

# Transforming Workday onboarding with an AI-powered requirements assistant

## Client

A leading Workday consulting firm

## Company Size

500+ employees

## Location

North America

## Featured Partners



A leading Workday consulting partner sought to enhance how consultants conduct and capture customer discovery (or Q&A) sessions during the early stages of Workday deployment. Traditionally, documenting requirements relied on manual notes, follow-up summaries, or lossy transcripts. This created inconsistencies and extra costs, and it also slowed down the configuration process.

To address this, Marlabs developed an AI assistant to transcribe and process Q&A discussions into structured requirements documentation. The outcome was faster onboarding, consistent documentation, and a scalable approach to prototype generation. In doing this, we also freed up consultants to focus on client relationships instead of administrative tasks.



AI Discovery &  
Strategy



GenAI Proof of  
Concept



AI-Powered  
Intelligent  
Automation



Onboarding  
Process  
Assessment

# The Challenge: Improving speed & consistency in Workday discovery sessions



**Objective:** Automate the generation of requirements documentation from consultant-client discovery sessions.



**Existing Issues:** Manual or delayed note-taking led to incomplete, lossy, or inconsistent information.



**Solution Needed:** An AI-powered assistant to transcribe and standardize Q&A inputs in real time.



**Outcome:** Improved documentation quality, faster onboarding, and scalable prototype generation.



**The client needed a solution that would reduce the burden of note-taking while increasing the reliability of requirement documentation.** Their consultants were spending time on administrative tasks that could be automated, which detracted from client engagement and introduced inconsistencies in delivery.

# The Solution: Building an AI assistant for automated requirements generation

**Marlabs partnered with the client to develop a prototype AI assistant that enhances Workday consultant discovery sessions.** The assistant captures live Q&A inputs, transcribes conversations, and automatically generates requirements documents and structured outputs for use in downstream configuration tools.

## Phase 1: AI Discovery & Use Case Definition

Our team identified and scoped the most impactful automation opportunities within the Workday Q&A delivery process.

### Workstreams:

- Discovery session mapping
- Stakeholder interviews
- Use case prioritization

## Phase 2: Prototype Design & Q&A Capture

We developed the assistant to capture conversation data and extract structured input for documentation.

### Workstreams:

- Speech-to-text integration
- Dialogue parsing logic
- Q&A tagging system

## Phase 3: Requirements Documentation Automation

The team automated the generation of standardized requirement documents from captured inputs.

### Workstreams:

- Template-based formatting
- Information validation
- Document consistency assurance

## Phase 4: SmartLoader Integration Feasibility

We explored how outputs could feed directly into Excel (XML) files and SmartLoader systems.

### Workstreams:

- Format transformation
- Prototype environment mapping
- Future-state automation roadmap

## Services and Technologies Used:

### Services:

- AI Discovery
- GenAI Proof of Concept
- AI-Powered Intelligent Automation
- Onboarding Process Assessment

### Technologies:

- Python
- AWS
- OpenAI
- ChatGPT-4o, ChatGPT-4o Mini
- SmartLoader

# The Results: Impact on the client organization

**The AI-powered assistant enabled Workday consultants to focus on building client relationships without sacrificing documentation quality.** By automating transcription and requirements creation, the client accelerated onboarding, reduced manual effort, and introduced repeatable and scalable processes that will soon support automated prototype generation.



**Faster Client Onboarding:** This initiative reduced time from discovery to prototype with automated documentation.



**Consistent Delivery Outputs:** We standardized requirements formats ensured repeatability across projects.



**Lossless Knowledge Capture:** We preserved full detail from Q&A sessions for future validation and use.



**Increased Readiness for Future AI & Automation:** Our team established a foundation for automated prototype and configuration generation.



**Consultant Focus on Relationships:** The AI assistant freed up consultant time to prioritize engagement over note-taking.



**Improved Client Confidence:** Marlabs delivered documentation the client could validate and trust immediately.