HFS Top 10 Workday Human Capital Management (HCM) Services 2021
Excerpt for PwC
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Krupa K S, Knowledge Analyst
A successful Workday HCM deployment adopts an HCM transformation approach. Ideally, an enterprise is prepared for the change, has access to value-added tools to facilitate fast and tailored deployments, and understands the importance of ongoing support and optimization services. Service providers that adopt a holistic, consultative, and proactive approach to Workday HCM engagements will be the ultimate leaders in this market.

—Khalda De Souza, Research Director
Introduction, definitions, and research methodology
The HFS Top 10 Workday Human Capital Management (HCM) Services 2021 report continues our theme of looking at the services sets for the planning, implementation, and management of leading software-as-a-service platforms.


We included 11 service providers in this research. We spoke with 35 client references provided by the participating service providers.
HFS OneOffice™ organization

The OneOffice™ is HFS’ vision for the digitally transformed enterprise. Emerging technologies help organizations mature into one integrated system that enables employees, delights customers, and delivers on its purpose. An effective HCM platform that enhances employee experience and assists enterprises to adapt to change is an integral part of this.
HFS OneOffice Emerging Tech Platform

The OneOffice Emerging Tech Platform is our next-stage vision for how enterprises effectively embrace emerging tech through native automation, people and process augmentation, and data-driven anticipatory insights. Key OneOffice applications include cloud-based HCM solutions such as Workday.

Source: HFS Research, 2021, Examples are representative
HFS Workday HCM Services Value Chain

The *HFS Top 10 Workday Human Capital Management (HCM) Services 2021* report assessed 11 service providers’ ability to deliver Workday HCM services as mapped to the HFS Workday HCM Services Value Chain.

### Plan
- Business case development for SaaS deployment
- Cloud advisory services, including cloud readiness assessment
- Compliance, risk management, and security consulting
- Human Capital Management (HCM) process and strategy consulting
- Workday strategy consulting, process design, and configuration support
- Technical change management consulting
- Organizational change management consulting
- Governance structure
- Medium-term to long-term Workday roadmap consulting services

### Implement
- Project management
- Data migration
- Custom development services to comply with industry, geography, or other business requirements
- Integration services
- Extensions or tools of Workday to meet specific client needs
- Testing
- Initial user training
- Technical change management execution
- Organizational change management execution
- Proactive consulting and advisory services sharing best practice

### Manage
- Governance management
- Upgrade support
- Workday help desk
- Ongoing integration
- Ongoing testing
- Ongoing training
- Ongoing proactive advice sharing best practice
- Ongoing employee adoption support
- Periodic solution and service delivery reviews
- Identify any required changes in Workday or process to account for changing business requirements, e.g. M&A, divestment or new investments in IT

### Optimize
- New Workday module value identification and benefit analysis
- Ongoing Workday module adds and upgrades, migrations, and consolidation
- Ongoing process strategy and system alignment
- Process analytics and measurement
- Medium-term to long-term Workday roadmap advisory services

Source: HFS Research, 2021
Workday HCM Applications

- Workday offers cloud applications for human capital management (HCM), finance, and planning processes. This Top 10 report covers the services that support Workday HCM, Payroll, and Planning as they relate to HCM. These include:
  - Workday Payroll: This service is available in the US, Canada, the UK, and France. Enterprises typically look to Workday payroll partners, mostly ADP, for international plug-ins and connectors.
  - Workday Student: Academic Foundation, Student Recruiting, Student Admissions, Curriculum Management, Student Records, Academic Advising, Financial Aid, and Student Financials. This report includes the HCM aspects of Workday Student.
  - Workday Prism Analytics: Data Discovery, Data Preparation, and Data Management. This is a relatively new area.
  - Workday Adaptive Planning: This is a relatively new area. It is mainly used for financial planning, but it is also relevant for workforce planning in HCM.
- There are updates twice a year when the tenant is taken down for four hours to load with new functionality. The releases used to be numbered (the last one being Workday 33 in September 2019). They are now simply called Workday (calendar year) Release 1 and 2.
- Workday’s Financial Management modules are not included in this Top 10 report. Please refer to the HFS Workday Finance Management Services Top 10 report for our analysis of this market.
The *HFS Top 10 Workday Human Capital Management (HCM) Services 2021* report assesses and scores service provider participants across execution, innovation, and voice of the customer criteria. The inputs to this process included a detailed RFI process we conducted with 11 service providers, briefings with leaders of the Workday services practice within service providers, as well as reference calls and surveys of reference clients.

