



# Sponsored and Licensed Research Citation Guidelines

April 2023

# PEAK Matrix<sup>®</sup> Assessment

## Citation and Asset Use Policy

# PEAK Matrix® Assessment

## Citation and asset use policy

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PEAK Matrix® assessments provide comparative evaluations of providers, locations, and products and solutions within various market segments. Leading organizations around the globe trust these comparative assessments due to their unbiased evaluation of factors such as vision, capabilities/functionality, talent availability, market success/impact, and cost.

To protect our reputation for objectivity and the integrity of our research, we have standards for the appropriate citation of PEAK Matrix research and the use of PEAK Matrix-related assets.



All PEAK Matrix citations must be for reports published within the past 12 months and be the most current PEAK Matrix assessment in that particular segment. Ensure to always cite the full report name and year.



Citations that negatively portray another company and/or its services or compare one company and/or its services with another may not be used. In addition, Everest Group's PEAK Matrix assessments may not be cited in any material that negatively portrays another company and/or its services or compares one company and/or its services with another.



The Everest Group brand team must review and approve **all** marketing collateral, including press releases, social media posts and banners, website landing pages, etc. Please send to: [BrandReviews@everestgrp.com](mailto:BrandReviews@everestgrp.com) and allow up to **three working days** for the review.

# PEAK Matrix® Assessment

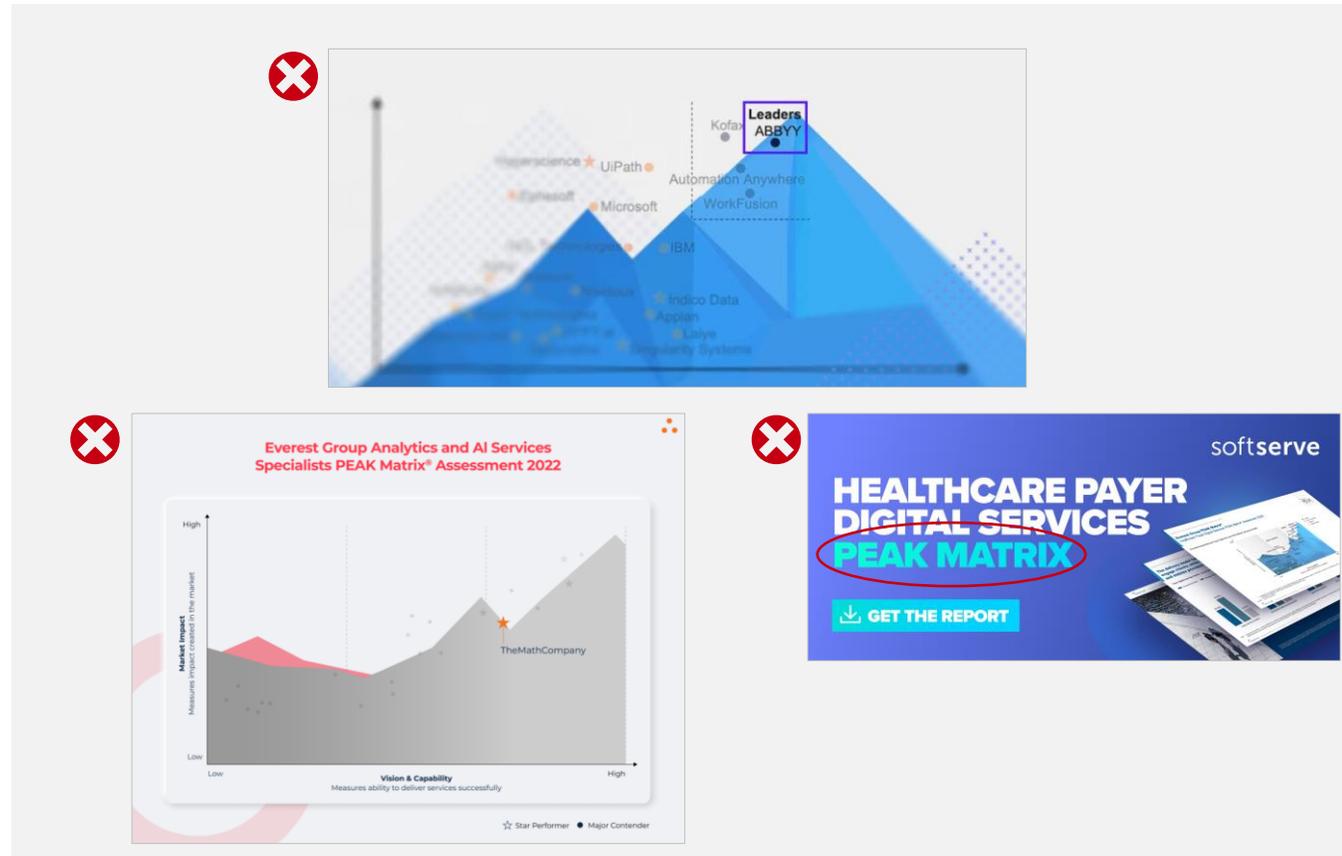
## PEAK Matrix proper references

**Always use both words in full:** PEAK Matrix® on each reference and “PEAK” in capital letters.

Ensure to add the ® trademark on the first reference of the term “PEAK Matrix”.

### PEAK Matrix Graphic

- Only our members and clients who license the PEAK Matrix extract may display the Everest Group PEAK Matrix graphic on their websites, in presentations, on social media, etc.  
