

# The Forrester New Wave™: Workday Implementation Partners, Q3 2019

The Nine Providers That Matter Most And How They Stack Up

by Liz Herbert  
August 27, 2019

## Why Read This Report

In Forrester's evaluation of the emerging market for Workday implementation partners, we identified the nine most significant providers — Accenture, Alight Solutions, Collaborative Solutions, Deloitte, Hexaware, IBM, KPMG, OneSource Virtual, and PwC — and evaluated them. This report details our findings about how each vendor scored against 10 criteria and where they stand in relation to each other. Application development and delivery professionals can use this review to select the right partner for their Workday implementation needs.

## Key Takeaways

### **Accenture, Deloitte, And KPMG Lead The Pack**

Forrester's research uncovered a market in which Accenture, Deloitte, and KPMG are Leaders; IBM, Alight Solutions, Collaborative Solutions, and PwC are Strong Performers; and OneSource Virtual and Hexaware are Contenders.

### **Mix And Breadth Of Services Are Key Differentiators**

The tightly controlled (by Workday) Workday ecosystem has a wide range of partners — from tech-heavy firms to business process outsourcing specialists to consultancies. The services vary widely, and there is major variation in size and breadth of practices.

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August 27, 2019

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## Workday Customers Have Lots Of Choice Despite A Limited Ecosystem

The Workday partner ecosystem is more locked down than the partner ecosystems of most other large enterprise application vendors. Workday not only dictates who's in and out but also has three specific partner designations — advisory, implementation, and application management services (AMS) — and a partner can be approved for only one of the three. Notably, no major India-based suppliers make the partner list (though Wipro once had a partnership, it sold off its Workday resources to Alight Solutions earlier this year; the other five largest India-based services firms have never had a Workday partnership). Despite overall expansion in the market in the past decade, consolidation has removed several choices, such as Omnipoint (Alight Solutions), Aggressor (Deloitte), and DayNine (Accenture).

Despite the control that Workday imposes over its ecosystem, buyers still have a range of choices. Workday has partnerships with three of the Big Four (Deloitte, KPMG, and PwC — not EY), global application services giants Accenture and IBM, smaller firms like Collaborative Solutions and Sierra-Cedar, regional specialists like Kainos and ABeam Consulting, and outsourcers including Alight Solutions (formerly part of Aon Hewitt) and OneSource Virtual. It also has AMS-only partners, like Hexaware, that provide services outside of Workday deployments but are not authorized for phase 1 deployments. Workday continues to add new partners — especially as it expands its functional footprint and geographic reach: It added Alchemy (higher education) and MHP Management (Germany) in 2017.<sup>1</sup>

## Workday Implementation Partners Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the New Wave evaluation, we assess only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included nine vendors in this assessment: Accenture, Alight Solutions, Collaborative Solutions, Deloitte, Hexaware, IBM, KPMG, OneSource Virtual, and PwC (see Figure 2 and see Figure 3). Each of these vendors has:

- › **Forrester client interest and relevance.** We focused our evaluation on partners that Forrester clients (typically 1,000 employees or more) care about.
- › **A formal Workday partnership.** We only included partners with formal partner status with Workday, though we sometimes hear of nonapproved partners providing “rogue” Workday support.

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**FIGURE 1** Assessment Criteria

<b>Assessment criteria</b>	<b>Platform evaluation details</b>
<b>Business results</b>	What examples does the provider have of transformational business results based on Workday projects in the public domain, with a focus on complex, multimodule transformation stories?
<b>HR transformation services</b>	Does the provider have a compelling and differentiated approach to Workday-based HR transformation, including employee experience, HR process consulting, and Workday (and surrounding tech) implementation?
<b>Finance transformation services</b>	Does the provider have a compelling and differentiated approach to Workday-based finance transformation, including process consulting and Workday (and surrounding tech) implementation?
<b>Business planning services</b>	Does the provider have a compelling and differentiated approach to Workday-based business planning, with a focus on Adaptive Insights implementation?
<b>Workday analytics services</b>	Does the provider have a compelling and differentiated approach to Workday-based analytics, with a focus on Workday Prism Analytics implementation?
<b>AI and automation approach</b>	How well does the provider bring compelling and differentiated automation and AI into Workday projects?
<b>Workday technology platform</b>	Does the provider have a compelling and differentiated approach to Workday tech, including platform development, integration, and testing?
<b>Vision</b>	How visionary is the provider's three- to five-year vision for its Workday implementation practice? Is it both ambitious and credible? Does the vision align with future customer needs?
<b>Road map</b>	How is the provider investing in its Workday services road map, including emerging tech and innovation, compared with others in this evaluation?
<b>Market approach</b>	How well does the provider's market approach align with current buyer behavior and needs compared with other providers in this evaluation?

