ISG Provider Lens™

Workday Ecosystem

Managed Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

pwc

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Executive Summary

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Workday continues to deliver and innovate platform solutions for a seamless experience

Platform and software modernization are revolutionizing the digital product industry. The focus is shifting from relevance to delivering a comprehensive experience at various stages of engagement for all personas interacting with the platform. The introduction and maturity of advanced models, such as large language models (LLMs) and algorithms, are expanding the possibilities for interactive and intelligent solutions that address complex challenges.

One of the most valuable capabilities in this regard is human capital management (HCM), which is a structured set of services across an organization. Technology integrations and solutions are continuously being adopted to meet the changing needs of all stakeholders, from developers to users.

The increasing integration of markets, technologies and cultures worldwide has created new opportunities and challenges for organizations. Globalization demands an HCM platform to manage a diverse and dispersed workforce that can operate effectively in different contexts and cultures. It must also cope with competition for talent, regulatory and legal differences, and ethical and social issues arising from operating in multiple countries.

The U.S. is a competitive market with vast opportunities. It is known for its ability to adopt innovative solutions and adapt them to meet the transforming industry needs. One of the main characteristics of the U.S. market is its openness to disruption. Software platforms are continuously evolving to match the maturity of the business processes, system interoperability and user convenience. Developing technology capabilities, constantly refining processes and elevating customer experience expectations impel a coercive force on the platform vendors to stay relevant by enhancing their offerings to gain a competitive advantage.

Workday constantly updates and improves its features and capabilities to benefit customers from the latest innovations and best practices. It has a strong customer community and partner ecosystem that offers support and

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

guidance. Workday focuses on security and reliability using a SaaS delivery model that ensures high availability, performance and data protection. It also leverages in-memory technology and cloud computing to provide real-time insights and analytics to help companies make better decisions.

Notable new features include:

- **Workday Assistant** – This AI-powered chatbot provides employees with answers to HR-related questions, such as how to change their benefits or request time off. Workday Assistant leverages NLP and ML algorithms to understand user queries and provide accurate responses.

- **Skills Cloud** – This new feature enables organizations to map their skills inventory and identify skills gaps. Skills Cloud provides a comprehensive view of an organization's skills landscape, allowing HR professionals to identify areas for improvement and create targeted training and development programs.

- **Workday Journeys** – This feature provides a personalized onboarding experience for new hires. It enables organizations to

create customized onboarding plans for each employee, guiding them through the process and ensuring a seamless transition into the organization.

Workday focuses on creating a solid technical and functional documentation library to build in-depth knowledge about the platform and transform a resource into an autodidact.

Workday Adoption Toolkit offers tools and resources that help customers drive user adoption and engagement with Workday. The Toolkit includes guides, templates, checklists, webinars and other materials covering change management, communication, training and support. Customers can use the Toolkit to plan and execute their adoption strategy and measure their results.

Workday focuses on incorporating a wider set of processes and capabilities. Thus, apprehension about technical complexity hovers as the platform expands and adds new offerings. Developing intelligent capabilities hosted on the top three hyperscalers has magnified the scope for the Workday platform to develop strategic go-to-market opportunities and improve

solution quality. Such a benefit will help enterprise clients host their workloads across cloud providers.

Workday has chosen the Google Cloud Platform for its public sector deployment, and a few modules are on Azure. It is an exciting start to new blue ocean opportunities for integrating novel solutions. This partnership is expected to drive Workday's solution maturity and increase penetration among existing customers through unique leverage and pricing structures to run the HCM platform in the cloud.

Evolving Workday Service Segments & Practices in the U.S. Market

Consulting and Strategy Services

Consulting and advisory competencies are among Workday Services partners' predefined standard offerings. In the past 12 months, we have seen a dramatic change in the transformation consulting space. Organizational change management (OCM), business technology fitment, technical architecture and process transformation converge to deliver a sustainable solution.

