

# Why Workday Go-Live is just the start.

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# Why Workday Go-Live is just the start

Workday is undeniably a powerful and innovative tool. Its HR implementation delivers enormous benefits for organisations, enabling them to manage data about their people effectively and providing consistency in key people processes.

Implementation partners use a tried and tested Workday methodology to get the system to the go-live stage. This means that technically Workday can be up and running as part of a predictable and manageable process.

*Yet even the best implementations have issues that often emerge only after the system has gone live. And they have nothing to do with the technical capabilities of Workday.*

These issues arise because the standard methodology fails to address the people side of Workday implementation: change management, stakeholder relations, communications, training, adoption and so on.

Customers are often left to find their own solutions and, given that most corporate employees will only be involved in a small number of such implementations in their careers, the opportunities to learn how to do it well are limited.

Which is why Preos commissioned this research project to assess how well Workday is meeting organisations' needs. Our objective is to share learnings, approaches and success stories, and to support other organisations in maximising the benefits and optimising Workday post-go-live.

We focused specifically on the HR implementations of Workday. We interviewed HR Leaders and HRIS Specialists from a range of industries, from retail to finance and technology. All interviewees had implemented Workday in the last three years and between them had 14,000 to 70,000 Workday users.

We talked to organisations that are generally considered to have implemented Workday successfully. This success was reflected in our respondents' average scores when asked to assess the success of their implementation (8.75 out of 10) and realisation of Workday's benefits (7.75).

While even these relatively high scores demonstrate room for improvement, the stories behind the numbers reveal missed opportunities and remarkably open feedback from all respondents, that they generally felt they could have done better. We thank all our interviewees for their candour and for this reason have kept the identities of our contributors anonymous.

Analysis of the feedback we received shows that organisations should focus on five key areas to maximise the benefits of Workday on a long-term basis:

- 1. User experience** – Get feedback to keep your systems and processes relevant to the needs of the user and the business
- 2. Change management** – Start change management early and continue post-go-live
- 3. Support structure** – Set up a strong team and define ways of working
- 4. Integrations** – Prioritise critical platforms/processes and invest from the start
- 5. Prepare for new releases** – Create your roadmap and release management plan.

We explore these areas in greater detail in section 3 of this report and make recommendations based on our interviewees' responses and our own extensive experience of implementing and optimising Workday.

**But we begin with a brief review of lessons that can be learned from our interviewees' experience of implementation.**

# 1. Implementation of Workday

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Of all the HRIS vendors, Workday has the most established and proven approach to implementation, helping to increase the chance of success for organisations that choose to use it.

However, Workday's approach concentrates on software implementation and doesn't address other crucial areas for a successful implementation, such as change management and process changes.

Unsurprisingly, our interviews highlighted that every Workday implementation is different, depending on the organisation, its requirements and approach. And, as with any large-scale technology implementation, it is unlikely to be completely challenge-free.

As one respondent commented, *'No matter how much you prepare, there is always more to do, and we uncovered some things along the way.'*

Despite this, the individuals we surveyed rated their implementation as successful, assessing their implementation at an impressive average of 7.75/10 (where 1 is very poor and 10 is exceeded expectations).



*Our interviews with organisations that had implemented Workday successfully revealed four ways to increase the chance of implementation success.*

### **1. Your programme management methodology has to be well-defined**

Implementing Workday is not about new technology alone. A strong programme management methodology based on the established Workday approach is vital.

The methodology ideally needs to be driven by an experienced team supported by consultants with expertise in Workday. These specialists will have supported multiple Workday installations and so will be familiar with best practice and common challenges. Employees are unlikely to have the same level of experience and so are effectively required to find solutions on the spot.

A disciplined approach with a clear programme structure, robust governance processes, accountable workstream owners and a well-defined implementation plan is essential.

### **2. You will have to make compromises**

You need to be comfortable with the fact that you will have to make compromises along the way. It may be that you cannot roll out all the Workday features immediately due to time, budget or organisational readiness.

Instead, make sure you have a prioritised roadmap for future features and investment. And always keep a realistic view of how long the implementation will take and the resource required.

As one respondent said, *'Don't set it up so everyone has to be a hero to get over the finish line.'*

### **3. Understand your processes, systems and roles**

Keep your people at the forefront of the design and engage with HR and the wider business to understand processes, structures, operations and roles.

Understand current and planned Workday functionality and create a design that is adaptable for future needs. The key to a good configuration (and reducing administrative tasks) that delivers the desired benefits is in the process design.

