

# The Extend Business Case Playbook

Build your case. Get the buy-in. No outside support needed.





# Table of contents

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## 1. Why Workday Extend is a strategic priority now 06

In today's fast-changing environment, HR and Finance teams need speed, flexibility, and control. This chapter explains why Extend helps organizations simplify their tech stack, innovate faster, and stay ahead of change

## 2. When to Use Extend vs. Built on Workday 08

Not every problem needs a custom app. This chapter helps you decide when to build with Extend and when to buy a Built on Workday app, giving you clear criteria to choose the right tool for the right job.

## 3. Identifying use cases for Workday Extend 11

The best Extend apps solve real pain points. You'll learn how to spot high-impact opportunities by looking for manual work, shadow systems, or unique processes and how to prioritize the right use case to start with.

## 4. Building a business case for Workday Extend 16

A solid business case turns ideas into approvals. This chapter shows you how to quantify Extend's value, calculate ROI, and structure a compelling story that speaks to decision-makers across Finance, IT, and HR.



## 5. Securing internal buy-in 21

Even the best ideas need champions. This chapter helps you identify key stakeholders, tailor your messaging to their priorities, and address common objections, so you build momentum and support from the start.

## 6. Maintenance & support 27

Extend apps are not set-and-forget. This chapter helps you define a long-term support model, plan for updates with each Workday release, and ensure your team (or partner) is ready to keep the app running smoothly.

## 7. Partner selection 32

Choosing the right partner can make or break your Extend project. This chapter outlines what to look for in a partner, which questions to ask, and how to evaluate proposals, so you can move forward with confidence.

## 8. Using AI in Extend 37

Explore how to embed GenAI into your Workday Extend apps. It also explains Extend Pro, AI Gateway, external model integration, and how to budget for token-based pricing in your business case.

## 8. Final checklist 44

A simple “readiness scan” to check if your case is solid, your story is clear, and you’re ready to hit send or step into the room.

## 9. Wrap-Up 46

This final chapter recaps the full Extend journey: from idea to implementation. It reinforces key lessons, outlines immediate next steps, and leaves you with a clear path to bring your strategy to life.

## Appendix 1: Extend Project Checklist 50

## Appendix 2: App library for inspiration 53



# Introduction

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Workday Extend is a platform that allows you to build custom HR and finance applications within your Workday environment. This means if your organization has unique requirements that Workday's delivered functionality doesn't cover, you can develop tailored apps that run seamlessly in Workday. These Extend apps look and feel like any other Workday feature, they inherit Workday's security, use real-time data, and upgrade safely with Workday's releases. In other words, Extend empowers you to meet specific needs without resorting to clunky spreadsheets or standalone systems.

This playbook is designed for HRIS managers and HR / FIN tech leaders. It will guide you through why Workday Extend is especially relevant now, when to choose a custom Extend app versus a Built on Workday (BoW) solution, and how to identify high-impact use cases. We'll then walk through making a compelling business case and securing stakeholder buy-in. Finally, we cover practical aspects of implementation: maintaining and supporting your new apps, selecting the right partner and mapping out a successful project roadmap. Each chapter follows a consistent format – starting with an introduction of what you'll learn, diving into concepts and best practices (often with examples or frameworks), providing immediate action steps, and teasing the next chapter.



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💡 **Action Steps:** To get the most out of this playbook, take a moment to:

- **Assemble a Core Team:** Identify a small team (IT, HR, Finance stakeholders) who will champion Workday Extend. Ensure they are aware of this guide and commit to collaborating on the steps ahead.
- **Define Your Goal:** Jot down what you hope to achieve with Workday Extend. Are you aiming to streamline a process, eliminate a legacy system, or innovate a new capability? Having a clear goal will focus your efforts.



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# 1. Why Workday Extend is a strategic priority now

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## Why this matters

Many organizations are under pressure to move faster, simplify their tech landscape, and respond to constant change. At the same time, HR and Finance teams often deal with unique needs that standard tools can't fully support. Workday Extend is a way to solve this by building exactly what you need inside the platform you already use. In this chapter, you'll explore why Extend has become such a timely, strategic tool for forward-looking companies.

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No two companies operate the same way. Many HR and Finance processes are too specific or fast-changing for standard software to handle well. In the past, the solution was to add standalone tools, build spreadsheets, or rely on manual steps. Over time, this created a cluttered setup: multiple disconnected tools, duplicated data, rising costs, and frustrated users.

That clutter has grown. Large organizations now run hundreds of different apps. Remote work, constant policy changes, and growing compliance demands have only added to the pressure.

Workday Extend offers a better path. It lets you build tailored apps directly within Workday platform using the same security model, and data your teams already trust.

You don't add complexity – you reduce it.

Instead of long procurement cycles or bending generic tools to fit your processes, Extend allows you to quickly develop custom capabilities that solve problems and unlock efficiency. Development is faster, maintenance is easier, and integration is seamless.



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Customers report that Extend apps require 75% less effort compared to traditional development. Apps are stable through updates because they use the same building blocks Workday uses. You get speed and long-term reliability, all on Workday's secure platform.

Extend also reinforces the "Power of One": one source of truth, one interface, one security model. This reduces risk and improves data quality. A good example is Blackstone, which replaced its external onboarding tool with an internal "Request a Consultant" app. The results? Faster processes, better control, and lower cost.

And beyond simplification, Extend is a tool for innovation. You can build apps that differentiate your business: tailored to your people, workflows, and goals. Extend also gives access to emerging capabilities like Workday's built-in AI and machine learning features.

In short: Extend allows you to streamline, innovate, and stay ahead – all from inside Workday.

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### 💡 Action steps

- **Map your current landscape:** List all external systems, spreadsheets, and manual workarounds used in HR and Finance. Identify pain points like double data entry, slow processes, or risk areas.
- **Spot missed opportunities:** Think of a time you needed to act fast, a new policy, compliance change, or business requirement. How long did it take? Could a simple app have made that easier?
- **Collect stories and data:** Gather internal data on inefficiencies, such as cost of external tools, time spent on manual tasks, user complaints. These will help when building your case for Extend
- **Review the PPT deck:** in it you will already find a slide to explain internally why Extend should be a priority. Feel free to adjust to your own specific challenges.



# 2. When to use Extend vs. Built on Workday

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## Why this matters

Workday gives you two main options to fill gaps in functionality: **build** with Extend **or buy** through the Workday Marketplace with Built on Workday (BoW) apps. Choosing the right approach can save time, reduce cost, and help you move faster. In this chapter, you'll learn how to decide when to go custom and when to buy something off-the-shelf. It's about making smart choices based on your need, timeline, and budget.

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## What is Built on Workday?

BoW apps are prebuilt applications created by Workday partners and available via the Workday Marketplace. These apps are designed to plug into Workday easily and solve common problems without custom development. Think of it as ordering a meal from a restaurant: fast, convenient, and ready to use.

Workday Extend, in contrast, is like cooking at home. You build exactly what you need, using the tools Workday provides. It takes a bit more effort, but you have full control over the ingredients, recipe, and final result.

So, when should you build vs. buy? Here are six questions to help you decide:

### 1. Is the need common or unique?

If it's a widespread problem (like standard payroll analytics or compliance tracking), chances are there's a BoW app for it. But if your process is unique or tied to your competitive edge, Extend may be the better route.



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## **2. Do you need custom logic or just configuration?**

BoW apps come with built-in logic and usually offer some configurable settings. If you need something more tailored like a specific workflow, decision rules, Extend allows you to design the logic yourself.

## **3. How many needs are you trying to solve?**

If you only have one small gap, buying a BoW app might be faster. But if you see a future with several custom needs, investing in Extend and building internal capability can pay off quickly. Many companies start with BoW for speed, then shift to Extend when custom demand grows.

## **4. What's your budget approach?**

BoW apps often come with a recurring subscription. Extend has upfront costs (the platform license and development work) but fewer long-term fees. If it's easier to get operating expenses approved than capital investment, BoW might be the better short-term fit.

## **5. Do you have development capability?**

If you don't have Extend developers or a partner to help, BoW lets you get started without needing those skills. But if you're thinking long-term and want flexibility, consider whether building Extend capability is worth the investment.

## **6. How urgent is your need?**

BoW apps, if available, can often be implemented quickly. Extend apps take time to design and build. If you're in a rush, BoW might get you there faster. If you have time and need something that fits perfectly, Extend could be the better play.

## **A Hybrid Approach**

You don't have to choose just one. Many organizations use both: buying BoW apps for standard use cases and building Extend apps for their unique needs.

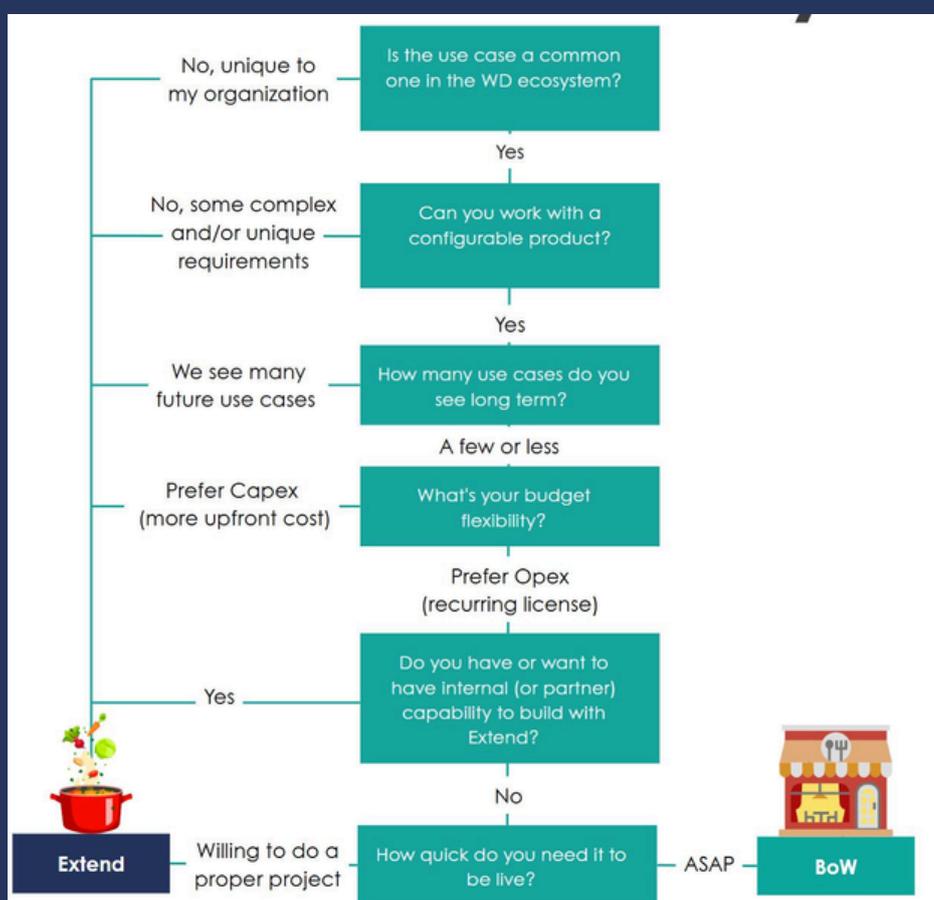


## 💡 Action steps

- **List candidate needs:** Make a list of the processes you want to improve and initial use cases you have in mind.
- **Apply the decision questions:** For each item on your list, walk through the six questions on the Powerpoint template. Note if the fit leans toward BoW, Extend, or a mix.
- **Check with the community:** If you're unsure what's available or what others have done, ask in the Workday Community or consult a partner. It can save time and prevent you from reinventing something that already exists.