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**FIGURE 2** Forrester New Wave™: Workday Implementation Partners, Q3 2019

# THE FORRESTER NEW WAVE™

## Workday Implementation Partners

Q3 2019



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**FIGURE 3** Vendor QuickCard Overview

Company	Business results	HR transformation	Finance transformation	Business planning	Workday analytics	AI and automation	Workday technology	Vision	Road map	Market approach
Accenture	⬆	⬆	⬆	⬇	⬆	⬇	⬆	⬆	⬆	⬇
Deloitte	⬆	⬆	⬆	⬆	⬆	⬇	⬇	⬇	⬆	⬇
KPMG	⬆	⬇	⬆	⬇	⬇	⬇	⬇	⬇	⬆	⬆
IBM	⬇	⬆	⬇	⬇	⬇	⬆	⬇	⬆	⬇	⬆
Alight Solutions	⬇	⬇	⬆	⬆	⬇	⬇	⬇	⬇	⬇	⬇
Collaborative Solutions	⬆	⬇	⬇	⬇	⬇	⬇	⬇	⬇	⬇	⬇
PwC	⬇	⬆	⬆	⬇	⬇	⬆	⬇	⬇	⬇	⬇
OneSource Virtual	⬇	⬇	⬇	⬇	⬇	⬆	⬇	⬇	⬇	⬇
Hexaware	⬇	⬇	⬇	⬇	⬇	⬇	⬇	⬇	⬇	⬆

⬆ Differentiated   
 ⬇ On par   
 ⬇ Needs improvement

## Vendor QuickCards

Forrester evaluated nine vendors and ranked them against 10 criteria. Here's our take on each.

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**Accenture: Forrester’s Take**

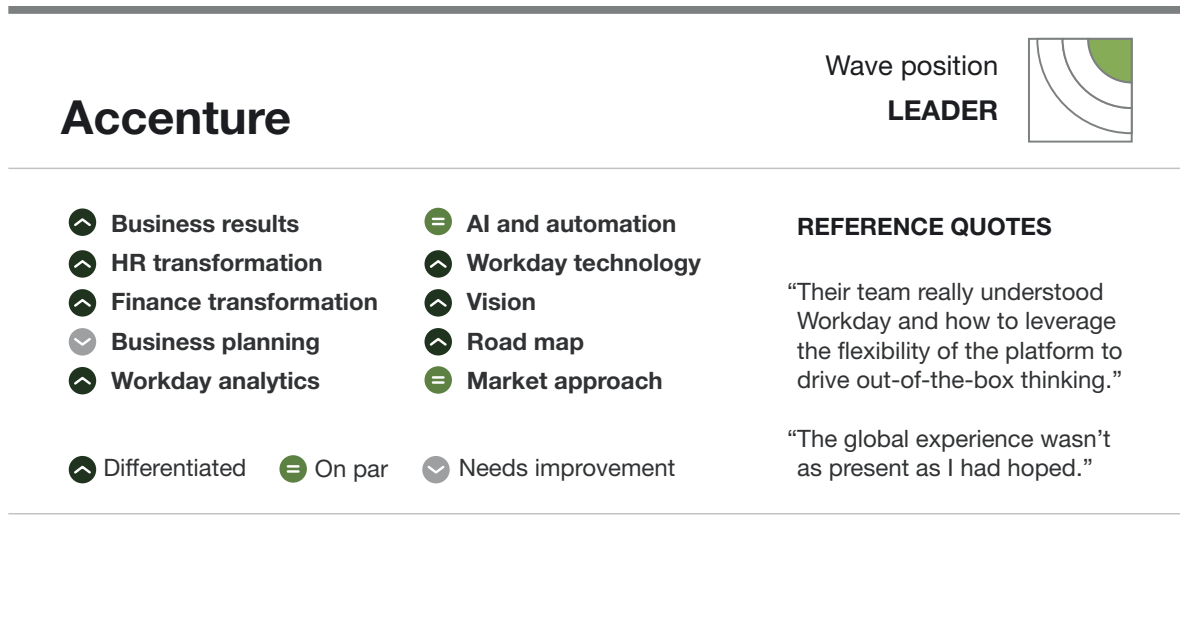
Our evaluation found that Accenture (see Figure 4):

- › **Leads the pack with breadth of capabilities and scale.** Accenture has scale across all major areas of Workday services and is a leading partner in newer Workday areas such as Workday Cloud Platform and Prism Analytics.
- › **Has less experience in Workday Planning versus peers.** Accenture did not have much of a practice around Adaptive Insights when Workday acquired it, and that has led to a smaller practice for Workday Planning (the new name for Adaptive Insights) today.
- › **Is the best fit for companies with complex, global needs.** Accenture thrives in large and complex transformations, including multipillar deals. Key references include Avis Budget Group, Hitachi, and Kimberly-Clark.

