

The Workday HR Tech Strategy Playbook

Build a Winning Roadmap for Success





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Introduction

A Practical Guide to Building Your Workday HR Technology Roadmap
As Workday experts, we've had the privilege of helping HRIS teams across industries design and execute strategic HR technology roadmaps that drive efficiency, improve adoption, and deliver measurable business value. Throughout our experience, one thing is clear: organizations that treat Workday as a strategic enabler rather than just an HR system see the biggest impact.

This guide is designed to give HRIS Managers at all levels a clear, structured approach to developing a Workday-driven HR technology strategy and multi-year roadmap. We've taken the lessons learned from working with clients and created a step-by-step framework that ensures your Workday investment aligns with business priorities and delivers real outcomes.





Why This Matters for HRIS Leaders

Building a Workday roadmap isn't just a project, it's a fundamental responsibility of an HRIS team. Workday touches every part of HR, and without a clear plan, organizations risk:

- Underutilizing Workday's full potential, missing out on automation, analytics, and self-service opportunities.
- Reactive decision-making, constantly firefighting issues instead of proactively improving processes.
- Low adoption rates, employees and managers not fully engaging with the system, leading to inefficiencies.

With a structured roadmap, HRIS leaders can:

- Align Workday initiatives with HR and business strategy, ensuring technology supports company goals.
- Prioritize high-impact projects, delivering quick wins while planning for long-term success.
- Engage leadership and key stakeholders, securing buy-in and ensuring continued investment.
- Create a governance model, keeping projects on track, measuring success, and adjusting as needed.

What You'll Find in This Guide

This guide is concise, actionable, and designed for easy reference and adaptation. It provides:

- Real-world tactics & strategies for developing an HR tech roadmap using Workday.
- Ready-to-use templates for workshops, assessments, planning, and governance.
- A structured approach to securing executive buy-in, prioritizing initiatives, and tracking success.



Get Your Team On Board

One of the most important steps in this process is ensuring your team is aligned. An HR technology strategy isn't built in isolation, because it requires collaboration between HRIS, IT, HR leadership, and business partners. This guide will help you facilitate the right conversations, engage the right stakeholders, and drive Workday forward in a way that delivers tangible results.

Let's get started on building a Workday HR Tech Strategy that truly makes an impact!



Rick Leunisse
Managing Partner



Matt Komendolowicz
Managing Partner



Understand the Current Workday Experience

Why This Step Matters

Before you can improve anything in Workday, you need to understand how it's actually being used in your organization. This helps you:

- Spot gaps and issues slowing down HR processes
 - Find features in Workday that aren't being used but could save time
 - Collect the right input to make a strong case for change
-

Step 1: Find the Right People to Talk To

Workday touches many teams. To really understand what's working and what's not, you need input from different roles.

What to do:

Make a list of key people from these groups:

- HR leadership (like CHROs or Directors): They'll tell you if Workday supports big-picture HR goals
- HR Business Partners (HRBPs): They work with Workday every day and know the pain points
- IT/HRIS team: They manage the system setup and know about any technical problems
- Employees and managers: These are your end users, if something's hard for them, adoption suffers
- Finance team: If you are using Workday Finance you obviously want to get their input to, if not, their input still matters for things like payroll and reporting (i.e. FTEs)



Step 2: Ask the Right Questions

You need both numbers and real feedback to see what's working. Combine short surveys with interviews to get a full picture. You can also review support tickets to find common problems.

What to do:

Use a mix of:

- Short surveys (just 5 to 10 minutes)
- One-on-one interviews with HR and IT leaders
- Optional focus groups with HRBPs or end users
- A quick review of HRIS tickets to see recurring complaints

Below are some sample questions, but make sure to add your own.

HR Leadership

- What reports or analytics are still missing?
- Does Workday support our growth plans?
- How is Workday viewed by leadership?

HRBPs:

- What tasks take too long?
- What features work well and which do you avoid?
- What are the top complaints from managers?

IT/HRIS:

- What technical issues come up often?
- Do any integrations break often or cause bad data?
- Are we really using Workday Extend and Prism Analytics?
- Are there features we're missing that push us to third-party tools?

Employees and Managers:

- How easy is it to get basic HR stuff done in Workday?
- What processes feel too complicated?
- What would make your job easier?

Finance:

- Are there issues in payroll or expense tracking?
- Which finance features help most? Which ones are underused?
- Can you manage audits and compliance smoothly?



Step 3: Sort and Organize What You Learn

Once you gather the feedback, group it into three areas:

1. Quick fixes: Easy improvements, like settings or small process changes
2. Adoption problems: Where people don't know how to use features
3. Big gaps: Missing functionality or major pain points

 **Action Step:** Use a simple table to document findings:

Workday Challenge	Root Cause	Business Impact	Suggested Fix	Category
Low adoption of goal-setting	Managers lack training	Inconsistent performance tracking	Provide Workday training & toolkit	Adoption Problem
High HR ticket volume	Employees avoid Workday self-service	Wasted HR resources on manual tasks	Improve knowledge base, automate responses	Adoption Problem
Recruiting data inaccuracies	Manual data entry errors	Poor hiring metrics reporting, slows down hiring	Automate data validation checks	Big Gap



Step 4: Present Your Findings in a PowerPoint Slide

The final output of this step should be a PowerPoint slide summarizing the key insights from your assessment. This will be used to present findings to HR leadership and IT.

Deliverable: Create a PowerPoint Slide with:

- Executive Summary: Top 3-5 key insights from the assessment.
- Pain Points & Gaps: A visual list of identified issues.
- Underutilized Workday Features: Opportunities for improvement.
- Next Steps: A brief outline of recommended actions.

