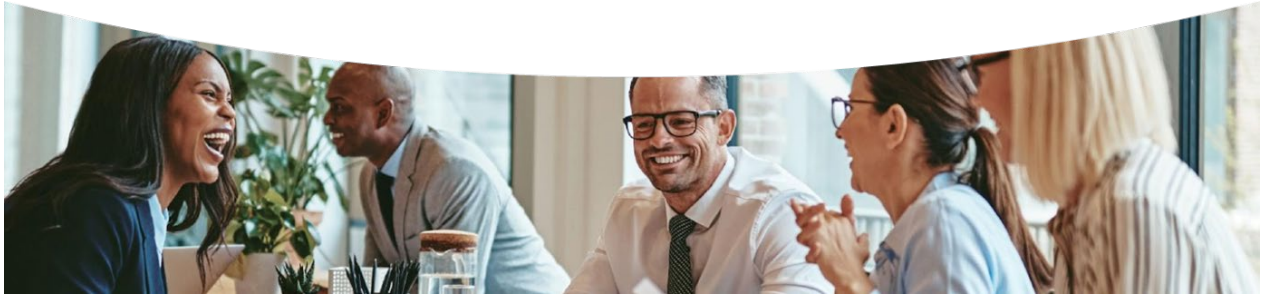
Workday Customer Experience

Implementation and Post-Production Services for Workday Adaptive Planning

Service Definition Document

G-Cloud 15



Who are Workday?

Workday is a leading provider of enterprise cloud applications for finance and human resources, helping organisations adapt and thrive in a changing world. Workday's applications for financial management, human resources, payroll, planning, spend management, and analytics are built with artificial intelligence and machine learning at the core. This helps organisations around the world embrace the future of work by moving away from disconnected systems and processes. With a unified solution, you are able to manage your most critical business functions, all supported by Workday's commitment to continuous innovation, ensuring you are always on the latest technology without disruptive upgrades.

What is Workday Adaptive Planning?

Workday Adaptive Planning is a centralised, automated planning solution, with an intuitive user experience, that provides flexible and scalable modelling to fulfil any planning requirement, enterprise-class performance, and groundbreaking AI/ML features for predictive modelling and analytics. With Workday Adaptive Planning, you will be able to eliminate unwieldy spreadsheets, disconnected planning processes, and all the challenges your team and organisation currently face when creating and managing your business plans. This is all backed by continuous innovation by Workday, so you will always be on the latest technology with no painful upgrades.

Adaptive Planning Benefits

We leverage the powerful and flexible Workday Adaptive Planning platform for superior results:



- **Flexible Modelling:** We build dynamic, driver-based models that mirror your unique business logic, enabling sophisticated planning without the constraints of rigid, pre-built structures.
- **Business Agility:** Empowering continuous, company-wide planning allows you to model multiple scenarios, forecast with greater accuracy, and make faster, more informed decisions in response to change.
- **User Adoption:** An intuitive, self-service interface empowers finance and business users alike, driving collaborative planning and ownership of results across the entire organisation.
- **Unified Intelligence:** Seamless integration with Workday Financials and HCM provides a single source of truth, automatically unifying actuals with plans and accelerating your planning cycles.

