



# HRIS Agent Strategy Blueprint

## Strategy & Vision



# The HRIS Agent Strategy Blueprint



In line with our core value of Sharing Knowledge, we have built the HRIS Agent Strategy Blueprint. It is available for free and is aimed to give you all necessary tools and templates to start your Agent Journey.

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## Strategy & Vision

Help HR tech lead define the vision and get buy in.

**AGENT**  
Ambitions & Outcomes | Governance & Guardrails | Experience & Platforms | Native vs. Custom Agents | Trajectory & Roadmap

**Your AI Readiness Assessment Score**  
Your Overall Score: **Developing - 62%**

**What Your Score Means**  
Data Completeness - You scored 60%. Data governance structures are still limited but beginning to take shape. Your system includes some of the mandatory fields required for AI and has implemented semi-automated reporting to help track data quality.

- AGENT Framework & Templates
- Agent Use Case Library for Workday
- Business Case & Token Calculator Template
- AI Readiness Assessment
- Executive Pitch Deck template
- On demand webinars
- Workday & AI Glossary for HRIS Teams
- Agent FAQ

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## Architecture & Build

Show how to design and wire agents with Workday and Flowise.

**Feedback Agent**  
Identify Feedback Needs  
Get Feedback  
Has Development Needs

**Super Agent**  
Agent Gateway  
Self Service Agent | Inflight Agent | Manager Assistant | Crew Agent  
Agent Gateway  
Primary HR Platforms: Workday, UltiPro

- Complex concepts simplified: Deterministic vs. Probabilistic, using RAG, Evals and more.
- Guiding Principles for Agent Architecture
- Agent Reference Architecture & MCP / A2A Explained and Decision Table
- Multi-Agent Architecture Templates
- Service request types & agent patterns
- Flowise Patterns, Templates and Tutorials

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## Governance & People

Make it safe, compliant, and make sure people can run it.

**Agent Governance Board starter pack**

**EU AI Act: Understand your risk level before you build**  
The 4 risk levels from EU AI Act: Unacceptable Risk, High Risk, Limited Risk, Minimal Risk.

**Checklist for Agent Use Cases**

- EU AI Act Explained
- Risk & Controls Checklist
- Example RACI for Agents
- Agent Governance Starter Pack for AI Board
- HRIS Agent Upskilling Plan (Functional & Technical Track)

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# How to Use the Strategy & Vision Blueprint



<b>Who this document is for</b>		<ul style="list-style-type: none"><li>• HRIS leads and HR tech product owners.</li><li>• Product owners and architects for Workday and adjacent HR / Finance tools.</li><li>• HR / IT leaders who sponsor AI and agent initiatives.</li></ul>
<b>When to use it</b>		<ul style="list-style-type: none"><li>• When you want to define an overall agent strategy on top of Workday.</li><li>• When you are building an agent roadmap and portfolio for the next 12–24 months.</li><li>• When you need to prepare a business case and executive pitch for investment in Workday and partner agents.</li></ul>
<b>How to work with it</b>		<ol style="list-style-type: none"><li>1. Use the A.G.E.N.T. Strategy Framework &amp; Template to capture your ambitions, governance choices, experience goals, native vs custom direction and roadmap. Rewatch the webinar Agent Strategy &amp; Business case if you need more context.</li><li>2. Complete the AI Readiness Assessment to understand where your Workday landscape and organisation are today.</li><li>3. Explore the Workday Agents Catalogue and start adding your own priority use cases.</li><li>4. Build your first agent business cases using the Business Case Template and Token Cost Estimator.</li><li>5. Review and tailor the Executive Pitch Deck pages to your context and use them with your CHRO / CIO to gain sponsorship.</li><li>6. Use the glossaries and FAQ to align stakeholders on terminology and answer common questions.</li></ol>



# A.G.E.N.T. Strategy Framework



# Agent Strategy Template



A Ambitions & Outcomes 		
Field	Description	Your input
<b>Vision statement</b>	One sentence on why you invest in agents	
<b>Main personas</b>	2-3 key personas (e.g. HRBP, Manager, Employee, Finance)	1. Persona
<b>Top 3 problems to solve</b>	Concrete pains you want to remove	1. Pain point X 2. Y 3. Z
<b>Business outcomes</b>	e.g. faster cycle times, better decisions, less manual work	
<b>Key KPIs</b>	3-5 KPIs you will track for agents	

