

Workday Ecosystem

A report analyzing the strengths and competitive positioning of Workday service provider partners

Customized report courtesy of:



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Platform-native AI and continuous optimization are redefining Workday services

The ISG Provider Lens® Workday Ecosystem 2026 U.S. report assesses how service providers help clients transform their Workday software from a cloud-based system of record for people and finance into an intelligent enterprise platform that supports AI-enabled decision-making, workflow automation, platform extensibility and continuous business improvement. The study evaluates providers across four stages of the Workday lifecycle: transformation services for planning; deployment and integration; ongoing optimization and application management services (AMS); and innovation services. These segments collectively represent the end-to-end lifecycle of Workday adoption and value realization.

The Workday ecosystem is entering a new phase of maturity. Historically, providers

differentiated primarily through implementation scale, deployment expertise, integration capabilities and migration experience. However, recent developments such as Workday Illuminate, Extend, Sana, Data Cloud and emerging Agent System of Record (ASOR) concepts demonstrate a broader shift toward intelligence-led operations and platform-centric transformation. As enterprises increasingly seek measurable outcomes after go-live, providers are evaluated not only on implementation quality but also on their ability to accelerate innovation, support AI adoption, govern emerging technologies and continuously optimize business performance.

Market Context: Factors Reshaping the U.S. Workday Ecosystem

AI-native Workday is becoming the new baseline

The U.S. Workday ecosystem is experiencing a structural shift from ERP modernization toward intelligent platform adoption. Workday's strategic investments in Illuminate, Sana, Extend, Data Cloud, skills intelligence and AI-enabled capabilities reflect a broader vision

Platform-native AI value realization replaces delivery scale as the key differentiator.



in which workflows, analytics, automation and decision-making operate within a unified business environment. Rather than functioning solely as a transactional platform, Workday is increasingly positioned as an environment where intelligence is embedded directly into business processes.

The market is also undergoing a transition from Workday deployments that serve as a static system of record toward systems capable of generating insights, supporting decisions and enabling automation. This evolution reflects broader enterprise technology trends, in which AI is becoming a foundational layer rather than a standalone capability.

Platform consolidation continues to gain momentum

Organizations in the U.S. continue to pursue platform consolidation strategies to reduce technology complexity, eliminate fragmented processes and establish more consistent data foundations. Workday's *Power of One* vision aligns closely with these objectives by enabling enterprises to combine their HCM, finance, planning, analytics and workforce intelligence within a unified environment.

As enterprises consolidate workloads and reduce dependency on disconnected systems, integrated operating models are becoming increasingly important. It results in increased demand for environments that support standardized processes, shared data models and real-time business visibility.

Extensibility and ecosystem expansion

The Workday ecosystem continues to expand through marketplace applications, platform extensions, integration services and AI-enabled capabilities. The growing adoption of Workday Extend, combined with the rising interest in custom workflows and platform-native innovation, is changing how enterprises approach solution design and business process optimization.

This growth is contributing to a more specialized and competitive ecosystem where platform capabilities increasingly extend beyond traditional HCM and finance functions. As a result, extensibility, interoperability and ecosystem maturity have become increasingly important elements of the broader Workday landscape.

Industry expertise as a market requirement

The rapid growth of Workday partners has increased competition and contributed to greater specialization across the ecosystem. As client organizations seek solutions tailored to sector-specific processes, compliance requirements and operational realities, industry alignment is emerging as a defining characteristic of the market. Prospective clients in healthcare, education, financial services and other regulated sectors continue to require solutions that address unique business requirements while remaining aligned with governance and compliance expectations.

U.S. market nuance

The U.S. remains Workday's most mature market and continues to demonstrate high enterprise penetration. Market growth is increasingly driven by platform expansion, optimization initiatives, innovation programs, AI enablement and broader adoption of adjacent capabilities rather than solely by new deployments. At the same time, midmarket adoption continues to grow as streamlined deployment models and pre-configured solutions reduce barriers to entry.

Enterprise Priorities

Maximizing value from existing Workday investments: Organizations are increasingly focused on extracting additional value from existing Workday investments rather than limiting success metrics to deployment completion alone. Enterprises increasingly emphasize operational efficiency, productivity gains, process optimization, adoption improvement and measurable business outcomes. This shift is driving stronger demand for optimization programs, roadmap planning, release adoption support and enhancement-led services.

Pursuing practical AI, not experimental AI:

Interest in AI remains high, but enterprise priorities have shifted toward practical use cases that generate measurable benefits. Buyers increasingly focus on automation, decision support, workforce productivity, EX enhancement and operational efficiency. Organizations are looking beyond experimentation and seeking clear pathways to scalable adoption and demonstrable returns.



Executive Summary

Key AI buyer considerations include:

- Measurable business outcomes rather than technology novelty
- Governance and risk management frameworks
- Scalability across functions and business units
- Long-term architectural flexibility

Seeking Workday as part of a connected enterprise: Organizations increasingly view Workday as a component of a broader enterprise architecture. Integration requirements extend across ERP environments, CRM platforms, analytics solutions, planning systems, workforce applications and emerging AI ecosystems. Buyers increasingly seek partners capable of orchestrating enterprise-wide connectivity and supporting end-to-end operating models.

Prioritizing industry-specific expertise:

As the ecosystem matures, enterprises are increasingly selecting providers based on industry knowledge rather than purely technical capabilities. Buyers emphasize sector-specific frameworks, regulatory familiarity, process

expertise and operational understanding. Industry experience is increasingly viewed as an accelerator of value realization and risk reduction. A few examples of the changing dynamics include:

- Healthcare organizations seeking workforce and compliance expertise
- Educational institutions pursuing student and workforce transformation initiatives
- Regulated industries requiring stronger governance and auditability mechanisms

Strengthening workforce adoption and change readiness: Organizations continue to identify workforce adoption as a major determinant of transformation success. Investments in AI, automation and new operating models are making change management, training, persona-based enablement and user engagement more important.

Key focus areas include:

- Workforce readiness
- Organizational change management
- Adoption measurement

- UX modernization
- Continuous learning and enablement

Decoding buyer behavior: Enterprise buying behavior is increasingly characterized by:

- Strong demand for outcome-based transformation
- Greater scrutiny of AI spending and ROI
- Preference for standardized approaches over excessive customization
- Growing interest in continuous optimization services
- Faster adoption among midmarket organizations seeking accelerated time-to-value

These characteristics strongly influence service provider selection decisions, creating implications for GTM strategy.

Provider Dynamics

Implementation-to-transformation partners:

Providers are evolving from implementation partners to transformation partners, broadening their positioning beyond implementation and integration services. Portfolios increasingly encompass transformation advisory,

governance services, platform innovation, AI enablement, optimization programs and value realization initiatives. The emphasis is shifting from project completion toward sustained business improvement.

AI-enabled delivery becomes table stakes:

Leading providers are embedding AI across delivery activities, including implementation, migration, testing, optimization, support and release management. AI-enabled accelerators and automation assets are becoming standard components of modern delivery models as providers seek to improve speed, quality and scalability.

Common investments include:

- Automated testing frameworks
- AI-enabled migration tools
- Delivery accelerators
- Intelligent support models
- Workflow orchestration assets



Proprietary intellectual property as differentiator:

As implementation practices become increasingly standardized, providers are investing heavily in proprietary assets that accelerate deployments and improve outcomes. Competitive differentiation increasingly stems from reusable methodologies, governance frameworks, industry accelerators, automation assets and platform-native solutions.

Acceleration of Workday-native innovation:

Innovation efforts increasingly center on Workday Extend, marketplace applications, AI-enabled workflows and platform-native solution development. Providers are expanding investment in extensibility services and experimenting with emerging capabilities associated with AI-enabled operations and agent-aware architectures. Greater participation in these initiatives signals ecosystem maturity and innovation readiness.

Continuous evolution of application

management services (AMS): Traditional ticket-based support models are gradually giving way to enhancement-led optimization

services. Providers are building operating models that emphasize release adoption, tenant optimization, governance maturity, AI readiness, automated testing and continuous value realization.

Intensifying expansion of alliances and ecosystem:

Providers continue to strengthen their relationships with enterprise application vendors, analytics platforms, cloud providers and emerging AI ecosystems. These alliances support broader transformation initiatives and enable providers to address increasingly interconnected business environments. Capability depth, integration expertise and ecosystem reach are becoming increasingly important differentiators in competitive positioning.