**Accenture Customer Reference Summary**

Accenture has consultants who bring vast technical expertise and knowledge. Although it bolstered its Workday practice with the acquisition of DayNine, it is still figuring out the best way to integrate that team into the Accenture ecosystem.

**FIGURE 4** Accenture QuickCard



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**Deloitte: Forrester’s Take**

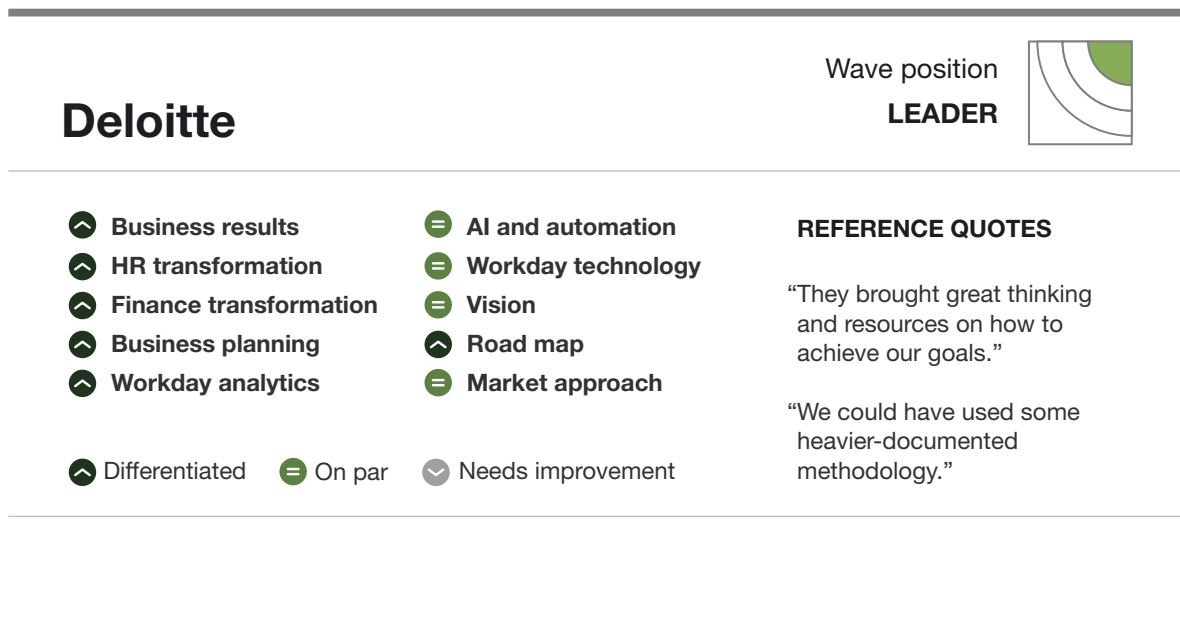
Our evaluation found that Deloitte (see Figure 5):

- › **Leads the pack with a consulting-rich transformation approach.** Deloitte is a natural partner for Workday due to its combination of Workday technology know-how and deep expertise in both finance and HR transformation.
- › **Is still lighter on assets, managed services, and tech versus some peers.** Though the Workday market overall skews toward consulting rather than heavy tech, Deloitte is still lighter in managed services, tech and tooling, and ready-made assets versus some leading peers.
- › **Is the best fit for larger projects where the goal is business transformation.** Deloitte excels at change-the-business work, especially in core Workday domains, including finance and HR. Clients include Christiana Care, Rochester Regional Health, and Yale University.

**Deloitte Customer Reference Summary**

Deloitte has a global presence and the ability and resources to support a multitude of workstreams. References noted having true partnerships with the Deloitte team, which led to little turnover.

