

# HCM Buyer's Guide

Mapping the Right Payroll and HR Solution to Your Business Outcomes



## In a rapidly changing world, running a business is more challenging than ever.

Given the changes in the way we work, how workplaces and workforces are organized, and the relationship between workers and employees, organizations have a rare opportunity to rethink how technology can help them adapt.

What does the right technology provider look like for your business today? How about a few months or years from now? How will the right solution help you manage your people and payroll? With so many human capital management (HCM) and payroll providers out there, where do you begin?

Informed by hundreds of Workday customers, this guide is designed to help you identify your business drivers, refine your payroll and HCM solution selection criteria, and make the business case for change.

## Table of Contents

---

### Getting Started

---

Define Business Drivers	3
-------------------------	---

---

Identify Business Requirements	3
--------------------------------	---

---

Consider System Options	4
-------------------------	---

---

### Guide to Evaluating Vendors

---

Business Scenarios to Consider	7
--------------------------------	---

---

Deployment Considerations	9
---------------------------	---

---

Making the Business Case for Change	10
-------------------------------------	----

---

### Conclusion

---

Why Make the Change Now?	10
--------------------------	----

---

Payroll and HR Capabilities Checklist	11
---------------------------------------	----

---

## Getting Started

### Define Business Drivers

Embarking on the journey to identify a new HR or payroll system can be both overwhelming and exciting. But before jumping in, it is important to first define the business drivers and understand how technology can support your business initiatives. To do this—and to avoid missing critical criteria—it's crucial to spend time rigorously defining and validating the business challenges your HR and payroll systems should help resolve.

### Start by understanding your desired state.

Three steps will help you do this:

- 1 Define your goal and desired outcome:**
  - a. Map out where your organization wants to be in six months to a year
  - b. Evaluate how changes might support future business plans across HR, payroll, and workforce management
- 2 Review current business challenges that must also be addressed across the organization:**
  - a. Consider simplifying your technology footprint to reduce your administrative support burden while maintaining compliance
  - b. Reduce manual processes and unify cross-functional processes for consistency and a frictionless workflow
  - c. Identify specific areas where the organization can benefit from data-driven workforce management decisions and tracking of global labor costs
- 3 Map out your organization's objectives and consider both internal and external factors, such as:**
  - a. Adapting to changing market conditions
  - b. Gaining visibility into the health of the business
  - c. Exploring new markets or lines of business
  - d. Assessing external factors or competitive pressures

### Identify Business Requirements

Now that your business outcomes are defined, it's time to dig deeper into your business requirements so you can set your project up for success.

- **Define the project scope:** Determine the operational or technical challenges you need to address within your project scope, including potential external and internal constraints that could hinder the success of the project.
- **Assemble a cross-functional team:** Include people from finance, payroll, HR, operations, and IT to not only get a complete picture of the problem but to also find ways to solve it together.
- **Determine your project goals, objectives, and ideal outcomes:** Pinpoint your business strategy, what you'd like to achieve, and where you'd like to be not only when the project is complete, but also in the years to come.
- **Prioritize your business outcomes:** Focus on your top three outcomes, and identify areas you want to avoid.

There are also a number of questions to ask internally. See our Persona Questions and Use Case Scenarios below to help you prepare.



## Consider System Options

Once you've defined your goals, priorities, and challenges, work with IT to understand what type of technology would benefit the business. To compare each vendor's ability to meet your HR, payroll, and workforce management requirements, consider how your organization currently operates as well as how those processes may evolve. How does the ability to continuously plan aid in business operations today and into the future? Can you seamlessly execute on those plans across the organization while analyzing business outcomes to make operational adjustments? It's important to understand the technology options based on how you hope to operate in the future and how your decisions potentially impact your business and your people.






### Consider these three factors to help determine which vendors to evaluate:

- **Strategy:** Identify vendors that will give your leaders and managers more visibility into all corners of the business (finance, operations, people) and enable a more thoughtful view of the organization, providing real-time and contextual insight for data-driven decision-making.
- **Operations:** Ensure that your future system alleviates administrative burdens and dependency on tools such as Microsoft Excel®, shortens processing time, and introduces automation while reducing friction in core processing (for example, hire to pay).
- **Technology:** Consider consolidating multiple systems into one, simplifying integrations, and leveraging a seamless update process that minimizes downtime. Choose tools and technologies that will help reduce the burden on IT.