Outlook

Baseline trajectory: Workday becomes an intelligent operating platform

Over the next 12 to 24 months, the Workday services market is expected to move beyond AI experimentation toward scaled operational adoption. Workday will increasingly serve as an intelligent operating environment that supports

automation, workforce intelligence, planning, analytics and business decision-making. Success will depend on embedding these capabilities within governed operating models that deliver measurable business value.

Key risks

Enterprises and providers should closely monitor several emerging risks:

- Insufficient governance for AI-enabled operating models
- Poor data quality limiting AI effectiveness
- Underinvestment in workforce adoption and change management
- Excessive customization that slows innovation adoption
- Increasing integration complexity across enterprise ecosystems

Leading indicators

Several indicators are likely to shape market direction. These include increased adoption of Workday Extend and expanded use of AI-enabled applications and workflows. Adoption is rising for integrated HCM, finance,

planning and analytics environments. These developments show that clients want more and different functionalities from Workday, which is reflected in the growing demand for service providers that commit to continuous optimization throughout their engagements. Enterprises are also increasing investment in governance frameworks.

Actions for enterprises

Whether preparing for their first Workday implementation or focusing on changing the environment to be more powerful, organizations should take the following steps to improve effectiveness:

- Establish governance frameworks before scaling AI initiatives
- Prioritize data quality and process standardization
- Align Workday roadmaps with broader enterprise architecture objectives
- Invest in organizational readiness and workforce adoption
- Measure success using business outcomes rather than deployment milestones



Priorities for service providers

Service providers should take corresponding and complementary steps, including:

- Expanding their AI governance and operating model capabilities
- Developing industry-centered intellectual property and accelerators
- Strengthening platform-native innovation capabilities
- Shifting commercial discussions toward measurable outcomes
- Embedding continuous optimization into long-term client engagements

The U.S. Workday services market is transitioning from implementation-centric transformation to platform-centric value realization. Enterprises increasingly expect Workday to support intelligent decision-making, workforce productivity, automation, extensibility and continuous business improvement. At the same time, providers are adapting their strategies through investments in AI-enabled

delivery, platform-native innovation, governance frameworks, industry specialization and continuous optimization models.

The next phase of market evolution will be defined less by deployment scale and more by the ability to convert emerging platform capabilities into governed, measurable business outcomes. As Workday evolves into an intelligent enterprise platform supporting the next generation of business transformation, enterprises that establish strong foundations for AI adoption and providers that combine industry expertise, innovation and value realization capabilities will be well positioned.

Leading Workday service providers extend beyond implementation services by embedding AI across transformation, optimization, governance, testing and innovation programs. Investments in Workday Extend, AI-enabled delivery assets, continuous optimization models and platform-native intellectual property are becoming primary sources of differentiation as enterprises seek measurable outcomes from emerging Workday capabilities.





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Accenture	Leader	Leader	Leader	Leader
Avaap	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Capgemini	Product Challenger	Product Challenger	Product Challenger	Contender
CapTech	Not In	Contender	Contender	Not In
CloudRock	Not In	Not In	Not In	Product Challenger
Cognizant	Leader	Leader	Leader	Leader
CrossVue	Product Challenger	Product Challenger	Product Challenger	Leader
Deloitte	Leader	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Product Challenger
ERPA	Contender	Contender	Contender	Contender





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Genpact	Contender	Not In	Product Challenger	Product Challenger
Grant Thornton	Product Challenger	Not In	Not In	Not In
Guidehouse	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Hexaware	Product Challenger	Leader	Leader	Product Challenger
HR Path	Product Challenger	Contender	Not In	Product Challenger
Huron	Leader	Leader	Leader	Leader
IBM	Leader	Market Challenger	Market Challenger	Market Challenger
Impact Advisors	Not In	Market Challenger	Market Challenger	Not In
Infosys	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Invisors	Leader	Leader	Leader	Leader





Provider Positioning

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	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Jade Global	Contender	Product Challenger	Not In	Not In
Kainos	Leader	Leader	Leader	Leader
Kognitiv	Product Challenger	Product Challenger	Product Challenger	Not In
KPMG	Leader	Leader	Leader	Leader
Makse Group	Contender	Not In	Contender	Product Challenger
Mercer	Leader	Product Challenger	Product Challenger	Product Challenger
Okorio	Not In	Contender	Contender	Product Challenger
PwC	Leader	Leader	Leader	Leader
Skillcentrix	Contender	Contender	Contender	Contender
Slalom	Not In	Not In	Not In	Contender





	Transformation Services	Deployment and Integration Services	Performance and Optimization Services	Innovation on Workday
Strada	Leader	Leader	Leader	Leader
TCS	Product Challenger	Rising Star ★	Leader	Rising Star ★
TopBloc	Leader	Leader	Leader	Leader
UST	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger



The **Workday Ecosystem** study focuses on the platform roadmap and the service partners offering intelligent HCM and financial management.

Simplified Illustration Source: ISG 2026

Transformation Services**Deployment and Integration Services****Performance and Optimization Services****Innovation on Workday****Definition**

The Workday service partner ecosystem is evolving; once focused on large-scale ERP and standard cloud implementations, it is rapidly transforming into a platform-centric, intelligence-led services market. Announcements and indications from recent Workday Rising events, combined with broad enterprise technology trends, underscore a clear shift: Workday is no longer positioned as just a system of record for people and money, but as a system powered by AI, agents and extensibility.

Workday's increasing emphasis on enhancing platform capabilities with Extend, Illuminate and SANA, along with the emerging concept of Agent System of Record (ASOR). Together, they are redefining the way work is designed, executed and governed. For providers and SIs, this shift represents both an opportunity and a structural challenge. Traditional implementation-centric value propositions, focused on configuration, data migration and integrations, are necessary but now insufficient.

Differentiation is now focused on platform fluency, domain-specific innovation, and sustained post-go-live value realization.

Recent developments in the Workday ecosystem reflect a deep integration of intelligence, extensibility and ecosystem-driven value creation. Capabilities such as Workday Illuminate, Workday Extend and the Workday Marketplace continue to shape how enterprises configure workflows, enhance decision-making and develop industry- and function-specific solutions natively on the platform. A growing focus on agent-aware configurations, platform integration and AI-enabled interactions indicates Workday's move toward scalable, experience-led enterprise operations, while remaining aligned to architectural and governance standards.



Scope of the Report

This ISG Provider Lens® quadrant report covers the following four quadrants for services/solutions: Transformation Services, Deployment and Integration Services, Performance and Optimization Services, and Innovation on Workday.

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 (quadrants)
- Focus on the U.S. market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

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

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

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

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

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

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

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

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

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

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

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





Transformation Services

Who Should Read This Section

This report is valuable for providers offering **transformation services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy and transformation leaders

Strategy and transformation leaders should read this report to understand how Workday focused transformation services are evolving in the U.S. The report helps these leaders assess how service partners support enterprise wide transformation initiatives, including operating model redesign, platform adoption, and long term value realization, enabling informed decisions in the selection of partners aligned with their transformation roadmaps.

IT and digital technology leaders

IT and digital technology leaders should review this report to gain insights into how providers support Workday led transformations beyond core implementations. The report provides a view on providers' consulting and advisory capabilities, change enablement approaches and experience driven transformation support, helping these leaders find partners that can align Workday programs with a firm's architecture and governance needs.

Business and functional leaders

Business and functional leaders including HR and finance executives, should read this report to understand how providers of Workday transformation services can translate their investments into measurable business outcomes. The report highlights how these partners support adoption, experience alignment and value realization across business functions, enabling leaders to identify providers that can support sustained transformation and post go live optimization.

