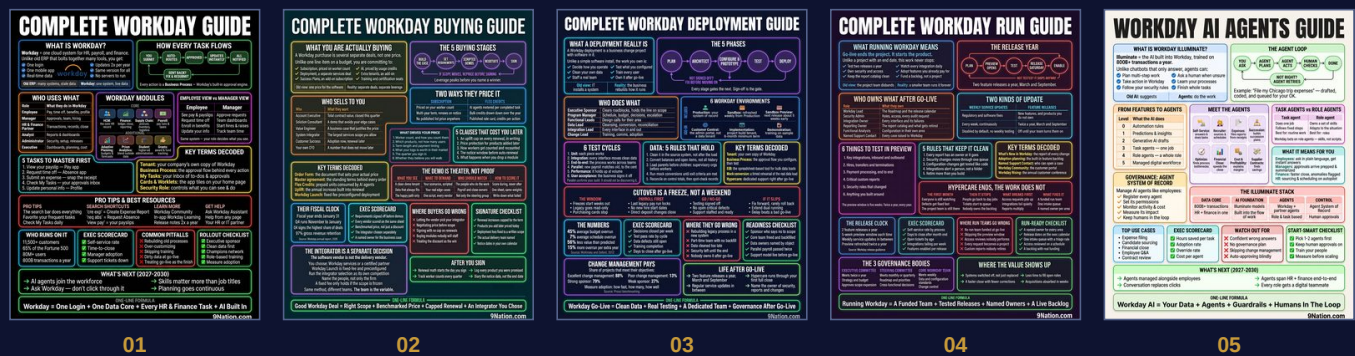


THE WORKDAY FIELD SET

Five one-page guides to the whole lifecycle.



Understand it. What Workday actually is, and how a task flows through it.

Buy it. The five buying stages, what drives your price, and the clauses that cost you later.

Deploy it. Six environments, six test cycles, and why cutover is a freeze rather than a weekend.

Run it. The release year, who owns what after go-live, and what breaks when hypercare ends.

Then the agents. Where Workday AI is going, and the guardrails to set before it gets there.

HOW TO USE IT

- Print them. Each guide stands on its own page and reads at arm's length.
- Hand one to a steering committee. They are built to need no preamble.
- Every number on every poster is sourced, by name and by date, on page seven.
- There is no form and no gate. Send them to whoever needs them.

David Apollon

Independent ERP and Workday program leadership. 25 years, 76 client engagements.

9Nation.com

Free to share. Free to print.

COMPLETE WORKDAY GUIDE

WHAT IS WORKDAY?

Workday = one cloud system for HR, payroll, and finance. Unlike old ERP that bolts together many tools, you get:

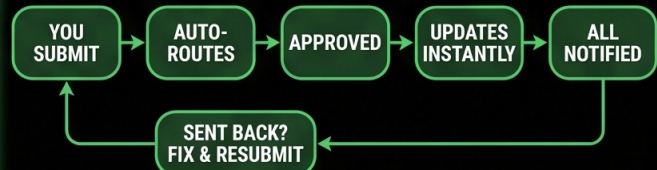
- ✓ One login
- ✓ One mobile app
- ✓ Real-time data
- ✓ Updates 2x per year
- ✓ Same version for all
- ✓ No servers to run



Old ERP: many systems, stale data

Workday: one system, live data

HOW EVERY TASK FLOWS

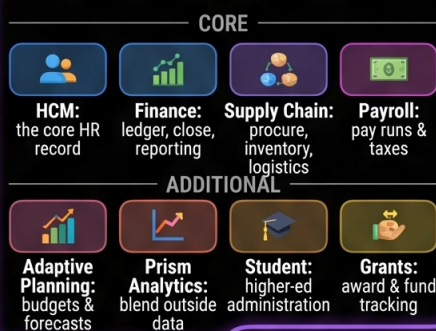


Every action is a **Business Process** – Workday's built-in approval engine.

WHO USES WHAT

Role	What they do in Workday
Employee	Pay, time off, benefits, profile
Manager	Approvals, team, hiring
HR & Finance Partner	Transactions, records, close
Analyst	Reports & dashboards
Administrator	Security, setup, releases
Executive	Dashboards, planning, cost

WORKDAY MODULES



EMPLOYEE VIEW vs MANAGER VIEW

Employee	Manager
See pay & payslips	Approve requests
Request time off	Team dashboards
Enroll in benefits	Start hires & raises
Update your info	Track team time

Same system – your role decides what you see.

