

Workday Ecosystem

Managed Services

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:





Executive Summary

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Report Author: Ashwin Gaidhani

Workday develops and innovates platform offerings for seamless and personalized experiences

The success of any business depends on its ability to adapt to changes in the market and address the needs of customers and stakeholders. In today's rapidly evolving business landscape, organizations must clearly understand their goals and objectives and have a comprehensive strategy to achieve them. As a result, the attention to human capital management (HCM) functions is growing. Experience, convenience and mobility are the key driving factors in building a strong familiarity between the stakeholders and HCM processes. Workday is aggressively crafting a strategy to connect and meet these business and customer demands by listening to its partner ecosystem and constantly adding new features, programs and functionalities.

In addition to having a clear vision, businesses must have a strong understanding of their target market. Europe is a crucial market for Workday, where its popularity and adoption are growing due to its integrability. Workday focuses on a few crucial offerings such as adaptive planning and payroll management, which include understanding customers' needs, preferences, behaviors and the competitive landscape in which customers operate. By leveraging data and analytics, organizations can gain valuable insights into their customers and markets to inform their strategy and decision-making.

Workday leads the enterprise cloud applications space for finance and HR and has seen rapid growth in its customer base across Europe, the Middle East and Africa (EMEA) and beyond. Workday's increasing adoption in 2023 is also a testament to its strong presence and reputation in the region. It works with over more than 2,000 customers headquartered in Europe, including over 40 percent of the Financial Times Stock Exchange 100 Index (FTSE100) and German Stock Market Index (DAX40) companies and more than 30 percent of the French Stock

Workday drives
Enterprise impact
by refining **HCM**
workflows and
delivering **Workforce**
experience.



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Market Index (CAC40) firms. Workday has also invested in expanding its sales capacity and partner ecosystem in the region and supporting local communities through its social impact initiatives.

Another critical element to achieving business success is having a strong leadership team. ISG sees that large consulting firms and global system integrators (GSIs) are building Workday leadership teams, delivery centers and practice teams in the EU, indicating a rise in the Workday platform adoption.

HCM entails the effective management of an organization's people-related processes, including recruiting, hiring, training and retaining employees. It involves people with diverse needs, expectations, skills and personalities. Moreover, HCM faces various external and internal challenges that require constant readaptations and innovations. It has become increasingly complex due to factors such as globalization, technological changes and evolving workforce dynamics. ISG has observed a set of challenges that require a comprehensive and strategic approach to HCM.

- **Talent acquisition and retention:** Finding and retaining talent are significant challenges. They involve identifying individuals with the right skill sets that fit the company's culture. Organizations must also strive to keep this talent pool engaged and prevent them from leaving. Workday has launched products around talent management that include talent optimization and acquisition, covering the full recruitment and talent acquisition lifecycle.
- **Workforce diversity and inclusion:** Organizations today are expected to have diverse and inclusive workforces. This goes beyond diversity in race and gender but also in age, culture, religion and others. Managing a diverse workforce requires understanding individuals' needs, preferences and cultural nuances.
- **Training and development:** Keeping up with the rapidly changing technology requires periodic employee training. Companies must ensure their workforce remains up to date with the latest tools. Career progression is crucial; therefore, Workday offers the learning

management capability as part of its talent management module, which helps design, develop and deliver a personalized learning experience and drives skill adoption.

- **Employee engagement:** Engaged employees are more productive, but increasing their engagement is challenging. Employees feel engaged when satisfied with their jobs and believe in the company's mission and values. To enrich employee experience and engagement, Workday products and solutions collect feedback and data through surveys, helping employers hear the pulse of the enterprise ecosystem and work on improvising employee relationships.
- **Compliance with regulations:** Organizations may find adhering to local, national and international labor laws challenging. Workday offers a complete set of financial and operational solutions that align with the corresponding operating region. Payroll and financial management are a few customizable products for enterprise clients.
- **Data security/privacy:** With the digitalization of HR processes or HCM software, organizations must ensure the security and privacy of employee data. The Workday HCM platform offers emerging technology capabilities like AI and automation to address data security and privacy needs.
- **Workforce planning and analytics:** Organizations need data-driven decisions regarding workforce planning. In most cases, the workforce includes the extended vendor ecosystem and contractual engagements, which are complex to manage. Workday's workforce management solutions include workflows and functionalities that capture performance, productivity and many other attributes, driving healthy workforce practice.
- **Change management:** Companies must manage organizational change effectively to ensure the conformance of all stakeholders. This helps in the seamless onboarding of capabilities and functionalities of any new technology and enterprise platform. Workday service providers offer comprehensive change management support during Workday onboarding projects across all



