

# Armanino Operates in an Alternative Practice Structure:

"Armanino" is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.



# Let's Talk: Workday Messaging in Recruiting

## QUICK TIPS

# Zoom Webinars

### Ask Questions in Q&A Box

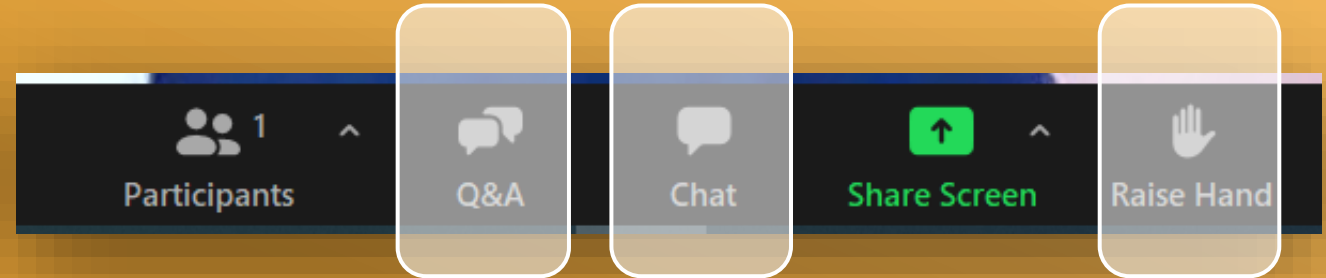
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

### Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

### Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button



WELCOME

# Today's Presenter



Jared Sarlo

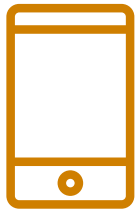
Armanino

LET'S TALK WORKDAY

# Today's Agenda

- Workday Messaging Overview
- Setting Up and Testing Workday Messaging
- Additional Considerations
- Open Q&A

# Workday Messaging



## New Channels

Support for SMS allows for you to connect with your audience where they are



## Expand your Reach

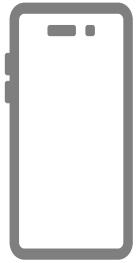
Communicate and engage to enhance engagement across your organization



## Integrated Solution

Seamlessly integrated into Workday, eliminating the need for additional vendor contracts and integrations

# Messaging as a Ubiquitous Form of Communication



**6x**

SMS click-through rate is 6-7x higher than email



**98%**

98% of SMS messages are read within the first 3 minutes of delivery.



**85%**

85% of people like to text with business and service providers

## Supported Use Cases

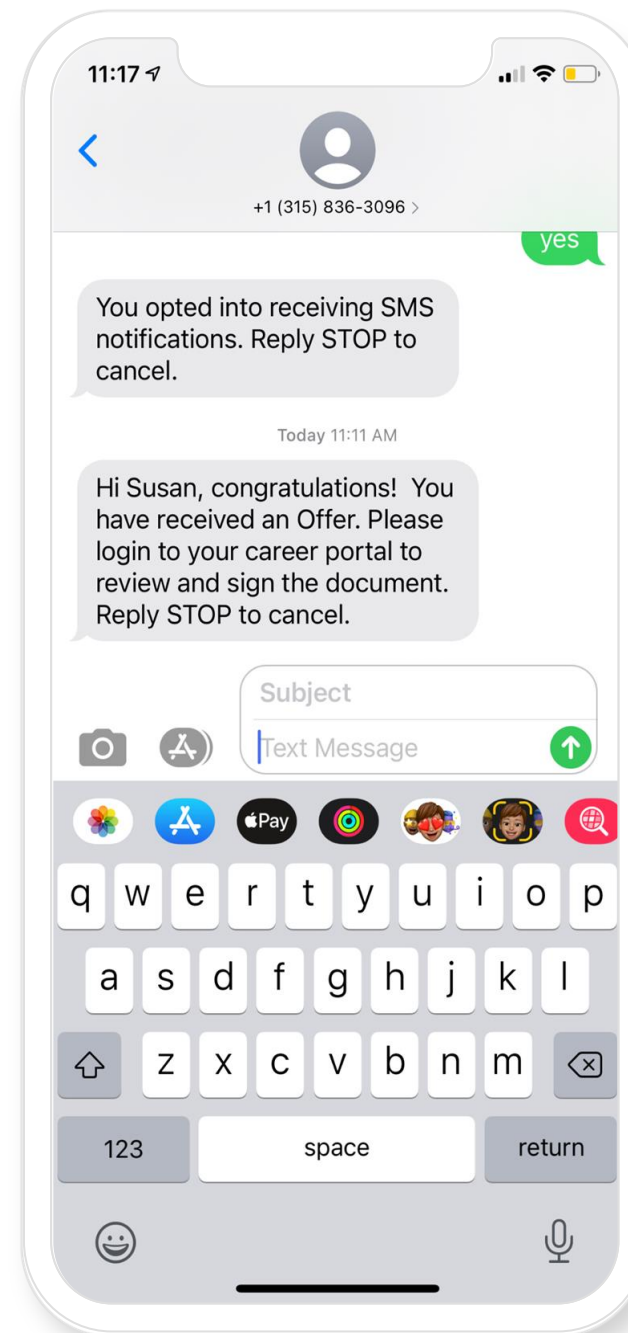
- ✓ **Recruiting Product Integrations**
  - Send Message
  - Invite to Apply
  - Interview Reminders
  - Recruiting Process Notifications
  - Message Templates
- ✓ **Custom Business Process Notifications - Across Workday**
- ✓ **Customer created Business Processes from Extend**
- ✓ **Ad Hoc Worker Communication *outside* Business Process Framework**
- ✓ **Ad Hoc Benefits Messaging**
- ✓ **Candidate Two-Way Conversations**
- ✓ **Messaging for Student**