### **4. Define how you will manage change**

The introduction of new systems such as Workday will require people to change the way they work. Providing support through this change increases adoption and reduces resistance.

Create a change plan that runs alongside the implementation plan and keep the mission and case for change at the heart of it.

For more details on how to improve adoption and optimise Workday, read [\*\*Workday Optimisation: 28 questions to ask yourself about your Workday project.\*\*](#)

# 2. Getting the most from Workday

Managing Workday to deliver the greatest success and benefits doesn't stop at go-live.

Managing the system itself, including the configuration, releases and new features, is part of the story. But integrations with other systems, new and old, and the adoption and engagement from users are equally important.

## What did the organisations set out to achieve from Workday?

Our research respondents were very conscious of ensuring Workday delivered long-term benefits that met the needs of the organisation beyond the technology and organisational data aspects alone. These ranged from increasing self-service and reducing administrative tasks for HR and end-users to simplifying processes, increasing the speed of decision-making, and reducing operating costs.

Overall, benefits realisation achieved the highest score in the survey at 8.75/10.

All respondents saw long-term value in Workday. As one interviewee said, *'It has been a game-changer for us... we went live and it picked all the low hanging fruit... and there is more impact yet to come.'*

This finding is significant because historically, HR professionals have struggled to build business cases and demonstrate the delivery of benefits post-go-live.

**We asked participants to assess their Workday implementation against four criteria scoring from 1 (very poor) to 10 (exceeded expectations).**

	Average Score
Benefits	8.75
Implementation	7.75
Users and adoption	7.60
Support	6.10

Our research shows organisations should focus on five key areas to maximise the benefits and optimise Workday post go-live.

### 1. User experience

This needs to be at the core. It is central to ensuring high user adoption and designing processes that work for the organisation. Engage with your people to understand their needs, involve them in the testing process, and monitor the processes and feedback post-go-live. Educate your people in their roles in achieving business outcomes.

### 2. Change management

Start change management early and make sure it continues post-go-live. Have a clear plan and governance for how to manage future changes. Secure visible and active leadership support for Workday.

### 3. Support structure

Set up a strong team, right for the size of the organisation. Invest in resource and skills for the ongoing management of Workday. Clearly define ways of working with the organisation and external partners or vendors and engage directly with Workday.

### 4. Integrations

To drive automation and productivity, set up integrations across the technology systems in the organisation, collaborating across HR, Finance and Payroll. Prioritise the critical platforms and processes and invest in getting it right from the start. Review and optimise integrations regularly and design for the future.

### 5. Prepare for new releases

Carry out strategic Workday roadmap planning proactively and in line with business needs. Create a Workday release management plan. Stay connected to keep informed about new functionality. We explore each of these areas in more detail in the next section of this report.

# MindMap<sup>®</sup>: Optimising workday post-go-live



# 3. The 5 keys areas to optimise Workday post-go-live

## 1. User experience

Adoption and how people experience the system are naturally critical to overall success. Without a good user experience and effective processes, adoption suffers.

Respondents to our survey scored 'users and adoption' 7.6 (meeting objectives), which is good but shows plenty of room for improvement.

How can others meet or exceed this level of success?

### 1.1 Involve users from the start

Engage with the business to understand users' needs from the system early in the process. Develop a strong understanding of their needs and use this insight to inform the process design, keeping the user experience at the forefront.

Understanding your stakeholders' requirements provides an opportunity to review existing processes where there are opportunities for improvement, rather than simply replicating the as-is. Can processes be designed in a way that empowers employees and enables them to be as self-sufficient as possible?

Some survey respondents told us that they

would like to challenge their processes more as Workday evolves in the organisation, as although they delivered what was asked for by the business, there is an opportunity for a more straightforward solution.

Involving Workday users from the start helps to achieve buy-in and support. One respondent shared how they even included users in the selection process for Workday, creating a net promoter score for the three HRIS options considered.

### 1.2 User testing

Preparation for go-live requires rigorous testing, not only to check the processes function correctly but to make sure they meet the needs of the different parts of the organisation. User testing is also an opportunity to engage with the organisation and help get individuals ready for the change.

All our respondents involved their people in testing to some degree and felt it helped with ownership and adoption.

Engaging with an experienced external party to support testing was generally recommended. One respondent told us he would do this next time, making sure it was specific to his

organisation: *'We did testing for a long time, but we didn't have the external expertise to tell us the best practices.'*

Another respondent advised caution. Involving large groups in testing was logistically challenging and resulted in re-work. They recommended using a small expert team for testing and using a demo tenant to engage with large groups and help the functions to plan for the changes.