G Governance & Guardrails 		
Field	Description	Your input
<b>Risk appetite</b>	How much risk you accept for agents, for example conservative, balanced, ambitious	e.g. "Balanced, low for HR core data"
<b>Data boundaries</b>	What data agents can and cannot use, including sensitive data and cross border rules	List key data domains and red lines
<b>Use case risk levels</b>	Simple categories for use cases, for example low / medium / high risk, or EU AI Act categories	Define levels and examples per level
<b>Human in the loop</b>	When a human must review or approve actions before they hit Workday or other systems	List processes where review is required
<b>Approval model</b>	Who approves which type of agent use case or change, and in which forum	e.g. AI board, HRIS CAB, data privacy
<b>Compliance &amp; EU AI Act</b>	How you make sure agents follow local law and EU AI Act rules	Note required checks and documents
<b>Monitoring &amp; audit</b>	How you log agent activity, monitor outcomes, handle incidents and give recourse	Tools, reports and escalation process
<b>Roles &amp; responsibilities</b>	Who owns what in practice, for example HR, HRIS, IT, legal	RACI style list of key roles
<b>Documentation &amp; transparency</b>	What you document for each agent, and how to share with employees and works councils	Decide minimum docs per agent

# Agent Strategy Template



E	Experience & Platforms 	
Field	Description	Your input
Target journeys	Key journeys where users will work with agents, e.g. hire, transfer, performance	List 3 to 5 core journeys
Experience goals	How the experience should feel, e.g. fast, trusted, simple, no jargon	3 to 5 words that describe the experience
Handover to humans	When the agent should hand over to a human	Describe rules for handover
Agent Builder Platform	Main tools and platforms, for example Flowise, LLM provider, integration tool	List your standard platforms
Primary HR Platforms	Where ~ 80 percent of HR activity happens, for example Workday, ticketing, LMS, intranet etc.	List 3 to 5 systems that must be integrated first
Entry points	Where users meet agents, for example WD Assistant, Teams, Slack	Choose main channels
Integration pattern	How agents talk to systems, for example APIs,, MCP, A2A	Describe preferred patterns
Measurement of experience	How you will measure success, for example CSAT, NPS, completion time	3 to 5 metrics

N	Native vs. Custom Agents 	
Field	Description	Your input
Strategic direction	Overall view on native vs. custom, e.g. native first, custom where it adds clear value	Short statement
Primary native agents	Workday delivered or partner agents you plan to use and extend	List core native agents
Primary custom agents	Key custom agents you plan to build yourself or with a partner	List 3 to 5 custom agent ideas
Decision criteria per use case	How you decide native vs. custom, for example speed, control, data needs, UX, cost	Bullet list of criteria
When to prefer native	Typical situations where you choose Workday delivered or marketplace agents first	Describe 3 to 5 patterns
When to prefer custom	Typical situations where you build in Flowise or other platforms	Describe 3 to 5 patterns
Ownership and support model	Who owns native agents vs. custom agents, including support, SLAs and upgrades	Define roles per type
Vendor and lock in considerations	How you manage dependence on Workday delivered vs. external platforms	Short notes on risk and mitigation

# Agent Strategy Template



T	Trajectory & Roadmap	
Field	Description	Your input
Time horizon	Period you plan for, for example next 12–24 months	e.g. "Now – end 2026"
Starting point	Where you are today with AI and agents	Short summary
Team skills & upskilling	Skills you need and how you will upskill HR, HRIS, IT	Training, coaching, hiring
Stakeholders to align	Key people and forums you must bring along	CHRO, CIO, works council, finance, etc.
Governance readiness	Actions to get AI governance, EU AI Act and policies ready	Boards, policies, templates
Data & integration readiness	Work needed on data quality and key integrations before agents can scale	Main gaps and actions
Business case preparation	What you need to build a credible case, for example baselines, volumes, rate cards	Data sources and owners
First experiments / pilots	1–3 low risk pilots to test approach and learn	List pilot candidates
Communication plan	How you create excitement and manage expectations around agents	Channels and messages

Use case / agent	Main persona	Annual volume (events)	Time saved per event	Other benefits	Agent complexity (L / M / H)	Est. build cost	Est. run cost / year	Rough annual value	Planned wave
Job Req Agent	Hiring managers	5.000 requisitions	15 minutes	Better quality reqs, fewer reworks and back and forth	M	€60k	€15k	≈ €75k (5.000 × 0,25h × €60)	Now
360 Feedback Agent	People managers	1.000 360 cycles	30 minutes	Better summaries, more consistent quality conversations	M	€70k	€20k	≈ €35k (1.000 × 0,5h × €70)	6–12m
Goal Setting Agent	Employees, managers	4.000 goal cycles	20 minutes	Higher goal quality, fewer reminders, better alignment	M–H	€90k	€25k	≈ €90k (4.000 × 0,33h × €70)	6–12m