Note: the following chapters are written from an Extend perspective, but you can take the same actions when you go with Built on Workday to create your case.

## Workday Extend vs. Built on Workday Decision Tree





# 3. Identifying use cases for Workday Extend

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## Why this matters

You can't build the right solution if you're solving the wrong problem. Identifying strong use cases is the most important step in getting value from Workday Extend. It helps you avoid low-impact apps and focus your time, budget, and effort where it matters most. This chapter shows you how to find those use cases: the pain points in your HR or Finance processes that Extend is built to fix.

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Great use cases for Workday Extend usually hide in plain sight. They're the manual tasks, workarounds, or Excel files that teams rely on because Workday doesn't fully support a process today. Below are five types of issues to look out for:

### 1. Manual processes or spreadsheets

Every spreadsheet or email-based process is a signal. If your teams are using Excel to manage something operational – approvals, data tracking, task assignments – that's a strong candidate for an Extend app.

Example: Netflix replaced their supplier requisition spreadsheets with a Workday app that eliminated reconciliation delays and cut down on emails.

### 2. Unique workflows or approvals

If your organization has specific rules or approval flows that don't quite fit Workday's standard options, Extend lets you build the steps you need and still keep everything under Workday's security and reporting.

Example: PGA of America built a custom app to manage golf tournament prize payouts with multi-step approvals and data feeds from external scoring systems.



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### 3. Self-service gaps

If employees or managers keep asking “Why can’t I do this in Workday?”, you might have a self-service opportunity. Extend can improve user experience by adding simple apps that reduce support tickets and speed up processes.

Example: Cushman & Wakefield created a labor billing app for managers and another company built a “Mileage Calculator” that uses Google Maps API to log reimbursements inside Workday.

### 4. Compliance and data quality

Some industries require tracking data that Workday doesn’t handle natively. If you’re collecting this information through forms, email, or another system, Extend allows you to build a secure, auditable solution right inside Workday.

Example: Companies have built Extend apps to manage certifications or internal audit processes that weren’t supported by standard fields.

### 5. Efficiency

Process in Workday are standardized, which is great for majority of cases. However, sometimes you want a process to be much leaner and quicker - good examples are retail organizations with hiring processes that have to be quick and efficient.

Example: Companies have built mass processing apps e.g. mass hire with grid for up to 100 contingent workers at the same time.

### 6. Country-specific or industry-specific requirements

Workday covers a lot of requirements, but can’t cover all - for certain industries & locations there are unique requirements for various HR / FIN processes, consider using Extend to fill these gaps.

Example: KION built an app to manage Works Council in Germany.

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## How to find use cases in your org

- **Talk with your business:** Speak with HR partners, payroll staff, and finance analysts. Ask simple questions like: “What’s something you wish Workday could do?” or “What do you still do outside the system?”
- **Look at shadow IT and quick fixes:** Are any teams using Access databases or Google Forms to patch a gap? These point to real problems and are perfect for Extend. But also review your existing HR IT landscape and think about which systems you could rebuild in Extend.
- **Scan support tickets and requests:** Review tickets, change requests, or recurring “how do I do X in Workday?” complaints. These can reveal repeat problems that are frustrating users.
- **Review your high volume processes:** if you have massive hire peaks, or if you need to do many salary rounds, these are good opportunities to create a good ROI.
- **Use Workday’s app catalog for ideas:** Browse Workday’s Extend app templates to spark ideas. Even if you don’t use them as-is, they show what’s possible and what others have built.
- **Identify old-school / high-cost systems to be replaced:** Consider using Extend to replace old systems that require high maintenance.
- **RfP option:** When purchasing new systems, consider adding Extend option, you might be surprised with efficiencies and low pricing compared to non-Workday off the shelf solutions.



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## Real-world inspiration

### Blackstone

- Use case: Contractor onboarding
- Problem: Manual, external system with duplicate data
- Extend solution: Internal “Request a Consultant” app
- Outcome: Faster onboarding, no duplicate entry, simplified process

### Netflix

- Use case: Supplier PO requests
- Problem: Google Docs and spreadsheets causing delays
- Extend solution: A self-service PO request form in Workday
- Outcome: Automation, fewer errors, better control

### Mileage Calculator

- Use case: Reimbursement
- Problem: External mileage tools
- Extend solution: Workday app using Google Maps API
- Outcome: One process, no switching tools, better experience

### PGA of America

- Use case: Tournament payouts
- Problem: Complex approval and payout logic
- Extend solution: Custom app that links scoring data to Workday Financials
- Outcome: Faster payments and audit-ready process



## Checklist to qualify a use case

- Does it eliminate manual work or reduce risk or reduce cost?
- Is there no BoW or native Workday solution that already does this?
- Does it support a business goal (e.g., employee experience, cost reduction)?
- Is there a stakeholder who cares enough to champion it?

## 💡 Action steps

- **Brainstorm with teams:** Host a short session with HR, Finance, or IT to gather wish-list ideas. Ask what frustrates them or what they do in Excel today. You can use the agenda in the Powerpoint to guide your discussion.
- **Shortlist and research:** Pick the 2–3 ideas that are easiest to solve or have the highest impact. Check if there's already a Workday or partner app that does this.
- **Use cases summary:** Use the Powerpoint slide to list your use winning use cases and fill in the table to provide a complete overview.

**Use Case Brainstorm Overview**

Use Case	Estimated Effort	Estimated Impact	Strategic Fit	Frequency of Use	Pain Level / Urgency	Replaces Tool	Customer / Teams Affect
Contingent Worker Onboarding ★	High	High	Efficiency	Weekly	Medium	Manual Process	Hiring Managers
Tuition Reimbursement ★	Low	High	Efficiency	Daily	High	Excel	Employees
Employee Offboarding	Medium	Medium	N/A	Weekly	Medium	Enhances WD Process	Managers
AI Supported Goal Setting ★	Medium	High	Employee Experience	Annually	High	Enhances WD Process	Employees
Permanent Education Tracker	Low	High	Compliance	Weekly	Medium	Manual Process	Hiring Managers
Technical Competencies	High	High	Compliance	Daily	High	Third Party system	Employees
360 Feedback	Medium	High	Employee Experience	Weekly	Medium	Manual Process	Managers
Advanced AI Check-Ins	Medium	High	Employee Experience	Daily	High	WD + Manual Process	All workers
Employee Relations Manager	Medium	Medium	N/A	Ad-hoc	Low	Email / Docs	HRBP + Legal
Promotion Nominations	Medium	High	Efficiency	Quarterly	High	Manual Process	Hiring Managers

Legend: High (Dark Green), Medium (Light Green), Low (Grey), ★ Launch Candidates



# 4. Building a business case for Workday Extend

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## Why this matters

A good use case is only half the story, to get approval, you need to make the numbers work. Building a business case helps you translate a smart idea into a clear decision. Whether you're asking for budget, a license, or leadership buy-in, a solid business case helps you show value, justify cost, and position your Extend project as a strategic move and not just another IT request.

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A business case should answer three key questions:

1. Why do this? What is the value?
2. What does it take? What are the costs and resources?
3. Why now? Why is this the right moment to invest?

## Step 1: Show the value

Start with the problem you're solving. Keep it simple:

*"Onboarding contractors takes three weeks with manual steps. This causes delays, errors, and lost productivity."*

Then show what your Extend app changes:

*"With an in-Workday app, onboarding takes three days. The process is faster, easier, and more secure."*

From here, list out the benefits:

### Cost savings

Show how this reduces hours of manual work, eliminates legacy software, or cuts back on error-related costs. Example: 520 hours saved per year = €26,000 in labor at €50/hour.



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### **Efficiency gains**

Faster processes lead to faster impact. If someone starts work sooner, what's that worth? If finance closes faster, what else can your team focus on?

### **Revenue impact**

Sometimes Extend apps help enable business growth, supporting your sales team with CV's for RFP's, better support, or smoother onboarding can all have indirect financial impact.

### **Risk reduction**

If a current process involves spreadsheets, manual emails, or compliance gaps, Extend can centralize and secure it. Avoiding even one fine or audit failure makes the case stronger.

### **User experience**

Better tools mean happier employees and fewer support tickets. This helps with retention, adoption, and satisfaction.

### **Better data & decisions**

Moving a process into Workday means you get better visibility. Leaders can act faster with data they trust.

### **Strategic agility**

Extend is not just a one-time solution, it's a capability. Solving this issue now sets you up to build more apps in the future.

### **Competitive advantage**

Extend apps can help you operate in ways that your competitors can't smarter workflows, cleaner data, or faster execution.

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## Step 2: Estimate the cost

Be realistic. Focus on these core cost categories:

### **Workday Extend License**

If not yet purchased, check with your Workday rep for a ballpark quote. Costs may depend on employee size or modules in use.

### **Build costs**

Estimate the effort to develop the app. Whether using internal teams or a partner like Incubane, get a rough range: e.g., 8–10 weeks of work = €XX,000.

### **No infrastructure costs**

Highlight that Extend runs on Workday. No servers, no integration platform, no extra hosting. This saves budget and reduces IT overhead.

### **Training and Rollout**

Plan for some time to train users or admins. Often a light cost, but shows you've thought about enablement.

### **Ongoing maintenance**

Consider who will maintain the app. Internal support? Partner support? Estimate cost per year (e.g., 0.2 FTE or €5K/year). Compare it to current system support if you're replacing a legacy tool. In later chapters we dive deeper into the maintenance strategies.

### **Contingency**

Add a 10–15% buffer to cover unknowns. It helps avoid surprises and signals you're planning responsibly.

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### Step 3: Calculate ROI

Basic ROI formula:

$$\text{ROI} = \text{Annual Benefit} / \text{Annual Cost}$$

Example:

€100K saved annually vs. €50K cost = ROI of 2x or 200%.

You can also show:

- Payback period: “Project will break even in under 18 months.”
- 3–5 year savings projection: Optional, if you have the data.

Also include intangibles in your pitch:

- Better audit readiness
- Enhanced user experience
- Faster decision-making
- Strategic alignment with digital transformation goals

These often matter more than the financials alone.