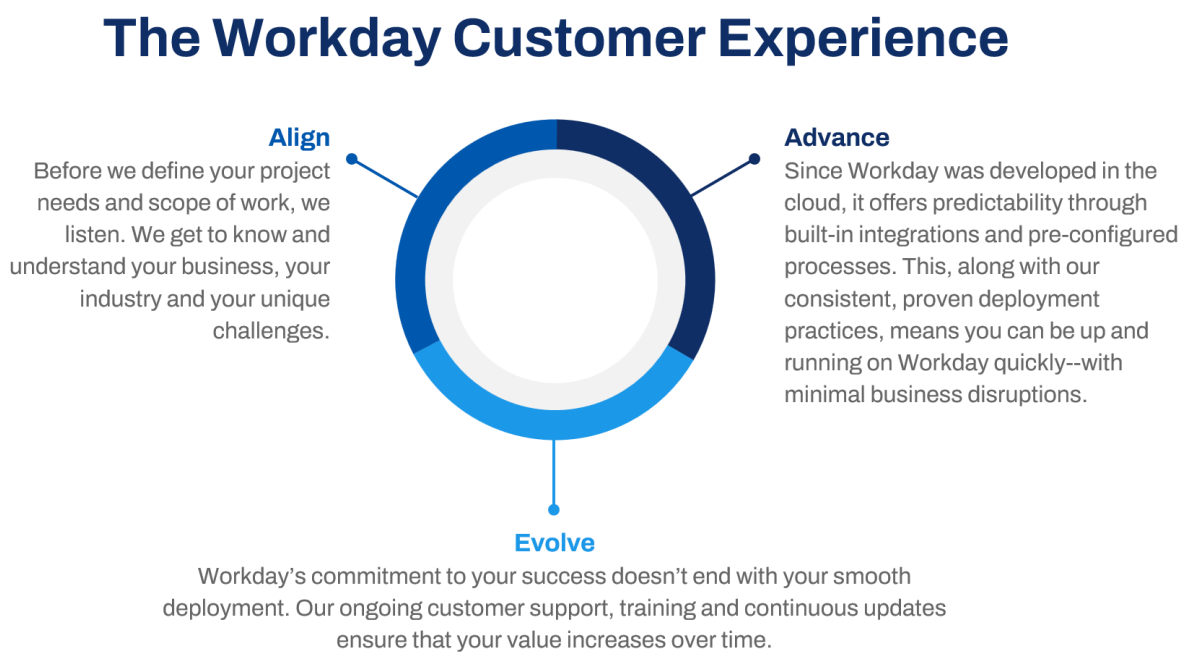
Our commitment is to help you build a connected, agile planning capability that scales with your business and drives better, faster decisions.

The Workday Customer Experience

In our rapidly changing world, organisations struggle to do it all:

- Manage the day to day
- Keep up with changes in the business, organisation, market, regulations and more
- Drive Continuous improvement with new systems, processes, and innovations

The Workday Customer Experience is a structured, continuous journey designed to ensure customer success and maximise value over time. It is divided into three distinct yet connected phases: Align, Advance, and Evolve.



Our Services

Our approach to Services is different and provides the right knowledge at the right time to constantly create value for you, through:

Access to Expertise

Expertise you need to deliver



Offerings

- **Deployment Services:** Guidance and support for initial and subsequent deployments of Workday products, including project management, testing, and change management.
- **Strategy Services:** Strategic consulting in all solution areas.
- **Advisory and Consulting Services:** Access to Workday experts for advice, hands-on support, and troubleshooting through offerings like Ask an Expert and Expert Assist.
- **Integration and Data Services:** Assistance with building, deploying, and managing integrations, as well as services for data extraction, transformation and loading.
- **Mergers, Acquisitions, and Divestitures:** Specialised support for tenant consolidation, separation, and data management during corporate restructuring.
- **Advanced Services:** A suite of services that includes specialised expertise in Testing, Change Management, and Program Management/Governance.
- **Optimisation Services:** A variety of packages to help you get the most out of Workday, including functional reviews, health checks, and technical guidance.
- **Training and Certification:** Including Implementation Training, as well as the Workday Pro program offers certification paths to build and validate expertise in various Workday product areas.

Why Workday Global Professional Services



We only do Workday technologies, we know our products better than anyone because we built it and we've been training other people to develop, deploy, and run it for years. We can help you do that too.

With Workday you have a partner that brings integrity, collaboration, and creativity to our customer relationships to help you drive the highest possible value for your organisation.

2,110+
Workday Consultants
with *6,626 Certifications*

6,440+
Primed Projects

61
Global Offices

68
Industries

95%+
Customer Satisfaction

70%+
Customers Live

Following Proven Success Paths

Customer-tested journeys that drive predictable success

Proven Methodologies

Workday and our partners use tested approaches that have driven success for thousands of customers.