# AI Readiness Assessment





Our partner VirtualResource has built an excellent AI readiness assessment. It helps you think through four different dimensions:

- Data Completeness
- Workday Architecture
- Process Maturity
- AI Readiness

Use [this link](#) to complete the assessment

## FREE AI Readiness Assessment

VR VIRTUAL  
RESOURCE



Is your organisation ready to harness the full potential of Artificial Intelligence within **Workday**?

By answering a few focused questions across four key dimensions –

- Data Completeness
- Workday Architecture
- Process Maturity, and
- Organisational Readiness

you'll gain a clear view of how well-positioned your environment is to adopt and scale Workday's AI capabilities.



Access the Assessment using the link in the caption above

# Agent Use Library for Workday



# Workday Agents Catalogue



This overview shows both Workday native agents, and gives you space to detail out your own agent use cases.

Agent ID	Agent Name	Primary Domain	Process Focus	Short Description	Example Value Signals	Typical Input	Typical Output or Action	Required Products	Availability
A001	Recruiting Agent (HiredScore)	Recruiting	End to end recruiting, sourcing, screening,	Discovers talent in existing pools, grades candidates, guides hiring managers and sends intelligent alerts to speed up hiring while improving quality.	Uplift in recruiter capacity, reduction in screening time, higher quality and coverage from existing talent pools, shorter time to fill.	Candidate data, job requisition data	Lead Matching & Applicant Score	Core HCM Recruiting	General Available
A002	Talent Mobility Agent (HiredScore)	Internal mobility	Internal career moves, internal talent discovery	Surfaces internal job opportunities for employees, recruiters and managers inside existing workflows to drive internal moves, progression and retention.	Workday highlights higher likelihood of internal moves, more internal applications, higher candidate quality and improved retention.	Talent data, job requisition data	Suggests resumes to review, fetch past applicants, surface personalized job opportunities to employees, personalized job recommendations	Core HCM Recruiting	General Available
A003	Conversational Recruiting Agent (Paradox)	Recruiting	Candidate conversations and scheduling	A conversational recruiting agent that uses chat to engage candidates and support recruiting processes, integrated into the Workday agent ecosystem.	Workday positions it as improving candidate experience and recruiter efficiency, but does not assign explicit numeric KPIs in the slides shown.	candidates use chat & text-to-apply	Conversational Apply and Conversational Scheduling	Recruiting	General Available
A004	Contract Negotiation Agent (Evisort)	Legal / Procurement / Revenue	Contract negotiation on the Evisort platform	Supports negotiation workflows on Evisort by using AI on contract data to help legal and procurement manage commercial terms during negotiations.	Increase legal team efficiency and effectiveness leading to incremental events & cost saving. Streamlined contract search and regulatory compliance management. Avoid unintentional auto-renewals, with proactive alerts and real-time reporting	Contracts	Ask AI review, Automated Redlining, Clause Creator	Core Financials	General Available
A005	Contract Intelligence Agent (Evisort)	Legal / Procurement / Revenue	Contract analysis, obligations and risk	Centralizes contract terms and obligations across customer and supplier contracts and uses AI to improve visibility, compliance and renewal management.	Increase legal team efficiency and effectiveness leading to incremental events & cost saving. Streamlined contract search and regulatory compliance management. Avoid unintentional auto-renewals, with proactive alerts and real-time reporting	Contracts	Ask AI across all contracts, Advanced OCR+AI processing	Core Financials	General Available
A006	Contingent Sourcing Agent	Contingent worker	Contingent worker sourcing in Workday VNDLY	Uses intelligent contingent applicant grading and talent rediscovery on existing applicant pools in Workday VNDLY to surface qualified candidates for new contingent roles.	Measures mentioned include time to fill, reduced sourcing costs, re-hire or engagement rate and manager review time. Workday also stresses cost optimisation through talent rediscovery and reduced third party mark ups.	Contingent worker applications and job requisitions	Contingent applicant grading and Contingent Talent Rediscovery for Contingent Job	Core Human Capital Management VNDLY	2025R2 for Early Adopters
	Payroll Agent	Payroll	Payroll input, compliance and insights	Reimagines payroll with human-AI collaboration, automates repetitive payroll tasks, minimum wage	Workday mentions organisations losing 2 days per week to manual payroll and positions the agent to cut admin time,		Automating repetitive tasks, detecting issues, and deflecting tickets. Manage one-off payroll entries through a simple,	Payroll for Canada Payroll for France Payroll for United	Time on Payroll A Payroll Errors Payroll Adjustme

 Click here to download the Excel

# Business Case Template for Agents



# Business Case Template & Token Cost Estimator



Our business case template helps you calculate the total costs, benefits and ROI of different agent use cases. You will have to provide several metrics in order to being able to calculate the ROI. In addition we have a token calculator that can help you estimate run costs of your AI/Agent use case.