Workday Current State Assessment – Key Findings



Executive Summary

- Performance management usage is low – only 40% of managers set goals in Workday.
- Workday reports lack visibility – HR leadership missing key workforce insights.
- Finance experiencing payroll sync errors, delaying compensation cycles.
- Employees rarely use self-service – 55% still rely on HR for tasks they could complete in Workday.
- Manual HR processes consume ~2,500 hours annually, which could be reduced with automation.

Pain Points & Gaps

Category	Issue	Impact on Business	Recommendation
HR Processes	Only 40% of managers set goals in Workday	Inconsistent performance tracking	Automate goal-setting reminders & training
HR Service Delivery	HR spends 5+ hours per week responding to routine HR queries	Wasted HR capacity & employee frustration	Implement Workday Help for automated case management
IT & Security	Role-based security setup incomplete	Unauthorized access risks	Conduct a Workday security audit
Finance	Payroll data misalignment with ERP	Monthly pay runs require manual fixes	Improve Workday-finance integration
Finance	Expense approvals require manual oversight	Delayed reimbursements & compliance risk	Automate approvals using Workday Business Processes
Employee Experience	55% of employees still rely on HR for transactions	Wasted HR team capacity	Launch training for self-service adoption

Underutilized Workday Features

- 70%** Majority of employees are unaware of the Workday mobile app
- 1,400** Hours are spent on creating total rewards statements by HR. With Extend we could automate this and reduce this with 1,100 hours.
- 80%** 80% of offboarding steps handled manually via email. Develop offboarding Extend app → **Reduce processing time by 60%**

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What's Next?

In the next section, we'll focus on how to align your Workday strategy with HR leadership & business goals to secure buy-in and drive improvements.



Align with HR Leadership & Business Goals

Why This Step Matters

To gain executive buy-in and ensure your Workday roadmap is impactful, you must connect your HR technology assessment to the broader company and HR strategy. Workday should be seen as an enabler of business priorities and not just an IT system.

- Aligning Workday with business priorities ensures HR tech investments deliver value.
 - Mapping Workday capabilities to HR's 1–3 year strategy keeps projects focused.
 - Securing leadership buy-in ensures budget and stakeholder support for Workday initiatives.
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Step 1: Identify HR & Business Priorities

💡 Action Step: Meet with HR leadership and business executives to understand strategic goals. These typically fall into:

- Growth & Scalability → Expanding headcount, global expansion, M&A.
- Cost Efficiency & Automation → Reducing manual HR work, improving process speed.
- Employee Experience & Retention → Improving talent management, engagement, and HR self-service.
- Data-Driven Decision Making → Enhancing workforce planning, real-time analytics.
- Compliance & Risk Management → Meeting labor laws, securing HR data.



Example Mapping:

Company / HR Priority	How Workday Currently Supports It	What else Workday could do
Growth & Scalability	Workday's unified platform scales globally without extra systems.	Use an Extend app to streamline the M&A process
Cost Efficiency	Push ESS/MSS and automate workflows (e.g., approvals, EIBs) to reduce manual HR effort.	Leverage GenAI in high volume processes to reduce time spend by managers and employees
Employee Experience	Mobile self-service, talent dashboards and career hub	Implement journeys in key moments in the employee lifecycle
Data-Driven HR	Extensive dashboarding and reporting in place	Adaptive Planning for workforce forecasting.
Compliance	Workday security, audit features, automated regulatory tracking.	Leverage audit tooling to automate certain processes

Step 2: Define HR's Strategic Initiatives for the Next 1–3 Years

💡 Action Step: Document HR's top initiatives and their expected business impact. Example:

HR Initiative	Description & Target Outcome
Workforce Planning	Plan for a 20% headcount increase, ensure critical roles are filled.
Employee Development	Launch career development framework to reduce turnover.
HR Process Optimization	Reduce time-to-hire by 30%, increase performance review completion.
Diversity, Equity & Inclusion (DE&I)	Extensive dashboarding and reporting in place



Step 3: Map Workday to HR's Key Initiatives

💡 Action Step: For each HR initiative, determine which Workday capability will support it.

HR Initiative	Workday Capability
Workforce Planning	Adaptive Planning for headcount & skills forecasting.
Employee Development	Introduce Workday Skills Cloud and align with current learning module
Process Optimization	Workday Recruiting automation, leverage Extend to optimize candidate scheduling
Diversity, Equity & Inclusion (DE&I)	Workday reports to track and improve diversity metrics.

Example: If HR's goal is to reduce time-to-fill positions, you can review the business processes in recruitment. You could also leverage Extend for candidate self-service scheduling.

Step 4: Create a Workday HR Tech Strategy Statement

💡 Action Step: Summarize your Workday strategy in a one-page executive summary.

Vision Statement: "At [Your Company Name], our goal is to leverage Workday as the backbone of our HR and Finance transformation. Creating a unified, data-driven, and scalable platform that accelerates global expansion, improves workforce planning, and enhances employee experience through automation and self-service."



Strategic Pillars:

- Scalable Growth Enablement → Configure Workday to support rapid international expansion and M&A activity with flexible, global HR processes.
- Data-Driven Decision Making → Equip leadership with real-time analytics via Workday Prism and Adaptive Planning for workforce forecasting.
- Process Automation & Efficiency → Reduce manual effort by 40% through Workday Extend, automated workflows, and EIBs.
- Employee Experience & Retention → Implement personalized learning and career growth paths through Learning and Journeys.
- Compliance & Risk Mitigation → Automate security access reviews and integrate Audit features to meet evolving labor regulations.