### 1.3 Adoption

Immediately post-go-live, our respondents saw good interactions with Workday and a high percentage of log-ins.

Most recognised, however, that building high adoption levels across all areas of the organisation is work in progress and that there is more to do.

One interviewee spoke about the challenge of *'how to move people to use [Workday] as a real resource and tool in their everyday work and business decisions, not just a database.'*

All saw a spectrum of user behaviours in the manager and user population. As one respondent said, *'Some are intellectually curious, some are calling the systems team, some are looking up data.'*

We heard many success stories of cyclical processes, with the highest ever completion scores for annual reviews, and faster pay review processes.

Many organisations have put engagement and education activities in place for regular processes and to make Workday part of the decision-making process. These activities included informal drop-in sessions, improving the feedback loop, change management campaigns and additional training programmes.

#### 1.4 Mobile as an enabler

Many respondents spoke about the value of setting up mobile access in their configuration, particularly for remote, field or retail staff. Adoption is always more successful when the means of access have been tailored to the users.

One retail organisation described how listening to their people to understand their experiences helped them to identify improvements. This understanding led them to provide iPads for shop floor and canteen staff to access Workday. They also changed some configurations in the structures for larger teams to reduce administration for managers.

*'Retail managers need to be on the shop floor and not behind their desks doing job changes, holiday requests and job requisitions. It is not necessarily the processes in Workday, but it is looking at their structures.'*

#### 1.5 Feedback loop and reporting

To understand how processes are being used as Workday matures, it is vital to set up reporting. If a process is seeing a fall in users, organisations need to be able to report on this and review the configuration.

Reporting also plays a role in user adoption. By giving managers good reporting and insight, reporting can support engagement. As one respondent put it, *'What are you telling [me as a manager] that I care about?'*

Having easy access to accurate organisational data is a powerful benefit, and the real-time Workday reporting and dashboards can support more effective decision-making throughout an organisation. One organisation's HRIS lead told us *'HRBPs love full visibility of their data for the areas they look after. Now they can go in and see where processes are sat and has helped them with business decisions.'*

Another explained how the Coronavirus pandemic highlighted the value of the data and reporting enabled by Workday: *'We have been able to know about our workforce in minutes without weeks or months of gathering info from various places. This level of efficiency and responsiveness is something we can assign a hard saving to.'*

These immediate insights have supported the promotion and adoption of Workday. Another organisation spoke about how they have been able to set up key worker forms by mobile device and absence codes for Covid-19, resulting in

clear and accurate reporting, and making it quick and easy for people to use.

Keeping the user experience at the core, reviewing processes with users, and providing insightful reporting all form a vital part of high adoption and Workday effectiveness in the organisation.

## 2. Change management

Implementing Workday is a significant business change. As one respondent said, *'We went through such a transformation, there was no self-service before, we [HR] did everything for managers, we held their hand.'*

Change management must be central to the implementation and ongoing management of Workday if its benefits are to be realised. But how should organisations approach this?

### 2.1 Set up a comprehensive change and communication plan

Establishing a change and communication plan helps build alignment to the change. Our research shows the importance of starting change management early in the implementation timeline.

*'Think about change management from the start,' said one of our interviewees, "You can't start too soon, the minute you understand what the system will do for you.'*



Regular and open communication with the business helps to bring people on the change journey. As one organisation told us, *'We started our change journey at the start of implementation, so change and implementation went alongside each other, which I think worked well. We were communicating [with] the business the entire time, and we were open and transparent with them about what to expect.'*

## 2.2 Strong leadership impacts adoption

Having strong leadership and role models to promote Workday was seen to impact user adoption and behaviours directly.

*'Where I worked previously, leadership did not take an interest' said one interviewee, 'and that filtered down.'*

Another reported more positive experiences:

*'The CTO does self-service and is a brilliant role model. People who see the power of it influence others.'*

The challenges in the optimisation journey are not insignificant and sponsorship at senior levels makes a difference to overall success. When CEOs talk about the benefits of Workday to the organisation, adoption and behaviours will be positively influenced.

People at all levels of the organisation can influence Workday adoption, from senior leaders to superusers. Many organisations had Workday champions to represent their function, advocate for the change and support their people, and all felt this role worked well.

## 2.3 Measure readiness and engage with your people

As the introduction of Workday involves changes in the way people work, it is as important to measure people readiness at the go-live stage as it is to assess technology readiness.