 <b>Agent Business Case Template</b>												
Agent Name	Use Case Name	Owner	Process Volume Per Year	Time Saved Per Execution Min	Hourly Rate	Annual Hours Saved	Annual Time Value	Annual External Spend Savings	Annual Error or Risk Avoided Value	Other Tangible Benefits Value Annual	Intangible Employee Experience Score (1-5)	Intangible Risk Reduction Score (1-5)
Recruiting Agent (HiredScore)	External hiring screening and sourcing	HRIS / Talent Acquisition	2,000	45	\$75	1,500	\$112,500	\$100,000	\$25,000	\$0	4	3

 <b>Token Cost &amp; Use Case Estimator</b>				
Area	Count			
Number of users	60,000			
Frequency of use	Monthly			
Average number of monthly uses per user	4			
Average amount of input tokens per prompt	425			
Total Number of API Calls	2,880,000			
Input Tokens Spend per Year	1,224,000,000			
Average amount of output tokens per prompt	175			
Output Tokens Spend per Year	504,000,000			
Provider	Cost Per Model	Input per 1K tokens	Output per 1K Tokens	Total
Anthropic	Claude Sonnet 4	\$0.0030	\$0.0150	\$11,232.00
Anthropic	Claude 3.5 Haiku	\$0.0008	\$0.0040	\$2,995.20
Google	Gemini 2.5 Pro	\$0.0013	\$0.0100	\$6,570.00
Google	Gemini 2.0 Flash	\$0.0001	\$0.0007	\$475.20
Meta	Llama 3.2 90b	\$0.0020	\$0.0020	\$3,525.12
Meta	Llama 3.3 70b	\$0.0007	\$0.0007	\$1,226.88
OpenAI	GPT-4.1	\$0.0020	\$0.0080	\$6,480.00
OpenAI	o4-mini	\$0.0004	\$0.0001	\$540.00
Add other provider	-	\$0.0000	\$0.0000	\$0.00
Add other provider	-	\$0.0000	\$0.0000	\$0.00

# Executive Pitch Deck Template



# Strategic context: why agents, why now



## Our starting point

We already run our core people and finance processes on Workday.

Data, security and approvals are standardised here. Any improvement we make on top of Workday scales across countries and functions. Workday is investing heavily in AI.

The question is not *if* we use AI, but *where* we want it to live in this landscape.



## Why agents, why now

AI agents are becoming the next layer of "digital workforce": they can read data, use tools and complete steps in a process, not just answer questions.

In HR and Finance this means agents that can help with hiring, onboarding, case handling, reconciliations and more. Competitors are starting to use these capabilities to remove low-value work and speed up decisions.



## The risk if we do nothing

If we do not set a clear direction, teams will solve problems with their own chatbots and point solutions.

That leads to fragmented data, extra integrations, inconsistent employee experience and higher risk. We also underuse AI capabilities already included in our Workday investment.



## Our proposal

Use Workday and approved partner agents as our default platform for people and finance use cases.

This lets us reuse Workday data, security and governance, and plug agents directly into existing processes.

We start with a small portfolio of high-value pilots; if they hit agreed KPIs, we scale them as a formal program.



## Option A – Point solutions per use case

- Each team buys its own chatbot / AI app.
- Best of breed instead of best of suite
- Fast to start, but: extra integrations, extra vendors, inconsistent UX, harder governance

## Option B – Custom agents from scratch (outside WD)

- Maximum freedom
- Can tie into overarching IT strategy and use IT's agent building capability
- But we own security, hosting, compliance and long-term cost.
- More work on integrating with Workday

## Option C – Workday + partner agents

- Built on top of our single source of truth (Workday data model).
- Uses existing security, roles and audit instead of rebuilding.
- Agents can live inside Workday processes, but also connect to other systems
- Can also build custom agents for our own organization using Flowise

Our proposed approach is Option X,  
because of XYZ

# Our A.G.E.N.T. decisions at a glance



Ambitions & Outcomes	
Area	Our View
<b>Vision statement</b>	Use agents on top of Workday to remove low-value admin, improve decisions, and get more from Workday
<b>Main personas</b>	Employees, managers, HR, Finance.
<b>Top outcomes</b>	Faster cycle times, less manual work, better data in decisions.
<b>Business outcomes</b>	e.g. faster cycle times, better decisions, less manual work
<b>Key KPIs</b>	Hours saved, process cycle time, error / rework rate, adoption.