There are a variety of technology solutions available for evaluation. Whether you consider an enterprise application offering a single cloud solution for HCM/HR and payroll or engage with service bureaus, many solutions look similar on the surface. As you dig deeper, you will uncover unique approaches to data, cross-functional processes, analytics, services, support, and deployment. Learn more about your options below.

Key consideration: Understand each vendor’s approach to data and analytics and the impact to solving your organization’s business challenges.

	WORKDAY	SERVICE BUREAUS/PAYROLL PROVIDERS
 <p><b>Approach</b></p>	<p>A flexible, end-to-end single cloud solution for HR, payroll, and finance, with dedicated account-level support and services.</p>	<p>Core focus on payroll with services and support enabled by software that provides integrated modules, which could possibly include third parties.</p>
 <p><b>Data</b></p>	<ul style="list-style-type: none"> <li>• One source for data across HR and payroll</li> <li>• Complete view of workforce head count, including contingent workers</li> <li>• Worker attributes such as position, job profile, and skills</li> <li>• Built-in security and data privacy</li> <li>• Support for ongoing governance and compliance</li> <li>• Global worker profile, including flexible control of worker attributes depending on country and territory</li> </ul>	<ul style="list-style-type: none"> <li>• Data is often siloed and requires reconciliation across HR, payroll, and finance</li> <li>• Finance is a separate system requiring integration</li> <li>• Limited access to timely payroll data for auditing and reporting</li> <li>• Limited visibility into global head count and associated labor costs</li> </ul>
 <p><b>Cross-Functional Processes</b></p>	<ul style="list-style-type: none"> <li>• Intuitive, easy-to-change workflows, notifications, and approvals</li> <li>• Consistent navigation leveraging all security roles in a single user experience</li> <li>• Compliance-driven, with native gross-to-net payroll calculation engine</li> <li>• Transparency, visibility, and control of the payroll process</li> <li>• Unlimited security roles to leverage across the business</li> <li>• Ability to initiate tasks and take action from anywhere in the system</li> <li>• Transparent rollout of compliance-related updates to all customers to keep pace with evolving regulatory requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Singular workflows limited to approvals and notifications and without any collaboration capability</li> <li>• Separate processes often required for areas of the business such as recruiting, HR, payroll, talent, and more</li> <li>• User interface often requires multiple security roles to ensure access, potentially resulting in an inconsistent user experience</li> <li>• Limited number of security roles to use across the business</li> <li>• Application-focused task initiation and management</li> <li>• Possibly requires multiple point solution products connected to payroll</li> <li>• Possibly relies on vendor for services engagement to make changes or apply updates</li> </ul>

## WORKDAY

## SERVICE BUREAUS/PAYROLL PROVIDERS



### Analytics and Insights

- Single data source for native reporting, including payroll
  - Built for HR dashboards with standard reports and easy-to-use report writer for business users
  - Drill down to transaction and metadata in HCM based on real-time data
  - Promote data-driven insights into labor cost analysis
  - Manage audits based on rules and exceptions
  - Bring in third-party operational data to analyze in context of other HCM data
  - Share report definitions and workflows with a customer community
- Separate data reporting hub
  - Static data in reporting and analytics
  - Lack of point-in-time or trending reports and analytics
  - Inability to drill into reports by different dimensions to deepen insights
  - Inability to initiate actions within reports



### Services and Support

- Flexibility to choose payroll services and global payroll approach
  - Adjust your service-level needs to meet changing business requirements
  - Global support 24/7/365
  - Support backed by performance and response-time SLAs
  - Team of experts continuously monitoring compliance-related regulatory changes with updates rolled out through the cloud
  - Global customer community with every customer on the same version of the software for more effective collaboration
- Services engagement often required for complex reports and system changes
  - Payroll services imposed by provider
  - Potential reliance on the vendor to make changes
  - Different levels of support provided at an additional cost
  - No performance SLAs unless individually negotiated
  - Notable exclusions from availability SLAs
  - Limited global support structure for meeting localization requirements