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enterprise portfolios, including technology, organizational and technical change management.

Hence, companies must leverage technology, data analytics and innovative practices.

Enterprise clients are reacting positively to Workday's functionalities, promoting its adoption in 2023. They see value in partnering with trusted vendors offering a comprehensive suite of cloud applications that are scalable, secure and innovative.

Consulting and Strategy Services

As European markets are rapidly acclimating to the Workday platform, the business consulting and advisory capabilities of Workday Services Partners play a crucial role in helping enterprises adopt new functionalities and modules. These enhancements complement the existing systems and expand the coverage of systemic data. Business technology fitment, technical architecture and process transformation converge to deliver a sustainable solution integral to the European client diaspora. Their capabilities are not limited to assessment, service mapping and

solution proposition but extend to delivering an improved experience through operational consulting and technical expertise. Their expertise is used to redesign the technical architecture to support microservices, container orchestration and cloud-native application development for platform resiliency. Localization, governance risk and compliance (GRC) and security consulting are predominant areas for Workday consulting in Europe. The consulting capabilities around the Workday platform, the HCM domain and competitive solution providers are crucial in transitioning enterprise clients from incumbent HCM platforms to the Workday platform.

Implementation and Integration Services

Workday engagements consist of new core implementations and Phase X projects. While the implementation methodology is standardized across the Workday ecosystem, unique technical expertise with legacy systems, cloud and new third-party applications set service providers apart. Integrating Workday with the existing legacy systems and other cloud-based solutions is becoming common and requires advanced technical competencies.

In Europe, integrating and managing third-party payroll systems are crucial for businesses. Large global systems integrators (GSIs) and Workday Services Partners are building these competencies to serve the European market. As Workday enhances its product offerings, consultants are helping organizations leverage new functionalities and expand their platform use.

Workday service providers are expanding their partner ecosystems by establishing technology partnerships with local firms to extend their service competency. These partnerships aim to serve Phase 1 and Phase X implementations as a continuum. With Workday's platform maturing, organizations are implementing additional financial, analytics, talent management and payroll modules atop the core HCM platform. Agile methodologies have gained prominence in Workday implementation trends, with service partners adopting practices that improve project management, communication, documentation and process efficiency.

Managed Services

Workday users require post-deployment support to optimize their systems and address issues that arise during normal operations. The quality of support relies heavily on services providers' resources, certifications and maintenance expertise. Application management services (AMS) handle platform break-fixes, design and development. Change and release management are continual activities that require careful execution to avoid disrupting the platform. These complex but routine activities must be carried out to incorporate the latest updates and features into the Workday platform.

Managed services in the Workday ecosystem were less popular last year due to ambiguity in the offering portfolio. Partners had disagreements on what managed services should be included due to limited service offerings in the Workday AMS space. ISG's own Workday team has built a blueprint with a futuristic view and anticipates transformation in this space. The Workday partner ecosystem reviewed in this study is confident about this space, especially with the experience of



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studying the platform market. We have seen capabilities expand through API customizations and application interfaces extended by the platform community. Workday Extend, a Workday offering that helps enterprises create related apps, is one of the fastest-growing Workday portfolios and comes with an additional license. Clients are willing to experiment with tailor-made apps for their businesses. Once these apps are designed and launched, they will likely be accepted as standard.

Enterprise clients are reacting favorably to the Workday platform in 2023, recognizing the benefits of moving to a cloud-based platform to achieve strategic objectives.





Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
BNB	Contender	Contender	Contender
Capgemini	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Hexaware	Not In	Product Challenger	Leader
HR Path	Product Challenger	Contender	Contender
IBM	Market Challenger	Leader	Leader





Provider Positioning

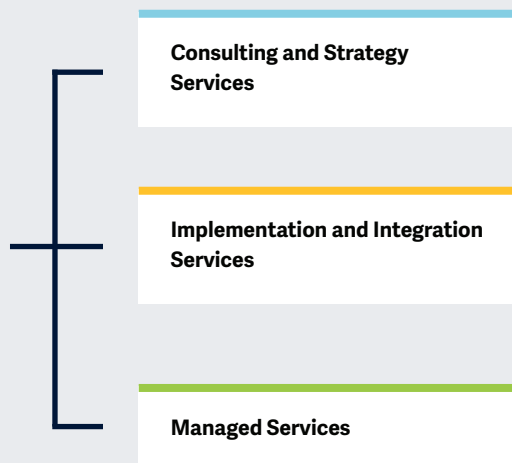
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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Invisors	Product Challenger	Contender	Product Challenger
Kainos	Leader	Product Challenger	Rising Star ★
KPMG	Product Challenger	Leader	Product Challenger
Mercer	Product Challenger	Rising Star ★	Product Challenger
MHP	Contender	Contender	Contender
Preos	Contender	Product Challenger	Not In
PwC	Leader	Leader	Leader
Three Plus Consulting	Contender	Contender	Contender
Tietoevry	Product Challenger	Leader	Product Challenger



The Workday Ecosystem study focuses on providers' ability to offer consulting, implementation and managed services for the Workday platform.

Simplified Illustration Source: ISG 2023



Definition

The global economy faces several uncertainties, such as high inflation, tepid growth and recessionary fears. For businesses, these challenges make soaring operating costs the biggest concern. More importantly, human resource costs have been at an all-time high because of global phenomena such as the “great resignation” and quiet quitting. Technological advancements have enabled companies to shift toward automation, AI and other transformative business processes. These, in turn, have improved human resources, a core service line for every organization.

HR functions are undergoing a drastic transformation in the manner of conducting business. Human-centric processes continue to shift to the virtual space by digitalizing HCM workflows. The continuous need to consolidate these essential functions to extend organizational support to employees and streamline mainstream HR functions digitally has necessitated integrating and focusing on modernizing processes and technological developments.

With a global presence across all major markets, Workday offers tailored solutions to streamline HR functions digitally, primarily for midsize and large companies. Workday's cloud-based solutions encapsulate the complete suite of Financial Management, Strategic Sourcing, Peakon Employee Voice, Adaptive Planning, Analytics and Reporting and more. Workday integrates HR applications into an enterprise management cloud platform. The platform is designed to incorporate custom requirements and personalization to extend its ability to cater to exclusive requirements effortlessly.

This study evaluates the partner network's service maturity, technical competency and the depth and breadth of its understanding of the service lifecycle on the Workday platform, encompassing not just a specific product but all modules. The following evaluation areas also apply to the service providers in all quadrants:

- Unique differentiators
- Economic stability
- Market position



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: Consulting and Strategy Services, Implementation and Integration Services and Managed Services.

This ISG Provider Lens™ study offers IT decision makers with the following:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

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

Provider Classifications

The provider position reflects the suitability of 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 a 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.





Managed Services

Who Should Read This Section

This report is relevant to European enterprises across industries that are evaluating Workday managed service providers.

In this quadrant, ISG highlights the current market positioning of Workday managed services providers in Europe and shows how each provider addresses the key challenges faced in the region.

Managed service providers' quality, availability and agility define the degree of seamless support and maintenance to European organizations. Service providers are currently working on strengthening the post-production support capabilities and business process services for existing Workday customers in the region. They also want to make managed services less transactional and cost-effective, thus improving customer expectations.

Enterprises in Europe require service providers to administer Workday operations and resolve operational challenges by periodically coordinating service activities and reporting and forecasting service demands. Security is a top priority; therefore, service providers must follow best practices to secure organizational data. Workday managed services continue gaining traction across Europe, with many enterprise clients seeking these services. ISG sees a rise in customized and personalized Workday modules.