Governance & Guardrails	
Area	Our View
<b>Risk stance</b>	Balanced, strict for core HR / pay decisions.
<b>Data boundaries</b>	Workday as source of truth; sensitive data only in defined use cases.
<b>Human in the loop</b>	Required for hiring, performance, pay and termination decisions.
<b>Approval model</b>	High-impact use cases go via AI governance board using a standard checklist.

Experience & Platforms	
Area	Our View
<b>Key journeys</b>	Recruiting, HR help, performance / goals, core finance ops.
<b>Experience goals</b>	Fast, simple, transparent, "one place to go".
<b>Entry points</b>	Workday (incl. Assistant), plus selected channels such as M365 / intranet.
<b>Build Platforms</b>	Workday Extend Pro with Flowise and standard integration tools.

Native vs. Custom Agents	
Area	Our View
<b>Default</b>	Workday native and marketplace / partner agents first.
<b>Custom When</b>	We need unique UX, special data, or cross-system flow or when the ROI is greater than X
<b>Ownership</b>	Native agents owned by HRIS with vendor; custom agents owned jointly by HRIS and business product owners

Trajectory & Roadmap	
Field	Description
<b>Time horizon</b>	Next 12–24 months.
<b>Starting point</b>	1–2 pilots on Workday (for example Policy Agent that can read knowledge base)
<b>Waves</b>	90-day pilot wave, 1-year scale wave, then continuous improvement.
<b>Enablers</b>	Upskilling plan for HRIS / IT, data and integration readiness, AI governance in place.

# What it means for HR and IT



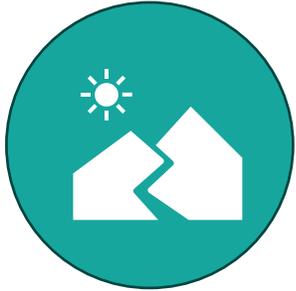
<b>Business value</b> Where will this help? 	<ul style="list-style-type: none"><li>• Our process focus: <b>Focus on 2–3 high-volume processes</b></li><li>• Our proposed KPI's: <b>e.g. hours saved, cycle time, completion rates, fewer errors.</b></li></ul>
<b>Risk and compliance</b> 	<ul style="list-style-type: none"><li>• Propose to start with Workday native / partner agents, supported by Workday's Responsible AI program.</li><li>• Use our AI governance board + checklist for any high-impact use case.</li><li>• Human in the loop; ability to switch off or roll back.</li><li>• Build Agent capability with experienced partner support</li></ul>
<b>Architecture</b> 	<ul style="list-style-type: none"><li>• Native Workday agents fully sit within their cloud system</li><li>• Partner and custom agents can connect via Agent Gateway (using A2A to identify other agents and MCP to call Workday tools)</li><li>• No new data lake or security model; we re-use what we have.</li></ul>
<b>People &amp; change</b> 	<ul style="list-style-type: none"><li>• We created an HRIS upskilling plan (functional + technical tracks).</li><li>• Small cross-functional “agent squad” with HR, HRIS, IT, Data.</li><li>• A separate change plan to be created for our first use case</li></ul>