### Step 4: Structure the business case

Use this flow to draft your business case document or slide deck:

- **Executive summary:** What’s the problem, what’s the solution, and what’s the ask?
  - **Problem statement:** Describe the current state with examples or numbers.
  - **Proposed solution:** Describe the Extend app at a high level. Make clear it runs securely inside Workday.
  - **Options considered:** If you evaluated other solutions (e.g., third party solutions, BoW apps), briefly explain why Extend is a better fit.
  - **Cost & benefit overview:** Show a table or slide with key figures: upfront cost, recurring costs, estimated savings, and soft benefits.
  - **ROI and payback:** Simple math. If break-even is under two years, say it clearly.
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- **Risks & mitigation:** Show that you've considered what could go wrong and how you'll manage it. Mention that Extend apps are supported by Workday and stable across updates.
- **Recommendation:** A clear call to action: "Approve an investment of €XXK to build this Extend app, which solves [problem] and delivers [benefits]."

## 💡 Action steps

We suggest to build your business case around 3 apps, but you can do more if you have many strong candidates. Select those that have high transaction volume, business impact or that will impact your BC positively in another way

- **Collect your numbers:** Get estimates on hours saved, licensing costs, app development, and internal effort.
- **Draft a rough version:** Use the structure above to sketch your business case. Don't over-polish early, focus on the content.
- **Do the ROI math:** Even rough calculations help you assess viability. Adjust scope if needed.
- **Get input early:** Share a draft with Finance, IT, or a trusted stakeholder. They can help spot gaps or refine assumptions.

Use Cases Summary			
Analysis	Contingent Worker Onboarding	Tuition Reimbursement	AI Supported Goal Setting
<b>Current Problem</b>	Onboarding for contractors is handled outside of Workday, using Google Forms, emails, and spreadsheets. Data is entered twice, processes are slow, and documents are stored in disconnected locations.	Reimbursement requests are often tracked in spreadsheets or submitted via email. It's hard to manage policy rules, ensure approvals, and track spending centrally. Delays frustrate employees and burden HR.	Goal setting is inconsistent across teams. Many managers forget to enter goals or write vague ones. There's little alignment to company OKRs, and HR spends time chasing updates before reviews. No intelligent support exists in Workday today.
<b>Proposed Extend App</b>	An in-tenant "Request a Consultant" app that lets managers initiate onboarding directly in Workday, includes form submission, automated approvals, document upload, and creation of worker record.	A guided tuition reimbursement request form inside Workday, built-in policy checks, manager approval routing, and finance integration. Allows uploading receipts, auto-calculates eligible amounts, and tracks TTD balances.	A smart goal-setting assistant inside Workday. Suggests goals using GenAI based on role, manager goals, or company OKRs. Prompts managers with goal-writing tips and nudges them if goals are missing or vague.
<b>Business Impact Areas</b>	<ul style="list-style-type: none"> <li>• Time saved: ~40 hours/month</li> <li>• Cost avoided: ~€15,000/year (replacing legacy tool + manual effort)</li> <li>• Better audit trail (everything tracked in Workday)</li> <li>• Smoother manager experience</li> <li>• No need for duplicate data entry</li> </ul>	<ul style="list-style-type: none"> <li>• Employee experience: clearer process, fewer errors</li> <li>• Compliance: ensures only eligible expenses are reimbursed</li> <li>• Time saved for HR and Finance teams: ~ 80 hours/month</li> <li>• Visibility into education spend</li> </ul>	<ul style="list-style-type: none"> <li>• Better goal quality across the org</li> <li>• Time saved for employees in setting goals: 1 hour per employee per year (11,521 hours total)</li> <li>• Time saved for managers: 20 min per employee (3,840 hours total)</li> <li>• More alignment to company OKRs</li> <li>• Easier mid-year and year-end reviews</li> </ul>
<b>Extend Fit Criteria</b>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Unique to our process</li> <li><input checked="" type="checkbox"/> No B2W app available</li> <li><input checked="" type="checkbox"/> Uses Workday data and objects</li> <li><input checked="" type="checkbox"/> Needs custom logic/UI</li> <li><input checked="" type="checkbox"/> Known pain point (request complaints)</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Unique to our process</li> <li><input checked="" type="checkbox"/> No B2W app available</li> <li><input checked="" type="checkbox"/> Uses Workday data and attachments</li> <li><input checked="" type="checkbox"/> Needs dynamic policy logic</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Needs GenAI logic</li> <li><input checked="" type="checkbox"/> Extends existing performance process</li> <li><input checked="" type="checkbox"/> No native Workday AI for goal setting</li> <li><input checked="" type="checkbox"/> Use of Extend UI and orchestration logic</li> <li><input checked="" type="checkbox"/> AI assistance is a differentiator</li> </ul>
<b>Estimated Effort</b>	Development effort: 6-8 weeks Partner required? <input checked="" type="checkbox"/> Yes Internal support readiness: Medium	Development effort: 4-6 weeks Partner required? <input type="checkbox"/> No (can be built internally with light support) Internal support readiness: High	Development effort: 6-8 weeks Partner required? <input checked="" type="checkbox"/> Yes (due to AI logic and user experience design) Internal support readiness: Medium
<b>Comments</b>	Well-scoped pilot use case with clear business value. Strong support from HR, Operations and Talent Acquisition. Visible to business leaders, good fit win.	Common use case with visible value. Strong employee support and easy to communicate. Could be a fast win with internal resources or junior Extend devs.	Innovative use case with strategic value. High visibility, great for showcasing GenAI in Workday. Strong alignment with performance management and leadership buy-in required.



# 5. Securing internal buy-in

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## Why this matters

Even the best app idea won't move forward without support from the right people. That includes the ones who sign off budgets, those who will use the solution, and anyone who could block progress. In this chapter, you'll learn how to identify key stakeholders, tailor your message for each group, handle objections, and build the internal support needed to move your Workday Extend initiative from idea to approval.

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Getting buy-in is not about convincing everyone with a spreadsheet. It's about knowing what each person cares about, building trust, and helping them feel ownership in the solution. Here's how to approach it:

### 1. Map your stakeholders

Start by listing out who has a say, who is impacted, and who needs to be on board.

- Executive Sponsors (CHRO, CFO, CIO): They approve the budget and need to see alignment with business goals.
- Department Leads (HR Ops, Talent, Finance Controllers): They care about efficiency, risk, and delivery.
- IT Leaders (CTO, Security): They look at architecture, support, integrations, and governance.
- End users (HR specialists, payroll staff, managers): Their buy-in drives adoption.
- Workday Admins / COE: They will configure and support the app long-term.



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Create a simple stakeholder map:

Stakeholder	Interest	Concern	Influence
CFO	ROI/Savings	Cost, Scope Creep	High
Head of HR Ops	Process improvement	Training needs	Medium
Payroll Manager	Simpler workflows	Fear of change	Medium

This helps you prepare targeted communication.

## 2. Tailor the message

Each stakeholder group needs to hear what's relevant to them.

### Executives

Focus on ROI, strategy, and risk.

Example: "This app reduces onboarding time by 70%, which improves productivity and lowers compliance risk."

### IT

Focus on security, maintainability, and platform fit.

Example: "Extend uses Workday's native tools, so there's no new infrastructure, and it stays within your existing security model."

### HR/Finance Leaders

Focus on how this solves a real operational pain.

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Example: “Managers can onboard talent directly in Workday, without emailing spreadsheets back and forth.”

### **End users**

Focus on how it simplifies their work.

Example: “You’ll have one place in Workday to do what used to take three tools and ten emails.”

### **3. Build trust through early conversations**

Don’t wait for a big steering committee meeting to pitch your idea.

Instead:

- Have informal chats with key decision-makers ahead of time.
- Ask for feedback, not approval.
- “We’re thinking about a simple Extend app to streamline contractor onboarding, would love your take.”

This helps you:

- Surface objections early
- Refine your case
- Build advocates before the meeting

### **4. Handle objections with confidence**

Here are common concerns and ways to address them:

*“It’s too complex”*

→ “Extend is a low-code platform built for fast delivery. We can use a partner or start small to manage scope.”

*“We should wait for Workday to build this”*

→ “We will review the roadmap before any new project. They may add something in future, but we need this now.”

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*“Is it secure?”*

→ “It uses the same security model as Workday. No external systems, no extra logins and using all the existing security roles. We can include a formal IT review if needed.”

*“Users will resist change”*

→ “We’ll involve them early in the design and give proper training. This app will actually simplify their work.”

*“What if it fails?”*

→ “We’ll start with a small MVP and use experienced partners. We will use proven methodology similar to the initial Workday implementation to make sure we test the solution thoroughly.”

## **5. Show, don’t just tell**

If possible, show a visual, even a mock-up or example screen from another Extend app. There are a lot of example videos of Extend apps online to use.

Explain:

“This is what it will look like in Workday: familiar layout, one-click access, and no new systems to learn.”

It helps non-technical stakeholders understand this isn’t a risky side project, but an extension of the platform they already use.

## **6. Form a small coalition**

One strong supporter is good. Three is better.

If you can align HR, IT, and Finance leads, they can speak together in support of the project.



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For example:

- HR: “This solves a real pain point for us.”
- IT: “It’s low-risk and fits our architecture.”
- Finance: “We’ve reviewed the ROI, and it makes sense.”

That kind of alignment builds credibility and reduces resistance.

## **7. Use real examples to de-risk**

People follow what others have done.

Use Workday customer stories (like Netflix or Blackstone) to show others have done it and seen results.

Better yet, if you know a peer company using Extend, offer to connect skeptical stakeholders for a short call. Or ideally, find someone who has already implemented your use case.

## **8. Keep language simple**

Avoid technical jargon. Instead of saying “object model” or “orchestration,” say: “We’ll add a new screen in Workday that lets managers submit requests directly, without spreadsheets.”

Keep it focused on what the change means for them, not how it works.



## 💡 Action steps

Use the Powerpoint template to complete the following steps

- **Create your stakeholder map:** List names, interests, potential concerns, and your engagement plan.
- **Write 1-sentence pitches:** Draft quick, clear messages for each key stakeholder, one sentence each.
- **Plot the stakeholders:** Use the grid to see what your approach should be for your different stakeholders.
- **Book informal chats:** Start soft-touch conversations with execs and department leads. Aim for feedback, not approval.
- **Prepare for objections:** Write out your answers to 5–10 tough questions. Rehearse them.
- **Find a champion:** Identify someone senior who supports the idea. Brief them well and ask them to speak first in key meetings.

Note: Obviously this slide is not needed for your final presentation, but is meant to create your own action plan.

**Winning Stakeholder Support: Who to Engage & How**



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### Stakeholder Engagement Plan

Stakeholder	Interest	Key Message	Engagement Strategy
CFO	ROI, total cost of ownership	"This will save €XX and pay back in under 18 months."	Share business case early, 1:1 review pre-steerco
CHRO	Talent experience, adoption, digital HR	"This supports better onboarding, retention, and performance."	Highlight user experience wins, demo a use case
CIO / IT Director	Security, architecture, integration load	"No new platforms – all within Workday's existing cloud + controls."	Include in design reviews, flag low maintenance model
HR/Finance Managers	Operational workload, usability	"You'll spend less time chasing data or rekeying requests."	Involve in workshops, validate pain points
End Users (e.g. HRBPs)	Fear of change, added steps, unfamiliarity	"You'll have fewer spreadsheets and a faster experience in Workday."	Engage early with mockups, training, and UAT involvement
Internal Workday Team	Configuration fit, ongoing support	"We'll align with your current tenant structure and security model."	Collaborate during design, handover support expectations

### Influence – Interest Grid

		Low Interest	High Interest
High Influence	Meet their needs	CFO	Manage closely CHRO CIO HR / Finance Managers
	Monitor		Keep informed Internal Workday team End Users
Low Influence			

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# 6. Maintenance & support

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## Why this matters

Launching a Workday Extend app is just the beginning. What happens after go-live determines whether your app continues to deliver value or becomes technical debt. This chapter helps you put the right support model in place to keep your app secure, reliable, and adaptable. You'll learn how to budget for sustainment, choose between in-house or partner support, and follow best practices to ensure long-term success.