Business leaders, including CHROs and CFOs, should read this report to understand Workday managed service providers' capabilities to manage and support maintenance across portfolios.

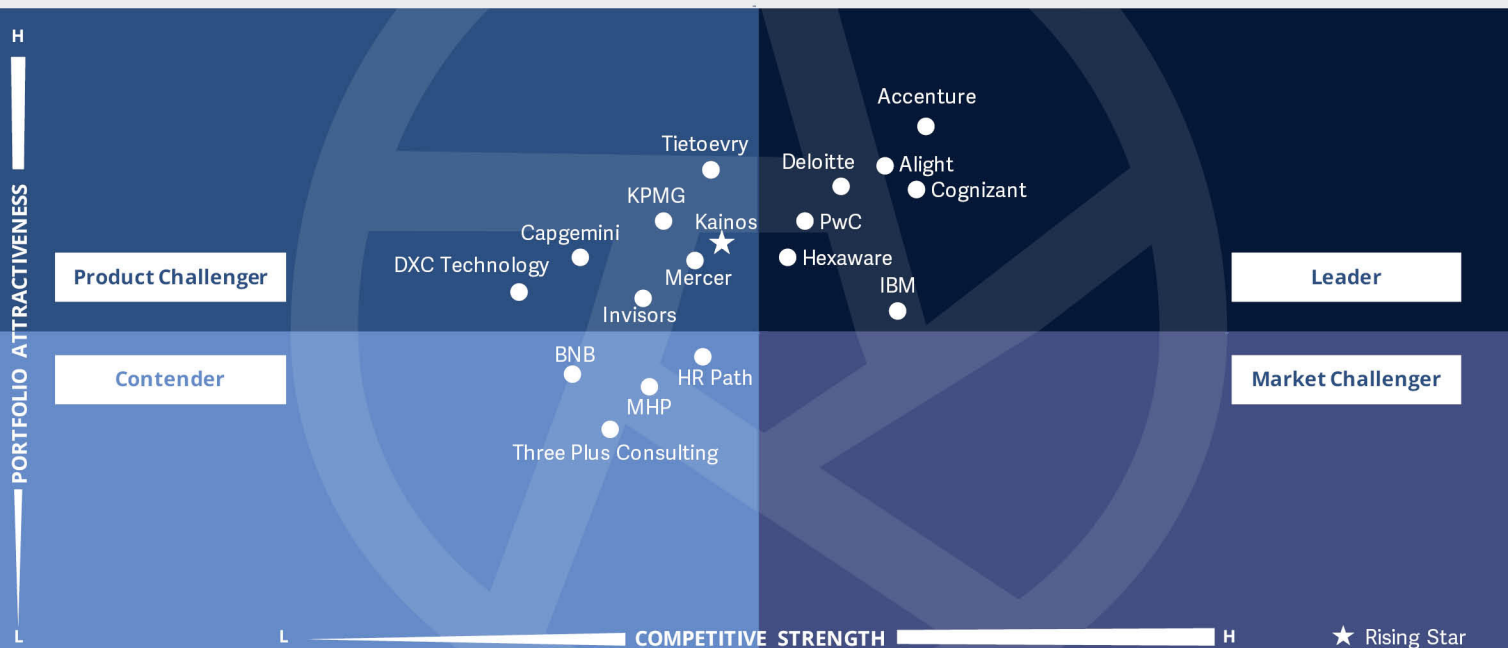


Operations and delivery leaders should read this report to understand how Workday managed service providers maintain their credibility and service quality.



Customer success and experience leaders championing the enterprise's voice in the market should read this report to analyze providers' service skills and how they adhere to SLAs and proactively offer customer feedback.





The quadrant assesses service providers with a **broad set of post-deployment services**, including **change management, system performance optimization, proactive monitoring** and **application management services (AMS)**.

