

# Workday Optimisation.

28 questions to ask yourself about  
your Workday project.

# Introduction

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Workday is a powerful and innovative tool to help businesses manage data about their people.

It offers a service-based architecture to provide a consistent set of processes covering the whole employee lifecycle and day-to-day events such as absence management.

However, with this versatility comes a complexity that makes it difficult to fully realise the significant benefits Workday can provide. Until you optimise Workday for your business, you will not be maximising your return on the investment.

This paper gives you a framework to help you review your current Workday deployment and support structures, test and challenge the way you are currently using Workday, and build a plan to realise the potential of your investment.

## **The dangers of deploying Workday at speed**

Workday is built on a single code base, which means all customers use exactly the same version. This ensures that all Workday's clients are up to date, benefit from fixes and upgrades immediately, and see the same core design.

This approach simplifies support and makes it much easier for Workday to develop and deploy new functionality consistently. Workday

releases regular updates and enhancements to all customers at once, and there is a defined process to review, test and deploy these changes that is the responsibility of the customer.

During your Workday implementation, you will have been advised to stick to 'out of the box' configuration as much as possible. This undoubtedly makes deployment faster and easier, but it means your business may have had to compromise the ways you do things to fit within the standard Workday processes.

These compromises can lead to gaps in the functionality that impact the adoption of the system.

Another consequence of rapid deployment can be a lack of planning for the post-Go Live management of Workday. This includes the direct support team and also the system management – the process to plan, configure, test and deploy changes and updates to the live production tenant.

Workday requires you to continuously adapt your business to take advantage of the regular enhancements and new features. You cannot stand still. You need a solid, reliable design base to build on and effective processes to plan,

build, test and deploy new functionality while providing support to your business for day-to-day activities.

Issues with design can lead to increased support calls, poor user experience and poor adoption, all of which can derail your ability to adopt new changes. It can become a vicious circle that needs to be broken.

## **How can you identify whether your Workday deployment and support structures have been compromised?**

You can conduct a high-level review of your Workday deployment and support structure using 28 self-assessment questions.

Use our checklist below to understand where you stand.

**John Brady**  
**Senior HRIS Consultant**

|                                                                                                                                                                        | Your response |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <b>Design</b>                                                                                                                                                          |               |
| <i>Was the design of Workday right during initial implementation?</i>                                                                                                  |               |
| 1. Have you been able to avoid changing parts of the design to better match your ways of working?                                                                      |               |
| 2. Is your job architecture fully built out, allowing for detailed reporting, global consistency, more accurate integrations to payroll and more inherited attributes? |               |
| 3. Are your key business processes working as expected?                                                                                                                |               |
| 4. Do users complain they are getting too many notifications or approvals?                                                                                             |               |
| 5. Do approvals seem to bounce around between too many different roles?                                                                                                |               |
| 6. Are users clear about their responsibilities regarding approvals?                                                                                                   |               |
| 7. Is your people data remaining up-to-date and accurate?                                                                                                              |               |
| 8. Is there global consistency in your people data?                                                                                                                    |               |
| 9. Is Workday your master people data system in all countries?                                                                                                         |               |
| 10. Are the integrations between Workday and other systems working effectively with minimal errors?                                                                    |               |
| 11. Do you get the reports you want and need from Workday?                                                                                                             |               |
| 12. Are your reports delivered in a consistent format?                                                                                                                 |               |
| 13. Is the data in your Workday reports consistent?                                                                                                                    |               |
| 14. Are your Workday dashboards optimised for people in key roles?                                                                                                     |               |
| 15. Is your security model fit for purpose?                                                                                                                            |               |
| 16. Are you confident you are meeting all requirements for access to data?                                                                                             |               |

|                                                                                                                                                     | Your response |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| <b>Enhancements</b><br><i>What did you delay at implementation that you now need to deploy?</i>                                                     |               |
| 17. Are there new integrations that would enhance the value of Workday to the business?                                                             |               |
| 18. Are there new modules that would drive more usage and more efficiency?                                                                          |               |
| 19. Have you been able to shut down systems that you had planned to replace with Workday?                                                           |               |
| 20. Do you need to enhance the design to support the more complex scenarios like international assignees, contingent workforce, or retired workers? |               |

|                                                                                               | Your response |
|-----------------------------------------------------------------------------------------------|---------------|
| <b>Support</b><br><i>Did you set up the right support model to manage Workday day-to-day?</i> |               |
| 21. Are you up to date with Workday releases?                                                 |               |
| 22. Do you have an efficient and effective release management process?                        |               |
| 23. Do you have adequate governance around changes to ensure you maintain the global design?  |               |
| 24. Do you have adequate governance around changes to ensure rapid decision-making?           |               |
| 25. Do you track usage and adoption of Workday?                                               |               |
| 26. Do you measure user satisfaction?                                                         |               |
| 27. Do you have a high number of Workday support tickets?                                     |               |
| 28. Do you consider the time to resolve Workday support tickets acceptable?                   |               |