Enterprise change and HR transformation leaders

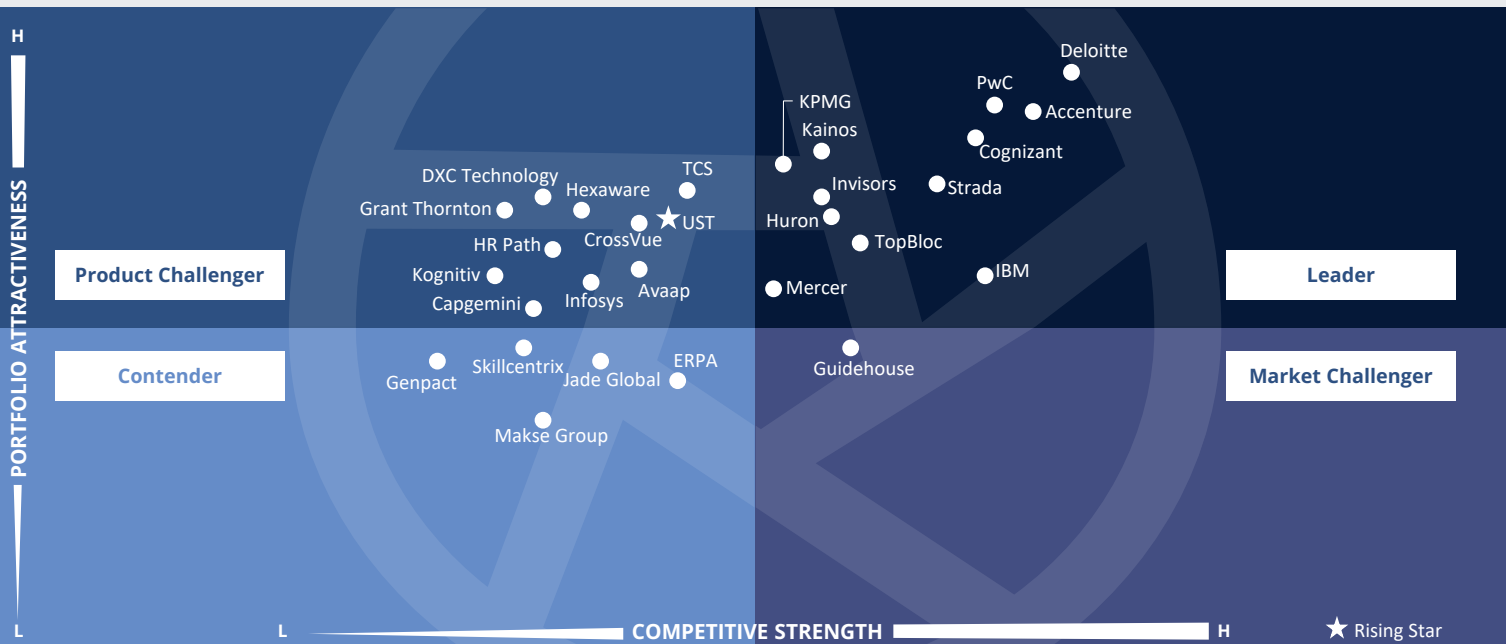
Enterprise change and HR transformation leaders should read this report to understand how providers support large scale Workday transformation programs that impact workforce structures, operating models and EX. The report helps these leaders evaluate partners that can align organizational change initiatives with Workday adoption efforts to sustain transformation outcomes.



ISG Provider Lens®
Workday Ecosystem
Transformation Services

Source: ISG RESEARCH

U.S. 2026



This quadrant assesses providers' ability to align Workday with **business transformation, operating model redesign and workforce readiness efforts**. It evaluates provider effectiveness in supporting adoption, governance, change enablement and value realization.

Ashwin Gaidhani



Transformation Services

Definition

The Transformation Services quadrant evaluates service partners based on their ability to deliver enterprise-wide business and digital transformation on the Workday platform. They are assessed on their consulting and advisory services aligned with Workday SKUs and solutions, including architecture definition, roadmap design and operating model transformation that support scalable and sustainable change.

With the growing adoption of agentic AI, partners must help enterprise clients avoid surprise expenditures and prove the value of Flex credits. They are assessed for consumption forecasting, ROI tracking dashboards, scaling gates and procurement/financial governance for AI use.

The quadrant emphasizes organizational change management and business value realization across employee, business and developer experiences.

Providers are also evaluated on their Workday-led transformation programs and ability to support experience-driven change, including AI-based value discovery and governance.

Eligibility Criteria

1. **Have the ability to deliver Workday-aligned consulting and advisory services** to support enterprise transformation initiatives mapped to Workday SKUs and solution portfolio
2. Can evaluate the HR **management landscape** to design service transformation strategies, set up **roadmaps** and provide in-depth, industry-specific knowledge of the Workday product portfolio
3. **Can establish enterprise transformation roadmaps and operating model designs** that guide Workday-led business change initiatives
4. **Have organizational change management expertise** to support stakeholder alignment, determine workforce readiness and foster adoption enablement
5. **Demonstrate experience in driving Workday adoption and value realization**, including use optimization and measurable business outcomes
6. Focus on **digital business transformation competencies** and have expertise in industry-specific functions and strategic consulting, including ESG and GRC
7. **Can support AI-enabled value discovery and governance** grounded in officially supported Workday constructs
8. Possess Workday platform certifications to **predict long-term technology developments** and adoption to ensure the **timely delivery of solutions** using expertise and partnerships



Transformation Services

Observations

Transformation services in the U.S. Workday market have advanced beyond implementation planning toward business-led transformation focused on operating model redesign, workforce modernization and measurable value. Among quadrant Leaders, Workday programs begin with readiness assessments, future-state design, governance frameworks and transformation roadmaps. Providers such as Kainos, Strada, Huron and KPMG emphasize structured transformation planning before technology execution.

Integrating AI strategy into transformation engagements is a key trend. Providers are doing so by embedding AI readiness assessments, governance models, adoption planning and operating model changes directly into Workday initiatives. Accenture, Cognizant, Deloitte and IBM increasingly position AI as part of workforce and finance transformation rather than as a standalone innovation agenda.

Leaders also strongly emphasize value realization and organizational adoption. Change management, workforce readiness,

stakeholder alignment and KPI-based outcome tracking are now viewed as critical to transformation success. Another differentiator is industry specialization, with Deloitte, PwC, Huron and Accenture leveraging sector-specific frameworks across healthcare, financial services, higher education and the public sector.

Collectively, Leaders signal that organizations seek advisors that can align strategy, governance, AI adoption, process modernization and change management into a unified transformation agenda that delivers sustainable business outcomes.

From the 45 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture combines Workday strategy, transformation advisory, AI-enabled innovation, industry consulting and change management through a tightly integrated alliance model designed to accelerate enterprise reinvention and value realization.

cognizant

Cognizant delivers business-led Workday transformation through advisory, change management, AI readiness and governance services, helping enterprises accelerate adoption, optimize operations and maximize business value.

Deloitte.

Deloitte offers Workday-led business transformation through consulting services focused on change, operating model, AI and industry needs, with support from strategic alliances, proprietary accelerators and an AI-enabled delivery methodology.

HURON

Huron differentiates its Workday transformation practice through proven operating model design, organizational change capabilities and AI-embedded delivery, supported by extensive industry-specific process assets and Workday co-innovation initiatives.

IBM

IBM emphasizes value activation roadmaps, organizational adoption, governance, AI-enabled workforce transformation and consulting, supported by a global Workday practice that has expanded into experience-led design, Illuminate adoption and Sana-related innovation.

inVisors

Invisors is a Workday-focused consultancy that combines transformation advisory, AI enablement, change management and extensibility-led innovation through close alignment with Workday and industry-specific solution development.

KAINOS &CO

Kainos combines advisory-led Workday transformation services, proprietary IP and AI-enabled innovation with a Workday-aligned GTM approach focused on enterprise transformation, value realization and long-term platform adoption.



Transformation Services



KPMG delivers Workday transformation services through Powered Enterprise, which combines transformation, operating model design, workforce advisory, governance and Workday-enabled strategy to help organizations accelerate value realization and sustainable change.

Mercer

Mercer combines Workday transformation consulting, workforce strategy, HR and finance transformation and human-centered change management to align Workday investments with broader business, workforce and operating model objectives.



PwC delivers Workday-led business transformation through industry-focused consulting, AI-enabled operating model design, proprietary accelerators and continuous value realization services spanning strategy, adoption and innovation.

Strada

Strada is evolving into a business-led Workday transformation partner that aligns operating models, governance, workforce strategy and change enablement with industry-specific frameworks to accelerate adoption, value realization and long-term enterprise modernization.