Enterprise clients realize the benefit of a swift transition of services led by a strong consulting practice. Consulting service goes beyond assessing, service mapping and recommending a solution. It entails improved experience delivery, operational consulting and technical expertise to redesign the technical architecture to accommodate microservices, container orchestration and cloud-native application development to impart platform resiliency. Governance, risk and compliance (GRC) and security consulting increasingly dominate the discussions because the HCM platform holds sensitive organizational information. A provider's consulting capabilities around the Workday platform and the HCM domain are crucial in transitioning enterprise clients from the incumbent HCM platform to Workday.

Implementation and Integration Services

The Workday implementation process is improving technically and operationally. Increasing the development of accelerators and other IP to complete the implementation process is deeply rooted in the Workday technical services practice. Partnerships

with testing platforms like TOTAL TaaS™ with prebuilt automated testing solutions for all primary Workday modules have accelerated deployment. Personalization and customization are critical asks by enterprise clients due to their increasing familiarity with the Workday Extend offering that helps build an application on top of the Workday platform. This enables enterprise functions to integrate and connect various internal and external systems, resolving information flow challenges. The service partners focus on serving the entire Phase 1 and Phase X implementations as a continuum. Workday's platform is in the next phase of maturity, where after implementing the core HCM platform, the natural course of scale is implementing other financial, analytics, talent management and payroll. Agile methodologies have also gained prominence in Workday implementation trends. Workday service partners are adopting these project management practices, enabling faster adaptation to changes, improved communication among team members and better documentation and process efficiency.

Workday Managed Services

Workday customers need ongoing support to maintain and optimize their systems and address issues that arise during normal operations. Post-deployment support quality heavily depends on resources, certifications and maintenance experience to ensure the smooth functioning of the platform. Application management services (AMS) deal with platform break-fix, design and development services. Change and release management are continuous activities that need administered execution, as these should not disrupt the platform. These are complex but routine activities that ensure the latest updates and features are incorporated into the Workday platform.

Using managed services in the Workday ecosystem previously was less popular due to ambiguity in the Workday partner ecosystem. Partners were contentious about the inclusions in this space due to limited-service offerings in the Workday AMS space. The ISG Workday team formed the blueprint with a futuristic view and anticipated

transformation in this space. This partner ecosystem study is confident about Workday managed services, especially with the experience from studying the platform market. In this case, we have seen capabilities expand through the customization of APIs and application interfaces extended by the platform community.

In conclusion, platform and software modernization is transforming the digital product industry by shifting the focus from relevance to delivering a comprehensive experience for all personas interacting with the platform. Human capital management plays a crucial role in this transformation by providing a structured set of services across an organization. Workday, a leading HCM platform provider, continuously incorporates technology integrations and solutions to meet the changing needs of all stakeholders. The increasing integration of markets, technologies and cultures worldwide presents new opportunities and poses challenges for organizations. Workday's renewed focus on technology,

including cloud services, data management, generative AI and intelligent automation, reflects its commitment to staying relevant and competitive in the rapidly evolving market.

> Workday is set to revolutionize how businesses approach their HR and finance operations by empowering organizations to achieve unprecedented efficiency and productivity. Workday will be a game-changer for the modern workplace and human capital function with its latest technology components and innovative solutions.

Provider Positioning

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	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Accenture	Leader	Leader	Leader
Alight	Leader	Leader	Leader
Avaap	Market Challenger	Contender	Product Challenger
BNB	Not In	Contender	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger
Cognizant	Leader	Leader	Leader
CrossVue	Contender	Contender	Contender
Deloitte	Leader	Leader	Leader
DXC Technology	Product Challenger	Product Challenger	Product Challenger
Glyde Consulting	Contender	Not In	Not In

Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Guidehouse	Market Challenger	Market Challenger	Market Challenger
Hexaware	Not In	Leader	Leader
Huron	Leader	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader
Impact Advisors	Not In	Market Challenger	Market Challenger
Intecrowd	Product Challenger	Product Challenger	Contender
Invisors	Product Challenger	Rising Star ★	Rising Star ★
Kainos	Not In	Product Challenger	Leader
KPMG	Leader	Leader	Product Challenger
Mercer	Leader	Product Challenger	Leader