💡 Deliverable: One-Page Workday HR Tech Strategy Statement

Workday HR Tech Strategy – Enabling [Your Company Name]’s Growth & Efficiency

Our HR Tech Vision Statement

Leverage Workday as the backbone of our HR transformation—creating a unified, scalable, and data-driven platform that accelerates growth, improves workforce planning, and enhances employee experience.

Our 4 Strategic Pillars

- Process Automation & Efficiency**
Reduce manual HR tasks by 40% through automation.
- Data-Driven Decisions**
Enable real-time analytics via Workday Prism & Adaptive Planning.
- Scalable Growth Enablement**
Support global expansion and M&A with configurable HR processes and streamlined Extend process.
- Employee Experience & Retention**
Improve career growth & learning via Workday Learning & Journeys.

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What’s Next?

The next chapter will focus on mobilizing your team to do detailed assessments of each module.



Mobilizing Your HRIS Team to Assess Modules

Why This Step Matters

With leadership alignment in place, the next step is to conduct a structured assessment of Workday's modules to identify gaps, inefficiencies, and opportunities for improvement. This allows you to pinpoint areas that need optimization and ensures your roadmap is data-driven.

- Identify which Workday modules are underutilized or problematic
- Engage the right team members to evaluate their areas of expertise
- Create a structured report that highlights quick wins and long-term improvements

Step 1: Assign Team Members to Workday Module Assessments

 Action Step: Assign a team member with expertise in each module to evaluate its effectiveness and challenges.

Workday Module	Responsible Team Member
Core HCM (HR Data, Org Management)	HRIS Analyst
Talent & Performance (Goals, Reviews, Succession)	HRBP / Talent Specialist
Compensation & Payroll	Compensation/Payroll Specialist + HRIS
Workday Extend (Custom Apps)	Workday Developer / IT

Ensure Comprehensive Coverage: You probably have additional modules, ensure they are included in the assessment process.



Step 2: Provide a Structured Workday Module Assessment Template

💡 Action Step: Standardize how each module is evaluated with a clear template.

Each module owner should complete the following Workday Module Assessment Form:

- **Module Name & Scope:** (Example: “Talent & Performance – Includes goal management, performance reviews, succession planning.”)
- **Utilization Score (1–5):** How extensively is this module used? (1 = hardly at all, 5 = fully optimized).
- **Biggest Pain Points:** Key issues (process, technical, or adoption-related).
- **Quick Wins (Low Effort Fixes, <3 months):** Examples: Enable a feature, adjust configurations, provide training, clean up data.
- **Long-Term Enhancements:** Larger improvements (new implementations, process redesign, Extend app development).
- **Additional Notes:** “Module not licensed, consider adding in future,” or “Usage is okay, but will be strained with company growth.”

Module:	Workday Talent & Performance
Utilization Score:	3/5 (Basic goal and review functionality; no talent analytics or succession planning)
Pain Points:	Performance reviews have 70% completion rate Goal-setting used inconsistently across departments No skills tracking in place
Quick Wins:	Configure email reminders for on-time review completion Provide short training for managers on goal setting Enable Skills Cloud for skills tracking
Long-Term Enhancements:	Implement Succession Planning feature Develop internal promotion process via Extend
Notes:	Need executive support to mandate goal-setting for all departments



Step 3: Consolidate and Analyze Module Assessments

💡 Action Step: Gather all completed module assessments, compare findings, and extract key insights.

- Compare Utilization Scores: Identify which modules have the lowest adoption (1–2) and highest adoption (4–5).
- List Common Pain Points: Are there recurring themes across multiple modules (e.g., user training gaps, data issues, reporting difficulties)?
- Highlight Quick Wins: Identify the easiest and most impactful improvements that can be implemented immediately.

Identify Long-Term Enhancements: Flag bigger projects that require leadership support or budget allocation.

Workday Module	Utilization Score	Top Pain Points	Quick Wins	Long-Term Enhancements
Core HCM	4/5	Manual data entry errors	Automate data validations	AI-driven HR data audits
Talent & Performance	3/5	Low goal adoption, managers lack insights	Enable Skills Cloud, set up notifications	Implement Succession Planning
Payroll	2/5	Frequent integration issues	Fix payroll-to-ERP data sync	Overhaul payroll approval workflows
Workday Extend	1/5	No custom HR apps developed yet	Identify manual HR processes to automate	Develop contract automation & onboarding workflow apps
Prism Analytics	3/5	Manual reporting efforts still high	Train HR team on dashboard creation	Develop executive workforce analytics dashboard



Step 4: Create a Workday HR Tech Gap Report

💡 Action Step: Summarize findings in a Workday HR Tech Gap Report, which will be used in the strategy workshop.

Structure of the Report:

1. Overview: High-level summary of Workday's current state & assessment process.
2. Module-by-Module Breakdown: Utilization scores, key pain points, opportunities.
3. Recurring Issues & Themes: Highlight common bottlenecks across modules.
4. Recommended Improvements: List of prioritized quick wins & long-term enhancements.
5. Key Takeaways: Where Workday is underperforming, areas with the most potential.

Example Key Takeaways:

- Major Underutilization: Workday Extend & Skills Cloud remain largely untapped.
- High-Impact Fixes: Quick win adjustments (e.g., configuring reminders) could improve adoption rates by 20%.
- Strategic Priority: Payroll integration issues require immediate attention to avoid compliance risks.

💡 Deliverable: Workday HR Tech Gap Report (Template Provided).