Ashwin Gaidhani

Managed Services

Definition

This quadrant analyzes providers specialized in offering managed services to maintain and support Workday products. The study focuses on providers that support enterprise clients with technical and operational tasks such as customization, personalization and configuration. These complement the Workday platform as part of the designed setup and address clients' requirements to accomplish specialized tasks. Additional competencies include provisioning, administering, monitoring and accessibility to ensure continuous operations across all Workday modules and related services. They also include incorporating platform customizations and personalization based on the enterprise clients' demands, changing demographics and social and corporate compliance policies.

The study evaluates the providers' technical and operational ability to support process improvements through regular change and release management processes. This involves application management services (AMS) for the client's internal and external systems.

The providers are also evaluated based on their ability to provide a broad spectrum of diverse applications, offer post-implementation and operational process support and modernize Workday services. The quadrant examines the providers' global reach, depth of Workday product portfolio and breadth of industry and technology coverage.



Eligibility Criteria

- 1. Provide core support for the Workday portfolio:** Experience in managing and maintaining Workday products but not limited to functions such as HCM, Financial Management, analytics, Enterprise Interface Builder (EIB), data load, reporting and security, including processes, workflows and applications
- 2. Enable change and release management:** Experience in Workday release management and installation of new packages based on the release schedule; expertise in managing controlled changes to the environment through change management
- 3. Offer application maintenance services:** Comprehensive experience in delivering Workday maintenance support, developing technical solutions that support HRMS functional processes and Workday packages, and maintaining a bug-free environment
- 4. Offer integrated internal and external support:** Must support testing of Workday integration code base, including Studio, EIB and third-party systems, to ensure the availability and maintenance of the Workday platform
- 5. Strong partnership ecosystem:** Partnership with technology integration providers and critical third-party software providers (Accu-Time Systems, ADP and others), covering the breadth of an AMS-related portfolio
- 6. Competent in platform-as-a-service:** Expertise in working with Workday's Integration Cloud platform and integrating it with client's offerings, including monitoring and management aspects of the Workday platform
- 7. Competent in customization and personalization:** Expertise in designing, developing, deploying and enhancing customized solutions to meet business requirements



Observations

Many European organizations opt to outsource their Workday support and maintenance tasks to MSPs. These MSPs specialize in providing ongoing Workday and third-party software support, system monitoring and administration. Workday MSPs are expanding their service offerings beyond the standard support and now provide additional services such as system enhancements, configuration changes, report development, integration management, data governance and compliance support.

- **Continuous improvement and optimization:** Workday MSPs are increasingly focusing on helping organizations maximize the value of their Workday investment. They engage in continuous improvement initiatives, identify optimization opportunities and implement best practices to enhance system efficiency and UX.
- **Global and multi-entity support:** Many European organizations operate globally or have multiple entities across different countries. Workday MSPs support this trend

by offering multicountry implementations and managing the complexities of operating in multiple regulatory environments.

- **Proactive monitoring and issue resolution:** Workday MSPs adopt proactive monitoring tools and practices to identify and resolve potential issues before they impact system performance. They offer 24/7 monitoring, incident management and rapid response to minimize disruptions and ensure system availability.
- **Change management and user adoption:** Successful Workday implementation goes beyond technical aspects; it involves effective change management and user adoption strategies. Organizations recognize the importance of providing training and support to end-users, ensuring a smooth transition and user acceptance of the Workday platform.

From the 28 companies assessed for this study, 18 have qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture's strong partnerships help support global, regional and large and midsize projects. It has a limited presence in small businesses. With strong adherence to budgets and project milestones, Accenture's change management capabilities optimize client costs.

Alight

Alight has cross-functional expertise, spanning value engineering and go-live support to ongoing services. In addition to AMS, Alight's optimization architects help clients with strategic roadmap development, thus increasing accuracy, security, agility and optimizing response time.



Cognizant's USP is its high-value target consulting, Prism Analytics and Adaptive Insights. It also does not charge startup fees, locked-in rates or penalties, and limits on

leveraged hours. Its scalable services facilitate shifting hours and on-demand and unplanned assistance.

Deloitte

Deloitte has a highly structured approach to offering its post-implementation support, which has won a loyal client base. In addition to outstanding aftersales services, it offers competitive TCO in this quadrant.



