



Everest Group Research Citation Guidelines

October 2023

PEAK Matrix[®] Assessment

Citation and Asset Use Policy

PEAK Matrix® Assessment

Citation and asset use policy

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 unbiased reputation 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 or 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 and allow up to two working days for the review.

PEAK Matrix® Assessment

Permissions and distribution rights

Permissions to use the PEAK Matrix® graph or contents from the report differ depending on whether you have a license or not. See below the comparisons. Everest Group's brand team must approve all forms of marketing content.

Without a PEAK Matrix license, providers may not use the following intellectual property:

- The report cannot be hosted on the provider's website
- The PEAK Matrix graph cannot be displayed
- The PEAK Matrix graph cannot be used in client-facing documentation or meetings
- PEAK Matrix badges may not be used
- Analyst quotes may not be used

Instead, providers may

- Promote a PEAK Matrix designation in a press release, on social media, and on the provider's website
- Link to the PEAK Matrix report page on the Everest Group website

With a PEAK Matrix license

- A licensed version of the PEAK Matrix graph can be displayed in marketing assets
- A licensed PEAK Matrix Award badge can be displayed on a provider's website and in other marketing material
- Brief extracts from the custom-profile report showing the provider's positioning on the PEAK Matrix can be used (citing Everest Group)
- The (gated) custom-profile report can be posted on the provider's website
- The custom-profile report can be distributed through email campaigns and newsletters
- An approved quote from an Everest Group analyst can be used in a press release and other marketing channels
- Specific charts and exhibits, attributing Everest Group, can be used as sources in sales materials

PEAK Matrix® Assessment

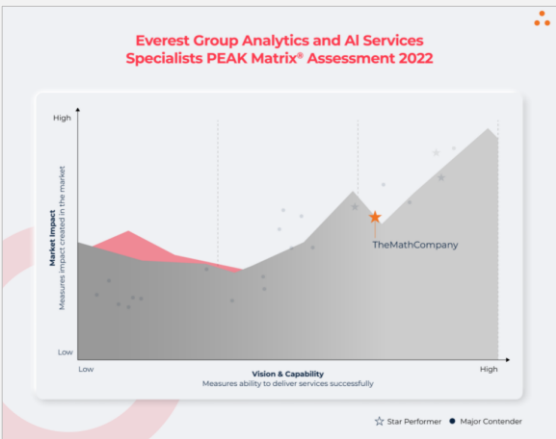
PEAK Matrix proper references

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

Ensure to use the registered trademark (®) on the first reference to “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 the 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 the 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 clarifying “a/an” prior to the relevant PEAK Matrix designation.

A PEAK Matrix Award badge is part of the marketing assets included as part of the licensing package.





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](#)







Conduent Named Leader

in Everest Group Healthcare Payer Operations PEAK Matrix® Assessment 2022

[Read the news](#)







A Leader and a Star Performer in the 2023 DAP PEAK Matrix® Assessment by Everest Group

[Download the Report](#)

PEAK Matrix® Assessment

Referencing a highest category designation

If a PEAK Matrix® designation is the highest in its category, ensure to follow the proper messaging styles. Do not use messaging that can be misleading, such as stating that a provider is an overall or industry leader. It must be clear the provider is designated highest in the relevant category.

- ✗ “[Company name] is named market Leader in..”
- ✗ “[Company name] is named overall Major Contender..”
- ✗ “[Company name] is the highest industry Leader in..”
- ✓ “[Company name] is positioned the highest in the Leader category in..”
- ✓ “[Company name] is the highest-designated Leader in..”
- ✓ “Everest Group positions [Company name] in the highest Leader position”

✗

Accenture Named Overall Leader in Everest Group Salesforce Industry Cloud Services PEAK Matrix® Assessment 2022

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✗


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Accenture Named Market Leader in Payments IT Services