Executive Summary

- Current Workday Utilization:** Majority of modules is well-utilized. Core HCM & Payroll are well adopted, while Talent & Extend are underutilized.
- Key Pain Points:**
 1. Low adoption
 2. Too many processes are manual outside WD
 3. Data quality in APAC is very low
- Quick wins for immediate impact:**
 1. Configure reminders for outstanding tasks
 2. Provide Q&A and helpdesk for key processes
 3. Reduce number of approvals in the process
- Long Term Strategic Enhancements:**
 1. Customize and streamline EOE process with Extend
 2. Implement succession planning
 3. Fully automated payroll integrations in APAC

Workday Module	Utilization Score (1-5)	Top Pain Points	Quick Wins	Long-Term Enhancements
Core HCM	4/5	Manual data entry errors	Automate data validators	AI-driven HR data audits
Talent & Performance	3/5	Low goal adoption, managers lack insights	Enable Skills Cloud, set up notifications	Implement Succession Planning
Payroll	2/5	Frequent integration issues	Fix payroll-to-ERP data sync	Overhaul payroll approval workflows
Workday Extend	1/5	No custom HR apps developed yet	Identify manual HR processes to automate	Develop contract automation & onboarding workflows
Human Analytics	3/5	Manual reporting efforts still high	Train HR team on dashboard creation	Develop executive workforce analytics dashboard

Pain Points & Recurring Issues

- Compliance & Security Risks:** To get access to data the security framework has been more and more changes. The resulting organization changes in data results in a security redesign.
- Onboarding Process:** HR/HRIS onboarding module is unutilized, leading to a manual onboarding process, limiting new hire onboarding and email based tracking.
- High Volume of HR Support Tickets:** Processes and managers lack feedback on how to improve HR support, leading to an over-reliance on HR teams for simple tasks. This quality of support also requires time off of checking tickets.
- Data & Reporting Challenges:** Data quality in certain regions is very low and trust in data is low. HR spends excessive time generating workday reports manually or manually reporting workday reports.
- Manual Workarounds:** Many processes have placed outside of Workday, with Excel spreadsheets. Payroll team manually reporting integrations every cycle. Career team is doing succession planning in Excel etc.
- User Adoption Gaps:** Managers not using goal setting tools consistently. Often managers use HR to complete processes on their behalf. Feedback is that the system has too many clicks and fees.

What's Next?

The next chapter will focus on prioritizing Workday improvements by hosting a strategy workshop and turning this assessment into an actionable roadmap.



Run a One-Day Strategy Workshop

Why This Step Matters

With stakeholder feedback, strategic alignment, and module assessments in hand, the next step is to translate findings into a prioritized strategy and roadmap. A well-structured workshop will bring together key decision-makers, align priorities, and set a clear path forward.

- Engage the right stakeholders in meaningful discussions.
 - Identify high-impact Workday improvements through structured exercises.
 - Prioritize initiatives based on effort vs. impact.
 - Develop a draft Workday Technology Roadmap to guide execution.
-

Step 1: Plan the Workshop Logistics & Participants

 **Action Step:** Set up the session for success with the right attendees, tools, and preparation.

Attendees: Invite 5–10 key stakeholders who can provide insights and make decisions.

- HRIS Team (Workday system owners and analysts)
- HR Leader or Executive Sponsor (e.g., CHRO, Head of HR)
- HRBPs or Subject Matter Experts (Recruiting, Talent, Payroll, etc.)
- IT Representative (For technical feasibility and integration considerations)

Duration: 6–8 hours (full-day session) or two half-day sessions if needed.



Pre-Read Materials: Send a summary of:

- Current Workday Experience findings (from Chapter 1)
- Workday HR Tech Gap Report (from Chapter 3)
- Strategic Alignment Summary (from Chapter 2)

Tools & Venue:

- In-Person: Whiteboards, sticky notes, flip charts, markers.
- Virtual: Miro, MURAL, Microsoft Teams Whiteboard, or a shared Google Doc.

Step 2: Workshop Agenda & Exercises

💡 Action Step: Facilitate structured discussions to ensure productive outcomes.

Morning Session: Define the Problem & Explore Solutions

9:00–10:00 AM: Present Current State Findings

- Review Workday gaps, underutilized features, and strategic alignment.
- Ensure everyone has a shared understanding of the business needs before solutioning.

10:30 AM–12:00 PM: Brainstorm Improvements

- Silent Ideation: 5–10 minutes for participants to write down potential solutions.
- Idea Sharing: Place sticky notes on a board and group similar ideas.
- Discussion: Identify trends and categorize ideas into Process, Technology, and Adoption improvements.

Example Improvement Areas:

Process Fixes: Automating approvals, streamlining reporting.

Technology Enhancements: Workday Extend apps, Prism Analytics dashboards.

Adoption Initiatives: Training for managers, Workday self-service campaigns.

💡 Deliverable: A broad list of Workday improvement ideas.



Afternoon Session: Prioritize & Develop a Roadmap

1:00–2:30 PM: Prioritization Using the Impact vs. Effort Matrix

- Draw a 2x2 Matrix: High Impact vs. Low Impact | High Effort vs. Low Effort.
- Place each idea in the matrix:
 - ♦ Quick Wins (High Impact, Low Effort): Prioritize for immediate action.
 - ♦ Major Projects (High Impact, High Effort): Schedule for long-term execution.
 - ♦ Fill-Ins (Low Impact, Low Effort): Nice-to-haves.
 - ♦ Avoid or Defer (Low Impact, High Effort): Likely not worth pursuing.

Category	Example Initiative	Placement
Process Fix	Automate performance review reminders	Quick Win
Technology	Develop Workday Extend app for contract approvals	Major Project
Adoption	Launch Workday self-service training campaign	Quick Win
Reporting	Advanced workforce analytics dashboard	Major Project

💡 **Deliverable:** A prioritized list of initiatives based on business impact and feasibility.