### Ability to execute

33%

- Breadth and depth of services: Value chain coverage, proprietary tools development, and services and solutions to support specific market segments, such as enterprise size and industry sectors.
- Geographic reach.
- Market and team experience: Number of clients and Workday certified consultants and reference feedback on the strength of resources.

### Innovation capability

33%

- Strategy and vision: Investment plans to enhance capabilities, including geographic expansion, partnerships, and talent development.
- Vision for the development of Workday services: Investment plans to enhance service offerings and assets.
- Ability to deliver business transformation: Adoption of a holistic view and consultative approach to supporting customers’ human capital management transformation journeys.

### Voice of the customer (VoC)

33%

- Direct feedback from service provider clients: From reference checks, surveys, and case studies critiquing provider performance and capabilities.
Research methodology (continued)

Workday maintains a carefully curated, invitation-only service partner ecosystem. Workday Delivery Assurance consultants assure service partners adhere to prescribed deployment methodologies. Workday service partners do, however, have opportunities to cultivate differentiation through investments in capabilities and vision for the HCM space. All of the service providers included in this Top 10 report are experienced and committed to the Workday services market. We considered several differentiators in our research methodology:

Execution
- **Breadth and depth of services**
  - **Value chain coverage:** Leading providers offer a breadth of services across the HFS Workday HCM services value chain. Strengths include additional services that facilitate a transformation, such as user-focused design and change management services and proactive, consultative recommendations to assist in long-term deployment success. Service providers that can leverage relevant skills from other divisions within their organization are advantageous for customers. In addition, Workday nominates “early adopter” partners for new modules; this status suggests a reputable Workday HCM practice as well as a strong relationship with Workday.
  - **Proprietary tools development:** All service providers have invested in tools and technologies, particularly to facilitate implementations. Table stake investments include data migration tools and a central platform that houses learnings from engagements. Value-add differentiators include tools that can provide analytics and recommendations, as well as tools that can help to prepare enterprises for their deployments. Best practices that include thought leadership and recommendations also stand out. Payroll is a niche area that requires local geographic knowledge. As such, any tools around payroll, such as payroll comparison tools, are also differentiators in this market.
Execution (continued)

• **Services and solutions to support specific market segments:** Market segments include enterprise size and industry sectors. These deliver a more tailored approach to deployments, which should result in a more successful business outcome. Leading service providers have developed services and solutions to support customers in different market segments. Some partners are certified to deliver Workday’s Launch methodology, which is a preconfigured tenant for medium enterprises delivering fast implementation and support and training services. In June 2020, Workday extended this to be available to large enterprises in North America.

• **Geographic reach**
  - **Most Workday HCM services business continues to originate from North America.** However, the UK, Europe, Asia-Pacific (APAC), and Australia and New Zealand (ANZ) are all strong growth areas. Some service providers have strengths outside of North America due to their heritage. Most service providers are expanding their brand, geographical presence, and delivery capabilities to new geographies.

• **Market and team experience**
  - **Experience includes the number of clients and engagements a service provider has.** HCM is a growth market, so the amount of experience a service provider has is a clear differentiator. A strong provider can also hone these experiences in a detailed best-practice toolkit. The number of certified Workday HCM consultants that a service provider, or the certified pool, has is also a differentiator, as only Workday’s employees and those of its service partners can achieve this certification.
Research methodology (continued)