### Deployment




- Flexible, simplified, fixed-fee approach
  - Out-of-the-box business processes, policies, reports, and dashboards
  - Unlimited roles available at go-live
  - Customers live in 16 to 26 weeks
  - 60 days of hyper-care after go-live to ensure success
  - Seamless update process
- Initial go-live with a focus on payroll and time and limited HR focus
  - Limited number of workflows out of the box
  - Limited integrations, dashboards, and reports during initial deployment
  - Accelerated deployment offerings with limited features at go-live
  - Customers on varying schedules to receive updates, enhancements, and innovations






# Guide to Evaluating Vendors

## Business Scenarios to Consider

As you test-drive products and discuss solutions, consider how best to explore the different systems through customized demos. Before your first meeting, prepare a set of scenarios you wish to see and functionality you wish to evaluate as part of live product demos. Consider hands-on events to test-drive key payroll and HR scenarios as part of follow-up conversations for your business users.

**Key consideration:** Prepare a current situation analysis. In your vendor demo, identify outcome-driven scenarios that impact your cross-functional teams in HR and finance, and across your organization.

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
	<p><b>Collaborative Plan-to-Hire Process:</b> How does the solution help with continuous planning and expedited hiring for key business roles, including internal, external, and contingent workers?</p>	Workforce planning with connections to job requisitions, a pipeline of internal and external candidates, and the ability to track contingent worker spend and status.	Accelerate the plan-to-hire process with the flexibility to build internal talent, hire externally, or borrow contingent workers.
	<p><b>Ensuring Day-One Readiness:</b> How can we streamline administrative tasks during key transitions from hiring to onboarding for all types of workers, including remote and contingent?</p>	Seamless automation to simplify the recruitment-to-hire process, engaging key internal stakeholders to ensure a successful new-hire experience.	Improve time-to-hire, productivity, employee engagement, and retention while fulfilling key business initiatives.
	<p><b>Seamless HR, Pay, and Finance:</b> How can we streamline and automate HR, payroll, and workforce management to improve data accuracy? How can we reduce manual tasks related to aggregating and reconciling data to avoid manual paperwork and audits, while helping to maintain compliance and reduce risk?</p>	Connect HR data changes that impact compensation, benefits, time tracking, absence management, payroll, and cost allocations, including preview of gross-to-net results and imports from third-party systems.	Improve productivity and accuracy while helping maintain compliance.

	DEMO QUESTIONS	CRITICAL CAPABILITIES	HOW YOU BENEFIT
	<p><b>Workforce and Labor Cost Insight:</b> How can we better control costs, including contingent worker spend, by providing managers and business leaders with the insights they need to drive change?</p>	Provide real-time and actionable insights, such as labor cost analysis, time off and liability, overtime trends, incentive pay analysis, and more, with standard dashboards and analytics.	Proactively manage labor costs and profitability.
	<p><b>Consumer-Driven Experience:</b> How can we address our need to provide a personalized and engaging experience that addresses flexible work environments?</p>	Gain multichannel access with a personalized user experience that highlights critical actions around time entry, promotes growth opportunities, and recommends actions.	Increase worker productivity and self-sufficiency through a multichannel, personalized experience within their most commonly used workspaces.
	<p><b>Promote Worker Mobility and Growth:</b> How can we empower workers with personal growth and skills development opportunities while promoting work-life balance?</p>	Leverage machine learning to provide workers with visibility into stretch projects, gigs, and jobs they can take to grow their skills and advance their careers.	Improve retention and engagement while proactively building a pipeline for future talent based on skills demands.
	<p><b>Actionable Insights for Decision-Making:</b> What is the data source for reporting purposes? What types of reports and analytics are available to gauge retention and engagement issues? Can you enable gap analysis to assess current head count versus future skills requirements to support strategic business initiatives? How does analytics provide both predictive and prescriptive capabilities for leaders and managers to empower rapid decision-making?</p>	Blend external data sets to establish a data hub that maintains role-based security, run sophisticated analysis with augmented analytics applications, and identify top opportunities and risks with dynamic visual representations and clear explanations.	Save time and resources with system consolidation to ensure data is secure and up-to-date, establishing one source of truth and freeing up analytics talent to focus on strategic work.
	<p><b>Diversity, Equity, and Inclusion:</b> How can we leverage technology to improve diversity and build an inclusive culture to drive positive change?</p>	Native reporting and analytics to monitor and measure efforts in hiring, talent development, recognition, rewards, and employee experience.	Ensure diverse representation while valuing inclusion, belonging, and equity.