2:30–4:00 PM: Draft the Workday Technology Roadmap

💡 **Action Step:** Organize the prioritized initiatives into a structured roadmap.

Create a Workday Roadmap:

- Next 12 Months: Immediate priorities (Quick Wins + High Priority Projects).
- Years 2–3: Medium-to-long-term initiatives requiring more planning/resources.
- Dependencies: Identify initiatives that must happen before others.
- Ownership: Assign initiative owners (HRIS, IT, HRBPs, etc.).

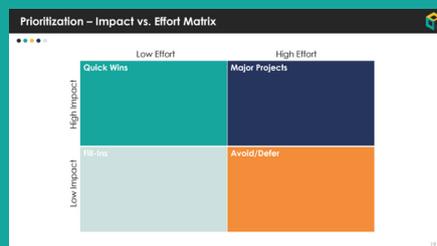
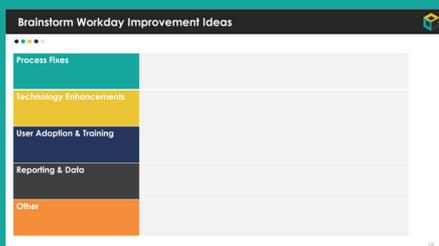
💡 **Deliverable:** A draft roadmap for Workday improvements over the next 1–3 years.

Step 3: Finalizing the Roadmap & Next Steps

4:00–5:00 PM: Review & Assign Action Items

- Recap the roadmap and ensure agreement on top priorities.
- Assign responsibility for drafting the final roadmap document.
- Outline next steps:
 - Schedule follow-up with leadership (e.g., CHRO, CFO) to validate priorities.
 - Identify budget needs for larger projects.
 - Plan communications to Workday users (e.g., managers, employees).

💡 **Final Deliverable:** Workday Technology Roadmap



What's Next?

With the strategy workshop completed, the next chapter will focus on turning this roadmap into a structured execution plan, including detailed project plans, timelines, and resource allocation.



Building the Workday HR Technology Roadmap

Why This Step Matters

With insights from the Workday Strategy Workshop, it's time to transform those outputs into a structured, actionable roadmap. This roadmap will:

- Guide execution, defining priorities, phases, and responsible teams.
- Align with business objectives, ensuring initiatives contribute to HR & company goals.
- Communicate Workday's value, providing clarity for stakeholders and leadership.

A well-structured roadmap ensures transparency, secures buy-in, and sets the stage for successful implementation.

Step 1: Structuring the Workday Roadmap

💡 Action Step: Organize Workday improvements into three phases, balancing quick wins with long-term transformation.

Phase	Timeframe	Purpose
Phase 1: Quick Wins	0–6 months	Immediate, high-impact, low-effort fixes to build momentum.
Phase 2: Medium-Term Enhancements	6–18 months	Larger projects requiring planning, resources, and cross-functional collaboration.
Phase 3: Long-Term Strategic Initiatives	18+ months	Transformational efforts aligning with future business needs.
Phase	Timeframe	Purpose



Step 2: Documenting Phase 1 – Quick Wins (0–6 Months)

Tackle high-impact, low-effort improvements that require minimal resources.

Examples of Quick Wins in Workday:

- **Feature Activation:** Enable Workday’s onboarding checklist for new hires.
- **Process Optimization:** Reduce promotion approvals from 3 steps to 1 to improve efficiency.
- **Training & Adoption:** Launch a “Workday Tips” email series for managers.
- **Data Cleanup:** Standardize job titles for better reporting.
- **Small Integrations:** Automate monthly data exports from Workday to Finance.

💡 **Action Step:** fill in the template below. This gives you a detailed Quick Wins Implementation Plan to drive immediate improvements.

Initiative	Owner (assign a name)	Expected Benefit	Deadline
Enable Onboarding Checklist	HRIS Analyst	Faster new hire processing	Q1 2025
Standardize Job Titles	HR Data Team	Improved reporting accuracy	Q1 2025
Automate Payroll Data Export	IT Integration	Reduce manual effort	Q2 2025



Step 3: Documenting Phase 2 – Medium-Term Enhancements (6–18 Months)

Address high-impact, high-effort initiatives requiring budget and planning.

Examples of Medium-Term Enhancements:

- **New Workday Modules:** Implement Workday Learning to replace an outdated LMS.
- **Advanced Analytics:** Develop Prism Analytics dashboards for HR & Finance insights.
- **Process Redesign:** Revamp performance reviews to align with new HR strategy.
- **Integration Overhauls:** Shift Payroll integration from batch uploads to real-time API sync.

 **Action Step:** fill in the template below. This gives you a detailed Workday Medium-Term Projects Plan, including budget needs.

Initiative	Owner	Resources Needed	Budget Estimate	Target Completion
Workday Learning Implementation	HRIS + L&D	Vendor + Internal SMEs	\$\$	Q3 2025
Performance Review Redesign	HRBP Team	Change Management Support	\$	Q4 2025
Prism Analytics Dashboards	HR Data Team	IT Support	\$	Q2 2026



Step 4: Documenting Phase 3 – Long-Term Strategic Initiatives (18+ Months)

Plan for future transformations that align with HR & business growth.

Examples of Long-Term Initiatives:

- **AI & Automation:** Implement Workday’s machine learning-driven career planning.
- **Global Expansion:** Integrate Workday into newly acquired companies (M&A preparation).
- **System Consolidation:** Retire legacy HR tools and move all functions into Workday by leveraging Extend.

 **Action Step:** fill in the template below. This gives you a Long-Term Strategic Workday Vision, ensuring future readiness.