## Record Tracking / Reporting

- Activity Stream
- History Timeline + Candidate Communications Report
- All Outbound SMS Notifications
- Business Process and Integration Notifications Indexed
- Find Candidates
- Innovation Services Summary
- SMS Opt In and Opt Out Activity
- SMS Terms and Conditions History
- View One-Way & Conversational Messaging Configuration
- Maintain Workday Messaging

## Prerequisites

- Signed Innovation Services Agreement (ISA)
- Must have Workday HCM and/or Financials
- Currently available for US, CAN, UK, & AUS Phone Numbers





# Setting Up Workday Messaging

- 1st step – purchase and acknowledgement – opt-in to this innovation service agreement. Universal Main Service Agreement (UMSA) automatically grants you Workday Messaging (View your organization on community to determine if you have a UMSA or not)
  - Must be done in production tenant
  - Process for getting numbers differs depending on the country
    - USA - must have A2P 10DLC Brand Registration and A2P 10DLC Campaign Registration – Takes up to 30 days
      - Setting up two way messaging will take up to an additional 30 days
    - CAN – Area Code needs to be selected
    - UK – Must submit Regulatory Bundle
- 2nd step – Number provisioning – process of requesting and receiving numbers from Workday
  - Maintain Workday Messaging Task is starting point for both one way and two way messaging. Numbers are set up and designed to handle thousands of conversations at a time.
  - Can have multiple countries at the same time and have multiple numbers
  - Can only test in one tenant at a time outside of production
- 3rd step – Security + Content. Set up Notifications, Message Templates and Security Domains

# Setting Up Workday Messaging

## Maintain Workday Messaging

View your one-way and conversational SMS messaging configurations for different countries. Click the View button for each configuration for additional status details. Use the buttons provided to create new one-way or conversational SMS configurations.

If there are two configurations for a country in the One-Way Messaging Configuration grid, the one that displays In Use in the State column is the active configuration. You can have only 1 active configuration per country at a time.

One-Way Messaging Configuration

Configure One-Way Messaging

0 items

Country	Date Submitted	Configuration Status	View Configuration	State
No items available.				

Conversational Messaging Configuration

Configure Conversational Messag...

0 items

Country	Date Submitted	Configuration Status	View Configuration	State
No items available.				

# Registering with Workday



Country United States of America

## Request Information

Requested	<input type="text"/>
Status	<input type="text"/>
One-Way Phone Number	<input type="text"/>

## Company Information

Legal Business Name	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Postal Code	<input type="text"/>
SMS Business Type	<input type="text"/>
SMS Customer Business Industry	<input type="text"/>
Business EIN Tax ID	<input type="text"/>
SMS Customer Company Type	<input type="text"/>
Company Stock Ticker Symbol	<input type="text"/>
SMS Customer Stock Exchange	<input type="text"/>
Company Website URL	<input type="text"/>
Privacy Policy URL	<input type="text"/>
Brand Representative Email	<input type="text"/>

# Testing Workday Messaging



Simplified Search is Enabled

### Configure One-Way Messaging for Non-Production Tenant

Run this task to:

- Set up non-production one-way messaging configuration for all countries that are successfully configured in Production.
- Associate the non-production SMS configurations with the tenant notification setting of this non-production tenant in order to test one-way messaging on this tenant.