Provider Positioning

Provider Positioning

	Consulting and Strategy Services	Implementation and Integration Services	Managed Services
Preos	Contender	Not In	Not In
PwC	Leader	Leader	Leader
TopBloc	Product Challenger	Product Challenger	Product Challenger
UST	Contender	Not In	Contender

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

Simplified Illustration Source: ISG 2023

Consulting and Strategy Services

Implementation and Integration Services

Managed Services

Definition

The global economy faces several uncertainties, such as high inflation, tepid growth and recessionary fears. Business services are seldom immune to these challenges, the biggest concern being soaring operating costs. 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. Such functions have seen a drastic transformation in the manner of conducting business. Human-centric processes keep shifting to the virtual space with the digitalization of HCM workflows. There has been a need to consolidate these essential functions to extend organizational support to employees and streamline mainstream HR functions digitally. It 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 a complete suite of services, such as financial management, strategic sourcing, peakon employee voice, adaptive planning, analytics and reporting. Workday integrates HR applications into an enterprise management cloud platform designed to incorporate custom requirements and personalization, extending its ability to cater to exclusive needs 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 only a specific product but also the modules. In addition to the evaluation mentioned above criteria, the following also applies to the service providers of 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 Managed Services

This ISG Provider Lens™ study offers IT decision-makers 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 regarding 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 (exceptionsare possible).

Provider Classifications: Quadrant Key

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

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

★ **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.

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

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

Managed Services

Managed Services

Who Should Read This Section

This report is relevant to all enterprises across industries in the U.S. that are evaluating Workday managed services providers.

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

Migration to cloud-based platforms is currently on the rise in the U.S. This has pushed enterprises toward seeking service providers that provide end-to-end Workday managed services ranging from pre-deployment stage to post-deployment support. Service providers currently focus on providing flexible support at any stage of the Workday journey instead of limiting the services to only certain phases. The two other current major focus areas are expanding post-production operational capabilities, and ongoing customer success management to increase customer satisfaction and retain a growing customer base to bolster future deployment processes.

ISG has observed that enterprises are moving from older HR platforms to new and advanced HCM platforms, leading to accelerated growth in the competitive managed services market. Most of these enterprises are seeking end-to-end managed service providers for an effective and optimal Workday service at a lower cost.