5 TASKS TO MASTER FIRST

1. View your payslip — Pay app
2. Request time off — Absence app
3. Submit an expense — snap the receipt
4. Check My Tasks — your approvals inbox
5. Update personal info — Profile

Tenant: your company's own copy of Workday
Business Process: the approval flow behind every action
My Tasks: your inbox of to-dos & approvals
Cards & Worklets: the app tiles on your home page
Security Role: controls what you can see & do

KEY TERMS DECODED

PRO TIPS & BEST RESOURCES

PRO TIPS

The search bar does everything
 Favorite your frequent tasks
 Check My Tasks daily

SEARCH SHORTCUTS

'cre exp' = Create Expense Report
 'req abs' = Request Absence
 'view pay' = your payslips

LEARN MORE

Workday Community
 In-app Workday Learning
 Release notes 2x a year

GET HELP

Ask Workday Assistant
 Help from any page
 Your HR or IT partner

WHO RUNS ON IT

11,500+ customers
 65% of the Fortune 500
 80M+ users
 800B transactions a year

EXEC SCORECARD

- ✓ Self-service rate
- ✓ Time-to-close
- ✓ Manager adoption
- ✓ Support tickets down

COMMON PITFALLS

- ✗ Rebuilding old processes
- ✗ Over-customizing
- ✗ Skipping training
- ✗ Dirty data at go-live
- ✗ Treating go-live as the finish

ROLLOUT CHECKLIST

- ✓ Executive sponsor
- ✓ Clean data first
- ✓ Champions network
- ✓ Role-based training
- ✓ Measure adoption

WHAT'S NEXT (2027-2030)

- AI agents join the workforce
- Skills matter more than job titles
- Ask Workday — don't click through it
- Planning goes continuous

ONE-LINE FORMULA

Workday = One Login + One Data Core + Every HR & Finance Task + AI Built In

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COMPLETE WORKDAY BUYING GUIDE

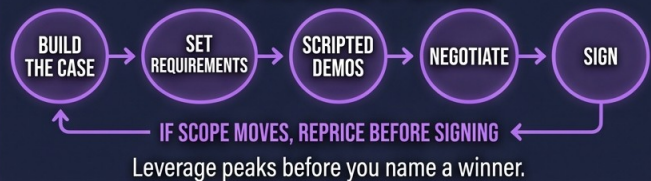
WHAT YOU ARE ACTUALLY BUYING

A Workday purchase is several separate deals, not one price. Unlike one line item on a budget, you are committing to:

- ✓ Subscription, priced on worker count
- ✓ AI, priced by usage credits
- ✓ Deployment, a separate services deal
- ✓ Extra tenants, an add-on
- ✓ Success Plans, an add-on subscription
- ✓ Training and certification seats

Old view: one price for the software Reality: separate deals, separate leverage

THE 5 BUYING STAGES



WHO SELLS TO YOU

Who	What they want
Account Executive	Total contract value, closed this quarter
Solution Consultant	A demo that avoids your edge cases
Value Engineer	A business case that justifies the price
System Integrator	The largest services scope you allow
Customer Success	Adoption now, renewal later
Your own CFO	A number that does not move later

TWO WAYS THEY PRICE IT

SUBSCRIPTION

Priced on your worker count
Multi-year term, renews on notice
No published list price anywhere

FLEX CREDITS

AI agents metered per completed task
Bulk credits drawn down over the year
Published rate card, credits per action

WHAT DRIVES YOUR PRICE

1. Worker count, and how you count them
2. Which products, not how many users
3. Term length and payment timing
4. What your logo is worth in their market
5. The quarter you sign in
6. Whether they believe you will walk

5 CLAUSES THAT COST YOU LATER

1. An uplift cap on every renewal, in writing
2. Price protection for products added later
3. How workers get counted and recounted
4. The notice window before auto-renewal
5. What happens when you drop a module

KEY TERMS DECODED

Order Form: the document that sets your actual price
Master agreement: the standing terms behind every order
Flex Credits: prepaid units consumed by AI agents
Uplift: the annual increase built into renewal
Workday Launch: fixed-fee preconfigured deployment