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Extend apps are easier to maintain than most custom software, they inherit Workday's upgrade cycle and security. But they still need attention. Without it, even a small app can become a problem.

## 1. Choose your support model

There are three main ways to manage support:

### In-House

- Your internal team handles fixes, enhancements, and compatibility checks.
- Works best if you have a COE or plan to build internal capability.
- Pros: full control, fast turnaround, builds team skills.
- Cons: risk of knowledge loss if key people leave, training effort required, Extend talent is scarce.

### External (Partner)

- A partner (possibly the one who built the app) handles support via a contract.
- They cover updates, testing, and minor enhancements.
- Pros: expert support without needing internal specialists.
- Cons: ongoing cost, and reliance on outside teams for quick fixes.



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## Hybrid

- Most common model. You keep some internal knowledge (e.g., HRIS manager, analyst) and use a partner for complex changes or testing during updates.
- Gives you flexibility without full dependency.
- You can work with your partner to make sure the apps are more configurable, that will give your team more ability to make updates themselves

Tip: If your IT team is stretched, an external partner like Incubane can act as your “virtual COE.”

## 2. Plan & budget for sustainment

Support costs are often overlooked in business cases. Make sure to account for:

- Extend License: Ongoing subscription fees.
- Support Labor:
  - Internal: estimate FTE time (e.g., 10% of a developer + 5% of analyst time per year).
  - External: fixed support contract or hourly rates.
- Enhancements: Budget for 2–4 weeks of changes annually as new ideas surface.
- Training: Upskilling for your team on Extend, continuous learning by for example attending Workday Devcon.
- Environment Costs: Workday provides one dev tenant, but have a look at how this fits in your overall tenant strategy if this is sufficient.
- Contingency: Reserve 10–15% for surprises (e.g., sudden UI changes or security patches).



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### 3. Follow best practices for support

#### Monitor Workday Updates

- Workday has two major releases a year. Always test your Extend app in the preview tenant.
- Breakages are rare and API's are versioned, but we still recommend regression testing.

#### Engage users

- Keep a feedback loop open. Simple surveys or quarterly check-ins can help you spot gaps early.
- Showing users that their suggestions lead to improvements builds engagement.

#### Track usage & performance

- Monitor usage: Who's using the app? Are they completing tasks?
- If usage drops, investigate: Is the app broken, forgotten, or not useful?

#### Stay trained

- Encourage your team to follow Workday Extend updates, join forums, and participate in events like DevCon.
- Use Workday's Developer Forum to keep up with tips, patterns, and tools.

#### Keep governance simple but clear

- Use the same change control process you apply to Workday config changes.
- Have one process to request, approve, and test Extend changes.

#### Monitor integrations

- If your app connects to external systems (via orchestrations), monitor them.
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- Set up alerts for failures and refresh API tokens regularly.

### **Formalize ownership**

- Decide early who owns the app after go-live.
- Assign a named person or team, even if using a partner, someone internal should stay accountable.

## **4. Consider a Center of Excellence (COE)**

If you're planning multiple Extend apps, a small internal or external COE can help.

Roles of a COE might include:

- Setting standards (naming, security, testing)
- Prioritizing new app requests
- Managing the roadmap
- Training and onboarding new team members

A good partner can also serve as your COE. Incubane, for example, supports clients with scalable, secure apps and acts as a long-term partner beyond go-live.

## **5. Train your team**

Everyone in your HRIS team should understand what Extend is and what it can do. So provide your team with some materials to at least understand the basics and engage them in projects.

For your internal capability you can have your analysts follow Workday Extend for Non-Developers, a two day Workday course to understand the basics. The full Extend training should only be reserved for those who are actually going to build in Extend.

Do not overestimate how much you will know getting out of those trainings. They do a good job in introducing you to the tools and how to use them. However, just like with Workday you will really learn on the

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job. That is why we always recommend to do a first project together with a partner. Building one app together will teach you more than 4 weeks of training. Of course you need to make sure that knowledge transfer and training is embedded in the project, and not that you only get a KSS call at the end of the project.

## 💡 Action Steps

- **Pick a support model:** Decide: will support be in-house, partner-led, or hybrid? Name an owner for each part of it.
- **Draft a support plan:** Create a simple document that outlines:
  - How issues will be reported and tracked
  - Who handles first-line and second-line support
  - How updates are tested during Workday releases
  - Frequency of user check-ins or enhancement planning
- **Estimate and budget:** Add support, training, and contingency costs to your business case. Plan for 1–3 years out.
- **Prepare your team:** Schedule training or onboarding for support staff. If internal, build a practice app for hands-on learning.
- **Set up monitoring:** During development, build in logging and error tracking. Set up alerts if integrations fail or errors occur.
- **Plan on a page:** Use the Powerpoint template to summarize your support plan





# 7. Partner selection

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## Why this matters

If you don't have the in-house skills (yet) to build or support Workday Extend apps, finding the right partner is critical. A good partner accelerates delivery, brings deep Extend knowledge, and helps your team grow. A bad one adds risk, delays, and long-term dependency. In this chapter, you'll learn how to select a partner who fits your goals, budget, and working style and how to recognize the difference between general Workday expertise and real Extend capability.

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## What to look for in a partner

### 1. Proven Workday Extend experience

Don't confuse general Workday consulting with Extend expertise. Ask:

- How many Extend apps have they delivered?
- What types of apps have they built?
- How many years has their team already built Extend apps?

*Example: Incubane's architects were among the first to deploy Extend apps back in 2018. That kind of hands-on experience is rare — and valuable.*

### 2. Official certification & Workday connection

Prefer partners who are Workday-certified or part of Workday's Extend partner network. This gives them access to training, early insights, and better collaboration with Workday.

Tip: If they're mentioned in Workday webinars, community resources, or DevCon events, that's a good sign.



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### 3. Technical and business expertise

Look for a mix of:

- Deep technical skills (App Builder, Orchestrations, security setup)
- Strong understanding of Workday's data model and business processes
- A team that wants to understand your problems, or has specific expertise in the area

Ask how they design apps: Do they talk about using delivered objects, tenant security, scalability, and reusability? Or do they stay vague? Be wary of generic responses.

### 4. Innovation and product mindset

A great Extend partner won't just build what you ask for, they'll suggest better ways to do it.

- Do they have reusable components?
- Can they show past apps (with client permission)?
- Do they suggest simplifications or automation ideas?

Incubane, for example, offers pre-built templates and re-usable widgets to shorten timelines and reduce costs.

### 5. Co-Creation and knowledge transfer

If your goal is to build internal Extend capability, choose a partner that supports learning. Ask:

- Will your team be part of development?
- Do they offer documentation, workshops, or pair programming?
- What is their methodology for ensuring knowledge transfer during the project?

Incubane, by design, supports enablement models, helping your team learn by doing, not just watching.



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## 6. Relevant references

Request references specifically for Extend projects. Ask:

- Did the app meet expectations?
- Was the team knowledgeable and responsive?
- How was post-launch support?
- Would you work with them again?

A smaller, specialized partner may have fewer clients, but more relevant stories. Use your informal network to get the real story, and make sure to ask Workday on their opinion.

### Questions to ask in an RFP or partner evaluation

Use these prompts to separate the true experts from the generalists:

- “How many Workday Extend apps have you delivered? Can you describe one?”
- “Who would be on our project team, and what is their Extend background?”
- “How do you manage tenant access and promote changes to Production?”
- “How do you handle Workday updates? How do you design for long-term compatibility?”
- “What kind of support do you offer post-launch?”
- “Can you share a real challenge you faced in an Extend project and how you solved it?”

Make sure they show you how they would solve your specific solution. Ask to see demos of previous apps.

### Cultural fit and working style

Extend projects involve co-design and iteration, not just implementation. Choose a partner who:

- Listens well
  - Speaks your language (technical or business)
  - Is open to feedback and collaboration
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A partner that works with you, not at you, will reduce friction and boost project success.

### Consider cost in context

Cheaper isn't always cheaper. A generalist SI may bill less per hour but take twice as long or require more rework. A specialist might cost more per hour but deliver faster, cleaner, and with fewer issues. Look at:

- Total cost to deliver
- Time to value
- Support and enhancement terms

### Why Incubane stands out

Without the hard sell, here's how Incubane positions itself differently:

- **Specialized in Extend and BoW** – Not a generalist. Their whole model is built around Extend innovation.
- **Early mover advantage** – They've been building Extend apps since the start of the platform, so they know what works.
- **Efficient delivery model** – Specialized teams, pre-built assets, and reusable frameworks mean faster and more cost-effective builds.
- **Enablement focus** – They offer co-creation models to upskill your team as the app is delivered.
- **Flexible engagement** – Choose from full delivery, hybrid, or enablement-led models based on your needs.
- **High-touch, boutique style** – You're not client #87 — you're a strategic priority, with leadership involved directly.

### 💡 Action Steps

- **Make a shortlist:** Ask Workday or peers for Extend-focused partner recommendations. Include 2–3 for comparison.
- **Host intro calls or send RFIs:** Share your use case and ask open questions. Look for partners who bring ideas, not just answers.



- **Prepare selection criteria or RFP:** Use the questions above to dig into experience, methodology, and team background.
- **Score & compare:** Rank partners on capability, cultural fit, cost, and references.
- **Run a pilot or discovery phase (Optional):** Consider a small paid engagement (e.g., 2-week discovery sprint or proof of concept) before full commitment.
- **Negotiate the SOW clearly:** Define:
  - Scope and deliverables
  - Who owns what
  - What handover looks like
  - Support terms and knowledge transfer expectations
- **Fill in comparison summary:** Once you have all the information from different partners use this one slide to present back to your leadership.