The impact of the changes on people and processes needs to be understood and planned for. This also allows any areas of concern or resistance to be raised and addressed. One respondent found significant differences in readiness and adoption between different regions, which they were then able to account for in their change planning.

Continuous engagement and monitoring of adoption post-go-live are equally essential for the full realisation of benefits. By understanding what is working and what is not, organisations can identify enhancements to increase adoption. Our respondents shared examples of engagement activities they had introduced, such as training in various forums, Q&A sessions, drop-in clinics, monthly newsletters and internal social media to engage with Workday users and gather feedback.

All organisations experienced 'noise', resistance or negative feedback in some form, and these forums helped them to ascertain the root causes and how to address the challenges.

# 3. Support structure

To optimise Workday post-go-live, organisations need to have a strong support team in place, with clearly defined roles, right for the size of the organisation. There is no right or wrong approach to the structure; most of the organisations we spoke to have a mix of internal and external resources, as well as consultant support.

On the support model, most of the organisations felt there is more to do. Support scored an average of 6.1/10 in our survey, the lowest score overall. So how can their peers improve on this?

## 3.1 Invest in resource

Workday cannot simply be implemented and left to run on its own. Investment in resources for the ongoing management of Workday is critical to the realisation of benefits and sustainability.

One respondent told us how, after implementation, all business-as-usual staff who had been working on the programme went back to the organisation. Those in support roles had limited capacity for optimising and improving, which resulted in quick-fix solutions. This compromise had consequences for processes, integrations and adoption, resulting in deterioration over time.

## 3.2 Governance for the roadmap

As part of the support model, there needs to be clear governance around the roadmap, the investment, and approaches to working with the organisation and vendors. The interactions and ways of working within the organisation need to be well-defined.

One respondent described how they have a change advisory board to manage changes and a change management plan which enables them to *'communicate to people when we can do their work.'* They focus on managers owning their processes and the importance of the business Workday being owned by them and not the support team.

Another organisation shared challenges around change management. With so many requests marked as urgent priorities, they highlighted the need to set up processes to capture requested configuration changes, a methodology to prioritise them, and Agile delivery methods to implement the agreed improvements.

### 3.3 Shape how internal and external teams work together

External support can be a confusing marketplace due to the number of models and services, yet it is hugely beneficial when used well.

There isn't one standard AMS (Application Management Services) model, as vendors differ from one to another in their offers. AMS can range from a simple ticketing solution, with added support on release management, through to the third-party vendors providing continuous improvement services.

It is important to shape how internal and external teams work together. One organisation felt *'we have not hit our groove on external support and the best way for the model to look and complement our expertise.'*

Given the low score attributed to the success of support models by our survey respondents, we asked how they might achieve greater success and optimise Workday on a long-term basis. Key themes shared included maturing the support model, making it sustainable and scalable and not reliant on key individuals, and reviewing ways of working with the wider business.

### 3.4 Engage with Workday

The role of Workday themselves should also be considered as part of the support structure. Exploring Workday's engagement model and the resource they provide can be invaluable to support future planning. As one organisation highlighted, *'Get involved in early product pilots, keep in touch with the customer success manager from the beginning and ongoing to understand what is coming.'*

Workday Community is a hugely powerful aspect of being a Workday customer. Users who engage with the community can find easy-to-deploy solutions for challenges they may have in their Workday configuration. Customers should make sure their support team actively engages with the Workday Community.

## 4. Integrations

The majority of the organisations raised integrations as something they would like to optimise more and introduce earlier in their Workday journey.

The level of integrations is a critical decision for the organisation to make. Integrations can drive automation and productivity, bringing together the systems, technology, data and processes in the organisation. They can improve alignment and collaboration across HR, Finance and Payroll.

### 4.1 Understand business systems and requirements

For integrations to work well, organisations need to have a deep understanding of the business systems and requirements and involve key subject matter experts.

Poor integrations can have a significant impact on the effectiveness of processes overall. As one organisation told us, *'That has brought our score down. We have a lot of legacy integrations and even today there are still many plasters that integrations teams have put on to fix the problem... that can cause a lot of issues if your systems aren't set up the same.'*

Integrations also affect adoption. *'We have one hand tied behind our back'* said one respondent. *'It is hard to drive adoption when there is no forced connection between systems.'*

## 4.2 Optimise integrations and review regularly

Our respondents frequently raised the need to optimise integrations with Workday early on and to review them regularly. They highlighted the importance of prioritising the critical platforms, requirements and processes between them, investing in getting it right from the start, and rigorously testing key integrations such as active directory and benefits.