Initiative	Owner	Dependencies	Strategic Impact	Planned Start
AI-Driven Career Planning	HRIS + Talent	Workday Skills Cloud Adoption	Personalized employee growth	2027
Global HR Job Framework Harmonization	HRBP Team	Job Framework project	Standardized career tracks	2026
Legacy System Decommission	IT	Extend License	Cost savings & data accuracy	2026–2027



Step 5: Finalizing the Workday Roadmap

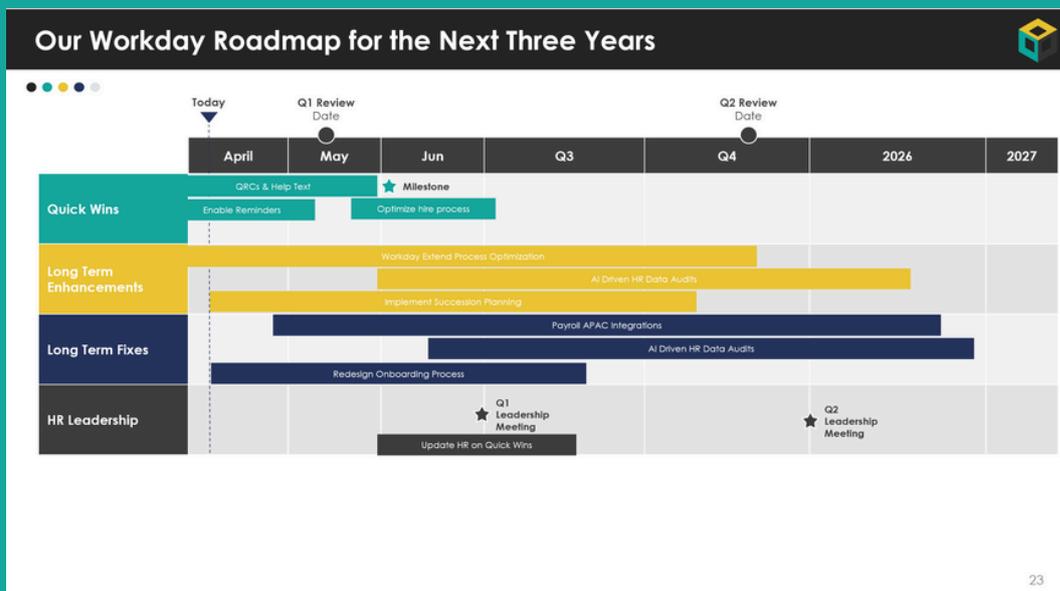
💡 Action Step: Ensure the roadmap is well-structured, easy to understand, and ready for stakeholder approval.

Checklist for a Strong Workday Roadmap:

- Clear Phase Breakdown – Quick Wins, Medium-Term, and Long-Term initiatives.
- Owner Assignments – Every initiative has an accountable team/individual.
- Budget Estimates – Highlight cost expectations for leadership alignment.
- Business Impact Summary – Demonstrate value (efficiency gains, cost savings, adoption improvements).
- Strategic Alignment Check – Ensure roadmap aligns with HR & business goals.

Visual Representation: Consider presenting the roadmap in a Gantt-style timeline or phased roadmap infographic to simplify communication with leadership.

💡 Final Deliverable: The Workday HR Technology Roadmap: a Gantt Chart and a structured document capturing priorities, owners, and impact (using the tables above).





Creating a Leadership Presentation

Why This Step Matters

With your Workday HR Technology Roadmap finalized, the next step is securing leadership buy-in, funding, and executive support. Your leadership presentation should clearly articulate:

- The case for change: why Workday enhancements are necessary.
- Strategic alignment: how the roadmap supports business & HR objectives.
- A phased execution plan: outlining priorities and expected outcomes.
- Business benefits: quantifiable impact and ROI considerations.
- What leadership needs to approve or support: clear next steps and requests.

Your presentation should be concise, outcome-driven, and focused on business value—not technical details.

Step 1: Structuring the Leadership Presentation

💡 Action Step: Use a clear, logical flow to tell a compelling story.
Recommended Slide Deck Structure:

1. Title Slide

Purpose: Set the stage for the discussion.

Content:

- Presentation title (e.g., “HR Technology Strategy & Roadmap – Workday 2025–2027”)
- Presenter name, title, and date.
- Company logo and optional Workday branding.



2. Agenda Slide

Purpose: Provide an overview of the discussion topics.

Content: Bullet list format covering:

1. Current State (Why Change?)
2. HR Strategy Alignment (Vision for Workday)
3. Roadmap Overview (Phases & Key Initiatives)
4. Business Impact & Expected Benefits
5. Next Steps & Leadership Requests

3. Current Workday State (The Case for Change) (1-2 slides)

Purpose: Establish why Workday improvements are needed.

Goal: Create a sense of urgency by highlighting inefficiencies and lost opportunities.

Content:

- Top 3-5 Key Challenges & Gaps: Examples:
 - Fragmented onboarding process (mix of Workday & manual steps) leading to delays.
 - Underutilized analytics—decisions made with incomplete data.
 - Manager adoption of Workday goal-setting is low (only 45% usage).
- Compelling Metrics (if available):
 - “Workday user satisfaction: 65% (survey) – opportunity for improvement.”
 - “Only 30% of HR reports are self-service; the rest require manual intervention.”
- Visuals:
 - Simple bar chart or heatmap showing module utilization gaps.
 - A snapshot of current inefficiencies (workflow diagram or statistics).



4. HR Strategy Alignment (Future Vision for Workday) (1 slide)

Purpose: Show how Workday improvements align with broader HR & company goals.

Goal: Show Workday as a key enabler of HR & business success rather than just a system improvement.