Partner Selection – Comparison Summary			
Criteria	Partner A	Partner B	Partner C
Extend Experience	10+ Extend apps delivered, including onboarding, workflows, and manager tools.	3 Extend projects, mostly for compliance tracking.	Limited Extend experience; more BoW-focused.
Team Profile	Dedicated Extend team with named senior architect and 2 certified developers.	Team of mid-level consultants with Extend training.	Offshore devs, no confirmed Extend architect.
Delivery Approach	Agile delivery, co-design workshops, knowledge transfer embedded.	Waterfall approach, limited iteration during build.	One-time delivery model with fixed scope.
Reusables / Accelerators	Has templates for document upload, approvals, and dashboards.	Custom from scratch each time.	No reusable assets available.
Support & Handover	Includes documentation, training, and 30-day hypercare.	Offers bug fix period only; no enablement.	Post-go-live support optional, billed hourly.
Cultural Fit	Strong engagement, fast response, flexible to stakeholder needs.	More formal/structured; slower turnaround.	Less consultative; required heavy follow-up.
Reference Feedback	Positive feedback on quality, communication, and post-launch support.	Mixed – one reference noted delivery delays.	One reference, no Extend-specific projects.
Pricing Estimate (App 1)	€55K – includes 2-week discovery, full build, and 1-month support.	€48K – build only, discovery not included.	€42K – lowest cost but excludes training/support.
Optional Pilot Sprint	Offered a discovery sprint with stakeholder interviews and mockups.	No pilot offered.	Discovery phase not part of engagement model.
Support Model	Hybrid: internal L1 support + partner for updates & biannual testing.	Partner-only support for 6 months, no internal training.	No defined support model, support billed hourly.

**Recommendation**

Based on Extend experience, delivery quality, and overall value, **Partner A** is the strongest fit. They balance deep technical knowledge with collaboration and long-term maintainability.



# 8. Using AI in Extend

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## Why this matters

If you want to build your own GenAI solutions in Workday you can do that best with Extend. This chapter helps you understand how to leverage GenAI across your use cases, what tools are available depending on your Extend edition, and how to connect with both Workday and external AI platforms.

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## Why AI Matters in Extend

Whether you're designing an app for performance management, recruitment, compliance, or finance, AI can make your process smarter. But the real value lies in how well AI is embedded into the user journey:

- SMART Goals that nudge users based on real-time input
- Performance Review Assistants that suggest phrasing or summaries
- AI-generated job requisitions based on workforce demand and benchmarks
- Sentiment-aware feedback nudges during review cycles
- Forecasting tools that use machine learning to predict attrition or budget impact

These are not standalone AI features. They're designed into the flow of Workday, so they support the action, not distract from it.

## Which use cases leverage AI well?

It is important to understand the different types of AI. Workday has been offering Machine Learning solutions for a long time already, and some of these solutions are available using Extend. These are especially interesting when it comes to pattern recognition or doing predictive analytics.

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There are also solutions like Optical Character Recognition (OCR). These will help you scan documents and leverage the text as actual input. But obviously at the moment there is a lot of interest in GenAI.

GenAI is especially interesting in areas where there is a lot of text that you want to work with, or where you want to have natural language interaction with the user. The Talent & Performance module for example has a lot of text, that you can not really report on or do anything with from an automation perspective. Until you connect with GenAI that is, all of a sudden you can use all the Check-In data to provide a summary at the end of the year for the performance review.

In our view GenAI works best when you embed the prompts in the process, so that the user does not directly affect the prompts. For example when a user provides feedback they can click a button to help them rewrite that feedback, which in the backend triggers a prompt with the users data in it, but the user cannot affect the prompt. This will give you much more control around the output of the model.

## Extend Essentials vs Extend Professional

Your ability to use AI depends on which Extend license you have.

Feature	Essentials	Professional
# of Production Apps	3	10+ (with App Packs)
AI Gateway	✗	✓ Full access
Extend Developer Copilot (GenA)	✗	✓ Speeds up UI & code creation
Native AWS Integration	✗	✓ S3, Lambda, EventBridge
Developer Tenants / Support	1 tenant / 3 contacts	3 tenants / 5 contacts
Use Case Fit	Internal, simple workflows	Scalable, multi-team, AI-driven



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Start with Essentials if you're testing Extend or have simple use cases. Upgrade to Professional when you're ready to scale or use AI seriously. It seems likely that Workday will add the creation of your own Agents to Extend Professional in the future as well.

## What Is the AI Gateway?

The Workday AI Gateway is your bridge to Workday-native AI services like:

- Document Intelligence (extracting data from PDFs)
- Q&A Generation (pulling answers from policies or data)
- Sentiment Analysis (on feedback or surveys)
- Skills Cloud integration
- ML Forecasting (headcount, financials, etc.)
- And more AI features are coming out every year..

With Extend Pro, you can tap into these using a secure and governed framework, without having to manage the AI model yourself. If you have use cases that would benefit from these features, then Professional is a no-brainer.

## Working with AWS AI Services

Extend Pro also unlocks native integration with AWS services, allowing you to:

- Use Amazon Rekognition for image recognition
- Parse documents with Amazon Textract
- Run classification or NLP via Comprehend
- Translate communication using Amazon Translate
- Automate reactions with Lambda and EventBridge

All this happens through a managed AWS account, provisioned by Workday, so security, audit, and access are tightly controlled. It opens up a whole new way of working, so if you have a team who has experience with AWS this will be a game-changer.



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## Using External LLMs with Extend

If your organization is already using OpenAI, Anthropic, or similar tools, you can call these LLMs from Extend apps using secure APIs. You'll need to manage:

- Prompt structures and safety checks
- Token limits and context windows
- Audit trails and user-level controls
- API authentication

Example: A performance review assistant app might send anonymized review text to OpenAI for tone analysis and suggested phrasing, returning a pre-filled feedback draft inside Workday.

Using an enterprise grade LLM already used in-house will give you more speed. The initial setup is straightforward, however there is more work to get them to work with your use cases than when you work with the predefined solutions from AI Gateway.

## Including External LLM Costs in Your Business Case

When leveraging external LLMs (like OpenAI, Anthropic, or Google) in your Extend apps, one of the most overlooked factors is cost — specifically, API pricing based on token usage.

### How Token-Based Pricing Works

Most large language models charge per 1,000 tokens, which roughly equals 750 words. Tokens include both:

- Input tokens (your prompt + any system instructions),
- Output tokens (the model's response).



Depending on the model, prices vary:

Provider	Model	Price per 1K Tokens	Example: 500 prompts/month
OpenAI	GPT-4o	\$5.00 / \$15.00	~\$10-30/month (moderate use)
Anthropic	Claude 3 Sonnet	\$3.00 / \$15.00	~\$15-40/month
Google Gemini	1.5 Pro	\$3.50 / \$10.50	~\$12-30/month

These costs can scale with usage. For instance, embedding an AI assistant in a performance review flow might result in:

- 2-3 prompts per employee per cycle
- Each prompt using 300-600 tokens input/output

Multiply that by employee count and frequency to get a rough monthly estimate.

Use Case	Monthly Usage Estimate	Token Cost Estimate	Notes
AI Goal Drafting Agent	5,000 prompts	~\$100/month	Assumes GPT-4o or Claude 3
Feedback Nudging Agent	2,000 prompts	~\$40/month	Low token usage per message
Resume Screening Assistant	1,000 prompts	~\$20/month	Spiky usage, HR cycles

The prices of the model highly vary per which model you use from a certain provider. This is definitely an area where to do proper research on what you really need. For example the mini models from OpenAI can be 20 times cheaper, and often serve use cases well. We build various models where we calculated the usage based on the amount of tokens, and that is definitely a requirement for your business case. However, we were often surprised how reasonable the costs were, as long as you can control how often users prompt and how they prompt.



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Add a buffer of 20–30% for variation, and flag it as an operational cost in your financial model.

#### 💡 Best Practices for Managing LLM Costs

- Use caching where responses are similar (e.g., same prompt per department)
- Limit output length with tokens caps (e.g., max 200 tokens for a nudge)
- Set up usage monitoring with tools like Amazon Bedrock or Azure OpenAI dashboards



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- Consider batching or rate-limiting prompts during high-volume periods

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### 💡 Action Steps

- **Map AI Opportunities in Your Processes:** Review HR and Finance workflows for high-friction or repetitive tasks. Identify where GenAI could reduce manual effort (e.g., goal writing, summarizing feedback, drafting job requisitions).
- **Choose the Right Extend Tier (Essentials vs. Pro):** Confirm which Workday Extend license your organization holds or wants to hold. Consider upgrading to Pro for full AI Gateway access, AWS integration options and the Developer Co-Pilot.
- **Evaluate LLM Providers and Costs:** Decide if you need to use an external LLM, we would recommend first evaluating the Workday native options. Review pricing and token usage from providers like OpenAI, Anthropic, and Google.
- **Engage Internal AI Governance Early:** Identify your organization's AI or data governance board (if one exists). Share your planned use case, models, data flow, and mitigation measures (e.g., no PII sent externally). Seek early approval or feedback to avoid roadblocks later during security or legal reviews.



# 9. Final checklist

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## Why this matters

Before you hit send on a business case, step into a steering committee meeting, or brief your executive sponsor, take a moment to check your readiness. This quick scan helps ensure your case is solid, your story is clear, and your team is aligned. It's the last mile and it matters.

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## Extend readiness scan

Use this simple checklist to confirm you're ready to move forward:

### Strategic fit

- The use case clearly ties to a real business need (cost, speed, experience, compliance, etc.)
- It supports a broader HR or Finance goal (e.g., improving onboarding, reducing system clutter, enabling agility)
- Stakeholders agree this is a priority

### Use case clarity

- You've documented the pain point or inefficiency
- You know what the Extend app would do (even at a high level)
- You've ruled out that it already exists in standard Workday or BoW

### Business case prepared

- You can explain the value in 2–3 bullet points (time saved, costs avoided, employee impact)
  - You've estimated cost (licensing + build + support)
  - You've outlined ROI or time-to-value, even if rough
  - You've considered alternative options (BoW, manual workaround, etc.)
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### ✓ Stakeholder support

- You've identified your key stakeholders (CHRO, CIO, CFO, users, etc.)
- You've talked to at least one sponsor or influencer to validate interest
- You have a plan to engage others (briefing, 1:1s, steering meeting)

### ✓ Delivery path is defined

- You know whether the app will be built in-house, with a partner, or both
- You've drafted a basic timeline and identified who needs to be involved
- You've considered what happens after go-live (support, enhancements, etc.)

### ✓ Communication ready

- You can explain what Workday Extend is in one clear sentence
- You have talking points tailored for execs, IT, and users
- You have a few real examples of Extend apps to reference (from this playbook or Workday Community)

### ✓ First steps identified

- You know the next 1–3 actions (e.g., book exec meeting, finalize business case, brief team, contact partner)
- You've assigned owners for those steps



# 9. Wrap-up

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## **Why this matters**

You've made it through the full Workday Extend playbook. Whether you're just exploring possibilities or already lining up your first use case, this chapter helps tie everything together. It recaps the key lessons and gives you clear next steps to turn ideas into impact. Most importantly, it reinforces that this isn't just about launching one app, it's about building long-term capability and momentum.

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## **Recap of key insights**

### **Why Extend matters**

Workday Extend helps you solve business-specific challenges using your existing Workday platform. It reduces system clutter, increases agility, and enables faster, tailored innovation, all within your trusted Workday environment.

### **Extend vs. Built on Workday (BoW)**

Use Extend when you need a custom-fit solution or want full control. Use BoW when a trusted partner has already built what you need. Often, a mix of both is the smart path forward.

