with the ISG Provider Lens™ team. Ashwin comes to this work with business and technology experience revolving around service management,

digital governance, emerging capabilities (artificial intelligence and intelligent automation), work design methodologies, and implementation frameworks. He is a highly qualified and experienced ITIL Expert with lifecycle experience in operations, delivery, consulting, and advisory for large corporations, including enduser, ITSP, and Technology product companies. He effectively partners with C-Level executives and tactical leaders to institutionalize digital business transformation and strategic initiatives.



*Enterprise Context and Overview Analyst*

**Varsha Sengar**  
**Senior Research Analyst**

Varsha Sengar is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Intelligent Automation, Software-Defined Networking and Workday Ecosystem. With more than five years of professional experience in the technology research industry, she supports lead analysts from multiple regions with their research and authors with global summaries.

Her role includes delivering an enterprise perspective for IPL and collaborating with analysts, advisors and enterprise clients on various ad-hoc requests, which covers primary and secondary research. She has expertise in areas such as IoT, artificial intelligence, smart homes and autonomous driving.





*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very

well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



### **\*ISG** Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally. For more information about ISG Provider Lens™ research, please visit this [webpage](#).

### **\*ISG** Research™

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit [www.isg-one.com](http://www.isg-one.com).





**SEPTEMBER 2022**



**REPORT: WORKDAY ECOSYSTEM**