See [checklist](#) for business users to evaluate functional requirements for vendor demonstrations.



## Deployment Considerations

To get the value and results you want, it's important to get detailed information on the vendor's deployment approach and methodology, how to engage in each step, and what to expect once your solution is live. Consider the following:

**Deployment approach and methodology:** Choose a vendor that can get you up and running in a predictable time frame with minimal risk. Look for a proven methodology that includes:

- Feature-rich, fixed-scope packages based on common deployments
- A view into what your data will look like in production
- A flexible and simplified experience throughout
- Resources to get you ready for go-live and beyond
- Stakeholders that are involved in your entire evaluation journey

**Ensuring a successful deployment:** Select a solution that delivers a smooth deployment, fast time to value, early mitigation of integration issues, and the support you need to leverage the capabilities of your new software. Make sure it offers:

- Consistent deployment across projects and products
- Collective expertise from prior deployments
- Early identification and mitigation of potential issues and risks
- Guidance and options throughout the project
- A single point of contact during the deployment
- Testing support to ensure integrations are complete and successful end to end before go-live

**Clarity about total cost:** If a vendor is clear about pricing up front, you'll have the insight you need to assess how to invest in their solution. Many vendors charge additional fees after you've already signed on. A solution that appears less expensive initially could cost more over time. Make sure you aren't caught off guard by the following:

- Costs outside of subscription and licensing
- Reporting fees for changes and custom reports
- Fees for extra services and consultations

**Deployment management:** No matter who manages the deployment, a vendor should be able to make deployment partner and services recommendations and stay engaged to ensure your success. Ecosystems and professional services teams can vary widely. It's important to find ones with:

- Global consultants in the regions where you do business
- Tight alignment with internal teams to troubleshoot issues and escalate challenges
- Regularly trained and certified service partners and consultants to manage upgrades and new products
- Expertise in your industry
- Guidance to help you set up and train your internal team
- The experience to get you up and running quickly and effectively



### Services and support to ensure customer success:

Choosing a vendor with a solution that can grow with and support your business is critical. To ensure you choose a vendor that offers a consistently excellent customer experience from the beginning of the sales cycle through deployment and production, ask if they provide:

- **Service plans:** Look for a range of services that can be consumed easily on demand, addressing different production stages and your teams' learning and engagement styles.
- **Customer success managers:** Make sure you have access to an advocate dedicated to helping you navigate available resources to help you meet your current and future business goals.
- **Training and education:** The right training and education will help your teams get the most out of the system.
- **Customer enablement:** One-on-one and one-to-many consulting services can help your teams use and administer more effectively and adopt the right features and functionality to support your objectives.
- **Collaboration with peers:** The ability to connect with experts or other customers to share ideas, ask questions, and learn best practices will not only deepen your knowledge but also help maximize your investment.
- **Support:** Get timely resolutions to unexpected issues that may arise.
- **Change management:** Look for programs, plans, and resources to guide, equip, and support end users in successfully adopting the solution.

When you invest time and effort in finding the right technology provider and deployment partner, you're setting the foundation for a smooth deployment and long-term success.

## Making the Business Case for Change

Now that you have completed your evaluation process, it's time to secure approval and financial support from leadership.

- 1 **Make your recommendation:** Create an overview of your recommendation with key challenges, benefits, pros and cons, and a clear analysis of the risk of doing nothing. Include feedback from the evaluation process from market- and industry-specific customer references. Make sure to outline the initial cost of deployment, contract length and pricing, internal cost, cost/benefit analysis, and estimated return on investment.
- 2 **Review the transition process:** Prepare for additional questions that may arise around implementation, transition strategy, and risk mitigation. Request resources for the implementation and transition teams. Take note of other internal projects that could affect the schedules, cost, or scope of the implementation.
- 3 **Review the evaluation process:** Highlight the steps you took in your vendor evaluation and selection process, including the business challenges that helped you determine your requirements, and the vendors that you considered.