TopBloc

TopBloc delivers Workday transformation services through a Workday-only advisory model that combines digital transformation strategy, enterprise roadmapping, change management and technology-enabled methodologies to help organizations maximize long-term value from Workday.



UST (Rising Star) combines Workday advisory, organizational transformation, AI-led roadmap services and change enablement with Workday expertise gained through its acquisition of Intecrowd. This helps enterprises modernize operating models, accelerate adoption and improve long-term value realization.



PwC



"PwC unites managed services, AI-driven insights and transformation expertise to optimize Workday investments beyond traditional support models."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. It helps organizations build AI-ready Workday-enabled digital cores through outcome-led transformation, industry model tenants and agent-first operating models. Its right-to-left methodology starts with targeted business outcomes and aligns processes, data, controls and workforce design to measurable value creation. Supported by its Concourse delivery platform, proprietary accelerators, responsible AI governance and Application Evolution Services (AES), PwC enables sustained innovation beyond go-live.

Strengths

Outcome-led AI transformation: PwC's transformation approach in the U.S. applies right-to-left design, starting with targeted business outcomes and working backward to define AI use cases, operating model changes, governance requirements and Workday roadmap decisions. The firm's Agent Powered Performance (APP) framework supports KPI-driven value realization through Sense-Think-Act workflows while embedding responsible AI controls and human oversight.

Industry-centric transformation design: PwC combines Workday advisory services with industry-specific model tenants, micro-vertical solutions and ecosystem architecture design to accelerate roadmap definition and fit-to-standard adoption. The firm has developed industry-focused assets

across insurance, banking, healthcare, professional services and consumer markets to enable transformation strategies aligned to sector-specific operating models and business processes.

Governance and adoption: PwC strengthens Workday transformation through structured governance, change management and AI-enabled adoption capabilities. Its Change Navigator, Concourse platform, PwC Delivery Methodology and Design Agent streamline stakeholder alignment, decision governance, documentation and Workday-compliant design, accelerating execution, reducing manual effort and improving delivery quality.

Caution

PwC can strengthen its U.S. transformation positioning by expanding quantified outcome reporting that links AI-enabled operating models, Workday adoption and business value. Consistent executive-level visibility would reinforce its outcome-led differentiation.





Deployment and Integration Services

Who Should Read This Section

This report is valuable for providers offering **deployment and integration services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Technology and IT leaders

Technology and IT leaders should read this report to understand how providers support the deployment and integration of Workday solutions in complex enterprise environments. The report helps these leaders evaluate provider capabilities in terms of implementation approaches, system integration and data readiness, enabling informed decisions when selecting partners that can support scalable and secure Workday rollouts.

Enterprise architects and implementation professionals

Enterprise architects and implementation professionals should review this report for insights on provider practices for deploying and integrating Workday across enterprise application landscapes. The report provides visibility into how providers manage integrations with ERP, CRM and collaboration platforms, as well as data migration and configuration activities that are critical for successful Workday implementations.

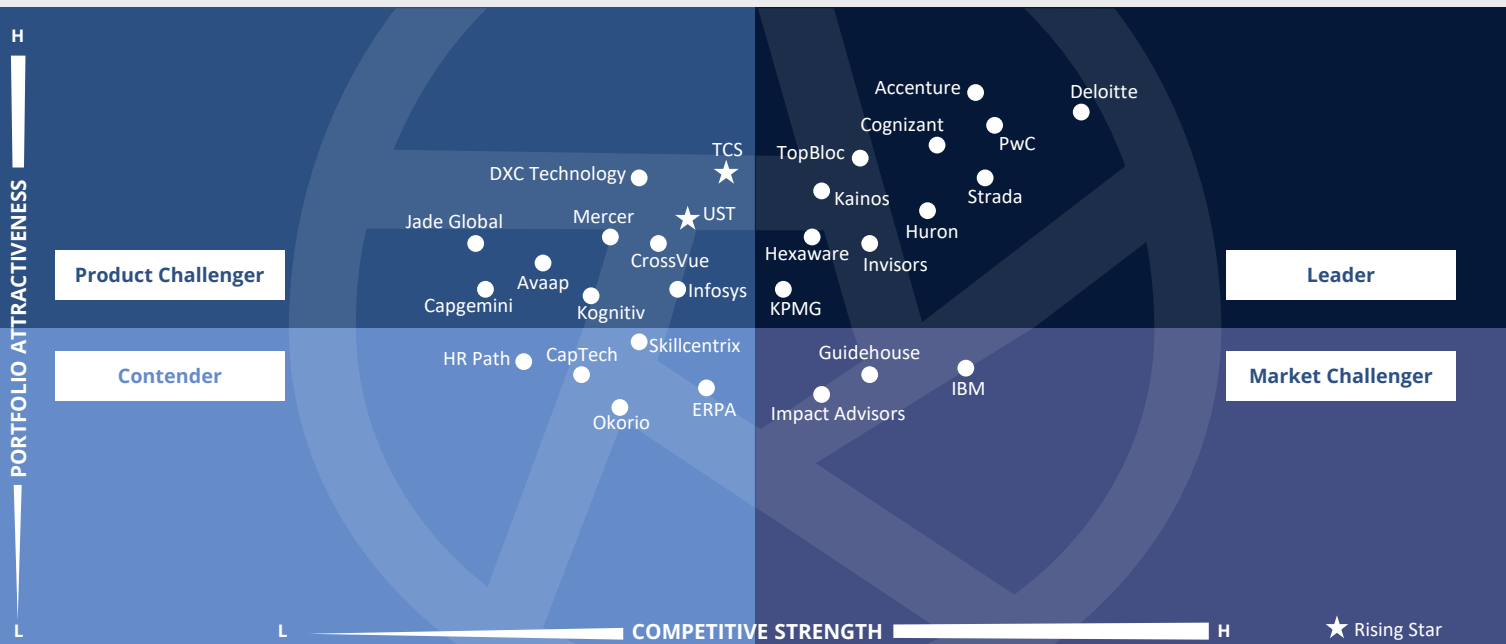
Business leaders

Business leaders overseeing Workday implementation initiatives should read this report to better assess providers' ability to undertake reliable and efficient deployments. The report supports decision making by highlighting how providers manage implementation complexities, coordination across systems and post deployment readiness, helping enterprises select partners aligned with their business objectives and timelines.

Program management and delivery assurance leader

Program management and delivery assurance leader should read this report to gain visibility into how providers manage complex Workday deployment and integration initiatives. The report helps these leaders assess provider approaches to deliver governance, coordination across systems and risk management, thus supporting informed partner selection for large or multi phase Workday programs.





This quadrant evaluates providers' capabilities in **Workday implementation, integration architecture and program execution**. The market is focused on accelerating deployment, managing data and ecosystem complexity and enabling scalable enterprise adoption.

Ashwin Gaidhani



Deployment and Integration Services

Definition

The Deployment and Integration Services quadrant evaluates Workday service partners based on their ability to design, deploy and integrate Workday solutions at enterprise scale. The providers demonstrate capabilities in Core and Phase X implementations, supported by established methodologies, frameworks and accelerators that enable consistent, secure and efficient outcomes.

Workday has positioned Workday Data Cloud in a way to eliminate exports/stale duplicates and enable real-time insights, making strong data engineering and governance skills a necessity for partners. The quadrant also assesses partner expertise in data readiness, grounding, migration and conversion, along with capability in integrating Workday with enterprise applications such as ERP, CRM and collaboration platforms. Providers are evaluated on their ability to deliver scalable integration architectures and AI-assisted deployment approaches explicitly aligned with Workday standards and ecosystem practices.

Eligibility Criteria

1. Have proven experience in **delivering Core and Phase X Workday implementations** across enterprise environments
2. Can apply established **methodologies, frameworks and accelerators** aligned with best practices in Workday implementation
3. Have the ability to **integrate, align, develop, optimize and test** Workday products across various modules
4. Offer expertise in **diverse system integrations and migrations with ERP, SAP, CRM** (ServiceNow and Salesforce) and internal collaborative systems
5. Provide **maintenance support and installation services, offer upgrades** and handle patch and lifecycle management
6. Use **emerging technologies** such as **automation, data science, AI, ML and cognitive computing** to enable digital transformations and drive implementations
7. Can **adhere to Workday security, governance and ecosystem requirements** throughout deployment and integration engagements
8. Can deploy **Workday Data Cloud connectivity** with Databricks/Salesforce/Snowflake, access controls and **showcase real-time analytical use cases**



Deployment and Integration Services

Observations

The U.S. Workday deployment and integration services market has moved beyond traditional implementation toward AI-enabled, accelerator-led delivery. Accenture, Deloitte, Cognizant, PwC and Hexaware embed AI into configuration, testing, data migration, integration development and cutover activities through platforms such as GenWizard, Ascend, Cynergy, Design Agent and AMAZE®, helping reduce manual effort, improve quality and accelerate deployment.