**FIGURE 5** Deloitte QuickCard





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**KPMG: Forrester’s Take**

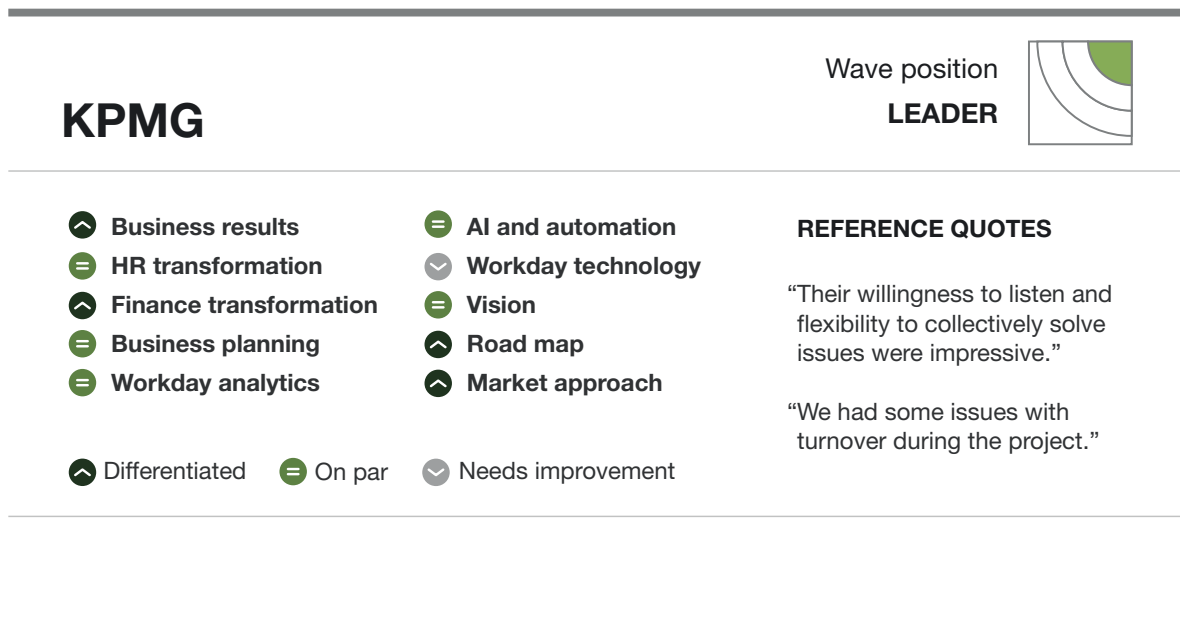
Our evaluation found that KPMG (see Figure 6):

- › **Blends business consulting expertise with deep Workday focus.** Like its other Big Four peers, KPMG excels at business transformation — with depth in both finance and HR. However, KPMG has a more focused approach to software partnerships, and Workday is one of its key focus areas.
- › **Still has more limited technology expertise — in the Workday space and broadly.** KPMG has numerous tools and assets, including its Powered Enterprise accelerator approach.<sup>2</sup> But KPMG remains stronger at consulting than building vast tooling and tech.
- › **Is the best fit for companies seeking a prescribed approach to transformation.** KPMG puts its Powered Enterprise approach front and center to significantly reduce the time and risk of a Workday rollout while maximizing results. Clients include Allergan, Club Med, and Dow Chemical.

**KPMG Customer Reference Summary**

KPMG is results oriented and outcome focused. References noted that it’s focused on landing projects to help clients with business transformation, not to gather fees.

**FIGURE 6** KPMG QuickCard



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**IBM: Forrester’s Take**

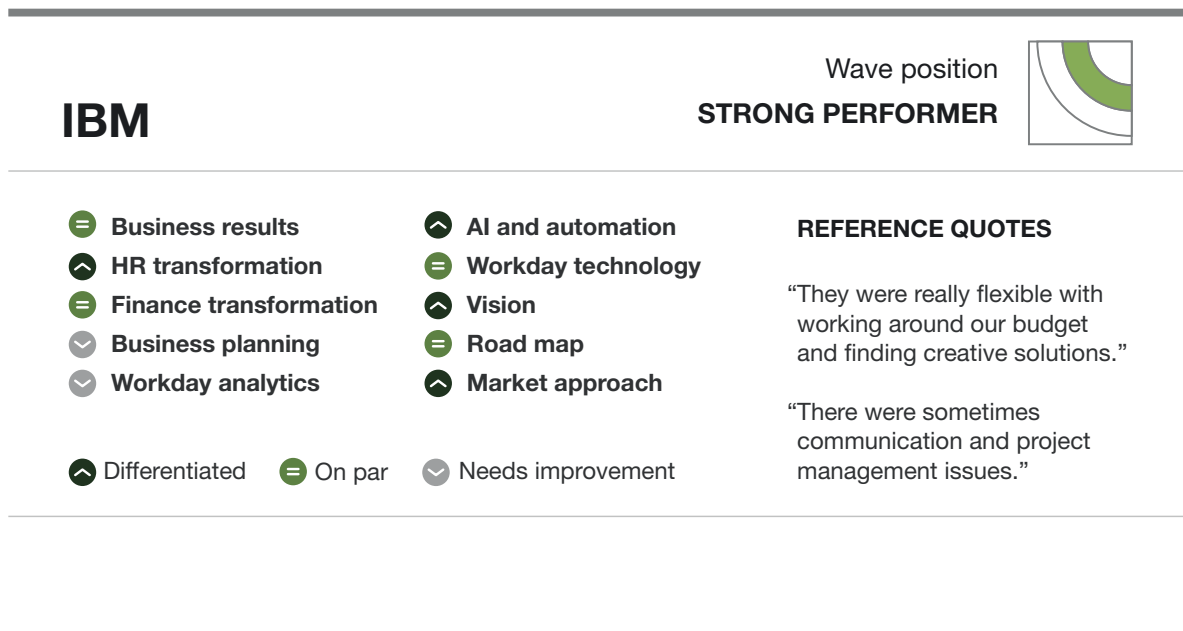
Our evaluation found that IBM (see Figure 7):