Innovation

- The innovation criteria capture the service providers’ plans to strengthen their service offerings, tools development, and talent development to elevate their competitive position in this market.
  - **Strategy and vision**: Investment plans to enhance capabilities, including geographic expansion, partnerships, and talent development.
  - **Vision for the development of Workday services**: Investment plans to enhance Workday HCM service offerings and assets.
  - **Ability to deliver business transformation**: Adoption of a holistic view and consultative approach to support customers’ human capital management transformation journeys.
  - **Reference clients**: Reference client scoring and responses to the following questions were relevant to the service provider analysis of these criteria:
    - HCM Process Understanding

Voice of Customer (VoC)

- **Reference clients**: We spoke with 35 clients references who provided feedback and scores on the service providers.
Workday HCM services providers covered in this report

- Accenture
- Alight
- Collaborative Solutions (A Cognizant Company)
- Deloitte
- DXC.technology
- IBM
- Kainos
- KPMG
- Mercer
- Onesource Virtual
- PwC
Executive summary
Executive summary

- **Little effect from the COVID-19 pandemic**: Some large Workday HCM projects were paused during the COVID-19 pandemic’s global lockdown. However, we spoke with several clients who did most of the projects remotely and successfully went live during the lockdown. The need for an effective cloud HCM solution that was easy to use became more important with a dispersed workforce. A few partners, like IBM and Mercer, developed services and solutions using Workday to help clients to return to work during the pandemic. Many service partners expect remote delivery to continue to be popular or even the default after the lockdown.

- **Phase 2 project uptick**: There continue to be opportunities for greenfield Workday deployments. However, service providers also have increasing opportunities with phase 2 deployments and engagements with enterprises that have already deployed at least one Workday module. Enterprises often select a different partner for any post-deployment service, whether this is for additional module implementation or for application management support (AMS) services. Enterprises also reach out to service partners for release management assistance, having tried and failed to keep on top of this in-house. Some enterprises are re-visiting their initial re-platforming exercise to elevate it to a true transformation.

- **Mergers, acquisitions, and divestiture opportunities**: There are increasing opportunities to assist enterprises that have experienced a merger, acquisition, or divesture, as the new entity seeks a unified, global HCM platform. KPMG and DXC are examples of service providers with offerings for this market.

- **Technical and organizational readiness is key**: Enterprises must consider the technical and organizational implications of a Workday deployment. Ideally, a service provider can offer assistance to understand the implications of the project up front. Service providers that can liaise with senior HCM executives and have tools and services that guide an enterprise through their deployment are key to success. For example, Deloitte and Collaborative Solutions have tools to assist clients in being better prepared for the deployment.
### Workday HCM services market snapshot

This table reflects the data collected and estimates for the 11 service providers included in this report.

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of certified workday HCM consultants</td>
<td>~9,000</td>
</tr>
<tr>
<td>Average number of certifications per consultant</td>
<td>2.5</td>
</tr>
<tr>
<td>Number of employees in Workday services practices</td>
<td>~14,000</td>
</tr>
<tr>
<td>Total Workday HCM clients to date</td>
<td>3,833+ (mid-market enterprises)</td>
</tr>
<tr>
<td></td>
<td>2,436+ (large enterprises)</td>
</tr>
<tr>
<td>Current Workday HCM clients</td>
<td>1,730+ (mid-market enterprises)</td>
</tr>
<tr>
<td></td>
<td>766+ (large enterprises)</td>
</tr>
<tr>
<td>Total number of HCM clients</td>
<td>6,000+</td>
</tr>
<tr>
<td>Average growth in Workday HCM services in past 12 months</td>
<td>43%</td>
</tr>
<tr>
<td>Average expected growth in Workday HCM services in the next 12 months</td>
<td>16%</td>
</tr>
<tr>
<td>Top three industries for Workday HCM services based on participating</td>
<td>• Financial services—banking and capital markets</td>
</tr>
<tr>
<td>service providers</td>
<td>• Healthcare</td>
</tr>
<tr>
<td></td>
<td>• Technology</td>
</tr>
</tbody>
</table>

Aggregate responses of service providers in this Top 10
Source: HFS Research, 2021
### Top three fastest-growing industries in the next 12 months

1. Financial services—banking and capital markets
2. Healthcare
3. Technology

### Top three Workday HCM modules

1. Core HCM
2. Recruiting
3. Payroll

### Top three fastest-growing Workday HCM modules in the next 12 months

1. Learning
2. Recruiting
3. Payroll

Aggregate responses of service providers in this Top 10
Source: HFS Research, 2021
Plan: Planning or consulting are emerging services seeing moderate growth. Service providers are developing consulting services to prepare enterprises that want to achieve a transformation versus a re-platforming of their HCM process. The ability to deliver user-focused design and organizational change management is particularly important to achieve success.