Another defining trend is the growing importance of enterprise integration orchestration. Accenture, Deloitte, Cognizant, KPMG, Strada and Hexaware position Workday as the enterprise digital core. They emphasize its connectivity across ERP platforms, payroll ecosystems, Salesforce, ServiceNow, cloud providers, analytics environments and Workday Data Cloud. Investments in reusable integrations and integration factories reflect the rising demand for scalable, future-ready architectures.

Leaders also demonstrate a clear shift toward industry-led implementation models. Huron, Deloitte, PwC, Kainos, KPMG and Strada leverage sector-specific process designs, model tenants, Powered Enterprise assets and industry accelerators for their target markets, including healthcare, higher education, financial services, insurance and the public sector. The industry offerings reduce deployment risk and time-to-value. Huron, Invisors, Kainos, Hexaware and PwC increasingly embed Workday Extend applications, Built on Workday assets, AI-readiness programs and emerging agent-enabled capabilities during implementation, signaling that deployments are designed to establish an AI-ready, integration-rich foundation for long-term business transformation.

From the 45 companies assessed for this study, 31 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture delivers Workday deployment, integration and transformation services through a combination of AI-enabled implementation assets, industry-led solutions and deep collaboration with Workday, helping organizations modernize and continuously evolve their Workday environments.



Cognizant offers Workday deployment, integration and lifecycle services through industry-focused consulting, AI-enabled delivery, governance frameworks and platform innovation to accelerate business transformation and value realization.

Deloitte.

Deloitte specializes in AI-first Workday deployment and integration services, leveraging the Ascend AI delivery platform, industry accelerators and ecosystem partnerships to accelerate implementations, simplify integrations, reduce risk and improve time-to-value.

HEXAWARE

Hexaware delivers Workday deployment and integration services through a Workday-first model that combines implementation expertise, integration engineering, Extend-led innovation and AI-enabled accelerators. A global Workday partnership and investments in next-generation platform capabilities reinforce its approach.

HURON

Huron accelerates Workday transformation through industry-focused implementation, integration and innovation capabilities, combining AI-enabled delivery, proprietary accelerators and co-developed Workday solutions to extend platform value and improve business outcomes.

invisors

Invisors specializes in Workday-focused deployments, combining AI-enabled delivery, integration expertise and industry-specific applications to accelerate platform adoption and address complex operational requirements.



Deployment and Integration Services



Kainos converges Workday expertise, proprietary accelerators, AI-enabled delivery capabilities, and ecosystem partnerships to deliver transformation-led implementations, seamless integrations and continuous business value.



KPMG delivers Workday deployment and integration services through its Powered Enterprise methodology, combining implementation, integration, migration, governance and industry-specific deployment assets to accelerate Workday adoption and operational transformation.



PwC, with a strong focus on AI-enabled Workday delivery, combines industry-driven implementation models, proprietary accelerators and ecosystem integration capabilities to accelerate deployment outcomes, improve governance and modernize enterprise transformation journeys.

Strada

Strada is strengthening its position as a Workday transformation partner by combining deployment, integration, payroll, advisory and managed services with industry expertise and platform innovation to accelerate value realization.

TopBloc

TopBloc, a Workday specialist, delivers deployment and integration services by combining certified implementation expertise, proprietary deployment technologies, integration support and lifecycle services to accelerate adoption and raise operational outcomes.



TCS (Rising Star) positions itself as an enterprise-wide transformation orchestrator rather than a basic module configurator, combining functional business logic with proprietary automation to deliver complex, multi-system integration at scale.



UST (Rising Star) delivers Workday deployment and integration services through a combination of advisory-led implementation, AI-enabled accelerators, integration expertise and Workday Extend capabilities, strengthened by the acquisition of Intecrowd and a Workday-focused delivery model.





"PwC's integration-led approach connects Workday with broader enterprise ecosystems through proven governance, automation and architecture capabilities that support long-term value realization."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC delivers Workday deployment and integration services through an industry-driven implementation model, an AI-enabled delivery platform and extensive Workday ecosystem expertise. Leveraging model tenants and proprietary assets, including Design Agent, Configuration Workbook Copilot, Testing Genie, Rapid Data Tool and Concourse, PwC accelerates design, configuration, testing, data migration and integration execution.

Strengths

AI-enabled deployment factory: PwC has embedded AI across its U.S. Workday deployment lifecycle through assets such as Design Agent, Configuration Workbook Copilot, Testing Genie, Rapid Data Tool and Concourse. These tools automate requirements capture, configuration generation, testing, data conversion and project governance, accelerating implementation while maintaining alignment with Workday methodology and quality controls.

Industry implementation models: PwC differentiates its U.S. deployment approach with pre-configured industry model tenants and Platinum business process libraries that accelerate fit-to-standard adoption and future-state design. Industry-specific

models for insurance, banking, healthcare and professional services provide pre-defined workflows, data structures, reporting components and integration considerations that reduce customization and strengthen clean-core adoption.

Integrated ecosystem engineering: PwC designs and governs enterprise-scale Workday integrations across ERP, payroll, analytics, planning and industry platforms. Its Design Agent embeds agents and integrations into deployment blueprints, while the Application Evolution Services (AES) Innovation Engine monitors integration maturity, identifies release impacts and proactively mitigates ecosystem risks to enable scalable, future-ready architectures.

Caution

PwC can strengthen its U.S. deployment and integration positioning by expanding measurable use cases for ecosystem integration. Demonstrating quantified outcomes from AI-enabled governance, real-time interoperability and deployment accelerators would reinforce differentiation and client confidence.





Performance and Optimization Services

Who Should Read This Section

This report is valuable for providers offering **performance and optimization services** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Operations and service delivery leaders

Operations and service delivery leaders responsible for the stability and continued performance of Workday environments should read this report to understand how providers support run state operations. The report provides insights on providers' application management, optimization and operational support capabilities, helping leaders assess partners that can ensure reliability, efficiency and continuity across business critical Workday systems.

Functional and service line leaders

Functional and service line leaders overseeing HR, finance and related business functions should review this report to evaluate how providers optimize Workday usage post go live. The report helps these leaders understand how providers support continuous improvement, enhancements and personalization, enabling more effective use of Workday capabilities across functions and aligning platform performance with evolving business requirements.

IT leaders and platform reliability owners

IT leaders and platform reliability owners should read this report to gain clarity on how providers manage Workday environments at scale. The report highlights provider approaches to platform monitoring, testing, release management and cloud operations, helping technology owners identify partners that can support stable, secure and well governed Workday operations over time.