Data-driven Insights

With all customers on the same version, we leverage data and signals to feed digital success paths and help customers improve.

Proactive Success Programs

We guide your path with proactive customer success programs.

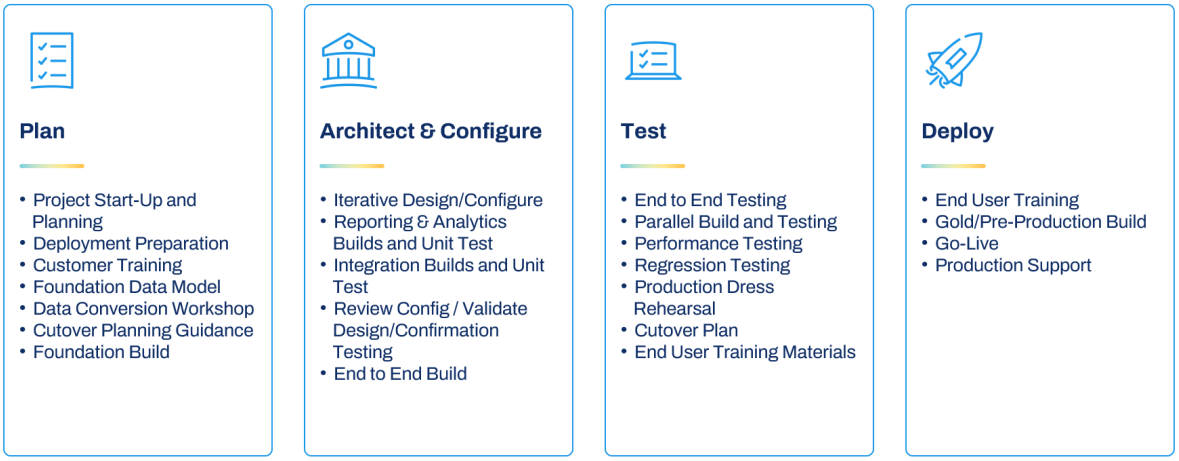
Release Playbooks

We offer continual advice to drive value from our new innovations.

Workday Methodology

Workday is committed to your organisation's successful deployment of the Adaptive Planning solution. While Workday's Methodology (below) will serve as the baseline roadmap for this engagement, we will work with you to further define options and project scope to provide a finalised deployment quote. It is a deliverable-based approach and applies across applications, business processes, and technologies. The overall process is supported by a set of planning documents, activities, techniques, and deliverables necessary to effectively implement Workday for your organisation.

Governance | Project Management | Knowledge Transfer



Approach

Our expert services and proven methodology ensure a fast, efficient, and successful transition to Workday, focusing on rapid time-to-value and organisational independence. The Workday Deployment Methodology enables our proven track record of completing deployments on time and under budget

Partnering for Success

We view deployment as a cohesive partnership, working alongside your team to ensure alignment and shared ownership from day one.

- **Unified Team Approach:** We establish **one cohesive team** encompassing your key stakeholders and our certified consultants, fostering open communication and collaborative problem-solving.
- **Established Governance:** We quickly establish clear **project governance,** controls, and a unified project roadmap. This includes setting expectations, defining roles, and proactively managing risk and issues with assigned ownership.
- **Shared Vision:** We orient your customer team to our deployment approach and methodology, ensuring a clear understanding of scope and shared commitment to the project's success.

Core Deployment Services

- **Solution Configuration:** Deployment using best practices, providing **real-time data access** and eliminating manual efforts.
- **Data Migration:** Expert conversion and secure transition of all critical **historical data** to the cloud.
- **Integration:** Utilisation of **Cloud Connect** and **Connectors** for seamless communication with third-party systems and organisations.
- **Knowledge Transfer:** Comprehensive training that ensures your team achieves **self-sufficiency** in the use, management and enhancement of the solution.