## Conclusion

### Why Make the Change Now?

In today's environment, organizations can no longer afford to rely on outdated, disjointed systems as they strive to launch new business models, redeploy workers, and support workers' shifting expectations. With the right HR and payroll system in place, you can gain the real-time insight you need to stay agile in a rapidly changing world.

We've provided a solution checklist below to help you make sense of how Workday capabilities work together to deliver the business strategies and outcomes your organization will need now and in the near future.

## PAYROLL AND HR CAPABILITIES CHECKLIST

To help business users evaluate solutions, it will be important to share a checklist of critical capabilities and why they matter as part of your evaluation process.

### Core Human Capital Management

#### Single source for data across all HR functions.

Gain critical HR capabilities including compensation, benefits, head-count planning, and more.

#### Flexible organizational management.

Manage organizational structures to meet unique business requirements, and adapt with drag-and-drop organizational modeling and mass actions.

#### Seamless onboarding experience for all.

Engage with a dynamic pre-hire experience and onboarding process that connects internal teams to help ensure day-one readiness.

#### Personalized user experience.

Increase employee engagement and productivity with universal device access that promotes curated content where and how they work. Proactively answer questions through chatbot assistance and connections to natural workspaces.

#### Support belonging and diversity.

Go beyond tracking and reporting diversity data to nurturing an inclusive culture with insights that empower you to measure everything from hiring and promotions to your people's sense of belonging—so you can see where you stand and then take action.

### Talent and Performance Management

#### Define performance and recognition strategy.

Focus on continuous performance conversations through anytime feedback, regular check-ins, and performance reviews to provide timely and meaningful feedback that recognizes contributions and reinforces your company culture.

#### Get a comprehensive view of talent.

Rely on accurate and in-depth talent data, including employees' career interests, to make informed talent decisions. Combine this comprehensive talent perspective with recommended learning, mentors, and development plans to engage and prepare your workforce to achieve business objectives.

#### Track and develop skills.

Empower your organization with visibility into skills and skills gaps to understand when to recruit, develop, or borrow talent. Leverage machine learning to connect employees to opportunities such as gigs and to suggest skills to develop, allowing them to take an active role in their career development.

#### Align goals and development.

Ensure goal alignment across the organization. Recognize contributions while simultaneously fostering learning and career growth opportunities to help promote engagement and retention.

#### Flexible succession planning.

Proactively manage succession planning with the ability to identify talent by leveraging internal and external candidate pools, assessing and developing candidates while predictively managing retention risk.

#### Foster internal mobility and career development.

Create agile teams and drive internal mobility through short-term gig assignments. Use machine learning to generate skills-based insight, identify internal career development opportunities for your workforce, and create a cohesive experience for employees on their career growth journey. This helps workers understand where they are today, explore where they want to go, and stay on track to meet their career interests in the context of the organization's business needs.\*

\*Future talent optimization functionality coming soon.  
Safe harbor provisions may apply.

## Recruiting and Talent Acquisition

### □ Manage hiring volume and hiring at scale.

With configurable and automated workflows, a seamless connection to compensation, and the ability to edit and process offers and employee agreements en masse, you can streamline your workflow and operate at a global scale.

### □ Engage and nurture candidates.

Bring together internal and external talent, as well as active and passive candidates, keeping them engaged and nurtured with a tailored, personalized job application process.

### □ Support recruiting compliance.

Use the Workday core security model, Business Process Framework, configurable external career sites, and reporting capability to help support compliance record keeping and obligations, such as Office of Federal Contract Compliance Programs (OFCCP) requirements for invitations for self-identification.

### □ Support equitable hiring.

With Workday Recruiting, talent acquisition teams gain access to features such as masked candidate screening and diversity pipeline analytics that help you reduce unconscious bias and drive the equitable hiring of diverse talent.

### □ Empower hiring team collaboration.

Communicate in real time about candidate status by connecting your hiring managers, recruiters, interviewers, and those making referrals in an effective team process. Self-service tools and the ability for teams to work in their natural workspaces drive true collaboration.