THE DEMO IS THEATER, NOT PROOF

WHAT YOU SEE	WHAT TO DEMAND	WHO SHOULD WATCH	HOW TO SCORE IT
A clean demo tenant	Your scenarios, scripted	The people who do the work	Score during, never after
Data that always fits	Your real edge cases	Payroll and close owners	One sheet, same weights
The happy path only	One script, every vendor	Not only the steering group	Write down what failed

THEIR FISCAL CLOCK

Fiscal year ends January 31
Q4 runs November to January
Q4 signs the highest share of deals
97% gross revenue retention

Source: Workday annual report, 2026

EXEC SCORECARD

- ✓ Requirements signed off before demos
- ✓ Every vendor scored on the same sheet
- ✓ Benchmarked price, not just a discount
- ✓ The integrator chosen separately
- ✓ A named owner for the business case

WHERE BUYERS GO WRONG

- ✗ Letting the vendor pick your integrator
- ✗ Negotiating price before scope
- ✗ Signing with no cap on renewals
- ✗ Buying modules nobody will staff
- ✗ Treating the discount as the win

SIGNATURE CHECKLIST

- ✓ Renewal increases capped for the term
- ✓ Products you add later priced today
- ✓ Deployment fees fixed to a written scope
- ✓ The actual delivery team named
- ✓ Notice dates in your own calendar

THE INTEGRATOR IS A SEPARATE DECISION

The software vendor is not the delivery vendor.

You choose: Workday services or a certified partner
 Workday Launch is fixed-fee and preconfigured
 Run the integrator selection as its own competition
 Name the people, not only the firm
 A fixed fee only holds if the scope is frozen

Same method, different teams. **The team is the variable.**

AFTER YOU SIGN

- Renewal math starts the day you sign
- Log every product you were promised
- Track worker counts every quarter
- Diary the notice date, not the end date

ONE-LINE FORMULA

Good Workday Deal = Right Scope + Benchmarked Price + Capped Renewal + An Integrator You Chose

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COMPLETE WORKDAY DEPLOYMENT GUIDE

WHAT A DEPLOYMENT REALLY IS

A Workday deployment is a business change project with software in it.

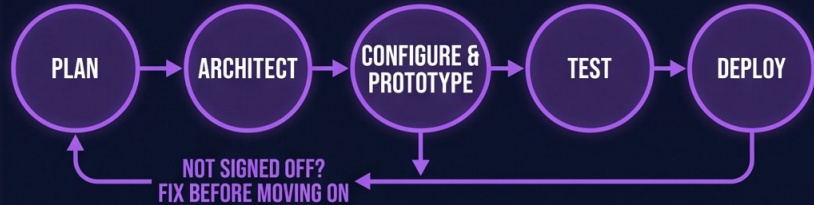
Unlike a simple software install, the work you own is:

- ✓ Decide how you operate
- ✓ Clean your own data
- ✓ Staff a real team
- ✓ Test what you configured
- ✓ Train every user
- ✓ Own it after go-live

Old view: IT installs a system

Reality: the business rebuilds how it runs

THE 5 PHASES



Every stage gates the next. Sign-off is the gate.

WHO DOES WHAT

Executive Sponsor	Clears roadblocks, holds the line on scope
Program Manager	Schedule, budget, decisions, escalation
Functional Leads	Design calls for their area
Data Lead	Cleansing, conversion, reconciliation
Integration Lead	Every interface in and out
Change Lead	Training, comms, adoption

6 WORKDAY ENVIRONMENTS

INCLUDED	Production: your system of record	Sandbox: refreshed weekly from Production	Sandbox Preview: next release about 5 weeks early
	Customer Central: the admin portal, not a data tenant	Implementation: project build tenant, 6-month minimum term	Demonstration: training on sample data
ADD-ON			

6 TEST CYCLES

1. **Unit:** each piece works
 2. **Integration:** every interface moves clean data
 3. **End-to-end:** the process works across teams
 4. **Parallel:** new payroll matches old, to the cent
 5. **Performance:** it holds up at volume
 6. **User acceptance:** the business signs it off
- Parallel confirms your build. It should not be discovering it.