# Our Plan on a Page



Area / Phase	Next 90 days – Pilot & learn	Next 12 months – Scale what works	Beyond 12 months – Strategic expansion
<b>Workday native agents</b>	Identify 2–3 high-value native AI features already in our license (for example recruiting, help desk, finance anomalies). Enable 1–2 as <b>controlled pilots</b> with clear KPIs and user feedback.	Roll out successful features to more countries / BUs. Standardise configuration and support. Include native AI usage and KPIs in HR / Finance dashboards.	Systematically review each new Workday release for AI features. Treat Workday AI as a standard lever in process design and optimisation.
<b>Partner agents</b>	Shortlist 1–2 <b>Workday marketplace / partner agents</b> that solve real pain (for example conversational recruiting, knowledge search). Run a limited PoC with strict scope and governance.	Contract and industrialise chosen partners. Integrate into Workday processes and channels (portal, mobile). Build standard patterns for vendor onboarding, security and support.	Move to a curated “agent portfolio” with a small set of strategic partners. Use Agent Gateway / ASoR concepts as they mature to manage partners as a digital workforce.
<b>Custom agents on Workday</b>	Pick <b>one custom agent</b> idea tightly linked to Workday (for example Manager Assistant, GROW agent, 360 Feedback). Do a feasibility spike and simple prototype using existing integration tools (and Flowise if available).	Build and deploy 1–3 custom agents on Workday for priority processes. Reuse components where possible. Document patterns for security, logging and monitoring.	Treat custom agents as a standard option in the solution catalogue. Reuse frameworks across regions; consider exposing some as global assets or templates.
<b>Capability &amp; operating model</b>	Nominate a small “ <b>agent squad</b> ” (HRIS, HR, IT, Data). Kick off the functional and technical learning paths. Reserve 2–3 hours per week per person.	Formalise roles: product owner, architect, MLOps / integration lead, change lead. Include agent work in job descriptions and performance goals. Train local HR teams to use and explain agents.	Build a sustainable <b>centre of excellence</b> for AI on Workday. Rotate people through it. Use it to support other platforms as well, not only Workday.
<b>Governance &amp; risk</b>	Agree a simple <b>Workday AI checklist</b> with the AI governance board. Classify each pilot use case, confirm human-in-the-loop points and monitoring.	Embed the checklist in standard intake for HR / IT projects. Automate as much as possible (templates, fact sheet library, risk register). Run periodic reviews of live agents.	Align fully with EU AI Act obligations as they go live. Use audit trails and metrics from Workday / agents to support external reporting and internal assurance.
<b>Data, integration &amp; UX</b>	Confirm which <b>Workday data</b> pilots will use and fix obvious data quality issues. Map current integrations that agents will touch. Design simple, low-friction UI entry points (for example Workday homepage, help portal).	Clean up and standardise key datasets that agents rely on (skills, org data, master data). Consolidate overlapping tools and entry points. Ensure agents reuse existing SSO and security.	Move towards a <b>coherent experience</b> where employees and managers see a small number of smart entry points, not many separate bots. Optimise cross-system orchestration using Workday Build / Agent Gateway patterns.

# Decisions we ask today and what happens next



## Strategic decisions (today)

- **Direction:** Approve a Workday-first approach for people and finance agents.
- **Pilot scope:** Confirm 1–2 pilot use cases from the agent library.
- **Governance:** Approve use of the AI checklist and board review for all high-impact Workday AI use cases.



## Budget and resources requested

- **People**
  - 1 HRIS product owner, ~0.3 FTE for 3 months.
  - 1 technical lead, ~0.3 FTE for 3 months.
  - 1 HR or Finance process owner, ~0.1–0.2 FTE
- **Budget**
  - Small pilot budget for: Partner or consulting support
  - Possible incremental Workday / partner fees and AI consumption during pilots.
  - Proposal: approve a pilot envelope of €X–Y, with spend tracked per use case and reviewed after 90 days.



## Execution next 90 days

- Finalise pilot design, risk assessment and KPI baseline.
- Configure or build agents in Workday and integrate where needed.
- Run pilots with agreed populations and track adoption and outcomes.



## Review and scale

- After 90 days we will report back on:
  - Impact vs KPIs (time saved, cycle time, quality, experience).
  - Risk, data and change lessons.
  - Recommended scale / adjust / stop decision per pilot.
- Refined budget and resource ask for the 12-month roadmap.

# Workday Ecosystem Glossary



# Workday Ecosystem Glossary



Term	What it is	Why it matters for agents / HRIS
<b>Workday Extend</b>	Platform to build custom apps directly on Workday, using Workday data, security and UX.	Many agent use cases will trigger or live inside Extend apps. It is your custom app layer on Workday.
<b>Workday Extend Essentials</b>	The base Extend edition with the core tools to build apps and workflows.	Good entry point if a customer wants custom apps but is not yet deep into AI and complex orchestration.
<b>Workday Extend Professional</b>	The advanced Extend edition with more orchestration and AI options, including access to AI Gateway, Co-Pilot and Flowise. Also includes additional app slots.	Key license if you want to do serious agent work on top of Workday and use Flowise style builders.
<b>Built on Workday</b>	A program where partners can publish Extend apps on the Workday Marketplace. All customers use the same version of the app. No Extend license is needed to use the apps.	You can purchase of the shelf apps that are pushed directly to your tenant. No maintenance required and much quicker to implement.
<b>Workday Build</b>	The overall developer experience that brings together Extend apps, agents, data, integrations and Marketplace into one build platform.	Build is the story that ties it all into one platform. It's mostly an umbrella branding term.