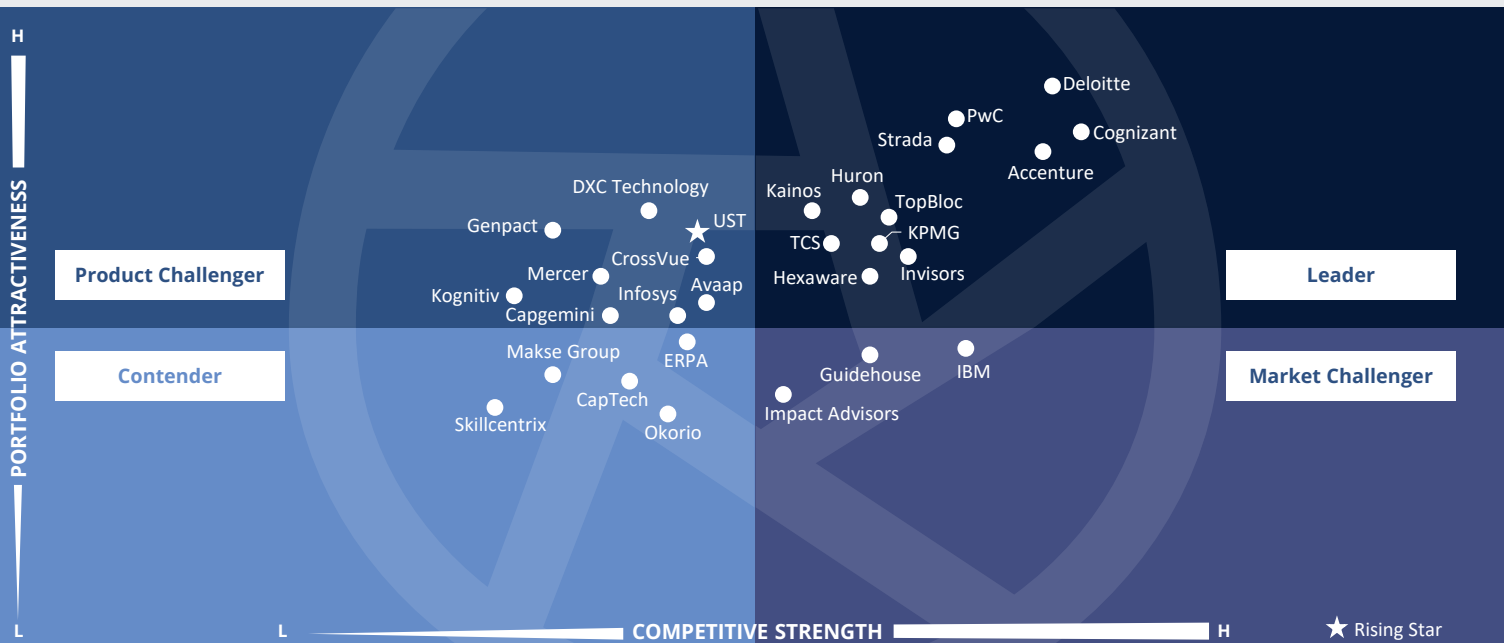
Enterprise application operations managers

Enterprise application operations managers should read this report to understand how providers support the ongoing operation and optimization of Workday environments. The report provides insight into providers' approaches to application management, performance monitoring, and continuous improvement, helping operations teams identify partners that can support stable and efficient run state Workday operations.



Workday Ecosystem Performance and Optimization Services

U.S. 2026



This quadrant assesses providers' **continuous optimization, application management and release governance** abilities. It evaluates how effectively they enhance platform performance, adoption, operational efficiency and long-term business outcomes.

Ashwin Gaidhani



Performance and Optimization Services

Definition

The Performance and Optimization Services quadrant evaluates Workday service partners on their ability to operate, optimize and continuously enhance Workday environments. They deliver application management services (AMS) that support platform performance in terms of stability and reliability, while enabling continuous improvement through change and release management, testing, and automation.

The quadrant also covers optimization services, including enhancements, personalization, and business process as a service (BPaaS) delivery models that combine Workday software and services. Providers are assessed on their ability to improve operational efficiency, platform performance and business outcomes, including support for Workday environments deployed on cloud platforms such as AWS and Google Cloud.

For this quadrant, providers are assessed on the transparency, flexibility and scalability of their offerings, as well as their commitment to innovation and continuous improvement.

Eligibility Criteria

1. Demonstrate proven **ability in delivering reliable AMS for Workday environments**, including support and maintenance
2. Have the **capability to manage Workday updates, releases and changes** with minimal business disruption
3. Show experience in **optimizing Workday performance** through enhancements and continuous improvement initiatives
4. Use **testing frameworks and automation** to ensure platform quality, stability and scalability
5. Can deliver **functional enhancements and personalized solutions** within the Workday ecosystem
6. Have the **ability to deliver BPaaS offerings that operationalize Workday platform capabilities**, combining application management, performance optimization, enhancements and continuous improvement services to drive measurable business value
7. Show proven support for **Workday environments operating on cloud platforms**, ensuring performance, resilience and efficiency
8. Demonstrate the capability to **industrialize the ongoing adoption** of new Workday AI capabilities, such as new agents/features, AI-driven workflows and experience changes, through a repeatable **release-to-adoption operating model**



Performance and Optimization Services

Observations

Performance and optimization services in the U.S. Workday market have evolved from traditional application support into continuous value realization programs focused on operational excellence, governance and innovation. Leaders, including Accenture, Cognizant, Deloitte, PwC, KPMG, Strada, TCS and Hexaware, are embedding AI-enabled operations, automated testing, release impact assessments, tenant health monitoring and structured governance into managed services models, shifting the focus from reactive issue resolution to proactive business optimization.

The rise of release-to-adoption frameworks is a prominent trend. Deloitte, PwC, Hexaware, KPMG and TCS are among the providers combining release governance, regression testing, change readiness and enhancement roadmaps to help clients rapidly adopt new Workday capabilities while reducing operational disruption. This reflects the growing demand for support models that translate platform updates into measurable business outcomes.

At the same time, firms such as Huron, Invisors, Kainos and TopBloc are differentiating through Workday-native applications, Extend-based solutions, compliance tools and industry-focused accelerators that improve user adoption, automate processes and address operational gaps. Across the quadrant, Leaders are increasingly integrating emerging capabilities such as Workday AI, Sana, Data Cloud and agent-governance frameworks into optimization services. Collectively, these developments demonstrate that Workday optimization is becoming a strategic discipline in which AMS, automation, governance, AI adoption and continuous innovation converge to drive sustained productivity, improved platform performance and long-term business value.

From the 45 companies assessed for this study, 29 qualified for this quadrant, with 12 being Leaders and one a Rising Star.

accenture

Accenture accelerates Workday performance optimization through AI-enabled operations, continuous improvement frameworks and its strategic Workday partnership, helping clients realize sustained business outcomes and platform value.



Cognizant couples one of the largest Workday AMS practices with AI-enabled platform assurance and optimization services, helping organizations shift from reactive support to proactive release adoption, tenant optimization and continuous business improvement.

Deloitte.

Deloitte combines AI-enabled application management, continuous optimization and its proprietary SimplrOps and Ascend accelerators to enhance Workday performance, increase user adoption, improve operational efficiency and deliver ongoing value through its Operate services.

HEXAWARE

Hexaware combines Workday managed services, optimization and AI-enabled operations with platform-native innovation through a Workday-first strategy focused on Extend, Sana, intelligent automation and outcome-based service delivery across the application lifecycle.

HURON

Huron delivers AI-enabled Workday optimization and managed services by combining deep industry expertise, automation and continuous innovation to improve adoption, operational efficiency and long-term business value.

invisors

Invisors is a Workday-focused consultancy that combines application management, AI governance and platform-native innovation, leveraging proprietary solutions and customer success-led services to optimize Workday performance and adoption.



Performance and Optimization Services



Kainos delivers continuous Workday optimization through advisory-led AMS, AI-enabled solutions and Workday-native IP. Its compliance, automation and innovation capabilities help enterprises improve adoption, governance, performance and business value.



KPMG delivers Workday performance and optimization services through its Powered Evolution and Powered Enterprise offerings, combining managed services, release management, platform enhancement, governance and continuous value realization to improve Workday outcomes.



PwC combines its AI-led Application Evolution Services with structured governance and innovation-driven optimization to enhance Workday performance and support value realization beyond go-live.

Strada

Strada integrates Workday optimization, AMS, advisory, payroll and innovation services within a unified operating model, enabling continuous improvement, governance, platform innovation and industry-focused value realization.



TCS combines Workday application management, AI-enabled operations, optimization services and industry-led transformation capabilities through a managed services model supported by proprietary automation platforms, accelerators and Workday-focused innovation investments.

TopBloc

TopBloc's model for Workday performance and optimization services features technology-enabled support that combines application management, payroll operations, optimization tools and continuous advisory support to help organizations sustain and extend Workday value.



UST delivers Workday performance and optimization services through AMS, release management, automation-led testing, security governance and continuous improvement programs, strengthened by the integration of Intecrowd's Workday expertise and optimization-focused accelerators.





"PwC's run-optimize-innovate approach elevates Workday managed services beyond traditional support, linking platform operations, enhancement roadmaps and AI-driven optimization into a single value-delivery model."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC positions its U.S. Workday Application Evolution Services (AES) business around a run-optimize-innovate model that combines AMS, continuous enhancement and AI-led optimization. Its AES Innovation Engine, Agent Powered Performance framework and structured governance through Quarterly Business Reviews, Innovation Workshops and release-adoption processes help clients continuously improve platform performance and accelerate value realization beyond go-live.