### **Identifying use cases**

We shared how to spot strong opportunities: manual tasks, disconnected spreadsheets, one-off workflows, or processes that don't fit standard Workday features. Real-world examples (Blackstone, Netflix, PGA) showed how Extend has solved those problems.

### **Building the business case**

You learned how to frame the benefits, quantify savings, and show

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ROI. The structure we gave: from problem to solution, costs to benefits, helps you clearly justify Extend projects to decision-makers.

### **Securing internal buy-In**

Success isn't just about tech, it's about people. From execs to end users, you need to frame Extend in terms that matter to each group. When you connect the dots between business needs and Extend's value, adoption becomes much easier.

### **Maintenance & support**

Post-go-live support is crucial. You explored how to structure support internally, externally, or both. Ongoing updates, user feedback, and monitoring all keep your apps valuable and secure long-term.

### **Partner selection**

If you bring in external help, it matters who you choose. Specialized Extend partners like Incubane bring deep platform knowledge, reusable assets, and flexible engagement models. A good partner doesn't just build, they teach, adapt, and set you up for future success.

## **Next steps – turning plan into action**

### **1. Socialize the vision**

Summarize the core idea from this playbook for your leadership or project team. Use the the slide deck to build support for starting an Extend initiative.

### **2. Pick a starting point**

Revisit your list of use cases. Choose one with clear pain, quick ROI, and willing stakeholders. Set up a short meeting to align on scope, timeline, and next steps.



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### 3. Talk to a partner (Optional)

If you want expert guidance, consider reaching out to Incubane or a recommended partner. A discovery call or informal chat can help you validate scope, get effort estimates, and explore collaboration options. It's a low-risk way to gain clarity. Any good partner is always happy to talk to you.

### 4. Plan the kickoff

Even if formal approval is still coming, prep the basics:

- Define the project owner
- Identify initial stakeholders
- Sketch a rough timeline
- This shows leadership you're serious and ready.

### 5. Use the slide deck you created for your internal leadership

If you've taken all the actions in the playbook you should now have a comprehensive deck. This will help you in your decision making process, but also with your internal stakeholders. You can make a selection of which slides or use all of them together.

### Long-term outlook

Extend is not a one-time tool, it's a capability and platform with enormous potential. Once your first app is live, others will follow. The best organizations embed Extend into their HR and Finance strategies, creating a repeatable way to solve problems inside Workday.

Remember these core principles:

- Start with strategy — tie every Extend idea to business value
- Think big, start small — don't wait for the perfect use case
- Build capability — whether in-house or with a partner
- Communicate success — wins build momentum



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## Final words

Thank you for reading this playbook. You now have a complete, practical guide to Workday Extend, from idea to delivery. Whether you're launching one app or scaling a portfolio, the tools are in your hands.

Innovation inside Workday is no longer just for developers or consultants. With the right vision, team, and plan, you can deliver solutions that feel like native Workday, because they are. We wish you every success on your Extend journey. And if you need help, we're just a message away.

### Action steps (This week)

- **Executive briefing:** Book a 30-min session with your CHRO, CIO, or CFO to share the opportunity.
- **Team huddle:** Bring together your HRIS/IT/Finance leads to discuss next steps.
- **Reach out to a partner:** If needed, contact Incubane for a quick scoping call or workshop.

Congratulations, you're ready to go from idea to impact. Let's build something valuable.

As a gift for reading through till the end - Incubane offers you up to 10 hours of free Extend consulting to help you build business case.



# Appendix 1: Extend Project Checklist

A readiness scan to validate use case fit, scalability, user adoption, and maintainability.

Review this at kickoff, during build, and again before go-live.

## 1. USE CASE VALIDATION

Question	Notes
Does this solve a real pain that business users are already talking about?	
Can we tie it to measurable outcomes like time or cost savings?	
Have we validated it's not solvable with native Workday features or BoW apps?	
Are end users involved in shaping the solution early?	
Is Workday the right place to build this?	

## 2. SCALABILITY PLANNING

Question	Notes
Can the app scale across more users, teams, or regions without major rework?	



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Is the logic modular (not tightly bound to one team or process)?	
Will security and access roles still work if the org structure changes?	
Can new features be added without breaking existing ones?	
Have we included an admin panel for config changes?	

### 3. USER EXPERIENCE & SIMPLICITY

Question	Notes
Can a first-time user complete the task with zero training?	
Are the steps, screens, and field names intuitive and user-friendly?	
Have we included clear help text on all the pages?	
Is the design mobile-friendly and accessible?	
Do users get clear error messages and helpful defaults?	

### 4. OWNERSHIP & KNOWLEDGE TRANSFER

Question	Notes
Is the app modular and easy to maintain (not a black box)?	

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Does someone internally understand how the app works and can make small edits?	
Has Extend training or documentation been provided?	
Is the app modular and easy to maintain (not a black box)?	
Is there a defined support plan (in-house, partner, or hybrid)?	

## 5. IMPACT & ADOPTION TRACKING

Question	Notes
Are we tracking usage metrics (logins, completions, drop-offs)?	
Is there a mechanism to gather user feedback post-launch?	
Have success metrics been agreed with stakeholders in advance?	
Is there a plan to share and celebrate outcomes across the business?	

### Final Tip

If you're missing more than 3 items in any category, pause and realign. Extend apps are about long-term value, not just quick delivery.



# Appendix 2: App library for inspiration

This list is meant as inspiration only.

It's a mix of real apps we've built with clients, public examples shared in the Workday ecosystem, ideas we've explored during workshops, and use cases from other partners. We don't claim ownership of all these apps, and not all of them are available off the shelf.

For each example, we've added the key benefit or problem it solves. These are meant to spark ideas, not to give you exact ROI numbers. The impact will always depend on your organization, your data, and your way of working.

Use this list to identify what's possible with Workday Extend, not as a catalog. When in doubt, validate the use case against your own goals and systems. Let it inspire your next big idea.