If you answer these questions honestly, you may feel like you need to start your Workday deployment from scratch, but that's not the case.

However, you may not have the time, resources or expertise internally to work out exactly what you need to do, which is where bringing in external expertise can help.

Preos can gather insight, interpret what we find and build an actionable plan that you can decide how to take forward.

# A six-step approach to Workday Optimisation

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Preos has created an approach to Workday Optimisation which can be adapted according to each organisation's specific needs.

It is built on the following six services.

## **1. Core System and Process Review**

Review the way your Workday tenant has been implemented to ensure processes, data, your support organisation and governance work well together.

## **2. Infrastructure Review**

Look at how Workday integrates with other systems and technology.

## **3. Adoption Acceleration**

Identify ways to make Workday easier and more satisfying to use so more of your staff use it.

## **4. Support Structure**

Analyse your user support structure, including how you work with vendors, for ways to control costs, optimise user satisfaction, and get the right results.

## **5. Roadmap Planning**

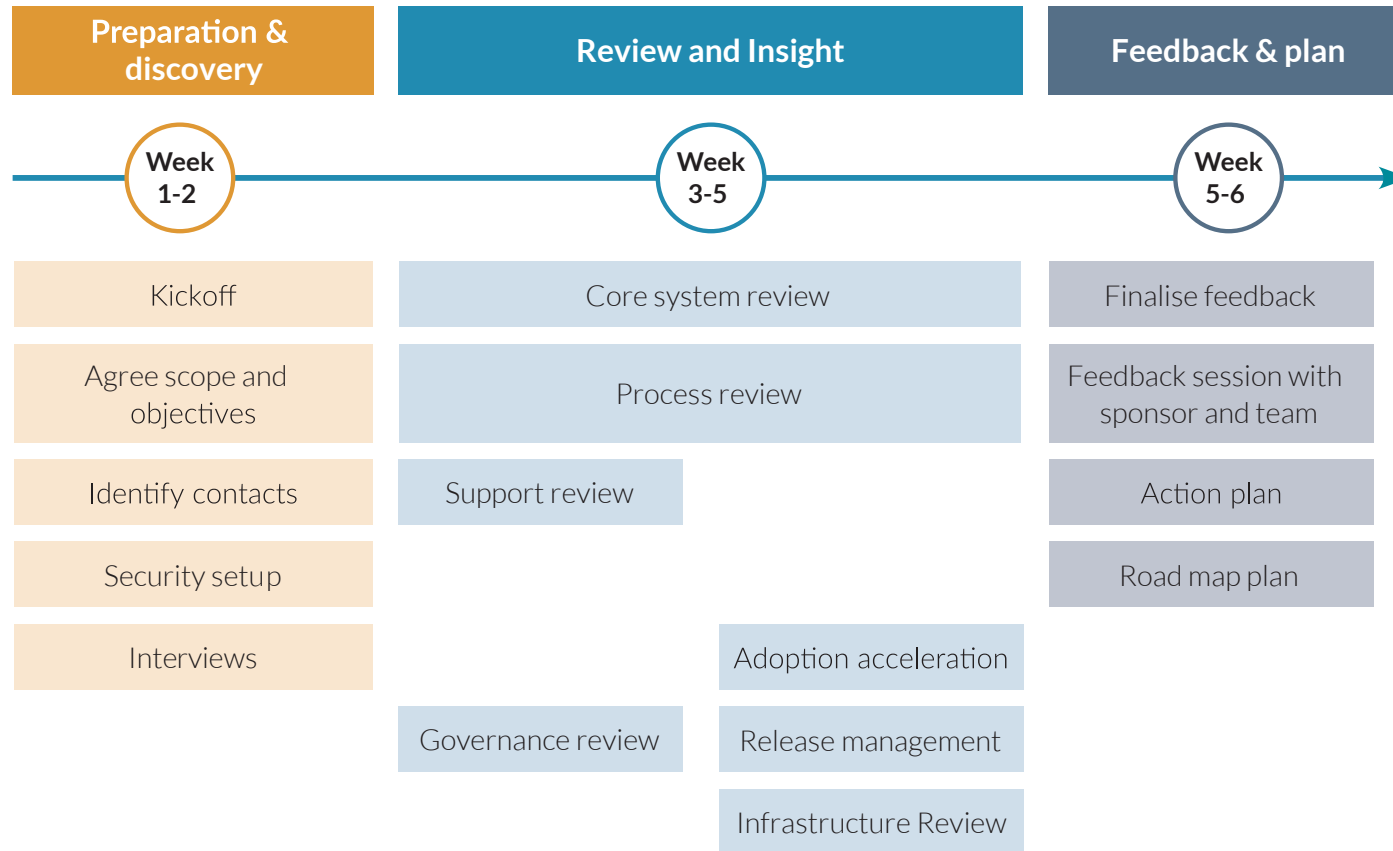
Plan the future development of your Workday tenant to ensure it continues to meet your evolving needs.