DATA: 5 RULES THAT HOLD

1. Clean it in the source system, not after the load
2. Convert balances and open items, not all history
3. Load parents before children: supervisory orgs before workers
4. Run mock conversions until exit criteria are met
5. Reconcile on control totals, then spot-check records

KEY TERMS DECODED

- Tenant:** your own copy of Workday
- Business Process:** the approval flow you configure, then test
- EIB:** the spreadsheet-based tool for bulk data loads
- Mock conversion:** a timed rehearsal of the real data load
- Hypercare:** dedicated support right after go-live

CUTOVER IS A FREEZE, NOT A WEEKEND

THE WINDOW

- Freezes start weeks out
- Legacy goes read-only
- Purchasing cards stop

PAYROLL FIRST

- Last legacy pay run locks
- No new hire start dates
- Direct deposit changes close

GO / NO-GO

- Testing signed off
- No open critical defects
- Support staffed and ready

IF IT SLIPS

- Fix forward, rarely roll back
- Extend dual running
- Delay beats a bad go-live

THE NUMBERS

45% average budget overrun
7% average schedule overrun
56% less value than predicted
15% more overrun per extra year

Source: McKinsey and Oxford, 2012

EXEC SCORECARD

- ✓ Decisions closed per week
- ✓ Test pass rate by cycle
- ✓ Data defects still open
- ✓ Training completion
- ✓ Days to close after go-live

WHERE THEY GO WRONG

- ✗ Rebuilding legacy process in a new system
- ✗ Part-time team with no backfill
- ✗ Data cleaned too late
- ✗ Security left until the end
- ✗ Nobody owns it after go-live

READINESS CHECKLIST

- ✓ Sponsor who says no to scope
- ✓ Core team freed and backfilled
- ✓ Data owners named by object
- ✓ Parallel payroll passed twice
- ✓ Support model live before go-live

CHANGE MANAGEMENT PAYS

Share of projects that meet their objectives:

Excellent change management: **88%** Poor change management: **13%**
Strong sponsor: **79%** Weak sponsor: **27%**

Measure adoption: how fast, how many, how well

Source: Prosci benchmarking

LIFE AFTER GO-LIVE

- Two feature releases a year, March and September
- Regular service updates in between
- Hypercare runs through your first full close
- Name the owner of security, reports and changes

ONE-LINE FORMULA

Workday Go-Live = Clean Data + Real Testing + A Dedicated Team + Governance After Go-Live

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COMPLETE WORKDAY RUN GUIDE

WHAT RUNNING WORKDAY MEANS

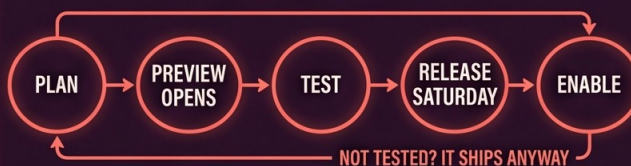
Go-live ends the project. It starts the product.

Unlike a project with an end date, this work never stops:

- ✓ Test two releases a year
- ✓ Own security and access
- ✓ Keep the report catalog clean
- ✓ Watch every integration daily
- ✓ Adopt features you already pay for
- ✓ Fund a backlog, not a project

Old view: the project team disbands | **Reality:** a smaller team runs it forever

THE RELEASE YEAR



Two feature releases a year, March and September.

WHO OWNS WHAT AFTER GO-LIVE

Role	What they own
Workday Lead	The Roadmap and the release calendar
Security Admin	Roles, access, every audit request
Integration Owner	Every interface and its failures
Reporting Owner	The report catalog and what gets retired
Functional Analysts	Configuration in their own area
Named Support Contact	Every case raised to Workday

TWO KINDS OF UPDATE

WEEKLY SERVICE UPDATES	FEATURE RELEASES
Regulatory and software fixes	New features, and products you do not own
Every week, continuously	Twice a year, March and September
Disabled by default, no weekly testing	Off until your team turns them on

6 THINGS TO TEST IN PREVIEW

1. Key integrations, inbound and outbound
2. Hires, transfers and terminations
3. Payment processing, end to end
4. Critical custom reports
5. Security roles that changed
6. Anything you built around

The preview window is five weeks. Twice a year, every year.