Category	Use Case	Description	Tangible Benefits	Intangible Benefits
Accounting & Tax	Advanced Transfer Pricing	Handles complex intercompany transfer pricing scenarios where one division charges another for goods/services, beyond what Workday's standard functionality supports.	Automates a previously manual or Excel-driven process, reducing errors in intercompany transactions and ensuring compliance with internal pricing policies and tax regulations.	Allows finance teams to implement sophisticated financial models within Workday, improving transparency of intercompany margins and easing the burden during audits or financial close (no need to track off-system).
Accounting & Tax	Joint Venture Accounting	Collects necessary data and performs calculations to properly account for joint ventures – including forms for assumptions and automated splits of financial results among venture partners.	Simplifies a niche but important process by bringing it into Workday – eliminating separate spreadsheets and ensuring joint venture transactions and allocations tie directly into the core financials.	Ensures consistency in how joint ventures are reported and offers self-service capabilities (e.g. a JV owner can view/pay their portion of expenses), which improves partner transparency and trust.
Accounting & Tax	Corporate Tax Provision	Allows finance to input tax-specific data and assists in calculating the company's direct tax provisions, integrating that information with the general ledger for seamless tax accounting.	Replaces external tax spreadsheets and manual journal adjustments with an in-system process, reducing risk of errors in tax calculations and speeding up the quarter/year-end close.	Improves compliance and accuracy in tax reporting by maintaining tax calculation details in Workday – providing auditors and stakeholders a clear audit trail and reducing reliance on external tax software for basic provision calculations.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Compensation &amp; Benefits</b>	<b>Global Supplemental Pay</b>	Enables employees to self-service enter on-call or supplemental pay details (e.g., on-call rotations), structuring data for compensation calculations.	Saved significant amount of hours of managerial administrative time; reduced pay discrepancies to zero.	Empowered employees through self-service and provided better workforce planning insights with centralized data.
<b>Compensation &amp; Benefits</b>	<b>Stock Option Enrollment</b>	Provides a guided self-service enrollment experience for a supplemental employee stock option program.	Handled annual stock option enrollments in-app, reducing paper forms and data errors during open enrollment.	Gave employees an informative, user-friendly way to manage stock options, enhancing engagement with the benefit.
<b>Compensation &amp; Benefits</b>	<b>Employee Rewards &amp; Recognition</b>	Allows employees and managers to give peer recognition and awards directly within Workday, integrating recognition into HR records.	Increased employee engagement (recognition frequency rose) and potentially improved retention and performance as a result.	Fostered a positive workplace culture of feedback and appreciation by seamlessly embedding recognition into daily workflows.
<b>Compensation &amp; Benefits</b>	<b>Executive Incentive Compensation</b>	Supports complex bonus or incentive programs (e.g. executive or management incentive plans) with configurable payment bands, targets, and weights that can be defined and tracked in Workday.	Replaces offline spreadsheets and disparate tools for high-level compensation planning, reducing manual consolidation and errors in bonus calculations.	Provides secure, centralized visibility into incentive plans for leadership, improving transparency and enabling timely adjustments to drive performance (no more hidden spreadsheets).
<b>Compensation &amp; Benefits</b>	<b>Wellness Reimbursement</b>	Allows employees to submit reimbursement requests for wellness program expenses (e.g. gym memberships, fitness equipment) under company wellness initiatives.	Streamlines claims for wellness benefits by replacing ad-hoc email or paper submissions with an automated workflow, reducing processing time and errors.	Encourages participation in wellness programs by making it easy to get reimbursed, thereby supporting employee well-being and satisfaction.
<b>Compensation &amp; Benefits</b>	<b>Tuition/Education Reimbursement</b>	Lets employees request education or tuition reimbursement for courses/training, including pre-approval and post-completion proof-of-passing tracking.	Consolidates and automates tuition assistance processes – employees can request multiple courses in one go, and the app can generate payroll inputs or record completions automatically.	Supports employee development by simplifying access to education benefits and eliminating lengthy paperwork, leading to higher utilization of learning programs and improved skills.
<b>Compensation &amp; Benefits</b>	<b>Leave Donation Program</b>	Enables employees to donate their unused paid leave (PTO) to a pool or directly to colleagues who need extra time off for emergencies.	Provides a formal mechanism to reallocate unused leave, reducing wasted leave and avoiding external hardship funds by covering coworkers' critical absences internally.	Boosts morale and employee retention by allowing coworkers to support each other in times of need, fostering a culture of caring and teamwork.
<b>Compensation &amp; Benefits</b>	<b>Merit &amp; Promotion processes combined</b>	Combines compensation review and promotion steps in one integrated workflow.	Reduces review time and alignment issues.	Encourages holistic evaluation of employee performance.
<b>Compensation &amp; Benefits</b>	<b>Executive and Partner Compensation</b>	Manages special comp structures for senior roles, including approvals and formulas.	Avoids errors in complex comp calculations.	Supports confidentiality and tailored workflows.
<b>Compensation &amp; Benefits</b>	<b>Bonus payout calculator</b>	Calculates and manages bonus payments based on formulas.	Reduces manual calculation errors.	Supports fair and transparent rewards.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
Finance Operations & Procurement	<b>Project Forecast Update</b>	Allows project managers to update up to a year of weekly project forecasts for multiple projects in one interface.	Batch updates of forecasts minimize manual effort and delays in financial planning.	Improves user satisfaction and planning accuracy by simplifying the forecasting process.
Finance Operations & Procurement	<b>Supplier Requisition Automation</b>	Automates the submission and processing of supplier purchase requisitions, removing the need for spreadsheets and email coordination.	Eliminated manual reconciliation between systems, speeding up purchase order processing and improving accrual	Improved scalability of procurement operations by reducing email traffic and human error, freeing up staff for higher-value work.
Finance Operations & Procurement	<b>Customer and Invoice Creation</b>	Combines customer setup and invoice creation into a single streamlined interface for billing operations.	Reduced data entry time and errors by handling customer and invoice in one step, accelerating the billing cycle.	Enhanced user experience for finance staff by simplifying what used to be two separate processes into one cohesive task.
Finance Operations & Procurement	<b>Labor Cost Allocation App</b>	Pulls labor expenses from an external system into Workday, allowing edits and reallocation to proper accounts with audit references.	Automated the reclassification of labor costs, eliminating manual journal entries and improving accuracy of	Provided better auditability (with external ticket IDs linked) and transparency in how labor costs are adjusted and allocated.
Finance Operations & Procurement	<b>Quick Company Setup</b>	Simplifies the creation of new company (legal entity) records by merging multiple tasks into one form and defaulting common fields.	Cut down time to create a new entity by removing redundant data entry and avoiding errors with predefined defaults.	Strengthened governance with an integrated approval step for new companies and improved administrator experience with a one-stop process.
Finance Operations & Procurement	<b>Supplier Request &amp; PO Portal</b>	Provides a self-service portal for suppliers or employees to submit purchase order requests, automating the intake and approval of supplier-backed POs and eliminating reconciliation	Eliminates countless emails and offline spreadsheets from the supplier PO process, speeding up purchasing and improving the accuracy of accruals	Improves scalability of finance operations by streamlining how external supplier requests are handled, and ensures all data is captured in one system for better oversight (no more fragmented
Finance Operations & Procurement	<b>Customer &amp; Invoice Creation</b>	Allows users to create a new customer record and an invoice in one unified interface/session, rather than navigating two separate processes.	Reduces duplicate data entry and potential delays – billing can begin immediately upon onboarding a new customer, shortening the	Improves user productivity and data integrity by combining related steps into one task, ensuring customer and invoice data stay in sync (and lowering training effort for finance staff).
Finance Operations & Procurement	<b>Finance Change Request Portal</b>	A one-stop portal for finance teams to request changes to core finance data (customers, suppliers or configurations) with built-in approvals and compliance checks.	Replaces scattered emails and legacy databases with an auditable Workday process for master data changes, reducing turnaround time and	Enhances control and governance by embedding compliance checkpoints (no changes happen without proper approval), and gives finance a clear view of all pending changes in one place.
Finance Operations & Procurement	<b>Expense anomaly detection</b>	Uses logic to flag suspicious or non-compliant expenses.	Reduces fraud and ensures policy adherence.	Improves audit readiness and trust.
Finance Operations & Procurement	<b>Purchase request tracker</b>	Simplifies and tracks non-PO purchase requests.	Improves visibility and reduces maverick spend.	Supports internal control processes.
Finance Operations & Procurement	<b>Procurement SLA tracker</b>	Tracks procurement response time and SLA compliance.	Improves accountability and supplier performance.	Supports better vendor relationships.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Financial Reporting &amp; Compliance</b>	<b>Enhanced Asset Reporting</b>	Extends Workday's asset management with custom reports for asset lifecycle events (disposals, impairments, depreciation) and jurisdiction-specific reporting (tax forms, local regulatory reports).	Fills critical reporting gaps by automatically compiling asset data that previously required manual effort or external tools – saving finance time and ensuring compliance reports (e.g. tax depreciation forms) are generated correctly.	Equips finance and accounting teams with better insights into asset performance and status, supporting data-driven decision making (e.g. when to retire or replace assets) and ensuring no compliance requirement is overlooked.
<b>Financial Reporting &amp; Compliance</b>	<b>Change Advisory Board (SOX)</b>	Supports SOX compliance by linking financial system changes to approval tickets – users can attach ServiceNow ticket IDs to Workday configuration changes, and admins can report on all changes monthly to verify proper approval.	Automates a key audit control – every change in Workday Financials is tracked and matched with a change ticket, reducing manual audit prep and ensuring no unauthorized changes go unnoticed.	Improves audit readiness and confidence for the finance IT team. It creates transparency in change management, making it easier to pass audits and giving stakeholders assurance that the financial system is tightly controlled.
<b>Financial Reporting &amp; Compliance</b>	<b>CFO Analytics Dashboard</b>	Provides a persona-tailored dashboard for CFOs/finance leaders that pulls together key reports and KPIs in one place, with narrative insights and guided decision prompts (leveraging Workday data and analytics).	Saves executives time by aggregating multiple financial reports and analytics into a single view (reducing the need to manually compile reports from various sources each month).	Improves strategic decision-making – finance leaders get real-time, curated insights (with commentary) within Workday, leading to better-informed decisions. It also increases adoption of analytics by making the experience interactive and role-specific.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
HR Compliance & Safety	Vaccination Status Tracking	Allows employees to self-report their COVID-19 vaccination status and upload proof (vaccine card) directly into Workday.	Automates what was a manual or external tracking process, giving HR up-to-date vaccination data and reducing administrative overhead in collecting and	Supports workplace health protocols by providing a reliable, private record of vaccination rates, helping leaders make informed safety decisions and giving employees confidence in office
HR Compliance & Safety	Return-to-Work Planning	Helps HR plan and execute phased returns to the office (or job site) by evaluating which employees can return in each phase based on survey data and business need.	Centralizes return-to-work coordination (replacing spreadsheets) and automatically enforces policy rules (e.g. capacity limits, role prioritization), ensuring a compliant and	Increases transparency and consistency in how return-to-work decisions are made, which improves employee trust. By keeping personal data in Workday, it also maintains privacy while delivering reports on who can return when.
HR Compliance & Safety	Secondary Employment Approvals	Lets managers record and approve employees' secondary jobs (external employment), ensuring outside work doesn't conflict with the employee's primary role or labor regulations.	Replaces an honor-system or manual declaration process with a formal workflow, creating an audit trail of approved outside work and flagging any potential conflicts (e.g.	Gives managers and HR visibility into employees' external commitments and ensures legal compliance (for example, adhering to working hours limits and GDPR requirements).
HR Compliance & Safety	Employer Statement Automation	Streamlines employee requests for official employer statements (e.g. proof of employment or income letters) by generating the document within Workday and routing it for approval.	Greatly reduces manual effort for HR: the app automatically pulls the required data and produces a standardized letter, cutting out email requests and tracking spreadsheets. What seemed like a simple request often involved	Improves employee satisfaction by delivering important documents (visa letters, mortgage verification, etc.) faster. It also ensures consistency and accuracy in official statements, and frees HR to focus on higher-value tasks.
HR Compliance & Safety	Enhanced Change Job	Improves the standard change job process with validations, approvals, or extra steps.	Reduces compliance issues and avoids downstream data errors.	Makes HR processes feel more controlled and transparent.
HR Compliance & Safety	Employee Relations Management	Centralizes tracking of ER cases, investigations, and documentation.	Improves compliance and follow-up on employee issues.	Builds trust by ensuring fair treatment and documentation.
HR Compliance & Safety	HR Policy Management	Tracks policy distribution, acknowledgment, and updates.	Ensures legal compliance and employee awareness.	Reduces confusion and improves trust in HR.
HR Compliance & Safety	Custom incident report & Safety Incident management	Captures, routes, and tracks safety incidents.	Supports regulatory compliance.	Builds a stronger safety culture.
HR Compliance & Safety	Conflict of interest disclosure	Captures disclosures and tracks follow-ups.	Reduces legal and reputation risks.	Promotes an ethical culture.