Term	What it is	Why it matters for agents / HRIS
<b>Flowise</b>	Visual builder for LLM agents and workflows, using a drag and drop canvas. Workday acquired Flowise for its agent tooling.	Very practical tool for your kit. Many clients will design and test agents here, then connect them to Workday.
<b>Pipedream</b>	Integration and automation platform where you can quickly connect SaaS apps, APIs and webhooks with low-code / code steps. Useful as a lightweight iPaaS in your agent architecture, for example to let agents trigger actions in non-Workday systems	This platform will be essential to connect your agents quickly to many different platforms.
<b>Workday Orchestrate</b>	Workday's orchestration and integration capability for designing workflows that connect Workday and external systems.	Glue between agents, Workday apps and other tools. Many agent actions will run through Orchestrate flows.
<b>Workday Illuminate</b>	Workday's AI Brand Name	Umbrella term for all AI features on Workday
<b>Workday AI Gateway</b>	Set of AI APIs in Workday that expose things like skills, document insight, Q&A and forecasting to developers. Part of Extend Pro.	Lets agents and Extend apps call Workday AI features without building their own models.

# Workday Ecosystem Glossary



Term	What it is	Why it matters for agents / HRIS
<b>Workday Agent Gateway</b>	Entry point for agents that connect to Workday using shared protocols such as MCP and A2A.	This is the “front door” for external and partner agents into Workday’s agent world. Important in your architecture diagrams.
<b>Workday Agent System of Record (ASoR)</b>	Central system to register, govern and monitor agents, just like you do with workers.	This is the “HR system” for agents. Key idea when you talk about governance, lifecycle and KPIs.
<b>Workday Agents</b>	Workday’s own role based agents for HR and Finance tasks, shipped as part of the product.	Helps you explain the difference between built-in Workday agents and custom or partner agents.
<b>Workday Data Cloud</b>	Shared data platform that combines HR and Finance data and makes it ready for analytics and AI.	Important for more advanced agents that need cross domain insights, not just single worker records.
<b>Workday Marketplace</b>	Catalog of Workday and partner apps and agents that customers can install.	When you talk about “build vs buy” for agents, Marketplace is the place to look for ready made solutions.

# AI Terminology Glossary



Term	What it is	Why it matters for agents / HRIS
<b>GenAI (Generative AI)</b>	Type of AI that creates new content, for example text, images or code.	Base technology behind most LLMs and agents you will use.
<b>LLM (Large Language Model)</b>	Very large AI model trained on text that can understand and generate language.	Almost every agent will use one or more LLMs. Helpful to separate “model” from “agent”.
<b>Agent</b>	An LLM wrapped in a role with access to tools so it can take actions, not only chat.	Core concept of your kit. This is the step from “chatbot” to “doer”.
<b>Tool / Tool Call</b>	External function the agent can call, such as an API, query or workflow.	Where the real value sits. For Workday teams, tools are often Workday APIs, reports, Extend apps or Orchestrate flows.
<b>RAG (Retrieval-Augmented Generation)</b>	Pattern where the agent first looks up relevant documents, then uses the LLM to answer.	Key for HR policy, knowledge and case deflection agents, without retraining models.
<b>Context Window</b>	How much text the LLM can “see” in one go, including prompts and retrieved data.	Limits how much history, policy and data you can push into one agent call. Important for design.
<b>System Prompt</b>	Hidden instruction that sets the role, tone and rules of the agent.	Where you encode HR rules, style and guardrails for employee facing agents.
<b>Orchestration Layer</b>	Layer that coordinates agents, tools and workflows to complete a task end to end.	In Workday this is often Flowise plus Workday Orchestrate plus the connections via Agent Gateway.

Term	What it is	Why it matters for agents / HRIS
<b>Guardrails / Policies</b>	Rules that limit what the agent can say or do, and when humans must step in.	Needed to keep agents safe, compliant and aligned with HR and legal rules.
<b>Memory (Agent Memory)</b>	Ways for an agent to remember past interactions or facts over time.	Important for coaching, manager assistant and career agents that need continuity.
<b>Model Context Protocol (MCP)</b>	Open protocol that lets models access tools and data sources through a standard interface.	Helps you build tools once and reuse them across different agents and platforms.
<b>Agent2Agent (A2A)</b>	Protocol that lets agents talk to each other in a structured way and pass tasks around.	Key for multi agent setups such as “HR agent + IT agent + Policy agent” working together.
<b>Human in the Loop (HITL)</b>	Pattern where humans review or approve important agent actions or outputs.	Critical for sensitive HR topics, such as performance or pay decisions.