Payroll, in particular, was mentioned as a priority integration by several interviewees.

## 4.3 Design integrations for the future

Within the complex interplay of systems and platforms, organisations should not simply accept current structures as they are and make Workday meet the present reality. Instead, the research shows the importance of looking at multiple options and designing for the future, taking a broader agenda, to make the integrations as effective as possible.

# 5. Preparing for new releases

Workday roadmap planning and an effective release management plan are essential if Workday is to continue to meet the evolving needs of the business and so ensure sustained success.

## 5.1 Define your approach to managing standard releases

Organisations must have a defined approach to managing standard Workday releases. Workday rolls out updates every six months, supplemented with weekly patches.

Organisations that use the system well ensure they understand and are prepared for new releases and have a plan in place to implement them.

One interviewee added *'Don't underestimate the time and resources needed to manage this'* while others worked with external support to understand the releases and carry out impact assessments. Many saw successes by deploying the changes via a series of quick sprints, improving time to value.

## 5.2 Create your Workday roadmap

Creating a Workday roadmap is key to optimising the HRIS in the long term. Having a view of the roadmap even at go-live helps to create a timeline for implementing new Workday modules or functionality such as Learning, which the organisation may not be ready for at launch.

As part of this strategic roadmap planning, the Workday configuration must always be aligned with the HR strategy to ensure broader business objectives are continuously supported. Most of our respondents had an ongoing roadmap of investments for Workday optimisation. For some, this represented significant investments over two or three years.

## 5.3 Do not underestimate the importance of leadership support

Leadership support forms another critical pillar in successful long-term Workday optimisation. One respondent told us *'Our HR leadership really push Workday and are behind me and the team to improve Workday, looking at what functionality is coming out: Do we need to purchase it? Is it the right investment? I think if you don't have that support from leadership, you are not going anywhere with Workday.'*

## 5.4 Connect with Workday on new features

We always advise organisations to stay connected with Workday and their Customer Success Manager to ensure they remain up to date with the system's latest developments. Several respondents described how they invest in events, such as Workday Rising, and training to keep informed. This enables organisations to consider new Workday functionality, such as Learning or Org Studio, as part of their roll-out plan and investment.

The Workday Community was highlighted as invaluable for learning, support and updates, as were some of the user groups on LinkedIn. Some respondents had also created their own network with other organisations that use Workday to share learnings and held regular internal team sessions to share information and ideas.

# Conclusion

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We interviewed HR leaders and HRIS specialists from a wide variety of industries and organisations and the message was consistent and clear: Workday is adding great value to their organisations. But realising the longer-term benefits requires active management, planning, leadership and support.

The core Workday methodology commonly used for implementation works well to get Workday live. But it lacks focus on processes that lie outside of Workday, such as change management, stakeholder engagement, training, communications and ongoing optimisation programmes.

It is these processes that ensure implementation is successful and sustainable. Yet Workday's customers need to find their own solutions here, and several respondents told us that this was an area in which they could have performed better with expert support.

## Five areas on which to focus to maximise the benefits of Workday

Our research tells us that to maximise the long-term benefits from Workday beyond successful implementation there are five key areas on which to focus to ensure sustained Workday success:

- 1. User experience** – Get feedback to keep your systems and processes relevant to the needs of the user and the business
- 2. Change management** – Start change management early and continue post-go-live
- 3. Support structure** – Set up a strong team and define ways of working
- 4. Integrations** – Prioritise critical platforms/ processes and invest from the start
- 5. Prepare for new releases** – Create your roadmap and release management plan.

Realising and sustaining the benefits of Workday is a journey, not a destination. As the organisational representatives we interviewed explained, there is much to learn about the “people side” of Workday, even from projects that have appeared to be technically seamless.

Workday implementation and optimisation is a long game in which the stakes are high but the returns are potentially transformational. Yet we repeatedly see organisations releasing their Workday teams back to business as usual as soon as Workday is launched.

Organisations that get the most out of Workday recognise that much of their learning – and much of the hard work – comes after go-live.

# Acknowledgements

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The contributors to this report were remarkably open when discussing their experience of Workday and explaining where their implementations had gone well and where they could have been better. As a result, we have agreed not to share their names in this report. Nevertheless, we would like to thank all those involved for their participation and candour.



# Why Preos

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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 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.

- 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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