### □ Strategically manage the talent lifecycle.

Combine recruiting and human capital management with job requisition creation, management, and fulfillment in a single system. Increase productivity by streamlining the entire onboarding process—from background verification and offer management to hiring and first-day orientation—all within your core system of record.

## Learning

### □ Provide a personalized, contextual learning experience.

Simply and intuitively surface content and recommendations while providing workers with the relevant information and training they need. Embed learning contextually throughout a worker's lifecycle, meeting the learner where they are, whether it be in onboarding, upskilling, or in other moments that matter.

### □ Develop a culture of continuous learning.

By integrating learning that ties to skills, people data, gigs, performance, and career goals, Workday delivers a continuous and personalized experience that meets the changing needs of both your business and your people.

### □ Unlock learning insights that drive effectiveness and agility.

Measure the value and demonstrate the impact of learning with dashboards and reports that combine live data across your organization. Analytics enables you to identify gaps and opportunities where you can use learning to increase results and pivot quickly.

### □ Engage with external learners.

Empower your organization with the ability to connect learning beyond your internal workforce to vendors, contractors, partners, and more through an inclusive, collaborative, secure ecosystem.

## Total Rewards (Compensation and Benefits)

### □ Benchmark against industry peers.

Use benchmarks to understand how well your organization is doing and where it can improve using anonymized data by industry and size. Compare important metrics across HCM, recruiting, time, absence, and more to identify and address major gaps in your organization.

### □ Build a complete employee total rewards program.

Start with a single system that gives you a complete and accurate view of your total rewards program, including compensation, benefits plans, allowance plans, and merit, bonus, and stock programs.

### □ Easily manage coordination of events.

With a single solution in place, you can easily manage concurrent business events such as job changes or ad hoc promotions without resorting to manual intervention, thereby shortening cycle time and minimizing human error.

### □ Maximize investments.

Empower your team with the information it needs to invest in rewards that will be valuable to employees. With a single system at your fingertips, you can make informed decisions linked to the appropriate rewards for maximum long-term value.

### □ Streamline benefits administration.\*\*

Manage your benefits program from plan to design to enrollment while supporting compliance (including ACA and Medicare management for U.S. customers) with a simple and intuitive interface for benefits administration. Rely on a single system for HR, compensation, and benefits data to more effectively manage benefits plans, packages, and eligibility rules. Reduce administrative burden and update payroll in real time.

### □ Easy-to-use enrollment experience.\*\*

Simplify enrollment with access to the right information about available benefits, including instructions to guide workers through the selection and decision process on any device.

### □ Comprehensive benefits management.\*\*

Configure a full and flexible spectrum of benefits options, including health, retirement, pension, insurance, flex options, wellness credits, allowance plans, and leave plans. Ensure tracking of dependents and beneficiaries as well as evidence of insurability.

### □ Seamless coordination of events and passive event management.

Leverage a single system where employee status changes, such as new hires, salary increases, or promotions, automatically trigger benefits without having to upload or rekey data or navigate events. Effective-dating helps ensure that plan, provider, or benefits changes can be coordinated along with job change and compensation review events.

### □ Connect to wellness programs.

Derive rates based on wellness participation values or set up wellness-related credits to promote health across your workforce.

### □ Robust benefits network.\*\*

Minimize costs with pre-built integrations that eliminate the burden of custom integrations. Track data changes and update benefits providers automatically.

## Time and Absence

### □ Seamless, agile time and absence management.

A single system for HR, time, absence, and payroll provides one source of data and unified actions to improve accuracy and productivity.

### □ Insight into key workforce metrics.

Drive decision-making with insight into critical time and absence KPIs, such as overtime, PTO, and more. Use benchmarks to understand how well your organization is doing and where it can improve. Compare important metrics, such as accruals and time off, with peers.

### □ A global, consumer-driven experience.

Provide an engaging experience that drives user adoption across the workforce for mobile and web time entry and global absence management.

### □ Streamline approvals with automation.

Automate time-consuming and error-prone processes, such as validation approvals and calculations, to help ensure nothing is missed and everything is on time, including time-clock integration capabilities.

\*\*U.S. only.

