

Workday Ecosystem

Implementation and Integration Services

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

Customized report courtesy of:



Executive Summary	3	Implementation and Integration Services	14 - 20
Provider Positioning	8	Who Should Read This	15
Introduction		Quadrant	16
Definition	10	Definition & Eligibility Criteria	17
Scope of Report	11	Observations	18
Provider Classifications	12	Provider Profiles	20
Appendix			
Methodology & Team	22		
Author & Editor Biographies	23		
About Our Company & Research	25		

Report Author: Ashwin Gaidhani

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.

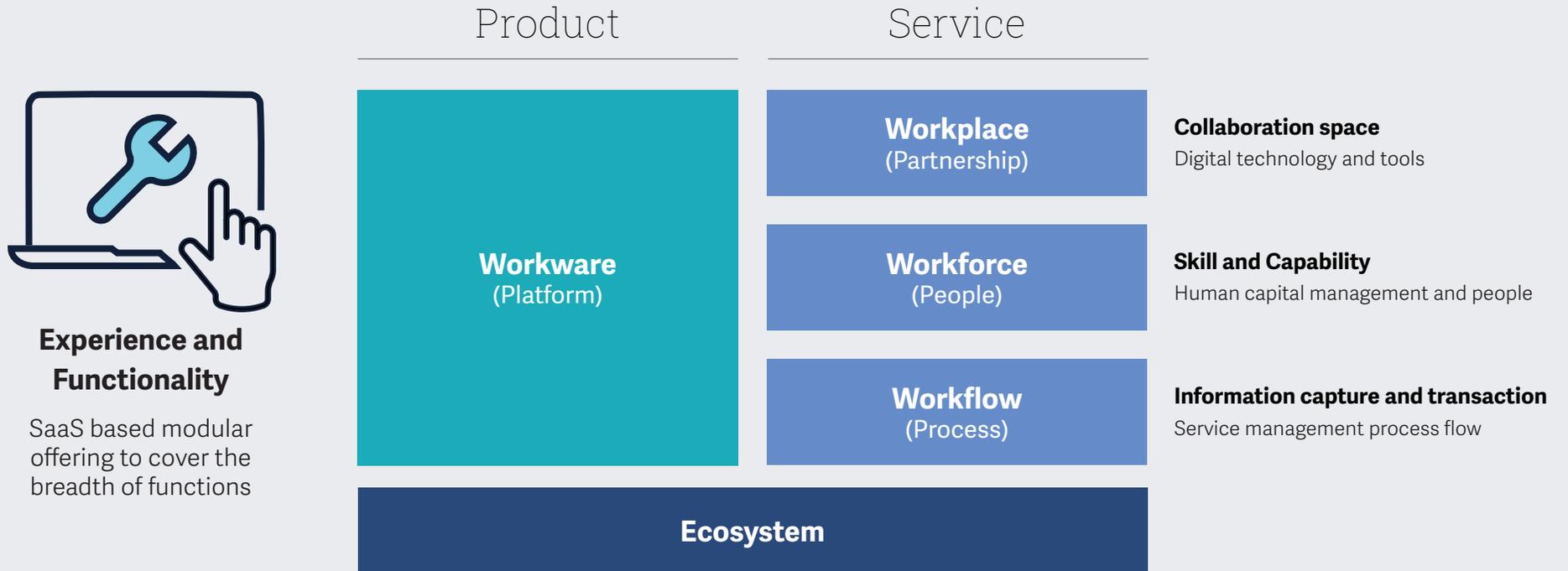
Changing business dynamics require process transformation by using proven and proprietary frameworks through consulting services. Organizational change management and execution methodologies are critical to adopting the new technology. Service providers are offering business, domain and technology consultants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