5 RULES THAT KEEP IT CLEAN

1. Every report has an owner or it goes
2. Security changes move through one queue
3. Configuration changes get tested like code
4. Integrations alert a person, not a folder
5. Retire more than you build

KEY TERMS DECODED

What's New in Workday: the report of every change
Adoption planning: the built-in feature backlog
Named Support Contact: who can open a case
Workday Community: the customer portal
Workday Rising: the annual customer conference

HYPERCARE ENDS, THE WORK DOES NOT

THE FIRST MONTH	THEN IT STOPS	WHAT BREAKS FIRST	WHAT FIXES IT
Everyone is still watching Defects get fixed fast The project team is still there	People go back to day jobs Tickets start to queue Nobody owns the backlog	Access requests pile up Integrations fail quietly Reports multiply	A funded run team One intake queue A named owner per area

THE RELEASE CLOCK

2 feature releases a year
 5-week preview window each time
 Weekly service updates in between
 Preview refreshed twice a year

Source: Workday release guidance

EXEC SCORECARD

- ✓ Self-service rate by process
- ✓ Days to close after month end
- ✓ Open tickets by age
- ✓ Integrations failing per week
- ✓ Features enabled per release

WHERE RUN TEAMS GO WRONG

- ✗ No run team funded at go-live
- ✗ Skipping the preview window
- ✗ Access reviews nobody performs
- ✗ Every request becomes a project
- ✗ Custom reports nobody retires

RUN-READY CHECKLIST

- ✓ A named owner for every area
- ✓ Release dates on the exec calendar
- ✓ One intake queue with a triage rule
- ✓ Access reviewed on a schedule
- ✓ A backlog with real funding

THE 3 GOVERNANCE BODIES

EXECUTIVE COMMITTEE	STEERING COMMITTEE	CORE WORKDAY TEAM
Meets twice a year Strategy and budget Approves scope expansion	Meets monthly or quarterly Roadmap and priorities Cross-functional decisions	Meets weekly Data and configuration standards Change control

WHERE THE VALUE SHOWS UP

- Systems switched off, not just replaced
- Less time to fill open roles
- A faster close with fewer corrections
- Acquisitions absorbed in weeks

ONE-LINE FORMULA

Running Workday = A Funded Team + Tested Releases + Named Owners + A Live Backlog

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WORKDAY AI AGENTS GUIDE

WHAT IS WORKDAY ILLUMINATE?

Illuminate = the AI built into Workday, trained on **800B+ transactions a year**.

Unlike chatbots that only answer, agents can:

- ✓ Plan multi-step work
- ✓ Take action in Workday
- ✓ Follow your security rules
- ✓ Ask a human when unsure
- ✓ Learn your processes
- ✓ Finish whole tasks

Old AI: suggests

Agents: do the work

THE AGENT LOOP



Example: "File my Chicago trip expenses" — drafted, coded, and queued for your OK.

FROM FEATURES TO AGENTS

Level	What the AI does
0	Automation rules
1	Predictions & insights
2	Generative AI drafts
3	Task agents — one job
4	Role agents — a whole role
5	Managed digital workforce

MEET THE AGENTS



TASK AGENTS vs ROLE AGENTS

Task agent	Role agent
Does one job	Owens a set of skills
Follows fixed steps	Adapts to the situation
Best for: routine work	Best for: roles

Workday bets on role agents — skills, not scripts.

WHAT IT MEANS FOR YOU

Employees: ask in plain language, get instant answers
Managers: approvals arrive prepped & summarized
Finance: faster close, anomalies flagged
HR: sourcing & scheduling on autopilot

GOVERNANCE: AGENT SYSTEM OF RECORD

Manage AI agents like employees:

- ✓ Register every agent
- ✓ Set its permissions
- ✓ Monitor activity & cost
- ✓ Measure its impact
- ✓ Keep humans in the loop

THE ILLUMINATE STACK

DATA CORE	AI FOUNDATION	AGENTS	CONTROL
800B+ transactions HR + finance in one	Illuminate models Built into the flow of work	Workday + partner agents Role & task based	Agent System of Record Human approvals

TOP USE CASES

- Expense filing
- Candidate sourcing
- Financial close
- Employee Q&A
- Contract review

EXEC SCORECARD

- ✓ Hours saved per task
- ✓ Adoption rate
- ✓ Override rate
- ✓ Cost per agent

WATCH OUT FOR

- ✗ Confident wrong answers
- ✗ No governance plan
- ✗ Skipping change management
- ✗ Auto-approving blindly

START-SMART CHECKLIST

- ✓ Pick 1-2 agents first
- ✓ Keep human approvals on
- ✓ Train your people
- ✓ Measure before scaling

WHAT'S NEXT (2027-2030)

- Agents managed alongside employees
- Agents span HR + finance end-to-end
- Conversation replaces clicks
- Every role gets a digital teammate

ONE-LINE FORMULA

Workday AI = Your Data + Agents + Guardrails + Humans In The Loop

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SOURCES

Where every number came from

Every figure on these five posters traces to a named, published source. Nothing here is folklore, and several widely quoted ERP statistics were deliberately left off because they do not survive a look at the primary document.