## Payroll\*\*\*

### □ Run payroll your way.

Streamline payroll processing with the control and flexibility to automate your payroll checklist. Focus on your most critical audits with the flexibility to configure audit rules, schedule recurring audits, and mass-update corrections.

### □ Visibility into the general ledger before payroll completes.

Enhance accounting accuracy with the ability for finance to preview payroll's impact on the general ledger before payroll completes. Gain visibility into real-time journal lines.

### □ Manage risk by keeping pace with compliance-related updates.

Get access to compliance-related enhancements on a weekly basis, supported and monitored by a team of dedicated experts.

### □ Mobile-first, employee-centric pay experience.

Empower workers with easy access to their pay information on mobile and desktop to help them better understand how their pay was calculated. Give workers greater control over their finances with the ability to request payment for hours worked earlier.\*\*\*\*

### □ Complete view of labor costs.

Get a complete and accurate view of your labor costs by combining all payroll data in one system. Use a single reporting currency to analyze labor cost trends, including overtime, time-off liabilities, and more.

### □ Adaptable post-payroll services.

Meet your service-level expectations today with the flexibility to adjust as your business needs change.

## Global Payroll

### □ One experience for your global workforce.

Workers can view their pay information from third-party payroll applications in one system for a consistent user experience for all workers.

### □ Streamline payroll and reduce costs.

Minimize costs associated with deploying, integrating, and managing third-party payroll applications with pre-built configurations.

### □ Improve data accuracy.

Built-in validation and auditing tools improve accuracy and visibility into third-party integrations for faster reconciliation of worker data and payroll results.

### □ Complete view of global labor costs.

Get a comprehensive and accurate view of your labor costs by combining internal and third-party payroll data in one system. Use a single reporting currency to analyze labor cost trends, including overtime, global overtime, and more.

## Workforce Planning

### □ Flexible head-count and cost planning.

Plan your workforce with flexible, multidimensional models that map to hiring, transfers, and retention plans.

### □ Analyze impact of workforce costs and compensation drivers.

Perform what-if labor analysis across compensation pools and business units to see the cost impact instantly.

### □ Securely streamline planning and collaboration.

Collaborate with finance and business partners from a common source of data and role-based dashboards.

### □ Drive operations to maximize workforce performance.

Optimize org structure and team skills mix to meet demand. Evaluate impact of one-time events, such as restructures or mergers and acquisitions.

### □ Plan for those skills and roles most critical to the organization's success.

Tap into your organization's rich worker data from Workday Human Capital Management—including skills, experience, and worker history—to better understand current talent capacity and inform plans to build, buy, or borrow talent as needed.

\*\*\*Native payroll capabilities listed for the U.S., Canada, the UK, and France.

\*\*\*\*Future U.S. payroll functionality coming soon.

Safe harbor provisions may apply.

### □ **Implement organizational changes with ease.**

Restructure existing operating models and immediately allocate worker resources to meet new operational needs.

### □ **Make the right strategic workforce decisions and plans.**

Map plans to strategic initiatives, including new job families, skill sets, and geographies.

### □ **Compare multiple driver-based, what-if scenarios in real time.**

See the impact upstream and downstream to create the optimal plan mapped to strategic initiatives and goals.

## **Reporting and Productivity Tools**

### □ **Reports libraries with native reporting engine.**

Choose from pre-configured standard reports, dashboards, KPIs, and scorecards along with an easy-to-use, self-service custom report writer.

### □ **Real-time, actionable insights.**

Empower managers to initiate changes directly from reports with live, cross-functional data along with trend and variance reporting analysis.

### □ **Always-on audit and statutory reporting.**

Deliver audit trails without history or system limitations and rely on key reporting capabilities to help support compliance.

### □ **Native collaboration tools.**

Promote collaboration and streamline operations with spreadsheet and presentation capabilities informed by system data.

## **Advanced Analytics**

### □ **Augmented analytics.**

Highlight anomalies and trends with operational data analysis powered by machine learning.

### □ **Prescriptive analytics.**

Proactively identify key areas for improvement.

## **Expense Management**

### □ **Mobile expense reports.**

Easy-to-use, self-service expense reporting enables receipt scanning from mobile devices and includes support for different units of measurement for global organizations.