# Agent FAQ



# FAQ Based on Incubane's Recent Agent Webinars



Category	Question	Answer
Technology	Does Flowise support A2A and MCP?	Workday is positioning Agent Gateway as the MCP-compliant way to connect agents to Workday and other tools. Flowise Agent Builder is part of this Build toolkit, so the expectation is that agents built in Flowise will be reachable via MCP / Agent Gateway and can talk to other agents and tools (A2A). Exact node types and configs will be documented by Workday.
Security & data	How is customer data protected when we use agents built with Flowise?	When Flowise Agent Builder runs inside Workday, it uses Workday's existing security model: tenant isolation, RBAC, audit logs and data residency controls. Workday emphasises human-in-the-loop, secure deployment and transparency as part of the Flowise acquisition and Build launch. If you use open-source Flowise outside Workday, then you are responsible for hosting, access control and compliance.
Security & data	Can agents access only data the user is allowed to see?	The target pattern with ASoR and Agent Gateway is that agents respect Workday security policies: the agent runs actions and queries on behalf of a user or service account, and only sees data that identity can access. We still need to see how Workday will achieve this from a technical perspective. You still need to design prompts, tools and RAG stores so that no extra data is cached or exposed outside those rules.
Skills & org readiness	What skills do we need to build agents with Flowise + Workday?	You need a mix of Workday functional knowledge, API / integration skills and basic LLM / prompt engineering skills. Flowise itself is low-code, so non-developers can design flows, but you still need someone who understands Workday security, data structures, and how to test and monitor AI behaviour in production.
Skills & org readiness	Do we need our own custom LLM or training data to start?	No. Most early use cases will use pre-trained LLMs (via Workday's chosen models or your cloud provider) plus RAG over your data. You typically start with configuration and prompt design, not full model training. Over time you may fine-tune or add specialised models, but it is not required for v1.

Category	Question	Answer
Use cases	Are agents like Org Design Agent, Manager Assistant Agent, 360 Agent "out of the box" or custom?	Some agents will be Workday-delivered or partner-delivered and appear as products on the Workday roadmap. Others, like your Org Design, Manager Assistant, GROW or 360 Feedback agents, are custom patterns that you or a partner build on top of Workday using Flowise. The FAQ and catalogue you are building should help stakeholders see which is which.
Governance	How do we align Flowise / agents with our AI governance and EU AI Act work?	Treat each agent like any other AI system: classify risk (e.g. many HR agents are high-risk under EU AI Act), define human oversight points, review vendor docs and Workday fact sheets, and run your internal risk and controls checklist before go-live. Workday's Responsible AI program and EU AI Act alignment reduce provider risk, but you still own how agents are used inside your processes.
Practicalities	How can we follow up or get hands-on with Flowise and agents?	Typical next steps: 1) Try open-source Flowise in a sandbox to learn the basics. 2) Work with your Workday AE to understand Build + Extend Pro roadmap for your tenant. 3) Use our Agent Strategy Kit and Business Case template to pick one or two pilot use cases and estimate value and cost.



## Clarify your agent vision

- Run strategy workshops with HR, HRIS, IT and business leaders using this blueprint.
- Help you define a clear agent vision:
  - Where agents fit in your HR / IT strategy.
  - What “Workday-first for people and finance” means in practice.
  - Which principles you want to apply for native, partner and custom agents.



## Build a realistic roadmap

- Use your Agent Use Case Library together with our patterns to:
  - Prioritise 5–10 high-value use cases.
  - Group them into waves (90 days, 1 year, beyond).
- Help you size the opportunity with our business case and token cost templates.
- Deliver a roadmap slide pack you can use in HR / IT planning and budget cycles.



## Support with Exec Stakeholders

- Tailor the executive pitch deck with your numbers and examples.
- Prepare CHRO / CIO and other sponsors for key questions on risk, architecture and value.
- Support you in presenting to steering groups or boards, so strategy, architecture and governance all line up.
- Stay onboard as a sparring partner while you deliver (or co-deliver) the first agents

## Contact Us

- If you want to build your agent strategy
- If you want to learn how to build agents inhouse
- If you have an agent use case you want to work together on



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# Thank you