- › **Leads with talent transformation, employee experience, and AI.** IBM (including Meteorix, which it acquired) focuses on innovation, experience, and intelligence in its Workday practice — which sets it apart from several peers that take a more prescribed approach.
- › **Has limited capabilities for Workday Planning and Workday Prism Analytics.** IBM has a strong body of work and sizable resource pool in core Workday areas such as finance and HR, but it has only limited experience with Workday Planning and the emerging Workday Prism Analytics.
- › **Is the best fit for larger Workday customers that want to reinvent and think differently.** In a market full of HR and finance consultants, IBM is taking a different approach — leveraging Watson and employee experience design to think differently and reinvent experience based on Workday. Example clients include General Motors and AECOM.

**IBM Customer Reference Summary**

IBM does well at taking its clients’ circumstances and finding creative solutions. It has great technical skills and knows when to utilize the correct resources at the correct time.

**FIGURE 7** IBM QuickCard



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**Alight Solutions: Forrester’s Take**

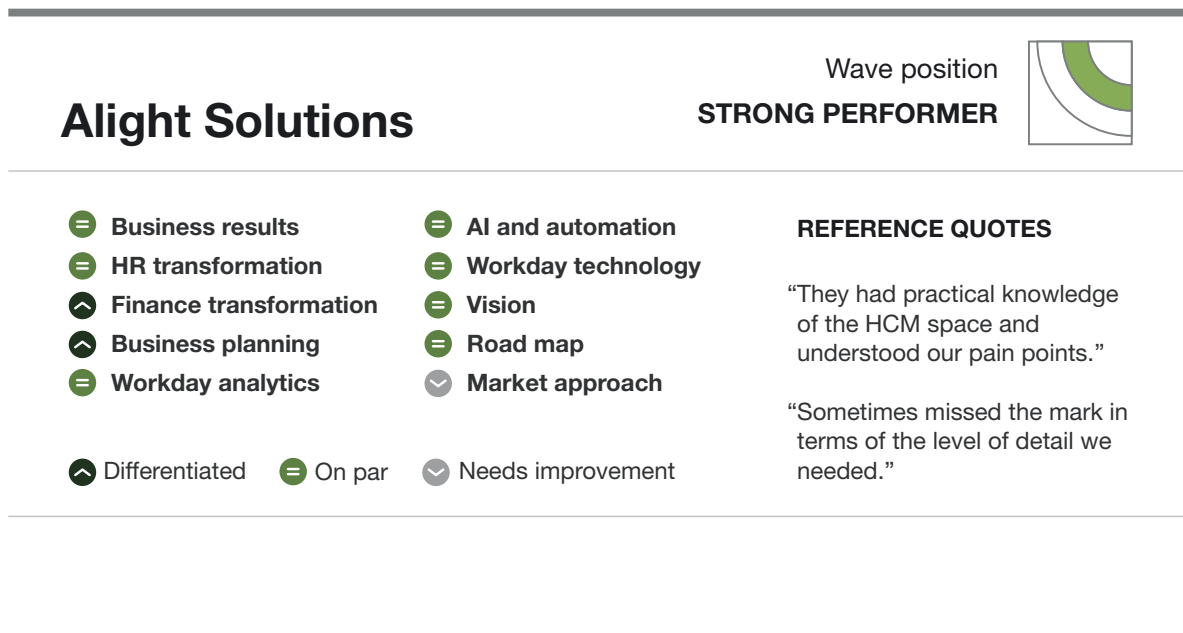
Our evaluation found that Alight Solutions (see Figure 8):

- › **Is a leading choice for finance transformation and Workday-based outsourcing.** Alight (formerly part of Aon Hewitt) specializes in outsourcing with Workday as the underlying platform. The provider is also well versed in large-scale Workday finance projects.
- › **Is more focused on efficiency than reinvention.** Alight has mastered the efficiency play around Workday deployments, including increasing use of robotic process automation and other tools to improve results even further than a great Workday rollout can on its own.
- › **Is best suited for HR and finance outsourcing rather than just project work.** Alight has broad Workday capabilities similar to those of other top peers, but it stands out most for full-fledged outsourcing — including outsourced support, benefits, and payroll administration. Clients include Birch Family Services, CRISPR Therapeutics, and Trustpilot.

**Alight Solutions Customer Reference Summary**

Clients noted that Alight Solutions had teams made up of former practitioners, which made the implementation process a lot smoother. References mentioned quick response times but also cited some issues around managing expectations surrounding the finer details of projects.