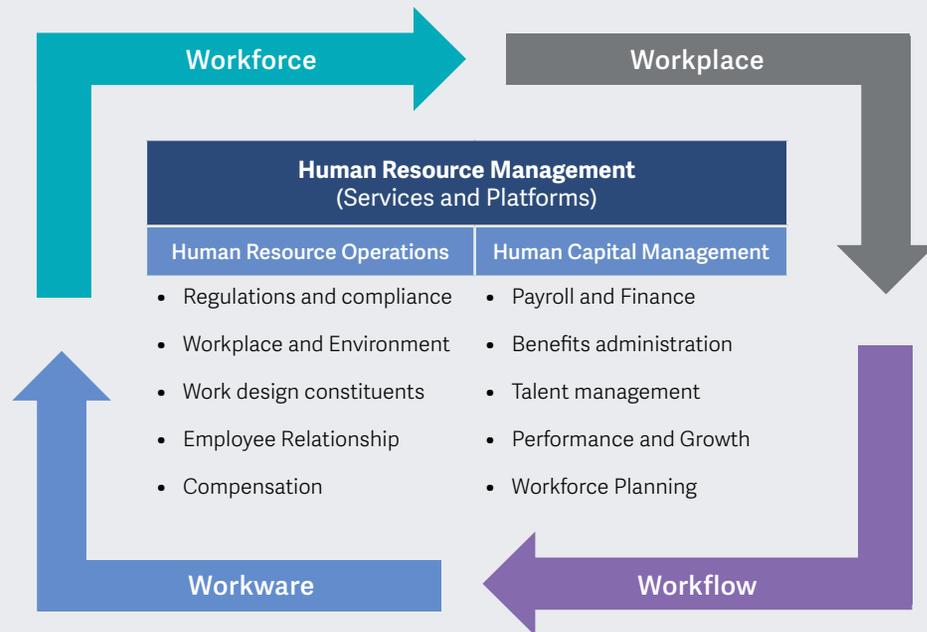
Global system integrators (GSI), boutique workday services firms and early partners of Workday have evolved with the platform by constantly refining implementation and deployment methodologies. This service segment constitutes a critical phase, outsourced by Workday to its certified partners that are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

Page 1 of 2

	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

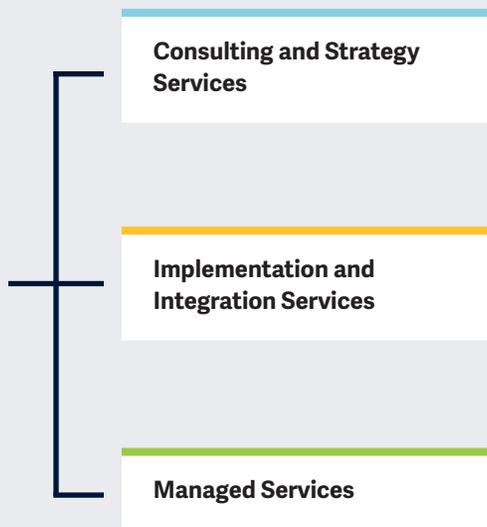


 Provider Positioning

	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.





Implementation and Integration Services

Who Should Read This

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

In this quadrant, ISG highlights the current market positioning of providers offering Workday implementation and integration 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 demanding seamless integration for smooth service delivery and a consistent user experience. They are keen on strategically leveraging the Workday platform ecosystem and innovations for digital business transformation. Hence, there is a growing need for providers to have certified experts, proven implementation

methodologies and strategies, along with experience in integrating tools such as SAP and CRM.

Globally, the U.S. continues to lead in technology adoption. Enterprises in the region are now seeking Workday partners to gain experience with emerging technologies such as automation, AI and machine learning to drive effective integration.

Clients are looking for providers that offer enterprise data security and employ rigorous security measures at the organizational, architectural and operational levels to ensure application enhancements and infrastructure optimization. They seek providers that offer proprietary tools and customized solutions with better ROI from an effective Workday deployment.



Business leaders, particularly CFOs and chief human resources officers, should read this report to identify the right system integration partner for meeting their business requirements for Workday implementation. This study will help them understand Workday implementation landscape and assess if a provider's capabilities are aligned to their long-term technology roadmaps.



Engineers and architect heads who are responsible for Workday implementations in enterprises can use this report to understand the developments in Workday solutions. This will allow them to invest in building tools and accelerators for respective activities, cloud platforms and industries.



Technology leaders should read this report to better understand the latest technology trends and patterns aligned with Workday features, functionalities, and components. They will also be able to seamlessly configure and integrate Workday solutions.



