

Workday Professional Services Automation

The knowledge economy gives professional services organizations a unique opportunity to grow profitably—but as projects grow in scope and teams expand, so do the risks of cost overruns, under-utilized talent, and disconnected data.

Workday Professional Services Automation (PSA) is the leading solution to manage the full project lifecycle holistically, with people, money, and projects data in one system. From quoting and staffing to execution, billing, and accounting, Workday PSA helps you automate manual steps, reduce errors, and gain real-time visibility into project, customer, and enterprise profitability.

Your sales, resource managers, project managers, operations/delivery, HR, and finance teams gain a single source of truth to view and act on every type of data. Rich talent intelligence and resource management help you match the right people to the right projects, while flexible billing and revenue recognition enable you to confidently grow billable utilization, increase revenue, and control costs. And because Workday applications across finance, HR, and operations are part of a single system, your entire company can collaborate more effectively, plan faster, and respond quickly to change.

Workday PSA products and capabilities

Workday Human Capital Management

Use Workday Human Capital Management (HCM) to recruit, manage, engage, and retain your workforce with a seamless user experience and dynamic analytics. Stay ahead of the retention curve with predictive talent insights and intuitive self-service that empowers employees to set goals, discover new project opportunities, and chart their own careers—all connected to the project work your business delivers.

Project and Resource Management

Get a holistic view of staffing needs and project status from a centralized resource management dashboard. Define roles and shop for talent inside or outside your organization using rich data on skills, certifications, interests, and availability. Enable quick and accurate staffing through intelligent resource management, so you can better match supply and demand, improve utilization, and keep consultants engaged on the right work at the right time.

Key Benefits

- Create quotes and proposal documentation, manage resources, create projects, and handle billing in one unified system across the full project lifecycle.
- Leverage rich talent and skills data in a single system to consistently match the right people to the right projects and improve utilization.
- Increase efficiency and accuracy in resource utilization, project billing, revenue recognition, time tracking, and expense management from any device, anytime.
- Drive better decision-making across HR, services, and finance with a single source of truth for actionable data, real-time profitability insights, and embedded analytics.
- Use built-in support for multiple business models (project, subscription, usage-based, and so on) and modern revenue standards, so you can adapt quickly to changing customer expectations and market conditions.

Project Financials

Workday PSA is part of a single system with Workday Financial Management for easier and more accurate customer billing, revenue recognition, and financial analysis. Unify operational and financial data to gain real-time visibility into project and customer profitability, support more accurate forecasting, and manage margins proactively. Improve financial management with built-in support for revenue recognition standards (ASC 606/IFRS 15) and dual reporting requirements.

Services CPQ

Workday Services CPQ (configure, price, quote) works in conjunction with Workday PSA to connect quoting, projects, and contracts on one system. It provides earlier insight into resource demand and streamlines billing based on contract terms, helping you move seamlessly from opportunity to cash.

Automatically generate services documentation—such as SOWs, ROMs, executive summaries, and proposals—using consistent data and templates instead of manual documents and spreadsheets. Services CPQ completes the opportunity-to-cash process from quoting and pricing through contracts, projects, billing, revenue recognition, collections, reporting, and revenue planning, reducing handoffs and rework.

Project Billing

Support flexible billing models and gain insight into billing rules, exceptions, markups, and write-offs to minimize revenue leakage. Workday PSA supports subscription-, usage-, and project-based billing; time and materials; fixed-fee; prepaid; milestone; percent complete; and more—so you can evolve pricing and delivery models as your business changes.

Expense Management

Email and scan receipts to automatically add comprehensive expense data through mobile devices. Minimize project overruns with the ability to create, find, edit, submit, and analyze expenses on the go. Strengthen spend governance by managing the expenses of personal transactions on corporate credit cards and ensuring expenses are accurately captured against the right projects.

Time Tracking

Capture project time easily by entering and approving multiple projects at once. Support daily, weekly, and monthly resource forecasts and project labor budgeting by hours and amount. Use consolidated time reporting and configurable PSA reporting to increase utilization, reduce leakage, and keep projects aligned to budget and scope.

To learn more about how Workday PSA can help your organization, visit www.workdayt.com/psa.

Key Product Areas

Human Capital Management

- Recruiting tied to projects
- Performance management
- Skills and competencies
- Workforce planning and analytics

Services CPQ

- Services quoting (pricing and estimating)
- Automated proposal creation
- Automated approval workflow
- Resource demand visibility
- Automated draft customer contract in project billing

Project Execution

- Project management
- Resource management
- Time tracking
- Expense management

Project Financials

- Project billing
- Revenue recognition
- Project costing and accounting
- Budgeting and forecasting

Reporting and Analytics

- Financial reporting
- Operational reporting
- Talent reporting

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