Strengths

AI-driven optimization engine: PwC differentiates its U.S. AES offering through the Workday AES Innovation Engine and Agent Powered Performance framework, which analyzes client data, identifies optimization opportunities, prioritizes enhancements and assesses release impacts. This repeatable release-to-adoption model converts Workday updates and AI capabilities into business improvements rather than routine maintenance.

Industrialized continuous improvement: PwC's AES model integrates scheduled innovation workshops, QBRs, platform health monitoring, automated regression testing, release adoption and AI-led ticket management into ongoing operations. This structured governance helps

clients continuously enhance Workday performance, accelerate change adoption and maintain platform stability with minimal business disruption.

Outcome-based managed services: PwC combines Workday support, enhancements, optimization and innovation within a unified AES delivery model backed by AI-native development and automation capabilities. A U.S.-based medical device manufacturing engagement demonstrated 24x5 operational coverage, automated regression testing, 30 percent immediate savings, 40-50 percent faster planning and 70 percent higher testing efficiency, evidencing measurable value delivery beyond traditional AMS.

Caution

PwC has an opportunity to deepen its release-to-adoption operating model by establishing more structured frameworks for scaling emerging Workday AI agents and workflow innovations. Expanding repeatable adoption methodologies can help accelerate business value realization across evolving Workday environments.





Innovation on Workday

Who Should Read This Section

This report is valuable for providers offering **innovation on Workday** in the **U.S.** to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence.

Strategy and innovation leaders

Strategy and innovation leaders should read this report to understand how providers are enabling innovations on the Workday platform. The report helps these leaders assess how providers support business modernization initiatives, platform extensibility and experience driven innovation, enabling informed decisions on selecting partners that align with long term digital and innovation strategies.

Application development and platform leaders

Application development and platform leaders should read this report to gain insight into how providers design and build custom solutions on Workday. The report provides visibility into provider capabilities related to platform extensions, Marketplace based offerings and domain-specific innovation, helping technology teams identify partners that can support scalable and governed innovations on Workday.

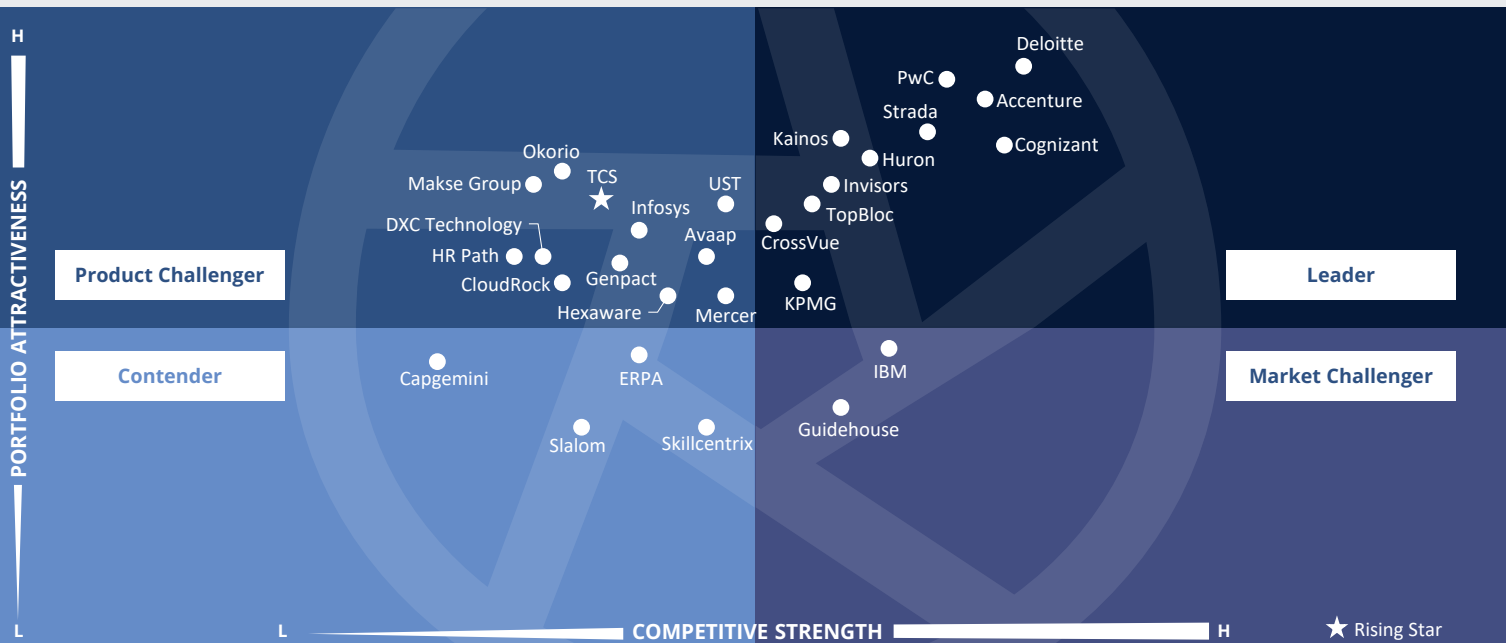
Architecture and engineering teams

Architecture and engineering teams including solution architects and technical leads, should read this report to understand how providers deliver innovation within the Workday ecosystem. The report highlights how providers support platform native development, integration and sustained value realization, enabling engineering teams to evaluate partners that can build secure, compliant and extensible solutions aligned with enterprise standards.

Digital platform governance and enablement leaders

Digital platform governance and enablement leaders should read this report to understand how providers support AI-based and agent-powered innovations on Workday while maintaining platform governance and control. The report helps these leaders evaluate partners that balance extensibility and innovation with security, compliance and architectural standards across intelligent enterprise environments.





This quadrant assesses providers driving **Workday-native innovation** through AI, extensibility and intelligent automation. It assesses their ability to develop **scalable solutions**, accelerate emerging capabilities adoption and extend **platform value**.

Ashwin Gaidhani



Innovation on Workday

Definition

The Innovations on Workday quadrant evaluates Workday service partners on their ability to design, build and scale AI-based intuitive solutions natively on the Workday platform. They focus on developing custom and industry-specific solutions using Workday Extend and on delivering validated offerings through the Workday Marketplace.

This quadrant also assesses the capabilities of Workday Illuminate, including prebuilt AI assets, to enable intelligent experiences, agent-aware workflows and business modernization initiatives. Providers are evaluated on their ability to deliver secure, scalable and compliant innovations within the Workday ecosystem, supporting long-term platform extensibility and value creation.

Providers are assessed on their ability to provide centralized visibility/oversight for agent identities, roles, permissions and business context in Workday Agent System of Record (ASOR).

An important development this year is SANA, which is an experience layer that converges knowledge, data, action and learning. Workday Partners are assessed on their capability to build differentiated offerings around it.

Eligibility Criteria

1. Show proven expertise in **building custom applications and extensions using Workday Extend**
2. Have experience in **publishing, validating and maintaining solutions** on the Workday Marketplace
3. Demonstrate capabilities in the deployment of **Workday Illuminate**, including prebuilt AI assets, within solutions
4. Have the ability to **deliver innovations native to the Workday platform** without dependence on external frameworks
5. Can develop **industry-specific or functional solutions** aligned with Workday use cases
6. Show an ability to design **intelligent workflows and experiences** using Workday-supported agentic constructs
7. Can adhere to **Workday security, compliance and scalability standards** for Workday Extend-based applications, Marketplace offerings and AI-enabled configurations built on the Workday (BoW) platform
8. Have an appetite for **joint innovation programs with Workday**, in early adopter participation (preview features and beta programs), and in **collaborations with hyperscalers and ISVs**, as well as contribution to Workday's product feedback loop
9. **Manage trust, governance and identity** for AI agents via its **ASOR** and partner integrations and demonstrate tangible business value



Innovation on Workday

Observations

Innovation on Workday is rapidly shifting from standalone platform extensions to AI-powered, Workday-native innovation ecosystems. Accenture, Deloitte, Cognizant, Kainos, PwC, Huron and TCS are investing heavily in emerging capabilities such as Sana, ASOR, Data Cloud, agentic AI and governance frameworks, reflecting a market transition from AI experimentation to scalable enterprise deployment. Their focus is increasingly on enabling intelligent workflows and governing automation and AI-enabled business processes directly within the Workday environment.