Everest Group Payments IT Services PEAK Matrix® Assessment 2023

✓

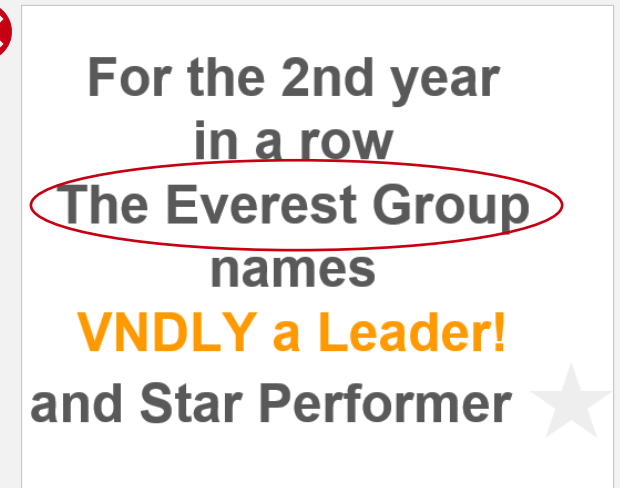
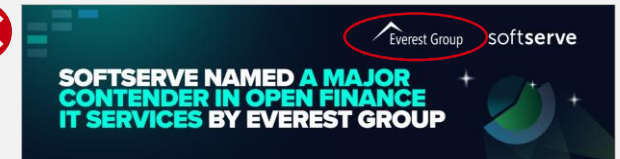
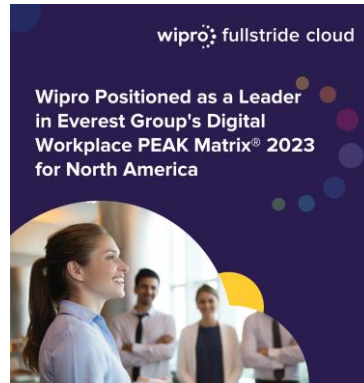
G-P Positioned as Highest Leader in Everest Group's EOR Solutions PEAK Matrix® Assessment 2023



PEAK Matrix® Assessment

Referencing Everest Group

- Always reference "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
- Instead, use the PEAK Matrix® badge for PEAK Matrix mentions



Top Provider Lists

Citation Guidelines

Top List Reports

Referencing a recognition

Everest Group often ranks providers in various disciplines. These reports include BPS Top 50™, Engineering Services Top 50™, Top Employers for Tech Talent™, Top 20 IT Service Providers list, Top GBS Employers™, AI Top 50, and others.

Providers that are featured in the Top List reports do not require a license to promote their recognition. All marketing channels can be used to promote a recognition, including media. A badge will be shared with all providers featured, which can be used in marketing. Before publishing, please share with brandreviews@everestgrp.com for approval.

A license is required to share the actual Top List report.

Examples of graphics and PR



Everest Group Recognizes Teleperformance in its BPS Top 50™ List

Teleperformance - 06.27.2022

Mastek Ltd, Mastek Ltd

Mastek is Named among the Top Five for Oracle Cloud Applications Services Delivering Superior Value Globally



SEPTEMBER 20, 2023

Mastek is recognized by the Everest Group's Platform Services Enterprise Pulse 2023 Report

NEW YORK--(BUSINESS WIRE)--Sep. 20, 2023-- Mastek (NSE: MASTEK; BSE: 523704), a trusted digital engineering and cloud transformation partner, was named in the recently published Everest Group report, "Platform Services Enterprise Pulse 2023." The report recognizes Mastek as one of the "Top Five Service Providers Delivering Superior Value" in Oracle Cloud Applications Services.

Everest Group, a prominent research and consulting firm, identified Mastek as a standout performer in Oracle Cloud Applications Services. The group's findings are based on over 120 interviews with global enterprises in 2022-23. These interviews assessed service providers' performance and value in delivering cutting-edge solutions and exceptional client value.

Sponsored Thought Leadership

Citation Guidelines

Sponsored thought leadership

Everest Group standards

Everest Group is selective in sponsored thought leadership and only undertakes research if it is believed that the topic is relevant, differentiated, and aligned with its research focus and brand.

- The licensed version will include the sponsor's logo and a licensing statement on the front cover of the document
- Sponsored research is not a “partnership” or “collaboration.” Therefore, it must always be positioned as Everest Group's thought leadership
- All promotional activity and circulation of the whitepaper is the responsibility of the sponsor
- Everest Group will not support any promotional activity of the licensed report, such as tagging the provider in social media posts
- If agreed, an analyst can take part in sponsor-hosted online or in-person events to elaborate on the report findings. This will not be co-branded. Everest Group may do light promotions of any events an analyst joins
- Any promotional add-ons must be agreed with Everest Group as part of the original agreement and at an additional fee
- 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 for approval

Sponsored 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 sponsored research should accurately be positioned as "Everest Group research," which your organization is pleased to share with its clients. Refer to the proper guidelines below on how sponsored research must be positioned.

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

❌ The whitepaper, 'Unleashing the Potential of Workplace Transformations - A Value-Centric Approach to Success,' authored by Everest Group in partnership with Zones, explores these workplace transformation developments and more.