Buying

- Fiscal year ends January 31, the fourth quarter signs the highest share of deals, and gross revenue retention was about 97%. Workday annual report on Form 10-K, fiscal year ended January 31, 2026.
- Flex Credits are metered per completed task, bought in bulk, and carry a published rate card. Workday Flex Credits page and the published Flex Credit Rate Card.
- There is no published list price. Verifiable by absence. Every per-worker figure in circulation comes from a reseller or an advisory firm, so none of them appear here.
- Workday Launch is fixed-fee and preconfigured, and you may deploy with Workday services or a certified partner. Workday Launch and partner pages.

Deployment

- 45% average budget overrun, 7% schedule overrun, 56% less value than predicted, and 15% more overrun per extra year, across more than 5,400 projects. McKinsey with the University of Oxford, Delivering large-scale IT projects on time, on budget, and on value, 2012.
- 88% of projects with excellent change management meet objectives against 13% with poor change management. Strong sponsor 79%, weak sponsor 27%. Prosci change management benchmarking.
- Five phases: Plan, Architect, Configure and Prototype, Test, Deploy. Kainos Workday implementation methodology v5.1, the partner-delivered method most programs actually run.
- Environments, refresh cadence, and the six-month minimum term on an implementation tenant. Workday tenants datasheet.
- Cutover freeze mechanics, the payroll lock, and the block on new hire start dates. Generalized from a published university cutover schedule for a 1 July 2026 go-live.

Run

- Two feature releases a year, in March and September, each with a five-week preview window. Workday release guidance, corroborated by published customer release calendars. 2026R1 went live 14 March 2026.
- Weekly service updates and feature releases arrive mostly disabled by default. Workday release best practices guide, in Workday's own wording.
- What to test in preview: key integrations, key business processes, and critical custom reports. Named directly in the same guide. Security roles and custom-built extensions are the practitioner additions.

Deliberately left off

The 55% to 75% ERP failure rate attributed to Gartner (no such publication exists), the claim that 83% of data migrations fail (no primary source), typical discount percentages, any per-worker dollar figure, any implementation-to-subscription cost multiple, and any fixed hypercare duration in weeks. Each one circulates widely. None of them survived sourcing.

ABOUT

Who wrote this, and why

I am David Apollon. I run ERP and Workday programs from the client side, which means I sit on your side of the table and keep the integrator, the software vendor, and the schedule honest.

Twenty-five years. Seventy-six client engagements. Roughly fifty ERP and CRM implementations with budgets between \$5M and \$65M, more than twenty Workday programs, and teams up to 300 people. Most recently a \$25M Workday big-bang across HCM, Finance, Supply Chain, and Payroll, delivered alongside a parallel workforce management rollout and aligned to a concurrent Epic go-live, and a statewide public-sector Workday program.

These five posters exist because the same questions come up on every program, from the same people, in the same order. What is this thing. How do we buy it without giving away our leverage. How do we get it live. Who runs it afterward. What happens when the agents arrive. Each guide answers one of those in one page, so you can hand it to a steering committee without a preamble.

Use them however you want

Print them. Put them on a wall. Drop one into a kickoff deck. Send them to a colleague who is two weeks into their first Workday project and drowning in vocabulary. There is no form, no gate, and no tracking pixel. The only ask is that you leave the 9Nation mark on the corner.

If you want the conversation behind them

I keep a small number of slots each month for a complimentary 30-minute deployment architecture review. Bring your timeline, your sequencing, and your resource plan, and you will leave with an unbiased read on where the hidden risk sits and what to do about it before your parallel run hits a wall.

Reach me

- 9nation.com/contact
- contact@9nation.com
- linkedin.com/in/davidapollon

The rest of the library

Every guide in this set has a full write-up at 9nation.com/workday-guides, along with readiness checklists, negotiation toolkits, and the visual playbook library. All free, all without a form.