The Workday Professional Services Difference for Adaptive Planning

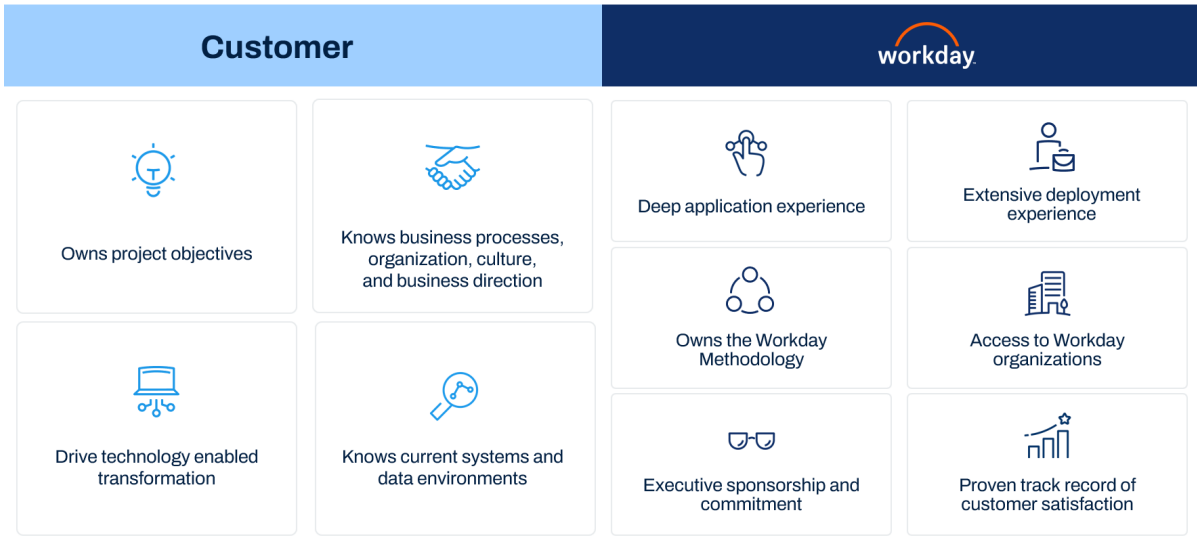
Partnering with Workday Professional Services for your Adaptive Planning implementation gives you a faster, lower-risk path to value:

- **Accelerated Time to Value:** Our consultants bring proven models, pre-configured templates, and best-practice design patterns so you spend less time building from scratch and more time using the platform to drive insight.
- **Design That Works in the Real World:** We combine deep product expertise with implementation experience across industries to shape driver-based models, dimensions, and workflows that reflect how your business actually plans, not just how the tool works.
- **Connected from Day One:** Because we understand enterprise planning and source-system integration, we design your planning environment to connect cleanly with your data landscape, improving data quality, consistency, and trust in your numbers
- **A Platform You Can Evolve Yourself:** We implement with “future you” in mind - so your team can extend models, add scenarios, and scale planning without heavy external dependence.

Our goal is to leave you with a robust, business-ready Adaptive Planning solution and a confident team that can keep evolving it as your organisation changes.

Teamwork drives Success

Working together to deliver value through initial implementation and continued innovation.



Training

The Workday Adaptive Planning Administrator Training Kit subscription library contains online self-directed courses that Workday Adaptive Planning administrators and users can access anytime for product training. Courses include videos and how-to demonstrations. Many courses also include a training tenant to practice topics in a guided format.

Adaptive Planning Administrator Training Kit

Recommended Pre-Project Training
- Introduction to Modelling ✪
- Operational Modelling (Financial Planning) ✪
- Workforce Planning

Modelling Training
- Introduction to Modelling ✪
- Operational Modelling (Financial Planning) ✪
- Use Modelling Design Decisions to Adapt and Collaborate ✪
- Build a Model
- Maintaining Your Model
- Process Steps to Enable Access Rules for Implemented Models

Consolidation Training
- Workday Financial Management for Workday Financial Planning
- Financial Consolidation for Adaptive Planning

Reporting Training
- Web Reporting Fundamentals ✪
- Web Reporting: Beyond Basics ✪
- OfficeConnect for Everyone ✪
- Analysing with Interactive Dashboards ✪

Integration Training
- Integration Framework Fundamentals ✪
- Integration Framework On-Premise & Scripted Sources ✪
- Integration Framework & Salesforce

End-User Training
- On-Demand Training for Contributors

✪ Course includes access to a training tenant for hands-on activities to practice topics in a guided format

Additional Services

Should customers require, Workday can provide additional services to compliment the main implementation. These are outlined below.