Content:

- Title: “Workday Vision: Enabling Our HR Strategy”
- Future state description: Examples:
 - “All core HR processes globally run through Workday with a consumer-grade user experience.”
 - “Leaders have on-demand workforce analytics for agile decision-making.”
 - “HR spends less time on manual processes and more on strategic talent initiatives.”
- Strategic Priorities Supported by Workday: Examples:
 - “Scalable HR Platform for Growth”
 - “Data-Driven Decision Making”
 - “Improved Employee Experience & Productivity”
- Visual: Use a simple icon-based infographic to illustrate Workday’s role.

5. Workday Roadmap Overview (1-2 slides)

Purpose: Present a structured plan for execution.

Goal: Provide a clear, phased approach to execution that balances impact and feasibility.

Content:

- High-Level Roadmap Timeline:
 - Phase 1 (0-6 months): Quick Wins (Feature enablement, training, automation).
 - Phase 2 (6-18 months): Medium-Term Enhancements (New modules, integrations, analytics).
 - Phase 3 (18+ months): Long-Term Transformation (AI-driven insights, global harmonization).



-
- Format:
 - Use a horizontal timeline with key initiatives under each phase.
 - Highlight quick wins to demonstrate immediate value.
 - If needed, add a second slide with brief descriptions of major initiatives requiring leadership support (e.g., “Workday Learning Implementation: Cost, Benefit, Strategic Impact”).

6. Business Impact & Expected Benefits (1 slide)

Purpose: Highlight the tangible and intangible benefits of Workday improvements.

Goal: Demonstrate the **business value** of Workday investments in a way that resonates with leadership.

Content:

- Tangible Benefits (Quantifiable Metrics):
 - “Save ~500 hours/year of HR staff time by automating manual tasks.”
 - “Reduce time-to-fill by 10 days through improved recruiting workflows.”
 - “Improve performance review completion rate to 95%.”
- Intangible Benefits:
 - “Empower leaders with real-time workforce insights.”
 - “Enhance employee experience with seamless self-service tools.”
 - “Strengthen employer brand through a modernized HR platform.”
- Optional ROI Calculation (if available).

7. Next Steps & Leadership Requests (1 slide)

Purpose: Clearly define the next steps and secure leadership commitment.

Goal: Provide clear, actionable requests that leadership can easily approve.



Content:

- Immediate Next Steps: Examples:
 - “Secure funding & executive sponsorship.”
 - “Kick off Phase 1 projects (Quick Wins).”
 - “Engage key stakeholders in change management planning.”
- Specific Approvals/Decisions Needed:
 - “Approve budget of \$XYZ for FY2025 to implement Workday Learning & Payroll integration.”
 - “Green light to engage Workday Professional Services for Learning module deployment.”
 - “Executive support to drive Workday adoption among managers & employees.”
- Closing Statement:
 - “With your support, this roadmap will enable HR to support business success and deliver a world-class employee experience.”

Final Tips for Presenting to Executives:

- **Keep slides simple:** minimal text, clear visuals, strong messaging.
- **Speak their language:** focus on business outcomes, not technical details.
- **Prepare for questions:** have backup slides with details on costs, risks, or dependencies.
- **Be confident & outcome-focused:** highlight Workday’s role in driving **business success**.

 **Final Deliverable:** A polished Workday Leadership Presentation. Use the outline and the slides from the previous chapters to build your presentation.



Keeping Stakeholders Updated on Progress

Why This Step Matters

Once the Workday HR Technology Roadmap is in motion, ongoing governance and communication are crucial for ensuring:

- Progress stays on track: Prevents delays and misalignment.
- Stakeholders remain engaged: Ensures continued support from leadership and teams.
- Adjustments are made as needed: Adapts to changing business priorities.
- Impact is measured: Tracks success through key performance indicators (KPIs).

A strong reporting and update process prevents the roadmap from becoming a document that “sits on a shelf.”

Step 1: Establish a Quarterly Workday Review Process

 Action Step: Set up a quarterly Workday governance meeting with key stakeholders, including:

- HRIS Team – Oversees Workday execution and system performance.
- HR Leadership (CHRO, HRBPs, COE Leaders) – Provides strategic direction.
- IT Partners – Supports integrations and technical feasibility.
- Project Leads – Updates on in-progress Workday initiatives.

Quarterly Meeting Agenda:

1. Review Roadmap Progress:

- What’s completed, what’s in progress, what’s delayed?
- Update roadmap status using a color-coded system (e.g., green = on track, yellow = at risk, red = delayed).



2. Address New Business Priorities:

- Any regulatory changes, company growth plans, or HR shifts requiring roadmap adjustments?
- Example: A new compliance law may require prioritizing Workday security enhancements.

3. Resolve Issues & Risks:

- Example: “Project X is delayed due to HRIS resource constraints – should we adjust scope or bring in external help?”
- Identify solutions collaboratively.

4. Plan for the Next Quarter:

- Clarify upcoming milestones and dependencies.
- Example: “We need Finance approval for Workday Adaptive Planning rollout next quarter.”

5. Leadership Involvement:

- CHRO or relevant VPs may attend quarterly or semi-annually.
- If they can’t join, send them a brief summary email (see template in Step 4).

Output: Updated Workday roadmap & action plan for the next quarter.

Step 2: Track Workday Progress with an HR Tech Scorecard

💡 Action Step: Define KPIs (Key Performance Indicators) to measure the impact of Workday initiatives.