Business leaders including CHROs and CFOs should read this report to understand Workday managed service providers' capabilities to manage and support maintenance across portfolios.
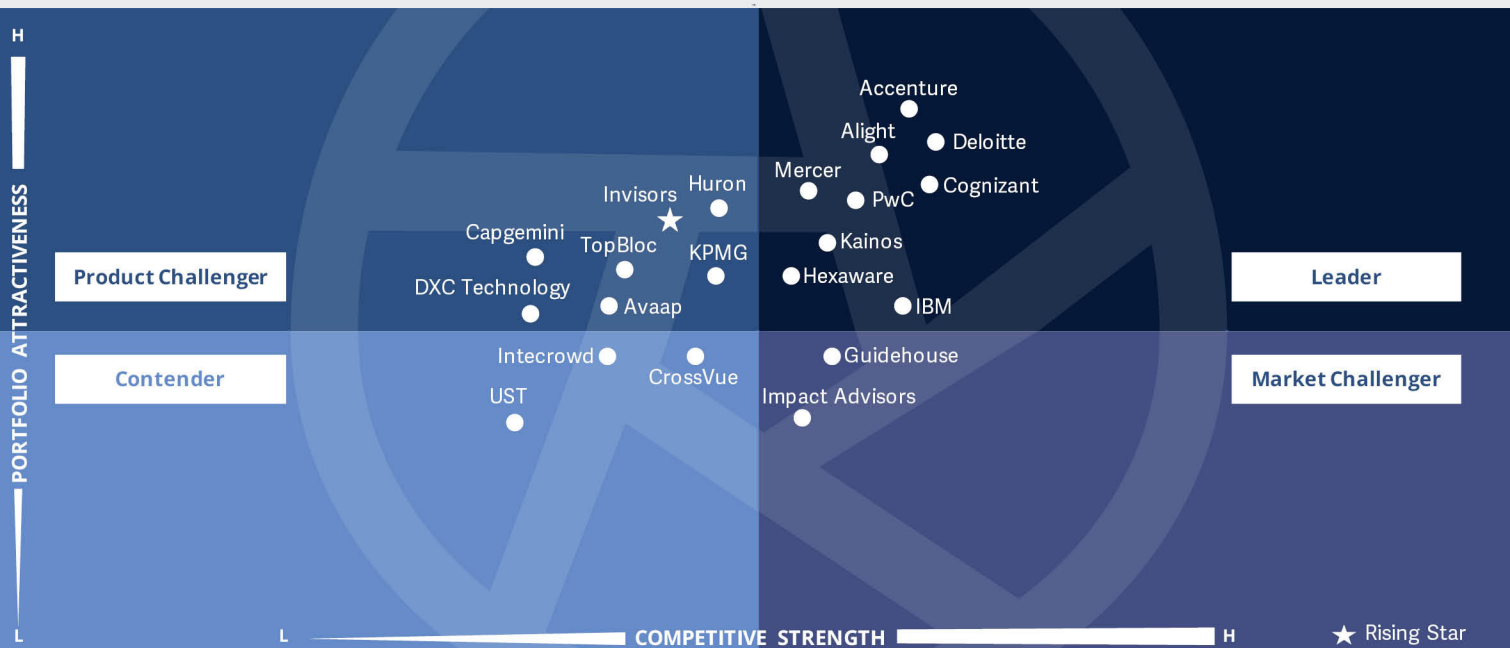
Operations and delivery leaders who are responsible for employee experience, business planning and financial management should read this report to understand how Workday managed service providers retain their credibility and service quality.

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

ISG Provider Lens™

Workday Ecosystem Managed Services

U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

Invisors

Huron

Capgemini

TopBloc

KPMG

DXC Technology

Avaap

Intecrowd

CrossVue

UST

Accenture

Alight

Deloitte

Mercer

PwC

Cognizant

Kainos

Hexaware

IBM

Guidehouse

Impact Advisors

Leader

Market Challenger

L   COMPETITIVE STRENGTH   H

★ Rising Star

This quadrant assesses providers that are **modernizing their Workday application management** portfolios to manage the platform. The managed services cover **change, release and event management** plus managing **third-party software and related business processes.**

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 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 et al.) covering the breadth of AMS-related portfolio.

Managed Services

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

Programs, initiatives and partnerships drive Workday's enterprise client engagements and education. Workday Pro, Workday Privacy Program and Explorer are a few programs that develop Workday competency within enterprise clients' organizations. Explorer helps address unique requirements and familiarize clients with Workday functionalities post-launch. These programs empower clients with the knowledge to use Workday features and modules optimally. Workday builds a strong, controlled partner network to ensure the platform product team effectively manages quality-of-service capabilities. The partner network comprises large global system integrators (GSI), independent software vendors and consulting firms that are constantly evolving.

- The Workday portfolio is predominantly undergoing transformation by its partners introducing services that enhance their complementing specialized services, such as business processes. These service segments include professional services, application management services (AMS) and consulting and advisory.

- One of the main developments in post-deployment support is the Workday Community, which allows customers to access resources, share best practices and collaborate with other Workday users and experts. The Workday Community includes forums, blogs, videos, webinars and events. Customers can submit ideas and feedback to Workday through the community and vote on the ones they like. Workday uses this input to prioritize and deliver product enhancements and innovations.