**The graphic must be displayed in its entirety**, including all referenced provider companies contained in the original report, as well as Everest Group’s copyright, logo, year of the report, and licensing statement
- Modifying the official PEAK Matrix graphic in any manner, including to disguise the names of other service providers, is explicitly forbidden
- Any descriptions and explanations about the PEAK Matrix, or Everest Group, must be incorporated within the main body of the press release, not as a separate paragraph
- **Ensure to use the licensed version of the PEAK Matrix**



# PEAK Matrix® Assessment

## Referencing the category designation

The PEAK Matrix® is a comparative assessment, **not** an accumulative ranking or rating. Citations must therefore refer to the PEAK Matrix designations as positions or recognitions, not rankings.

- ✘ Everest Group ranks [Company name] as a Leader in Payroll Outsourcing in its report “[Multi-Country Payroll Outsourcing \(MCPO\) – Service Provider Landscape with PEAK Matrix® Assessment 2020](#)”



### Links Ranked a ‘Major Contender’ by Everest Group

Links International was ranked as a ‘Major Contender’ for Everest Group’s Multi-Country Payroll (MCP) Solutions PEAK Matrix® Assessment 2021 in Links’ first year of participation in the research.

#### Highlights from the Assessment:

- 100% in-country support across Asia with no dependence on third-party partners for services
- Highly integrative technology – Links’ platform integrates seamlessly with clients existing office applications or global HCMs
- All-in-one payroll solution featuring consolidated reporting, smart payroll dashboard capabilities, and multi-country payroll, leave and benefits management
- Mobile-first approach with a modern and simple UI
- Robust and scalable payroll solution with the best-in-class HR experience for employees

- ✔ Everest Group has named / positioned / recognized / acknowledged [Company name] as a Leader in Payroll Outsourcing in its report “[Multi-Country Payroll Outsourcing \(MCPO\) – Service Provider Landscape with PEAK Matrix® Assessment 2020](#)”



# PEAK Matrix® Assessment

## Referencing the category designation

PEAK Matrix® positions must **always** be capitalized, i.e., Leader, Major Contender, Aspirant. Always use “a” ahead of the relevant PEAK Matrix designations.



**Everest Group names SoftServe Open Finance Major Contender**

Cognizant named an Everest Group PEAK Matrix® leader for CXM services for healthcare, 2022