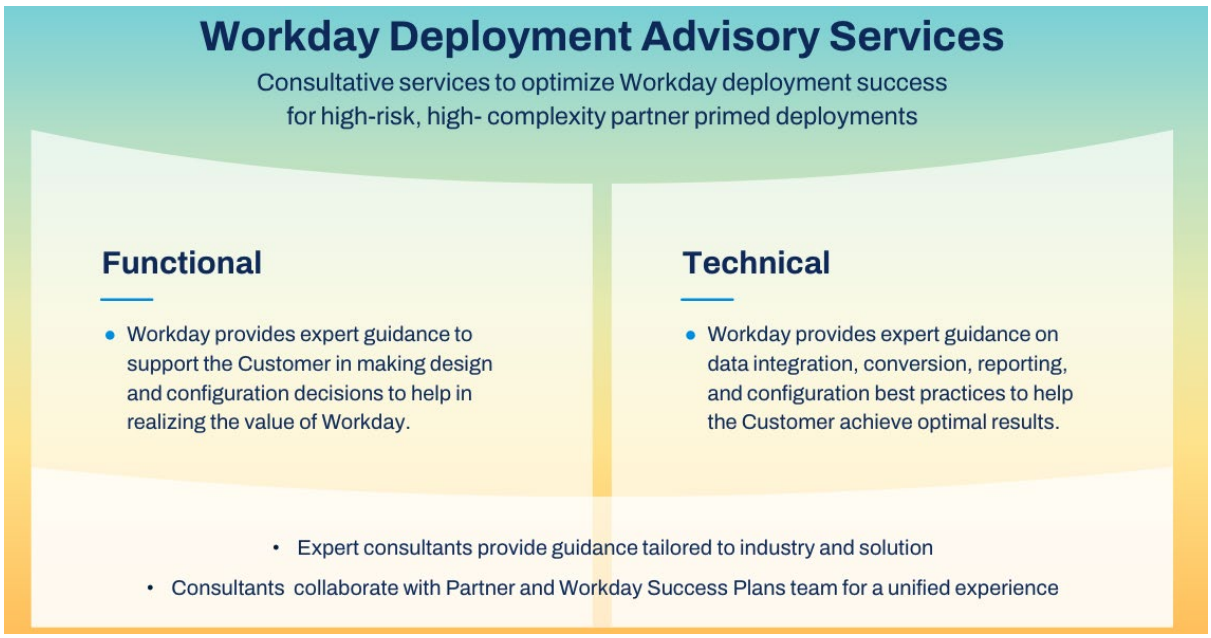
Workday Advisory Services

Expertise and Experience
Deep expertise in deployment strategy, design and configuration leveraging Workday's countless deployment experiences.

Partnership and Engagement
In depth support on the most complex areas of deployment

Tailored Solutions
Deployment guidance aligned to Customer's business objectives

Fast Track ROI
Enablement for optimised product usage and on-time delivery



Post Deployment Services

Workday offers services once customers are live, from Phase X deployment services to implement additional functionality, Advisory Services, adhoc requirements, or packaged services. For additional information, contact your Account Team and they will work with you on the best service for your organisation.

About Workday

Workday is a leading provider of enterprise cloud applications for finance and human resources. Founded in 2005, Workday delivers financial management, human capital management, and analytics applications designed for the world's largest companies, educational institutions, and government agencies. Organisations ranging from medium-sized businesses to Fortune 50 enterprises, have selected Workday.

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