Implement: Most Workday HCM services business continues to be in implementation services. Many enterprises are focused on achieving fast deployments. Service providers have been investing in strengthening these services by developing tools and technologies.

Manage: Application management services (AMS) have shown good growth in the past few years for two reasons:
1. Enterprises who thought they could perform AMS in-house soon realized that it is a more complicated task than they had at first thought.
2. Enterprises with more sourcing experience or that are embarking on a true transformation project understand the importance of AMS from the outset.

Optimize: Optimization services represent a rapidly growing market as enterprises realize they need to adopt a dynamic approach to keep up-to-date with new modules and business opportunities.
Workday HCM services business by geography

**Split of Workday HCM services by geography**

- North America: 66%
- Continental Europe: 14%
- APAC*: 11%
- ANZ*: 5%
- United Kingdom: 3%
- Rest of the world: 1%

**Percentage of Workday HCM services engagements in the following geographical categories**

- Single country: 29%
- 1-3 countries: 21%
- 3-5 countries: 8%
- 5-10 countries: 12%
- More than 10 countries: 37%

*APAC*: Asia and Pacific, *ANZ*: Australia and New Zealand

Aggregate responses of service providers in this Top 10
Source: HFS Research, 2021
Workday Services: Voice of the customer
Client reference demographics

Exhibit 1: Client references by industry sector

- Manufacturing
- Retail and CPG*
- Insurance
- Healthcare and life sciences
- Banking and financial services
- Travel, hospitality, and logistics
- Software and high-tech
- Media
- Energy and utilities
- Public sector
- Non-profit
- Education

N = 35, Number of client references

Exhibit 2: Client references revenue

- >$100 billion
- $50-$100 billion
- $21-$50 billion
- >$11-$20 billion
- $6-$10 billion
- $1-$5 billion
- < $1 billion

N = 35, Number of client references

Organization alignment

- Business: 60%
- IT: 40%

N = 35, Number of client references
Why Workday?

1. Enhanced and intuitive user interface
2. Culture of innovation
3. Flexible configuration
4. Mobile functionality
5. Organically developed SaaS application
6. Market leader and best solution to fit our strategy
7. One full platform having a fully integrated ERP (human capital management, financial management, and payroll)

Which other solution(s) did you consider?

1. Oracle HCM Cloud
2. SAP HCM
3. ADP
4. NetSuite SuitePeople
5. Other specific solutions, such as Kronos, Ceridian DayForce, or Ultipro
Why this service provider?

- Workday implementation experience
- Quality of RFP presentation, including meeting the project team
- Past experience with enterprise or stakeholder making the decision
- Deep product knowledge
- Customer reference feedback

Criteria that received the highest number of mentions by all client references
Source: HFS Research, 2021
HFS Workday HCM services
Top 10 results
# Summary of service providers assessed in the report

<table>
<thead>
<tr>
<th>Service providers (alphabetical order)</th>
<th>HFS Point of View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accenture</td>
<td>Top-two certified pool, with strong capabilities and vision</td>
</tr>
<tr>
<td>Alight Solutions</td>
<td>Global HR, benefits, and payroll with flexible service delivery</td>
</tr>
<tr>
<td>Collaborative Solutions</td>
<td>Workday’s longest-tenured services partner, focused on solving business challenges for large and medium enterprises</td>
</tr>
<tr>
<td>Deloitte</td>
<td>Top customer feedback scores, global experience, with strong capabilities and vision</td>
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<tr>
<td>DXC Technology</td>
<td>International experience with management services strength</td>
</tr>
<tr>
<td>IBM</td>
<td>HR transformation capabilities strengthened by IBM Watson-based tools</td>
</tr>
<tr>
<td>Kainos</td>
<td>UK and European partner expanding its scale and capabilities</td>
</tr>
<tr>
<td>KPMG</td>
<td>Industry sector-led with international experience</td>
</tr>
<tr>
<td>Mercer</td>
<td>HR specialist delivering digital transformation services</td>
</tr>
<tr>
<td>OneSource Virtual</td>
<td>Payroll management services specialist with a strong client base</td>
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<tr>
<td>PWC</td>
<td>International experience with strong methodologies and vision</td>
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</table>
## HFS Top 10 Workday HCM services 2021