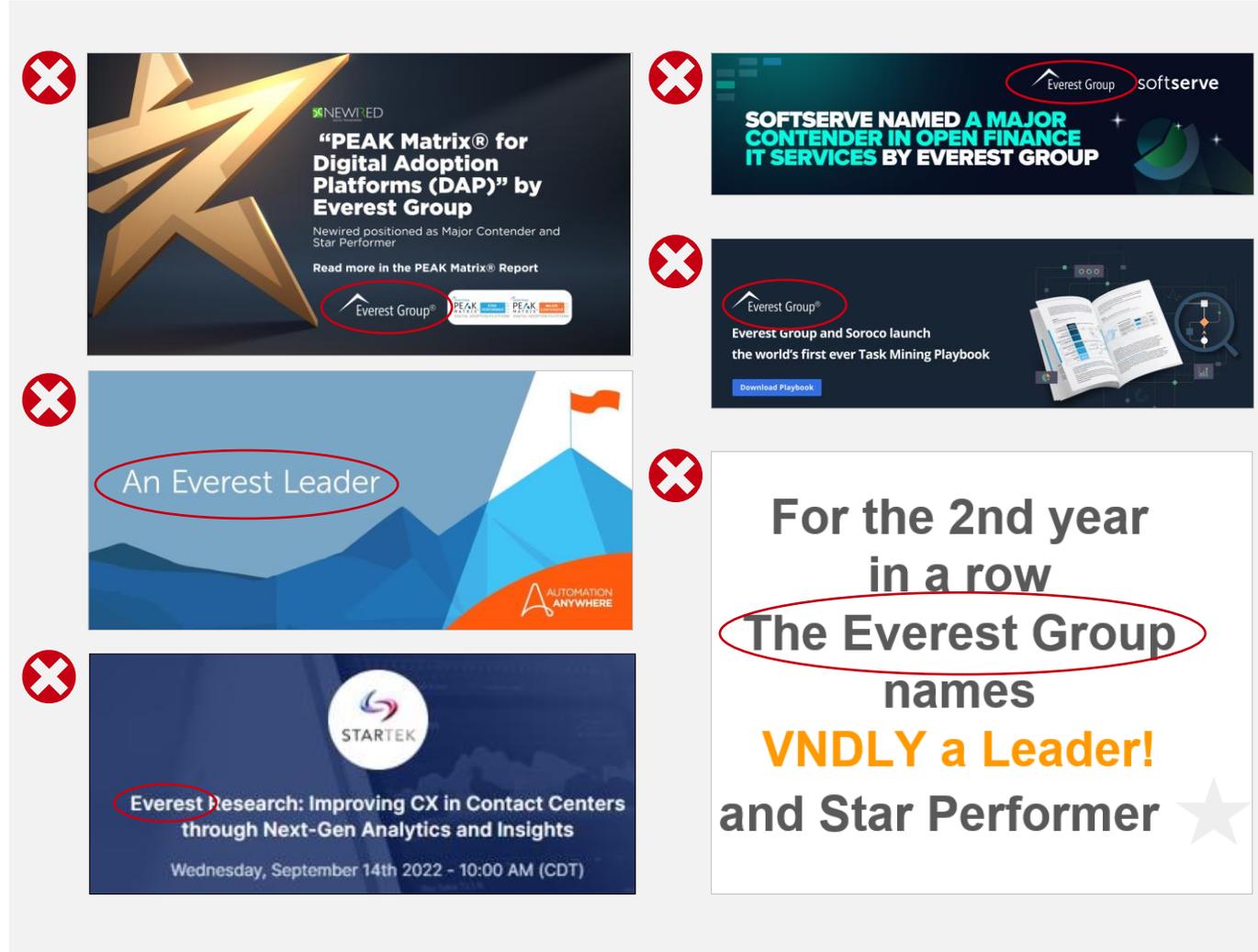
We emerged as a leader in this first-time report due to our strong domain presence in healthcare, robust digital-first offerings, and competent on-shore and off-shore delivery network for servicing payers and providers.

[Read the report](#)

# PEAK Matrix® Assessment

## Referencing Everest Group

- Be sure to reference the firm name "Everest Group" in full
- Do not use "The Everest Group" or "Everest"
- Any references to Everest Group must be incorporated within the main body of the press release, not as a separate paragraph
- Do not include an "About Everest Group" section in the press release
- Do not use Everest Group's logo on press releases or on any other promotional assets, i.e., social media banners, landing pages, etc.
- Instead, use the PEAK Matrix® badge for PEAK Matrix mentions



# Sponsored and Licensed Thought Leadership Citation Guidelines

# Custom thought leadership

## Overall principles

Everest Group is a trusted source of unbiased research and perspectives. We only participate in licensing and sponsorship with third parties that support our reputation as an unbiased source of research.