ISG Provider Lens™
Workday Ecosystem
Implementation and Integration Services

Source: ISG RESEARCH

U.S. 2022



This quadrant evaluates providers offering **Workday implementation, integration and migration services** to **modernize HCM processes**. Enterprises are seeking a flawless implementation of the Workday platform, without business disruption

Ashwin Gaidhani



Implementation and Integration Services

Definition

This quadrant evaluates service providers specialized in implementing Workday products. Competency and experience in implementing and integrating the Workday products suite with broad software tools are essential evaluating factors. Workday defines the implementation methodology, and partners follow the guidelines. As a result, the providers' ability to develop accelerators and components that drive efficiency and quality of implementations will be examined. Modernizing initiatives is a major focus area among providers to drive innovation by enhancing, improving and developing proprietary tools to deliver accurate and faster results. Providers' capabilities in Workday implementation include designing the entire implementation plan, creating data migration strategy, modernizing processes, deploying hybrid and multicloud environments, ensuring

data security and developing governance protocols. In addition, the providers must demonstrate the ability to integrate the Workday products and offerings with internal systems such as ERP, CRM, collaboration tools and third-party solutions that act as an extension of a few critical HCM domain functionalities to complement and complete the value chain. These are usually part of the Workday software partner ecosystem.

Eligibility criteria:

- 1. Use of predefined solutions and templates and expertise in successful implementation of Workday platforms:** Predefined solutions and accelerators for Workday product deployment.
- 2. Speed of Workday platform deployment:** Ability to design solutions based on reference architecture, align prevailing technical environment, and deploy new features, modules and enhancements on the Workday platform and the Workday Integration Cloud.
- 3. Integrating and mapping Workday products:** Application development, optimization and testing services across Workday modules (HCM, financial management, analytics, planning, payroll and other modules).
- 4. Expertise in diverse system integration and migration:** Experience in integrating with ERP, SAP, CRM (ServiceNow) and internal collaborative systems (Microsoft Teams, Slack, etc.).
- 5. Ability to offer maintenance and support:** Installations, upgrades, new feature/module release management, migration, patch management, lifecycle management of instances, and Workday release management.
- 6. Experience in working with emerging technologies:** Capability to work with APIs, automation, data science, AI and machine learning, paired with cognitive computing to enable digital business transformation and the ability to drive implementations and integrations with major hyperscalers.
- 7. Size and capabilities of regional delivery teams:** Diverse set of certified expertise (adoption kit) and resource pool to manage implementation and integration through various stages



Observations

Enterprise focus on agility, speed, and deployment accuracy is increasing to meet business, customer, and employee expectations. A flawless methodology to deploy Workday is expected from service partners — to minimize downtime as it directly impacts business outcome and commitment to clients. The Workday implementation and integration space is mature by design as most practices are directed, governed and administered by Workday. The partners offer custom solutions for the technical requirements and fast-track the deployment process. Developing proprietary accelerators and integration methodologies, using technology platforms, is helping service providers to differentiate and determine a unique growth trajectory for their service offerings.

The following trends are observed in this space:

Digital transformation is driving 360-degree integration of Workday with cloud-native applications. Building a vertical and horizontal integration strategy. This also simplifies Workday deployment and integration through continuous innovations and connectivity between various platforms.

Workday's Extend is growing in popularity and applicability in the service partner ecosystem. Building custom solutions for clients has increased the confidence of the service provider community. To further accelerate the integration with Workday cloud, a library of pre-built integrations with non-Workday systems is in place. Additional solutions and exclusive requirements are built using Enterprise Interface Builder (EIB), and Workday studio.

Partnerships with niche technology vendors for automation, data warehousing and testing activities are on the rise.

These help reduce technical friction and the number of additional efforts in data migration that might prolong the deployment of the Workday platform. Developing proprietary accelerators for data migration is a top priority among service providers.

Data security and integrity remain among the top priorities of service providers to ensure adherence to all security guidelines and compliances.

Cloud-based services, integrations and connectors to third-party software provide enterprises with a wide array of options, allowing them to modify their data and manage workforce management processes effectively.

From the 28 companies assessed for this study, 19 have qualified for this quadrant with eight being Leaders and one a Rising Star.

accenture

Accenture's implementation capabilities are evinced from its expansive services, comprehensive offerings, proprietary assets and customized market offerings. It has one of the most extensive client bases among Workday partners, which cements its leadership position. It adds value by co-creating pioneering HR functions with clients, by focusing on outcome-based goals.