<table>
<thead>
<tr>
<th>Rank</th>
<th>Overall HFS Top 10 position</th>
<th>Breadth and depth of services</th>
<th>Geographic reach</th>
<th>Market and team experience</th>
<th>Overall execution</th>
<th>Strategy and vision</th>
<th>Vision for and investment in the development of Workday services offerings</th>
<th>Ability to deliver business transformation</th>
<th>Overall Innovation</th>
<th>Voice of the customer</th>
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<td>1</td>
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## Notable performances in Workday HCM services

### HFS Podium Winners
Top 5 providers overall across execution, innovation, and voice of the customer criteria

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<th>#1</th>
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<th>#3</th>
<th>#4</th>
<th>#5</th>
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</thead>
<tbody>
<tr>
<td>Deloitte.</td>
<td>accenture</td>
<td>alight</td>
<td>PwC</td>
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</table>

### Execution powerhouses
Top 3 providers on execution criteria

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<tbody>
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</table>

### Innovation champions
Top 3 providers on innovation criteria

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<tr>
<td>accenture</td>
<td>Deloitte.</td>
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</table>

### Outstanding voice of the customer
Top 3 providers on voice of the customer criteria

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<tr>
<td>Deloitte.</td>
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</tr>
</tbody>
</table>

### Other Notable Performances
- KPMG and PwC both continue to invest heavily in their tools and methodologies and performed well in the innovation categories.
- Since our last Workday HCM Blueprint, Mercer established its Mercer Digital practice.
- OneSource Virtual has the second-highest number of clients in this research at 1,072.
- Kainos is the smallest service provider in this research, but it is steadily growing and expanding its geographic reach. Its optimization service capability is a particular strength.
Workday HCM services provider profile
International experience with strong methodologies and vision

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Rank</th>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>HFS Top 10 position</td>
<td>#5</td>
<td>• Good geographical coverage: Unlike many of the service providers in this research, half of PwC’s Workday’s services business comes from outside of North America. In addition, more than 50% of PwC’s Workday services engagements span more than 10 countries. PwC, therefore, has good experience in delivering global Workday deployments.</td>
<td>• Continued growth of certified pool: While PwC has a sizeable Workday HCM practice, its certified pool is still smaller than the outright leaders in this market. Attracting and training Workday consultants is a challenge for all of the Workday services ecosystem. However, PwC has to continue to invest in this to remain competitive with the other global partners. Buyers should check that they will have access to the right level of skills where they need them, especially for deep transformation skills. They should also note that PwC clients highlight that PwC leaders and senior consultants are “outstanding” and “exceptional.”</td>
</tr>
<tr>
<td>Ability to execute</td>
<td>#7</td>
<td>• BxT (Business-Experience-Technology) methodology: PwC’s BxT (business-experience-technology) methodology, including “The Difference” workshop, focuses on personas, business outcomes, efficiency, and effectiveness in a highly engaging environment setting. All of these present key differentiators in the Workday services market as clients need guidance on current and likely future implications of deploying Workday.</td>
<td></td>
</tr>
<tr>
<td>Breadth and depth of services</td>
<td>#4</td>
<td>• Optimization services growth: PwC offers the full life cycle of Workday services and is focused on its optimization services. Its Next Level HR solution helps clients maximize the use of their Workday system by using benchmarks and providing a roadmap for improvements.</td>
<td></td>
</tr>
<tr>
<td>Geographic reach</td>
<td>#8</td>
<td>• Tools investment: PwC has invested $3 billion to develop new tools, technologies, and change agents to train staff on emerging technologies. In addition to those highlighted here, PwC also has 25 certified developers on the Workday Extend platform for Workday HCM and FM.</td>
<td></td>
</tr>
<tr>
<td>Market and team experience</td>
<td>#8</td>
<td>• HCM expertise: PwC has developed expertise and proprietary tools to support clients’ HCM transformation journeys with its focus on digital workforce transformation. Examples include PwC’s change management services, which include its Change Navigator and Change Communicator digital tools. Also, PwC’s Digital Risk services assist clients in understanding the implications of non-compliance to regulations. Much of this is based on PwC’s own experience of deploying Workday internally to more than 275,000 employees in over 150 countries. This lends PwC increased credibility to deliver Workday HCM engagements.</td>
<td></td>
</tr>
<tr>
<td>Innovation capability</td>
<td>#4</td>
<td>• Analytics investment: PwC has combined its Saratoga tool with Workday’s Prism Analytics platform to provide insights into people data.</td>
<td></td>
</tr>
<tr>
<td>Strategy and vision</td>
<td>#5</td>
<td>• Voice of the Customer: Clients commend PwC on the quality of its account management, flexibility, and its understanding of the HCM process. One client said of PwC, “They were not our vendor, they were our partner in this massive transformation,” and that “PwC was above average in their functional expertise.”</td>
<td></td>
</tr>
<tr>
<td>Vision and investment in the development of Workday services offerings</td>
<td>#4</td>
<td></td>
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<td>Ability to deliver business transformation</td>
<td>#4</td>
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<tr>
<td>Voice of the customer</td>
<td>#7</td>
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</table>