### □ **Flexibly adjust to business requirements.**

Set up rules, approval workflows, spend authorization, and freezes based on your unique needs.

### □ **Track and report to better control costs.**

Gain real-time visibility into employee spend with multidimensional reporting and analytics.

## **One Source for HR, Payroll, and Operational Data**

### □ **A unified data core.**

All applications should be based on a single source for data, including the ability to bring in third-party data. Transactions made in one area should be immediately reflected in other areas with no need for data reconciliation.

### □ **One version.**

All customers should be on the same version of the system at all times to increase community collaboration and sharing of best practices.

## Employee Experience

### □ Universal device access.

All applications should natively support iOS and Android devices to take advantage of familiar activities and gestures. For other devices, a responsive HTML design should be provided.

### □ Personalized experience.

Applications should provide personalized recommendations for content, tasks, and activities that are specific to the individual user. These recommendations can be based on the user's usage history, the histories of similar users, and time-bound events.

### □ Chatbot assistant.

A single natural language digital assistant (chatbot) should be provided as part of the service.

### □ Connection to natural workspaces.

As part of the experience, users should be able to engage with the system from where they spend a majority of their day. Users should be able to complete simple, common tasks without leaving their natural workspace to open a separate application.

## Upgrade Frequency and Experience

### □ Update included.

Updates should be included on a predictive time frame and managed by the vendor.

### □ All updates should be non-disruptive.

Updates should be seamless and non-disruptive, reflecting update procedures in popular consumer apps, with no need to wait six months for a new update. All updates should take fewer than four hours to complete.

### □ Unlimited access to innovation.

Innovations should be continuously built into the system without requiring a new investment in a separate service or software. When rolled out, new capabilities and innovations should come toggled off, enabling the organization to adopt them in a non-disruptive fashion on their own time frame.

## Availability, Scalability, and Performance

### □ Service-level agreement (SLA) with consistent outperformance.

The system should minimally provide an availability SLA with a track record of actual availability outperforming the SLA.

### □ Performance SLA for all customers.

The system should also provide a consistent performance SLA for all customers.

## Security and Data Privacy

### □ Single sign-on.

To reduce friction, consider enabling a seamless single-sign-on (SSO) experience between your system and an internal identity and access management (IAM) solution.

### □ Multifactor authentication.

Support for multifactor authentication (MFA) is a must. The system should also allow the organization to opt for multifactor authentication from an identity and access management (IAM) solution.

### □ Always-on auditing.

For your most sensitive information, such as for human capital management and financial management, your system should track all changes to business data at the application level in compliance with Sarbanes-Oxley Section 404.

### □ Encryption of data at rest.

All customer data within the application should be encrypted when it is stored at rest.

### □ Encryption of data in transit.

Users should access the system via the internet protected by Transport Layer Security (TLS) protocol to secure network traffic from passive eavesdropping, active tampering, or forgery of messages.

### □ External audits and certifications.

The system should undergo recurring, applicable audits and certifications from a third-party auditor with the resulting reports made available to customers. Examples may include SOC 1 Type II, SOC 2 Type II, ISO/IEC 27001, and so on.



## Deployment and Support Model

### Proven track record for on-time and on-budget deployments.

Vendors should have a proven track record for deploying on schedule.

### Free up technical resources for more strategic work.

Vendors should be able to provide examples where other customers have been able to reduce the staff required to support the system, reskilling and reusing those resources for more strategic work.

### Consistency through proven methodology.

Vendors should follow the same key stages and phases throughout the deployment, regardless of who leads—your vendor or a certified partner. This will help keep the deployment efficient and organized, resulting in a successful go-live.

### Reduce external consulting fees.

Provide the tools, control, and flexibility to make changes to workflows and processes from within the organization versus hiring outside consultants. Enable the creation of reports and dashboards to meet business needs.

## Customer Community and Feedback

### Contribute and adopt best practices shared by peers.

A strong community of users should be available to network, share, and adopt best practices, with all customers using the same version.

### Recommend and vote for new features.

Vendors should be able to provide a proven track record of soliciting input on new features, engaging with customers, and delivering customer-submitted requests in every major update.

Visit [workday.com/workforce](https://workday.com/workforce) for more information.