From the 28 companies assessed for this study, 21 have qualified for this quadrant, nine being Leaders and one Rising Star

accenture

Accenture has one of the best-managed service suites in the industry for its Workday practice, evidenced by its budget-friendly packages and exit clauses. This has ensured transparency and cost optimization, winning client trust and repeat business.

Alight

Alight's support desk, Tenant Optimiser and flexible support hours offer a discretionary hours pool. Tenant Optimiser offers tenant assessment, while the release updater provides impact analysis, change configuration and regression testing. It provides issue triage support.

cognizant

Cognizant's portfolio comprises Workday release management services, enhancement, change requests, incident and service requests, global delivery service model and service management applications support. It also has a dedicated resource based and/or squad-based shared services model.

Deloitte

Deloitte's post-deployment support is one of the industry's best and most transparent. Its go-live support is scientific and rationalized to hold the client's hand throughout the journey. It provides quick ticket resolutions and technical assistance.

Hexaware

Hexaware's comprehensive managed services portfolio consists of application support and maintenance, service management and application operations. Application support comprises end-user enablement, chatbot support, service requests tracking and incident management.

IBM

IBM's market differentiators include ticket analytics and reports to provide insights and metrics and an integrated management tool to identify optimization trends and challenges. It also offers an automated testing tool for Workday and customer production releases.

Kainos

Kainos is a leading Workday managed services partner this year. Its rapid growth is attributed to the substantial development of its post-production services. Kainos delivers transparent deployment services and offers Workday support services, including a Workday audit platform.

pwc

PwC's comprehensive managed services portfolio consists of ticket resolution, demand management, incident/problem root cause management and application controls, driving user efficiency and continuous improvement. Its digital assets such as HRIF and accelerators, enable superior UX.

Mercer

Mercer's managed services offers a plethora of tools to optimize end-to-end Workday deployment. Mercer has a dedicated Workday-certified AMS team that is skilled in the latest Workday functionality and is dedicated exclusively to providing post-production support.

Invisors

Invisors' (Rising Star) portfolio of managed services is highly contextual, client-oriented and broad-based. Its ready reference library of resources, such as videos, blogs, quizzes and on-demand webinars, are driven by client need.

PwC

Leader

"Aligning processes to business outcomes, unwavering focus on innovation and offering advanced Workday solutions drive the PwC leadership in the Workday managed services space."

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. PWC Workday's portfolio comprises ticket resolution, demand management, incident management, application controls, driving user efficiency and continuous improvement. PwC, together with Workday, increases agility at scale by providing access to a variable workforce and flexible technology to support the client's dynamic business needs., Some U.S. clients have a longstanding relationship with PwC.

Strengths

Outcome-aligned, key processes-focused managed services portfolio: PwC's portfolio comprises health check/assessment, optimization, new development and phase X implementations. Its extensive vendor ecosystem provides able support. PwC's mature change and release management processes oversee the Workday upgrades as part of releases and planned modifications to the Workday platform.

Unflinching commitment to operations and innovation: PwC's Application Evolution Services (AES) are — application support and operations, including user support, problem management, data, root cause, incident and service requests and integration monitoring; application development consisting of bugs remediation, BAU

configurations and minor enhancements. AES also encompass the improve and innovate phases, including performance optimization, enhancements, DevOps, support automation, ticket analytics and Next Level HR.

Easily scaled, flexible solutions to optimize costs: PwC's innovative solutions can easily accommodate new features and be deployed to new geographies, which facilitates efficiencies across applications. Its post-implementation capabilities include routine monitoring and analytics automation to enhance productivity and reduce costs. PwC is focusing more on Workday Extend and helping customers drive personalization.

Caution

PwC has always been among the first to adopt any new offerings and products from the Workday portfolio. Expanding the reach of managed services to client-supported software services and processes will position PwC in a unique spot for future scalability.

Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of 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.

Author & Editor Biographies

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.

About Our Company & Research

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.

ISG Provider Lens™

AUGUST, 2023

REPORT: WORKDAY ECOSYSTEM