Hexaware focuses on four key outcomes for its Workday practice, namely improved collaboration across the client's organization, a single, reliable source of truth, swift data exchange for real-time decision-making and scalable solutions tailored to the client's business needs.



Managed Services



IBM's Workday Continuum offerings comprise an array of post-go-live services tailored for organizations of all sizes, their levels of complexity and maturity. Clients can leverage IBM Watson for advanced analytics and quick resolutions.



PwC offers flexible Workday support services tailored to client needs. It provides end-to-end, full-service application management, with application support in specialized turnkey projects. Its assurance, tax and advisory services further accentuate its capabilities.



Kainos' (Rising Star) deliveries surpass expectations. The in-depth Tenant Health Check by Kainos identifies opportunities for system improvement, realigns them to meet clients' current needs and addresses user adoption issues to improve efficiencies.



PwC



"PwC is a dominant player in the Workday Managed Services quadrant owing to its highly qualified resources, focus on critical processes and comprehensive and flexible solutions portfolio."

Ashwin Gaidhani

Overview

PwC is headquartered in London, U.K. and operates in 152 countries. It has more than 327,900 employees across 690 global offices. In FY22 the company generated \$50.3 billion in revenue, with Advisory as its largest segment. Several case studies endorse PwC's robust managed services portfolio that has flexible contractual terms. The company increases agility at scale by providing access to a variable workforce and flexible technology to support its client's dynamic business needs. Many European clients have a longstanding relationship with PwC owing to their previous contracts in other areas.

Strengths

Easily scalable and flexible solutions to optimize costs: PwC's innovative solutions can easily accommodate new functionalities and be deployed to new geographies, increasing efficiencies across applications. PwC's post-implementation capabilities include automating routine monitoring and analytics, which enhances productivity and lowers costs.

Result-oriented managed services portfolio focusing on critical processes: This portfolio comprises health checks/assessment, release management, incremental functionality, optimization, new development and Phase X support. PwC also leverages support from its extensive vendor ecosystem.

Comprehensive managed services portfolio:

This portfolio consists of ticket resolution, demand management, incident/problem root cause management and application controls, which drive user efficiency and continuous improvement. Digital assets such as HRIT and accelerators enable clients to close functional whitespaces and enable next-generation application services. Other assets include testing automation, analytics and insights, system and process monitoring and change management.

Caution

PwC is adopting emerging technologies rapidly. Its enhanced focus on infusing automation and ML components into operational processes and CX channels will modernize the Workday support portfolio.





Appendix

The ISG Provider Lens™ 2023 – Workday Ecosystem research study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:

Ashwin Gaidhani

Editors:

Upasana Hembram and John Burnell

Research Analyst:

Swetha Tadepalli

Data Analyst:

Laxmi Sahebrao Kadve

Quality & Consistency Advisors:

John Cook and Yadu Singh

Project Manager:

Sreya Ghosh

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of June 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



Author & Editor Biographies



Research Partner

Ashwin Gaidhani
Lead Analyst

Ashwin Gaidhani has a comprehensive view of Enterprise services portfolio and digital business transformation initiatives with over two decades of experience as an ISG Research Partner and subject matter expert in enterprise services and workflow management. He is presently contributing as a Lead Analyst and Author with the ISG Provider Lens™ for platforms, emerging, and digital technologies.

Ashwin comes to this work with in-depth business and technology experience revolving around service management, consulting, emerging capabilities (artificial intelligence and intelligent automation), and work design methodologies.



Enterprise Context and Global Overview Analyst

Swetha Tadepalli
Research Analyst

Swetha Tadepalli is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Workday Ecosystem, and Oil & Gas studies, respectively. Swetha has experience in the technology research industry. She carried out research delivery for both primary and secondary research capabilities.

She is also involved in authoring enterprise context and global summary reports with market trends and insights. She also supports the advisors with her research skills about the latest market developments in the industry.





IPL Product Owner

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

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

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





AUGUST, 2023

REPORT: WORKDAY ECOSYSTEM