Relevant acquisitions and partnerships*:

- **Acquisitions include:**
  - Balkon (2014)

- **Key clients**:

  - PwC helps clients across industries and geographies. PwC also focuses on organizations that are acquisitive or divesting components for their business. Geographic coverage: North America, the UK, Continental Europe, South Africa, and APAC.
  - Industry coverage: All industry sectors, including retail and consumer, industrial products, technology, communications, financial services (insurance, banking), healthcare, and professional services.
  - Some publicly disclosed clients include:
    - Leading US healthcare provider
    - Leading global advertising agency
    - Leading global automotive manufacturer
    - Large consumer electronics group
    - Major global credit finance organization
    - Leading professional services firm
    - Major social networking company
    - Large interactive software company

- **Operations**:
  - Partner since: 2008
  - Number of employees in Workday services practice: 1,000+
  - Number of Certified Workday consultants: 700+
  - Average number of certifications per consultant: 2.7
  - Total number of clients: 350+
  - Total number of projects or ongoing engagements: 75

Key delivery locations for Workday practice:

- USA: Chicago, Atlanta, San Jose, New York, Dallas, Los Angeles
- Canada: Ottawa, Toronto, Montreal, Calgary, Edmonton, Vancouver, Waterloo
- EMEA: UK, France, Belgium, Italy, Poland, Netherlands, Spain, Ireland, Germany, Sweden, South Africa
- APAC: Japan, China, India, Hong Kong, Singapore, Malaysia, Thailand, Australia

- **Technology tools and platforms**:

  - Accelerators:
    - BxT and “The Difference” workshops
    - Enterprise Insights platform
    - Healthcare pre-configured tenant
    - Global HR business process framework with applicable localizations
    - Security, compliance, and integrated controls solutions
    - Banking solution
    - Insurance solution
    - PwC’s Saratoga and People Analytics
    - Experience platform
    - Test script library
    - Integrations library
    - Next Level HR optimization
    - Change Navigator
    - Change Communicator

*Relating to Workday HCM unless stated otherwise.*
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Khalda De Souza is Research Director, SaaS services at HFS Research. She tracks how service providers are developing their SaaS services strategies as well as enterprise clients’ requirements and needs in these markets.

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Krupa is a Knowledge Analyst at HFS Research, and she is part of data products. She is responsible for ITO-BPO outsourcing contract and Merger & Acquisition data collection for different service lines.
About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics. HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice™ Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

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