HR Compliance & Safety	Code of conduct attestation	Ensures employees read and acknowledge conduct policies.	Reduces liability through documented compliance.	Supports culture of integrity.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Offboarding &amp; Transitions</b>	<b>Matrix Manager Nomination</b>	Facilitates nomination and approval of matrix (dual) managers for teams, requiring director approval and integrating with training and org setup.	Eliminated ad-hoc processes for assigning matrix managers, ensuring proper approval and automatic setup of new manager roles.	Improved organizational agility by transparently managing dotted-line leadership roles and readiness through integrated training triggers.
<b>Offboarding &amp; Transitions</b>	<b>Resignation Self-Service</b>	Allows an employee to submit their resignation and final work date through a guided Workday process, which triggers all offboarding steps.	Automatically kicks off offboarding workflows (benefits, payroll, IT, etc.), reducing HR manual steps in managing employee exits.	Ensures a smoother, more consistent exit process for employees, with transparency into next steps, which improves departing employees' confidence and goodwill.
<b>Offboarding &amp; Transitions</b>	<b>Offboarding Task Management</b>	An offboarding coordinator app that tracks progress on all activities when an employee leaves, organizing tasks for HR, IT, managers, etc..	Reduces missed steps by providing checklists and reminders, and saves administrative effort by automating task assignments (replacing manual trackers).	Improves compliance and accountability during offboarding, and provides a better experience for departing employees by ensuring nothing falls through the cracks.
<b>Offboarding &amp; Transitions</b>	<b>Access Revocation Workflow</b>	Enables managers or IT to request and approve the removal of system access for departing or transferring workers, feeding directly into downstream IT actions.	Automates access de-provisioning, eliminating ad-hoc emails to IT and ensuring accounts are revoked promptly to reduce security risks.	Mitigates security and compliance risks by promptly removing former employees' access and providing an audit trail of who approved each revocation.
<b>Offboarding &amp; Transitions</b>	<b>Exit interview</b>	Digitalizes the exit interview process and captures insights.	Saves time and improves response consistency.	Supports continuous improvement through feedback.
<b>Offboarding &amp; Transitions</b>	<b>Alumni engagement tool</b>	Keeps ex-employees engaged through updates, invites, or referrals.	Maintains talent pool and brand advocacy.	Drives rehire potential and goodwill.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
Other	<b>International Remote Work Approval</b>	Provides a streamlined workflow to request and approve international remote work arrangements, with built-in privacy compliance.	Achieved a faster approval SLA through automation and reminders.	Ensured consistency and GDPR compliance while enhancing user experience for requesters and approvers.
Other	<b>Access Request Automation</b>	Streamlines the process for employees to request and get approval for access to internal systems, replacing emails and manual forms.	Cut down provisioning time by automating approvals and eliminating manual IT ticket handling.	Improved security and compliance by centralizing access requests and providing an audit trail of approvals.
Other	<b>Mileage Expense Calculator</b>	Lets employees calculate and submit mileage reimbursements in Workday by automatically computing distances via map APIs.	Replaced a third-party mileage system, consolidating expense reporting and saving costs on external tools.	Made mileage reimbursement more user-friendly (multi-language support) and ensured policy compliance by standardizing calculations.
Other	<b>Change Advisory Board Tracker</b>	Links change-management tickets to financial record changes in Workday, facilitating review and approval for SOX compliance.	Improved audit readiness by ensuring all financial system changes have attached approvals and justifications, cutting audit prep time.	Reduced compliance risk by enforcing that every change is accounted for and reviewed, providing a clear audit trail for regulators.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Recruiting &amp; Onboarding</b>	<b>Project Onboarding (Automated Access)</b>	Automates onboarding tasks for new client projects, centralizing system access provisioning and reporting.	Reduced provisioning errors; saved on FTE	Centralized and automated processes improved efficiency and user satisfaction.
<b>Recruiting &amp; Onboarding</b>	<b>New Hire Onboarding Tracker</b>	Automates new hire onboarding by consolidating tasks like orientation, IT access, and equipment requests into one progress dashboard.	Accelerated new hire readiness by ensuring all onboarding steps are tracked and completed without manual coordination.	Provided a positive first-day experience for new employees through a clear, centralized onboarding journey, boosting engagement.
<b>Recruiting &amp; Onboarding</b>	<b>Corporate Credit Card Request</b>	Creates a structured process for employees to request a corporate credit card with multi-level approvals, instead of paper forms.	Shortened the cycle time for issuing cards by moving from paper to digital, and tracked all requests to prevent delays.	Improved traceability and control over corporate card issuance, reducing risk and providing audit visibility into approvals.
<b>Recruiting &amp; Onboarding</b>	<b>Bulk Hiring (Mass Hire)</b>	Consolidates high-volume hiring into a single streamlined process for managers, with simplified data entry and auto-populated fields.	Speeds up the hiring process and reduces manual data entry errors by automating repetitive steps.	Provides a unified, user-friendly experience for managers hiring large groups, instead of relying on spreadsheets or email-driven workflows.
<b>Recruiting &amp; Onboarding</b>	<b>Employee Referral Tracking</b>	Tracks employee-referred candidates and automates referral bonus payouts within Workday, eliminating the need for external tracking.	Eliminates manual spreadsheets and emails for referral programs, saving recruiting teams significant time and effort.	Boosts employee engagement in referrals and helps attract quality talent by making the referral program easy and rewarding to use.
<b>Recruiting &amp; Onboarding</b>	<b>Interview Scheduling Automation</b>	Automates the interview scheduling process for candidates and interviewers directly in Workday, removing back-and-forth coordination.	Saves recruiters time by removing manual scheduling steps (emails and calls), accelerating time-to-interview and reducing scheduling conflicts.	Improves the candidate experience with faster, more organized interview scheduling, reflecting well on the company's hiring process.
<b>Recruiting &amp; Onboarding</b>	<b>New Hire System Access Requests</b>	Streamlines IT setup during onboarding by letting managers request system access, equipment, and permissions for new hires in one place.	Centralizes and automates IT provisioning tasks, reducing onboarding delays and errors (e.g. missing accounts).	Ensures new hires are productive on Day 1 with all access in place, improving onboarding satisfaction and strengthening security compliance.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
Recruiting & Onboarding	<b>Guided Onboarding Portal</b>	Provides new hires a single portal to view and complete all their onboarding tasks, with real-time status tracking of each step.	Consolidates multiple onboarding activities into one interface, reducing confusion and manual follow-ups from HR.	Enhances the new hire experience and accelerates time-to-productivity by guiding employees through onboarding in a clear, engaging way.
Recruiting & Onboarding	<b>Mass Create Positions &amp; Job Requisitions</b>	Allows mass creation of positions and requisitions, often linked to business growth or re-orgs.	Accelerates recruiting readiness across multiple departments.	Supports better workforce planning and internal collaboration.
Recruiting & Onboarding	<b>Quick hire (Pre-hire, position, hire combined)</b>	Combines key hiring steps into one streamlined flow.	Cuts down hiring cycle time drastically.	Improves experience for both candidates and HR staff.
Recruiting & Onboarding	<b>Streamlined onboarding process with orchestrating other systems</b>	Connects onboarding with IT, facilities, and other systems for task orchestration.	Avoids missed onboarding steps and saves HR time.	Improves the first-day experience for new hires.
Recruiting & Onboarding	<b>Onboarding Checklist Tracker</b>	Tracks onboarding tasks, forms, and status in one view.	Ensures compliance and smooth experience.	Gives new hires clarity and structure in early days.
Recruiting & Onboarding	<b>Internal job referral tracking</b>	Manages and tracks referrals, incentives, and candidate statuses.	Improves referral program performance and transparency.	Encourages employee involvement in recruitment.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
Talent & Engagement	Promotion Nomination	Lets senior leaders review performance and nominate employees for promotion during a set window, with structured criteria and HR tracking.	Provided a single system for promotion nominations, replacing spreadsheets/emails and saving HR time in consolidating inputs.	Increased transparency and fairness in promotions by standardizing criteria and workflow across the organization.
Talent & Engagement	Coaching and Feedback Tracking	Allows managers to record coaching discussions and performance feedback for employees in Workday, replacing external or ad-hoc tools.	Replaces a third-party vendor solution and eliminates a cumbersome workaround process for documenting coaching (no more separate systems).	Fosters a culture of continuous feedback and development by making it easy to document and follow up on coaching conversations, leading to higher employee growth and engagement.
Talent & Engagement	Diversity & Inclusion Data Collection	Enables the company to collect additional diversity information from employees (e.g. self-identification data) to inform HR initiatives.	Automates the collection of D&I data that was previously gathered via surveys or not at all, eliminating manual data consolidation.	Supports informed D&I strategies and promotes an inclusive culture by giving leaders better insight into the workforce's diversity metrics.
Talent & Engagement	Employee Pulse Surveys	Allows HR to send targeted surveys to selected employee groups and schedule questions over time, storing responses in Workday for analysis.	Brings employee feedback into Workday (no need for separate survey tools), making results immediately reportable and reducing manual compilation of survey data.	Provides leaders real-time feedback and insights from employees, improving decision-making and responsiveness to employee concerns and ideas.
Talent & Engagement	Leadership Nomination Workflow	Provides a structured process for nominating and approving employees for leadership roles (e.g. matrix or supervisory manager assignments).	Automates a previously email-driven process, ensuring nominations are tracked and approved consistently, and updates downstream systems (LMS, org charts) without manual	Increases transparency in how new leaders are chosen and ensures a fair approval process, strengthening succession planning and employee trust in promotions.
Talent & Engagement	Promotion process with interviews & panels	Adds structured panel reviews and interview scoring to internal promotions.	Ensures fairer and more data-driven promotion decisions.	Boosts transparency and trust in internal mobility.
Talent & Engagement	Coaching	Supports coaching programs by matching, tracking sessions, and goals.	Shows ROI of coaching through progress tracking.	Strengthens leadership pipeline and engagement.
Talent & Engagement	Internal mentorship matching	Matches mentors and mentees based on goals or profiles.	Encourages internal development.	Strengthens cross-functional connections.
Talent & Engagement	Enhanced succession planning	Tracks readiness, gaps, and nominations for critical roles.	Supports proactive talent planning.	Reduces leadership risk exposure.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Time, Leave &amp; Payroll</b>	<b>Family Leave Planner</b>	Helps employees plan out parental or family leave dates and pay impacts before submitting a leave request, with manager visibility.	Reduced back-and-forth by letting employees model leave timing and pay, resulting in clearer plans and fewer errors in leave requests.	Enhanced employee confidence and satisfaction during life events by providing clarity on leave and return-to-work timing.
<b>Time, Leave &amp; Payroll</b>	<b>Leave Request &amp; Approvals</b>	Offers an enhanced leave-of-absence request process (for certain leave types or local requirements) within Workday, with custom business rules and approvals.	Eliminates paper forms and manual HR processing of special leave requests, significantly reducing administrative hours per request.	Ensures consistent tracking and approval of leaves across the organization, improving compliance and giving employees clarity on their leave status and entitlements.
<b>Time, Leave &amp; Payroll</b>	<b>On-Call Pay Management</b>	Structures the tracking of on-call rotations and automates calculating any supplemental pay or stipend for employees who are on call (e.g. in 24/7 operations).	Standardizes on-call and premium pay calculations, reducing errors/discrepancies in pay and saving managers time previously spent manually tracking extra hours.	Provides better insight into coverage and workloads, helping with workforce planning and ensuring fairness in how on-call duties are compensated.
<b>Time, Leave &amp; Payroll</b>	<b>Remote/Flexible Work Requests</b>	Allows workers to request work-from-home or flexible work arrangements through a formal process, consolidating location, pay, and benefits implications for manager approval.	Replaces informal emails with a transparent approval workflow, ensuring any remote-work allowances or policy checks are handled automatically as part of the request.	Improves compliance with remote work policies and creates a clear record of who is working remotely, while giving employees a consistent way to seek flexibility – enhancing trust and work-life balance.
<b>Time, Leave &amp; Payroll</b>	<b>Overtime &amp; Hours Tracking</b>	Lets employees log overtime or extra hours worked beyond their normal schedule via a simple Workday form, capturing data needed for labor law compliance.	Removes the need for a separate time-tracking system for occasional overtime – data is captured in Workday and fed to payroll, ensuring accurate compensation and EU working time directive compliance.	Helps meet labor regulations by transparently tracking hours worked, while giving employees an easy, familiar interface to report overtime, thereby improving accuracy and reducing compliance risk.
<b>Time, Leave &amp; Payroll</b>	<b>Employee leave donation system</b>	Allows employees to donate leave to others in need.	Reduces unused leave and boosts morale.	Fosters a supportive company culture.
<b>Time, Leave &amp; Payroll</b>	<b>Off-cycle payroll request tool</b>	Manages requests for off-cycle payroll runs.	Speeds up urgent payments with control.	Reduces frustration and escalations.



Category	Use Case	Description	Tangible Benefits	Intangible Benefits
<b>Workplace &amp; Facility Management</b>	<b>Remote work management</b>	Tracks remote work status, eligibility, and agreements.	Ensures compliance with remote work policies.	Builds accountability and supports hybrid models.
<b>Workplace &amp; Facility Management</b>	<b>Uniform &amp; Equipment request system</b>	Handles requests and approvals for uniforms or equipment.	Speeds up provisioning and tracks costs.	Improves employee readiness and satisfaction.
<b>Workplace &amp; Facility Management</b>	<b>Access management</b>	Handles badge and system access requests.	Reduces risk and manual work for security teams.	Improves new hire readiness.
<b>Workplace &amp; Facility Management</b>	<b>Facility access management</b>	Manages long-term or contractor facility access.	Improves security and tracking.	Supports facility planning.
<b>Workplace &amp; Facility Management</b>	<b>Desk reservation system</b>	Lets employees book desks or spaces in a hybrid office.	Improves space utilization.	Supports flexible working models.
<b>Workplace &amp; Facility Management</b>	<b>Visitor pre-registration</b>	Allows external visitors to register in advance.	Speeds up entry and improves security.	Creates a professional guest experience.