Confirm \* ☐

Cancel OK

Santa Claus (CANDIDATE 1)

For: JR100036 Nurse

Actions

Phone

Email

SMS Text

Summary

Overview

Attachments

Interview

Screening

Employment Offer

Personal Notes

Recruiting History

Activity

Reminders

Job Application Details

Job Requisition

JR100036 Nurse (Open)

Location

Dallas

Date Applied

08/13/2025 12:07:00 PM

Candidate SMS

JR100036 Nurse

Ashley

Hello Santa

Sent 08/13/2025, 12:07 PM

New Messages

Santa Claus

Hello Recruiter

08/13/2025, 12:08 PM

Messages can be types and sent here

Send to candidate



1

# Domains to Configure

- **Manage: SMS Conversations** – Secures tasks and reports that enable you to view records for SMS, such as sending history, opt in and out history, and changes to the Terms and Conditions
- **Manage: Candidate SMS Conversations** - Enable users to view or participate in SMS conversation with active candidates relating to job applications
- **Candidate Data: SMS Opt-In/Opt-Out** – Opt in or out of SMS notifications or messages on behalf of candidates and prospects

# Additional Considerations

- Update the Customer Name in the SMS Compliance Section of Edit Tenant Setup – Notifications
- Create SMS Messaging Rules to default for Notifications
- Messages cannot be sent to prospects – only active candidates currently on a job application
- New SMS Conversations Card in the Recruiting Hub

## ▼ SMS Compliance

Customer Name \*

Default Terms and Conditions \* 

Normal

▼

B

I

U

A

▼

☰

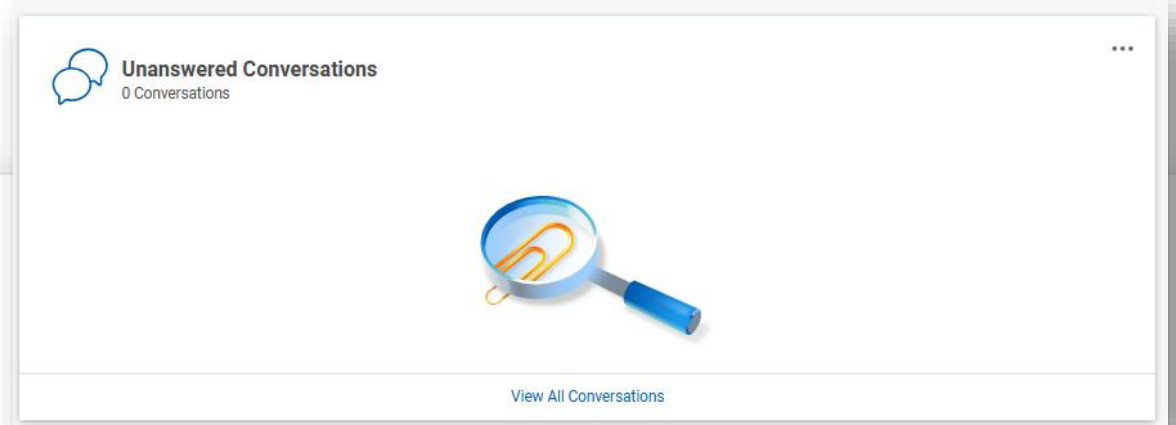
🔗

↗

Agreed

Agreement Consent

I consent to receive periodic automated text messages (including both transactional and marketing SMS and MMS) related to employment applications, prospective employment opportunities, employment- and job-related correspondence, and/or student admissions, student registration, student billing and scheduling related correspondence. I understand that these and related two-way text message exchanges in which I participate may originate from different numbers and agree that these exchanges may be retained, shared, and processed by the sender and/or its business partners. I accept the associated Terms and Conditions and understand that my consent is not required. Reply STOP to any text to opt-out of all messaging. Standard message and data rates may apply.



## Delivered Reports

- **SMS opt-in and opt-out activity**
  - Displays SMS opt-in and opt-out records within a timeframe. If an “error receiving instances” message occurs, narrow the timeframe.
- **SMS terms and conditions history**
  - Contains historical records for SMS terms and conditions, such as information on when the content was changed and by whom. You can filter by date ranges to view records for a specific time.
- **SMS Usage Metrics**
  - This task provides a total summary of your usage across all tenants. We recommend that this task is used to understand your usage over a longer period of time (prior months, prior weeks)



POSSIBLE (RE)DEFINED  
**Questions?**

LET'S  
**TALK**  
**WORKDAY**