**FIGURE 8** Alight Solutions QuickCard



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**Collaborative Solutions: Forrester’s Take**

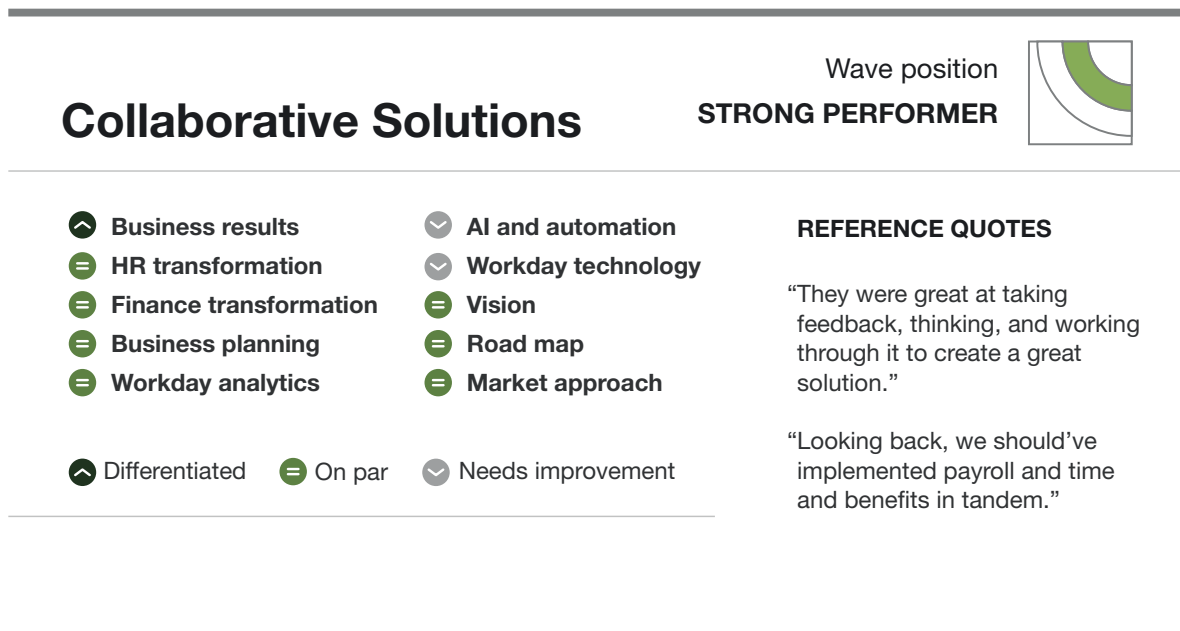
Our evaluation found that Collaborative Solutions (see Figure 9):

- › **Is a smaller alternative with deep Workday expertise and experience.** Collaborative’s Workday services are similar to those of the top-ranked large consultancies, but it can offer a more personal touch and more flexibility due to specialization. The firm touts high customer experience scores.
- › **Faces some challenges due to its smaller scale.** The smaller scale is a two-sided coin — more flexibility but also more limitations. Collaborative does not have other consulting or non-Workday tech to draw from and has smaller pockets of R&D and innovation.
- › **Is best suited to mid- to large-size North American firms.** Collaborative has implemented in more than 100 countries and acquired Theory of Mind in Asia Pacific, but its calling card remains North American companies — both midsize and large. Example clients include Campbell’s Soup, Legg Mason, and MassMutual.

**Collaborative Solutions Customer Reference Summary**

Collaborative Solutions offers clients a more personalized touch. One reference said that the CEO attended monthly meetings — something they felt helped to make their project more successful.

**FIGURE 9** Collaborative Solutions QuickCard



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**PwC: Forrester’s Take**

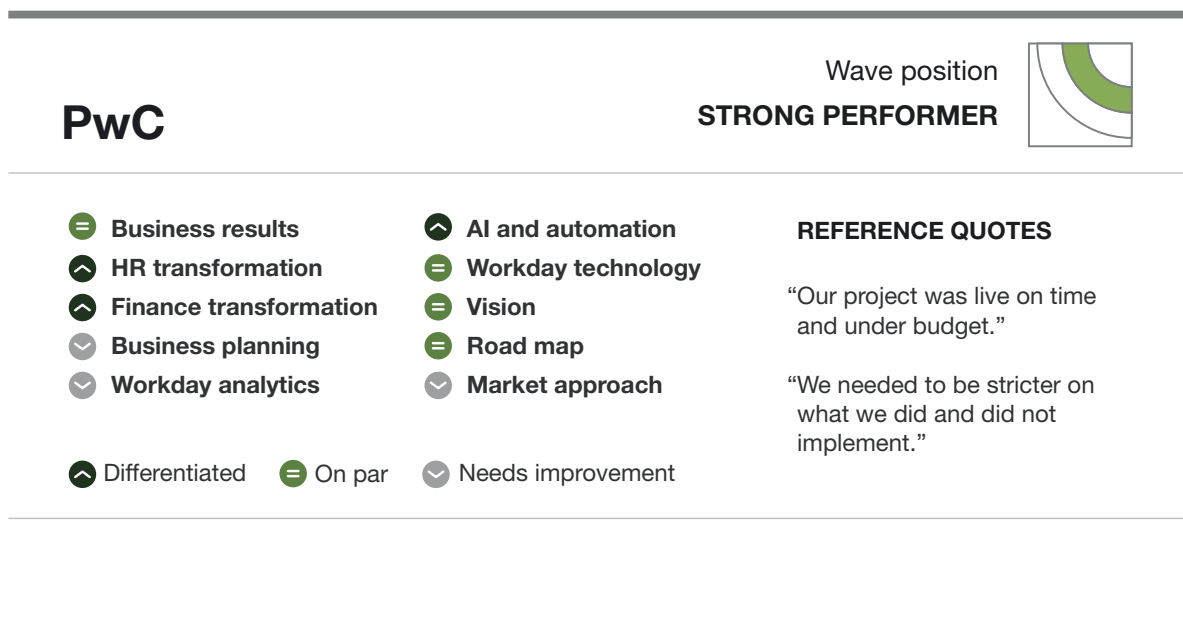
Our evaluation found that PwC (see Figure 10):