Our custom research and perspectives are understandably respected as Everest Group's IP.

As such, reference to licensed and sponsored research should accurately position it as "Everest Group research," which your organization is pleased to share with its clients.

- ❌ "A report in collaboration with Everest Group"
- ❌ "In partnership with Everest Group, [Company name] publishes"
- ✅ "We are pleased to present [offer] this Everest Group report."
- ✅ "A report by Everest Group, supported by [Company name]"



# Sponsored thought leadership

## Key principles

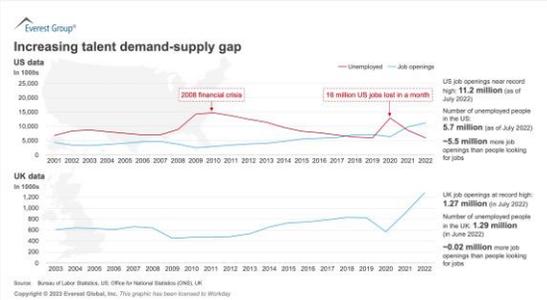
Everest Group’s brand team must review and approve **all** marketing collateral, including assets, press releases, social media posts, website landing pages, etc. Please send to [brandreviews@everestgrp.com](mailto:brandreviews@everestgrp.com) and allow up to **three working days** for the review.

- **Always** refer to a report as **Everest Group’s report**
- For sponsored reports, the licensed version will include the sponsor’s logo and a licensing statement on the front page of the document

You must confirm and agree with Everest Group to promotional add-ons as part of the original agreement and at an additional fee. These promotional options may include:

- **Wrapper:** You may personalize the licensed version by adding a front and/or back page to “wrap” around the report; your team develops this content based on our specifications, and our graphics team marries it to the sponsored version of the report
- **Participation in an online event:** Analyst participation in a sponsor-hosted and led online event
- **Analyst blog:** Author of a supporting blog
- **Social media:** Graphics from the report for use in social media

Wrapper Examples



# Sponsored thought leadership

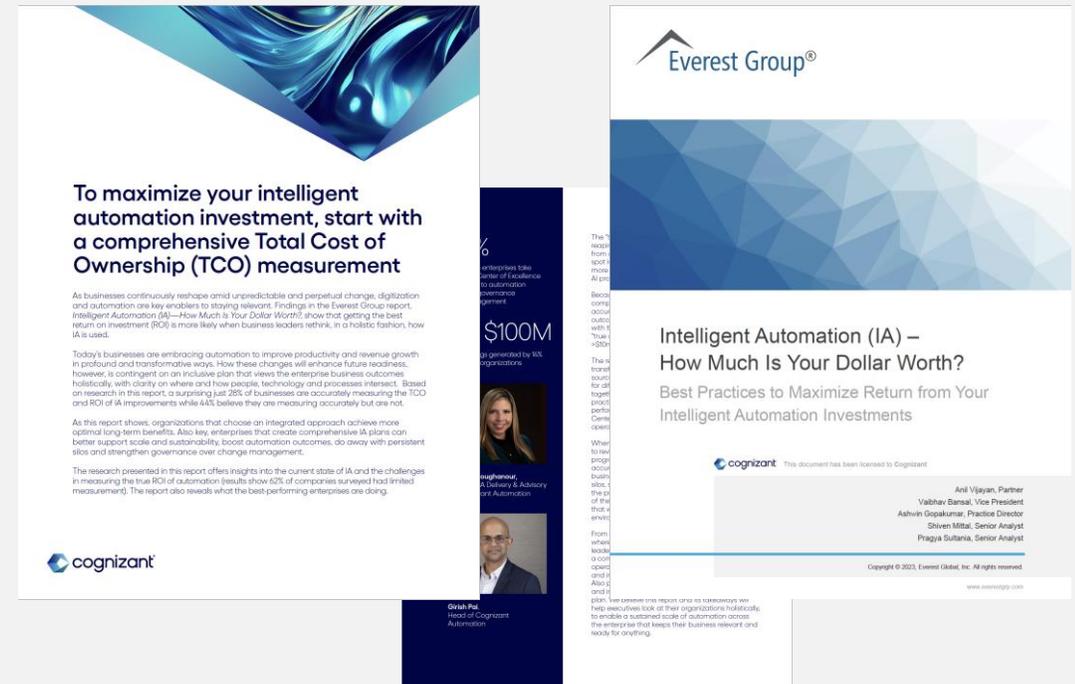
## Key principles | wrapper

A licensed report can be personalized and branded by adding pages at the beginning and an “**about us**” at the end of the document. This acts as an introduction and allows for your branding to the report.