Alight

Alight's Worklife platform is a centralized mobile interface that empowers users with multiple beneficial HR applications. AI and data science components continuously track interactions and information exchange on this platform to build models and enhance relevance, efficiency and effectiveness.



Implementation and Integration Services



Collaborative Solutions has supported large and midsize enterprises implement Workday, with a focus on outcomes and on delivering tangible value. This also includes optimizing implementation effort and accuracy through accelerators and proprietary offerings.

Deloitte

Deloitte's go-to-market strategy comprises an award-winning accelerator toolkit that enhances performance and agility. For instance, Deloitte has developed the Cash Forecasting Accelerator and the Performance-Based Variable Incentive Compensation Solution for the banking industry, as well as other industry-specific accelerators.



Hexaware has a unique blend of Workday services, covering advisory, phase X implementation, integration, reporting, testing, managed services and M&A. With a sizable team that has a long-standing association with human resource IT (HRIT) support functions, Hexaware is positioned in a unique place to support a comprehensive set of platforms and respective integrations.

KPMG

KPMG, offers HCM and financial management solutions in collaboration with Workday. KPMG's Powered Enterprise is backed by cutting-edge research, with a proven track record of consulting and partnering with vendors of a broad ecosystem. It brings this expertise and experience to the board when integrating with Workday.

OneSource Virtual

OneSource, Virtual's Workday practice includes a comprehensive set of professional services, covering HR transformation across all segments for enterprise clients. In addition, audits, process enhancements and scalable services enhance its services portfolio.

PwC

PwC, with its certified experts, provides clients with services such as redesigning HR processes and capabilities and a better understanding of their respective workforces and technological diversity. The company has developed numerous customized solutions and has a strong presence in the financial services, technology, media and telecommunications sectors.

Huron Consulting Group

Huron Consulting Group, the Rising Star, works together with clients to identify and adjust to any unique testing scenarios or environments. It continues to help the clients identify, categorize, and address issues during the testing activity, thereby mitigating risks. Huron's project management team works with an organization's leaders to ensure that testing methods align with their goals.





"PwC has built a mature practice as a Workday service partner in the U.S."

Ashwin Gaidhani

PwC

Overview

PwC is headquartered in London and operates in 156 countries. It has over 295,400 employees, including more than 750 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. PwC provides implementation and integration services to several companies by combining various methods and tools.

Strengths

Strong Workday alliance: PwC brings in decades of experience in the design, implementation and operation of Workday solutions for enterprise clients in verticals such as financial services, healthcare, pharmaceuticals and manufacturing. The company has developed strategic alliances with Microsoft, SAP, Oracle and Salesforce to streamline end-to-end application support.

Security design principals: PwC's deep sector knowledge of business, technical and regulatory solutions allows it to provide highly relevant, customized solutions to a client's security challenges. PwC's Workday Security Dashboard provides valuable insights about security changes, sensitive

data and configuration exposures.

Good geographical coverage: Unlike many of the service providers in this study, half of PwC's Workday's business comes from outside North America. In addition, more than 50 percent of PwC's Workday services engagements span more than 10 countries.

Provider transformation integrated solution framework creates clear directional roadmap: PwC helps a client identify core capabilities, designs them into their operations, trains the employees and finally automates the capabilities with the Workday portfolio. For this, it first gains consensus among stakeholders on goals, and defines future state operating models, processes and roles.

Caution

PwC has a strong background in financial services and accounting. Its team has built solutions and completed many workday deployments. With the increasing complexity and technical expertise required to administer the Workday deployment process, PwC should focus on building a solid cloud and application talent pool to support its E2E Workday deployment services.





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

Lead Author:

Ashwin Gaidhani

Editors:

Iphshita Sengupta and Grant Gross

Research Analyst:

Varsha Sengar

Data Analyst:

Hema Gunapati

Project Manager:

Abhishek Rammurthy

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research delivers guidance that helps businesses accelerate growth and create more value.

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

***ISG**

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

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.





SEPTEMBER 2022



REPORT: WORKDAY ECOSYSTEM