- › **Combines experience, consulting, and tech to achieve Workday-based transformation.** PwC emphasizes business plus experience plus technology (BXT). It excels at business strategy and change work in Workday-based finance and HR projects.
- › **Is still stronger at strategy and consulting than technology and support.** PwC has made big strides in its technology capabilities over the past decade but still has more capabilities for consulting and business change work than tech and app management.
- › **Is best suited for large Workday projects where the goal is business change.** PwC’s hallmark is its experience-led consulting approach. The provider is a good choice for large finance and HR transformation and is not as good of a fit for pure technology project work or application management. One example client is John Muir Health.

**PwC Customer Reference Summary**

References mentioned that PwC showed dedication to their overall projects by including their whole team in every meeting. Customers praised PwC’s ability to adhere to timelines and budgets but felt that it could have offered a little more guidance on what to implement and what not to implement.

**FIGURE 10** PwC QuickCard



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**OneSource Virtual: Forrester’s Take**

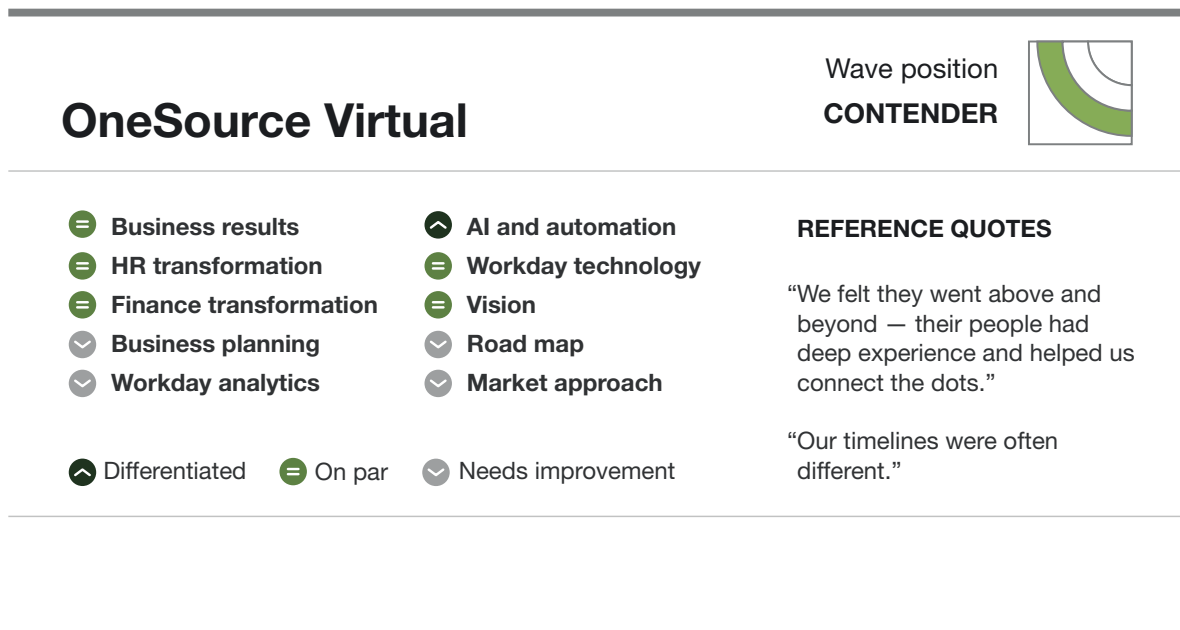
Our evaluation found that OneSource Virtual (OSV) (see Figure 11):

- › **Provides Workday-based business process services.** OneSource Virtual provides a full range of Workday services, from project work to business-process-as-a-service (BPaaS) to ongoing application management. OSV also has a strong focus on automation.
- › **Has been slower to invest in Workday’s newer technology areas.** OSV is not as experienced as other top peers with newer Workday products such as Workday Planning and Workday Prism Analytics.
- › **Is the best fit for midsize firms seeking end-to-end Workday services.** OSV’s hallmark is its ability to offer Workday-based BPaaS, and it generally offers a wide range of services from implementation to support. The provider has significant experience in midsize deployments. Example clients include E. W. Scripps, Gogo, and Pernod Ricard.