### Always refer to a report as **Everest Group’s report**

- The wrapper text should **NOT**
  - position the report as the sponsoring company’s
  - position the report as a collaboration with Everest Group
- The wrapper **should not** have the Everest Group logo or any Everest Group branding
- The pages should clearly be distinct from the report
- These additional pages can be included only at the beginning and/or end of the document with Everest Group’s report remaining intact

### Examples



# Sponsored thought leadership

## Key principles | participation in online events

A licensed report can be personalized and branded by adding pages at the beginning and an “**about us**” at the end of the document. This acts as an introduction and allows for your branding to the report.

As part of a sponsored research report and/or licensing agreement, an analyst may present at an in-person event, on a webinar, or in a virtual roundtable to discuss report findings.

To avoid any perception of bias, **we do not co-sponsor or co-host events with providers**. As such, providers must host the events and produce all promotional materials.

Everest Group will **not promote** the event through dedicated email campaigns; however, we may support the event with some “light” marketing activity, such as listing the analyst’s speaking participation on our website, in newsletters, and in social media.

- The event **must not appear as a co-branded/co-hosted** event
- The Everest Group logo must **not** be displayed on any marketing assets or collateral
- Instead, you can use the logo next to the analyst speaker’s photo or/and role title

### Examples



In Partnership With Everest Group

### Improving CX in Contact Centers through Next-Gen Analytics and Insights

Speaker: Sharang Sharma, Practice Director, Everest Group

Globally, enterprises are doubling down on customer experience (CX) as a key lever to build market differentiation. With increasing focus on digital CX, analytics has emerged as a lynchpin for enterprises' digital transformation strategies.

In this webinar, we look at best practices for an effective next-generation analytics strategy and how to maximize the impact of transformation initiatives. We also look at the future of analytics and the way forward for enterprises to drive the adoption of next-generation analytics solutions.



STARTEK

WEBINAR RECAP

### Improving CX in Contact Centers Through Next-Gen Analytics and Insights

Sharang Sharma, Practice Director, Everest Group

# Sponsored thought leadership

## Key principles | social media

Always ensure to refer to the sponsored report as Everest Group's research rather than a collaborative effort

### Examples



**Beeline Europe**  
5,843 followers  
1mo • 🌐

**Everest Group** research in 2022 shows that only 23% of organisations have a well-integrated strategy to optimise their use of the contingent workforce.

As we enter 2023 have you thought about how you can more effectively manage this workforce?

Read more: <https://lnkd.in/eNJTU62h>

#contingentworkforce #industryreport

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**Everest Group**  
Increasing use of the contingent workforce

An overview of organizations' adoption of forward-looking strategies to estimate and optimize the use of temporary workforce

Strategy	Percentage
No coherent strategy for use of temporary workforce	8%
Plan to formulate the strategy in the next 6-12 months	33%
Currently adopting the formulated strategy	37%
The strategy is well integrated in the organization	23%

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**WNS**  
610,812 followers  
1mo • 🌐

Today, CFO priorities have changed to keep up with the new challenges of a post-pandemic world. What steps have CFOs undertaken to build future-ready enterprises? To find out, download the Global CFO Survey 2022 by Everest Group, supported by WNS <https://bit.ly/3rFuCdy>

#FinanceInsights #CFOSurvey #ChatterVsReality

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**WNS**

#ChatterVsReality

**>60% FINANCE LEADERS ARE FOCUSING ON ROBUST RISK MANAGEMENT PRACTICES**

What other steps are CFOs taking to make businesses future-ready?

DOWNLOAD THE REPORT TO FIND OUT

## Stay connected

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everestgrp.com

### Social Media

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everestgrp.com/blog

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