Metric	Baseline (2024)	Q1 2025	Q2 2025	Target (Q4 2025)
% Employees logging into Workday monthly	70%	75%	78%	90%
Performance Reviews Completed on Time	60%	-	75%	90%



Metric	Baseline (2024)	Q1 2025	Q2 2025	Target (Q4 2025)
Avg. HR Ticket Resolution Time (days)	5.0	4.2	4.0	3.0
Manual HR Transactions per Quarter	200	150	80	0 (fully automated)
Workday Roadmap Initiatives Completed	N/A	3 of 3	5 of 6	All Phase 1 by Q2 2026

Key Insights Section:

- “Q2 saw a big jump in self-service transactions due to the new manager training.”
- “Need to boost mobile adoption for remote workers—targeting this in Q3.”

Output: A quarterly updated scorecard to quantify Workday progress and share with leadership.

Step 3: Implement Regular Workday Updates for Stakeholders

💡 Action Step: Send a concise, structured update email each quarter to keep HR teams and sponsors informed.

Subject: Workday HR Tech Roadmap Update – [Month/Quarter Year]

Greeting & Introduction:

Hello [Team/Stakeholder Group],

I'd like to share our latest progress and upcoming plans on the **Workday HR Technology Roadmap**.



✓ Recent Achievements: (Highlight key wins)

- Workday Onboarding feature is live – 50+ new hires have used the new checklist.
- HR Dashboard v1 launched for HRBPs – now tracking turnover & headcount in Workday.
- Kicked off Workday Learning implementation – team assembled.

17 Upcoming Focus Areas: (Preview next priorities)

- Building the Workday Extend Offboarding app (testing with IT & HR in Q2).
- XYZ Payroll integration is in final testing, targeting June go-live.
- Exploring AI-driven career recommendations (Phase 3 initiative).

✓ Impact & Key Metrics: (Show measurable results)

- Workday usage is up – 78% of employees logged in this quarter (vs. 70% last year).
- HR tickets on job changes reduced by 25% after simplifications.
- Decommissioned old onboarding tool, saving \$15K annually.

⚠ Issues or Support Needed: (Raise any blockers)

- Performance review enhancements are behind schedule due to resource constraints.
- Sales managers need to complete Workday training

Feel free to reach out with any questions or feedback. We're excited about the Workday improvements ahead.

Best,

[Your Name]

[Your Title]

Customization Tip: You may have one version of this email for HR leadership and a more detailed one for the HRIS and HR BPs team, but keep updates concise and results-focused.



Final Tips for Keeping Workday Strategy On Track

- Schedule quarterly governance meetings in advance to ensure consistency.
- Use structured KPI tracking to measure adoption, efficiency, and ROI.
- Keep updates concise and high-impact, focus on results, not just tasks.
- Proactively engage leadership, show them the ongoing value of Workday investments.

💡 Final Deliverable: A quarterly Workday Review Process and a quarterly Workday communication to key stakeholders.

Topic	Current Items
Review Roadmap Progress	• Example: Update on Workday Learning implementation
Address New Business Priorities	• Example: A new compliance law may require prioritizing Workday security enhancements.
Resolve Issues & Risks	• Example: "Project X is delayed due to HRIS resource constraints – should we adjust scope or bring in external help?"
Plan for the Next Quarter	• Example: "We need finance approval for Workday Adaptive Planning rollout next quarter."
Leadership Involvement	• Example: "Update from CHRO on Workday Rising executive discussions outcomes"

Metric	Current Status	Baseline (2024)	Q1 2025	Q2 2025	Target (Q4 2025)
% Employees logging into Workday monthly	●	70%	75%	78%	90%
Performance Reviews Completed on Time	●	60%	-	75%	90%
Avg. HR Ticket Resolution Time (days)	●	5	4.2	4	3
Manual HR Transactions per Quarter	●	200	150	80	0 (fully automated)
Workday Roadmap Initiatives Completed	●	N/A	3 of 3	5 of 6	All Phase 1 by Q2 2026



Conclusion: Turning Strategy into Execution

Your Workday HR Tech Strategy: A Blueprint for Success

With this structured approach, you now have a clear, actionable roadmap for maximizing Workday's impact within your organization. Each step, from assessment to execution, ensures that Workday is not just a system, but a strategic enabler of business success.

- You've Defined the Vision: Your Workday strategy is now aligned with HR and business objectives, securing leadership buy-in.
- You've Prioritized the Right Initiatives: A phased roadmap ensures a balance of quick wins, long-term transformation, and business continuity.
- You've Built a Governance Framework: Regular reviews, stakeholder engagement, and key performance metrics keep the roadmap on track.
- You've Established a Communication Plan: Leadership and teams are continuously informed, ensuring ongoing support and adoption.

What Comes Next?

A strategy is only as strong as its execution. Now that the plan is in place, focus on:

- Executing Quick Wins: Build early momentum by delivering impactful but manageable improvements.
- Engaging Stakeholders: Keep leadership, HR, and IT aligned through transparent updates.
- Tracking KPIs: Regularly measure Workday adoption, efficiency gains, and business impact.
- Iterating & Adapting: Workday's capabilities, business needs, and technology trends will evolve: so should your strategy.
-

Final Thoughts: Elevating HR Through Workday

Your investment in Workday isn't just about technology. It's about



giving HR the tools to lead with confidence, improve decisions, and create a better experience for employees. When you stay focused on execution, communication, and continuous improvement, you are setting your team up for long-term success.

You can absolutely do this on your own. Many teams already have the knowledge and ambition. But sometimes bandwidth becomes the real blocker.

That is where Incubane comes in. If you ever need a second set of hands or someone to help move faster, the team at Incubane is always happy to support. From quick wins to custom apps, we help Workday customers turn strategy into action.

Now it is time to bring your Workday HR Tech Strategy to life.