A second defining trend is the industrialization of innovation through reusable products and marketplace assets. CrossVue, Huron, Invisors, KPMG, PwC, Strada and TopBloc have built portfolios of Built on Workday applications, Extend solutions and Marketplace offerings that address workforce management, payroll, identity governance, compliance, analytics and industry-specific challenges.

These developments reflect growing client demand for packaged, repeatable innovation rather than custom development.

Leaders also demonstrate a strong commitment to co-innovation with Workday. Accenture, Deloitte, Cognizant, Huron, Kainos and PwC are among the providers participating in Workday's Design Partner, Advisory Council, Innovation Partner or early-adopter programs. Participation in these programs gives clients early access to emerging capabilities while helping shape the Workday roadmap. Collectively, these Leaders demonstrate that innovation on Workday is no longer defined by extensibility alone. It is increasingly about combining AI, governance, industry accelerators and Workday-native IP to create scalable business outcomes and long-term platform value.

From the 45 companies assessed for this study, 30 qualified for this quadrant, with 11 being Leaders and one a Rising Star.

accenture

Accenture is a leading Workday partner that combines AI innovation, platform co-development and Workday Extend capabilities to accelerate enterprise transformation through its aligned AI and agent ecosystem.



Cognizant combines advisory-led AI adoption, Workday Extend innovation and co-innovation with Workday to accelerate HR and finance transformation through native AI, platform IP and governance-led modernization.

CrossVue

CrossVue is a Workday-focused consulting and innovation partner that combines Workday Extend solutions, Built on Workday applications, industry accelerators and a product-led delivery approach through its Solutions Lab to help organizations modernize and extend the Workday platform.

Deloitte

Deloitte is a Workday-focused transformation partner that combines AI-enabled accelerators, industry-specific solutions and agent-led innovation to extend platform capabilities, create agent-enabled experiences and accelerate enterprise modernization.

HURON

Huron advances Workday innovation through Extend applications, AI-enabled experiences and Marketplace solutions. It blends close Workday collaboration with transformation-led delivery to accelerate automation, platform adoption and business value across industries.

invisors

Invisors accelerates Workday innovation through AI enablement, Workday Extend development and Built on Workday applications, delivering industry-focused solutions that help enterprises adopt AI, enhance platform value and address sector-specific business challenges.



Innovation on Workday



Kainos advances Workday innovation through AI agents, Extend applications, proprietary products and co-innovation with Workday, helping enterprises accelerate adoption, strengthen governance and realize business value faster.



KPMG advances Workday innovation via Workday Extend development, Workday Marketplace offerings, industry-specific accelerators and analytics solutions that help expand Workday functionality while maintaining alignment with native platform capabilities and governance requirements.



PwC converges Workday-native innovation, industry-specific application development and AI-powered automation to deliver agent-aware experiences, intelligent workflows and scalable Marketplace solutions that accelerate continuous enterprise value realization.

Strada

Strada's Workday-native innovation strategy combines Extend applications, Marketplace solutions, advisory, deployment and managed services to accelerate platform adoption, co-innovation and continuous enhancement across workforce programs tailored to client industry requirements.

TopBloc

TopBloc advances innovation on Workday through proprietary Built on Workday applications, AI-enabled advisory services and technology investments that help organizations extend Workday capabilities while maintaining alignment with native platform functionality.



TCS combines Workday-native innovation, AI-led transformation, industry-specific accelerators and advisory-led services through its Workday practice, leveraging platforms such as TCS Crystallus™, Cognix™, ignio™ and Paceport™ to deliver intelligent, extensible Workday solutions.



PwC



"PwC's commitment to Workday-native innovation is reflected in its extensive application portfolio, dedicated innovation organization and strong alignment with emerging agent-aware operating models."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. It has more than 364,000 employees across 136 countries. In FY25, the company generated \$57.0 billion in revenue. PwC's U.S. innovation on Workday portfolio combines Workday Extend development, Workday Marketplace solutions and AI-enabled innovation assets aligned to Workday's agentic vision. The firm supports strategy-to-execution through its Global Workday Innovation CoE, Workday ASOR-aligned offerings and Workday Marketplace innovations, while embedding continuous governance and innovation through Application Evolution Services.

Strengths

Built on Workday and Extend leadership:

PwC has established a scaled Workday Extend innovation capability anchored by a global CoE with over 70 specialists and more than 200 custom applications. Its portfolio includes 28 Workday Marketplace applications and multiple award-winning solutions, demonstrating proven experience in building, validating and operationalizing Workday-native innovations across functional and industry use cases.

Agentic innovation framework: PwC differentiates through solutions built around Workday ASOR, combining its Scaffolding framework, Agent Powered Performance platform and Design Agent capabilities. These assets help design agent-aware workflows, configure skills and business

context, automate design activities and accelerate deployment while maintaining alignment with Workday architecture and methodology.

Industry-focused Marketplace solutions:

PwC extends Workday innovation beyond generic applications through industry-specific offerings developed with Workday technologies such as Extend, Prism, Adaptive Planning and Sana. Its portfolio includes solutions for hospitality, financial services, ESG, payroll, security, benefits and incentive compensation. These solutions are supported by ongoing product collaboration and Marketplace deployment and have received multiple Workday Innovation Awards.

Caution

PwC can further strengthen its U.S. innovation on Workday position by expanding publicly validated business-outcome evidence for agentic workflows, ASOR-enabled solutions and Marketplace innovations, enabling clients to benchmark value realization across industries and functional domains.





Appendix

The ISG Provider Lens® 2026 – Workday Ecosystem study 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 service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of August 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

1. Definition of Workday Ecosystem market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources

6. 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 and Editor Biographies

Author



Ashwin Gaidhani
Lead Analyst and Research Partner

Ashwin Gaidhani has over 22 years of experience as an SME, advisor, practitioner and researcher in ESM and emerging technologies. He has worked as a global practice leader and an executive-level advisor in ESM, automation and cloud technologies, covering business transformation, ITES & ITIS, AIOps, CloudOps, and metrics-driven practices. As an ISG Lead Analyst and research partner for studies related to hyperscalers such as AWS and Google, ESM services and platforms, and intelligent automation, he defines and leads the ISG Provider Lens® research projects for the markets

in the U.S. and Europe. With his extensive experience in service management, Ashwin has worked in technology operations, business consulting and advisory roles for large global system integrators (GSIs), independent software vendors (ISVs) and technology services companies. He is highly qualified and experienced in offering guidance on technology practice adoption across industries such as BFSI, manufacturing and retail.

Research Analyst



Arnab Das
Research Analyst

Arnab is a Research Analyst at ISG, supporting and co-authoring Provider Lens studies such as ServiceNow, Workday, Enterprise Service Management (ESM), and NVIDIA. He works closely with lead analysts throughout the research lifecycle, contributing to study development, market analysis and the creation of enterprise context and global summary reports that highlight industry trends and insights.

Arnab supports both primary and secondary research initiatives, ensuring the delivery of high-quality and data-driven research outcomes. He brings over three years of experience spanning business, technology, and academic research, with a strong background in analysis, writing, and content development.



Author and Editor Biographies



Study Sponsor

Namratha Dharshan
Chief Business Leader – India Research

As a Chief Business Leader at ISG, Namratha Dharshan spearheads the BPO, AI and Analytics arm of the ISG Provider Lens® program, contributing to more than 20 reports. Under the aegis of this program, where she heads a team of analysts, Namratha manages the delivery of research findings on service provider intelligence.

As a part of her role in the Senior Leadership Council, Namratha is the designated representative of the ISG India Research team, comprising more than 100 dynamic research professionals. In addition, Namratha is a speaker in ISG's flagship quarterly call, ISG Index™.

As a principal industry analyst and thought leader, Namratha is well recognized for her contributions to service provider intelligence and her understanding of the customer experience landscape, particularly the area of contact center services.

She has also authored reports on other horizontal service lines such as finance and accounting and penned vertical-focused reports for insurance.



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 research director, principal analyst 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.



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. 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](#).

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