**OneSource Virtual Customer Reference Summary**

OneSource Virtual offers implementation services across the whole Workday suite. Client references noted its ability to mesh well with different teams and to understand the underlying business. Client and partner timelines were sometimes different and did not mesh well.

**FIGURE 11** OneSource Virtual QuickCard



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**Hexaware: Forrester’s Take**

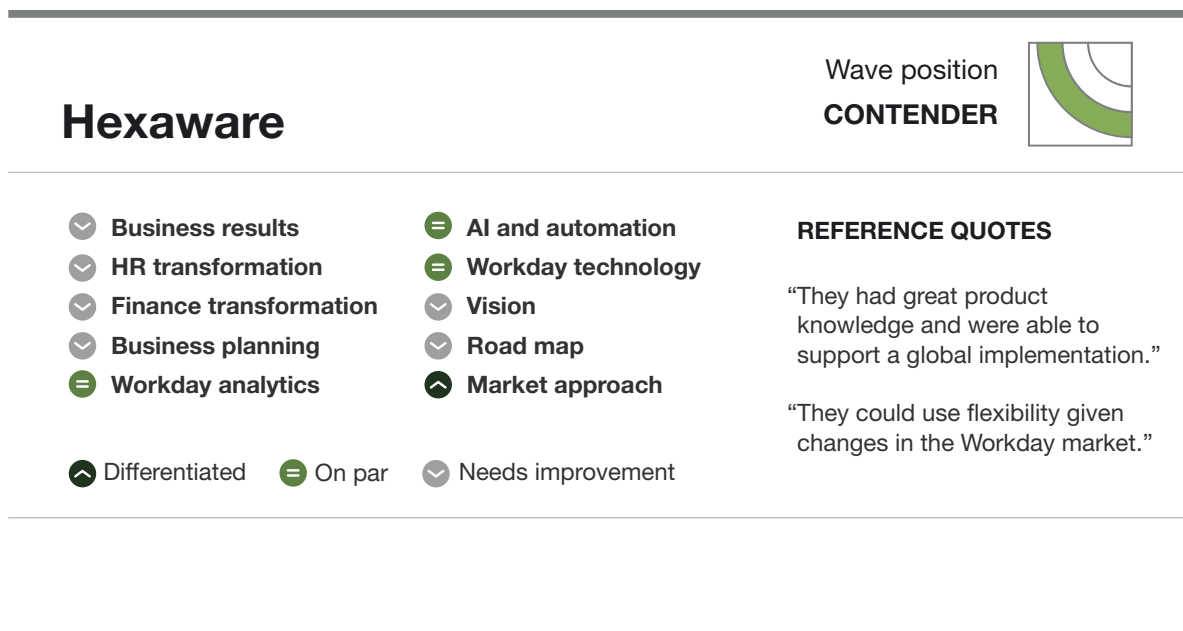
Our evaluation found that Hexaware (see Figure 12):

- › **Has strong capabilities for ongoing support and Workday technology.** Hexaware’s major focus is application management and support; the provider is not an approved partner for Workday consulting and implementation.
- › **Needs to formalize its partnership for implementation to gain more traction there.** Though Hexaware does transformation through its application management services and has project examples, it won’t be taken seriously for implementation work while its approved partner status is “AMS only.”
- › **Is the best fit for application management work, including reports and integration.** Hexaware is best suited for work that Workday formally recognizes — for application support, it offers fixed-fee (including a \$150,000 starter services pack) and shared services models.

**Hexaware Customer Reference Summary**

Client references praised Hexaware’s ability to go above and beyond the contractual agreement and to adapt to changes in the business, but they also suggested it needs to evolve more.

**FIGURE 12** Hexaware QuickCard



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## Supplemental Material

### The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.



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## Integrity Policy

We conduct all our research, including Forrester New Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

## Endnotes

- <sup>1</sup> Source: "Services Partners," Workday (<https://www.workday.com/en-us/partners-services/partners/services-partners.html?q=&partnerType=Services%20Partner>).
- <sup>2</sup> Source: "KPMG Powered Enterprise," KPMG (<https://home.kpmg/xx/en/home/services/advisory/management-consulting/kpmg-powered-enterprise-new.html>).

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