## **6. Release Management**

Explore your update and release management procedures and highlight ways to be more efficient.

In the following section, we explain how we run a typical Workday Optimisation project in practice. You can choose to work with us to apply this approach to your Workday instance or use it as a basis for your own Workday Optimisation project.

# Workday Optimisation in practice



Example timeline (note this is not necessarily elapsed time)

# Key Tasks

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## Phase 1 - Preparation and discovery

### Kick off to mobilise the team

- Meet with the project sponsor, workstream leads, and system owner to agree scope and objectives and plan.

### Interviews to gain insight

- Once key contacts are identified, hold short interviews to understand current perspective, pain points, opportunities for improvement and benefits currently being realised.

## Phase 2 – Review and insight

### Core system review

- Perform a suite of reviews looking at the core configuration of Workday to identify any issues that might be impacting efficiency, effectiveness, accuracy or adoption.
- Review your governance structures and processes and the high-level support model for Workday including tenant management.

### Process review

- Review the design of key business processes to identify opportunities to simplify and improve. This will include security and roles. Consider workflows and notifications design along with the overall approval processes.
- Analyse data maintenance processes and how you maintain global master data.
- Depending on scope, perform a more detailed analysis of specific areas such as Support, Adoption, Release Management, Technical Infrastructure and Integrations.

## Phase 3 - Feedback

- Collate findings and feedback into a high-level report by area in Red/Amber/Green format with suggested mitigation actions where applicable.
- Build the suggested actions into a short-term action plan together with a longer-term road map plan for future enhancements.
- Identify the internal or external resources you will need to put the plans into action.
- Present to your governance group for formal sign off.

With the right resources in place it is possible to deliver this process in-house. However, this approach often requires the redeployment of valuable staff who may not have the relevant expertise, or whose time may be better focussed on business as usual.

**Which is why many organisations choose to work with Preos when seeking to optimise Workday.**

# Why Preos

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**Preos has proven expertise working with Workday in small, medium and large organisations around the world. We bring a balance between technical knowledge and a real-world HR perspective, helping organisations to get the right skills in place and to establish the processes and structures to meet their individual needs.**

We create environments in which change is accepted and adopted, and cultures that support constant improvement.

We're confident we can make a big difference to organisations that would like to get more from Workday. With our insight and detailed planning, you will be well-equipped to move to the next level with Workday, driving user adoption and realising the full potential of this powerful system.

- Preos specialises in Workday optimisation.
- We are experienced in Workday implementation and optimisation; helping clients maximise the return on their investment.
- Our team comprises highly accomplished subject matter experts and a network of specialist consultants with an in-depth understanding of all Workday solutions, including HCM, Finance, and Analytics.
- Preos consultants have developed hands-on expertise in the technical, process, organisational and infrastructure elements of Workday over many years' involvement in making Workday happen across a broad range of organisations and sectors.
- This expertise is enhanced by an active research programme and our Partner insights into Workday's strategic roadmap.
- Preos consultants work as part of your team, on-site as required, collaborating closely with you throughout the programme.
- You get the precise support you need for each stage of the project, so you don't pay for expensive resources you don't use.

*If you'd like us to help you get more out of Workday please email*

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