Sponsored thought leadership

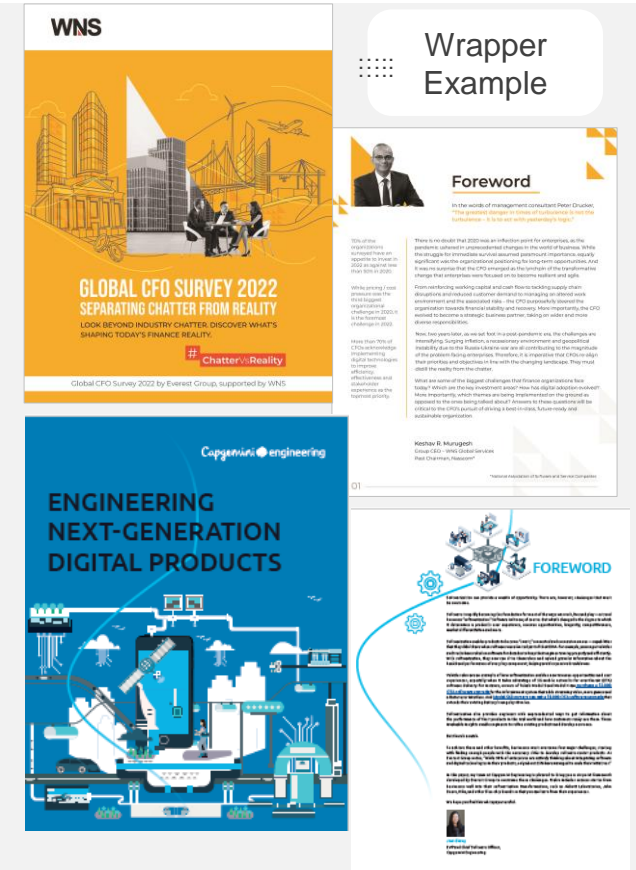
Key principles

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 of the whitepaper by adding a front and/or back page to “wrap” around the report; your team develops this content based on our specifications
- **Event participation:** an analyst can participate in a sponsor-hosted and led online or an in-person event
- **Blog:** an analyst authors a supporting blog
- **Social media:** graphics from the report for use in social media
- **Video:** video to support promotional activity
- **Infographic:** additional graphics to support

All materials additional to the report must cite Everest Group as the source.

All promotional assets must be approved by Everest Group.



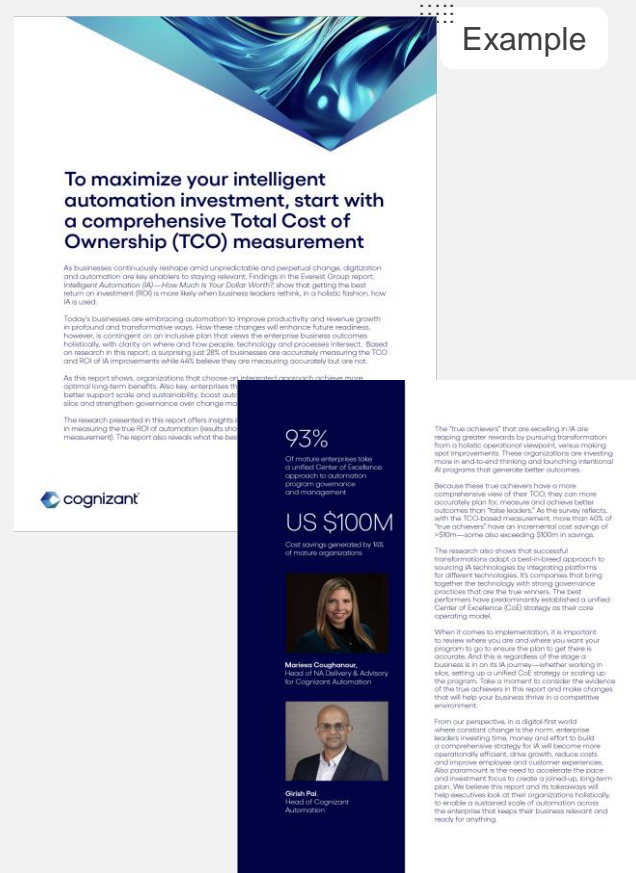
Sponsored thought leadership

Key principles | wrapper

A licensed whitepaper 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.

- A two-page wrapper can be designed to act as a cover for the licensed version of the report
- This can use the sponsor’s brand identity and messaging style, providing context to the topic
- The wrapper generally includes a cover and an introduction to the paper at the front and an “about us” at the back
- Always refer to the thought leadership as Everest Group’s
- 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 of Everest Group’s 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
- There is an additional cost for a wrapper

Example



Sponsored thought leadership

Key principles | participation in online events

If included within an agreement, an Everest Group analyst may present at an in-person event, webinar, or virtual roundtable to discuss the findings from the thought leadership and share industry expertise.

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

Everest Group will not promote the event through dedicated email campaigns; however, we may support the event through 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 in any promotional material
- Instead, you can use the logo next to the analyst speaker's photo and/or role title




Sponsored thought leadership

Key principles | social media

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

Examples



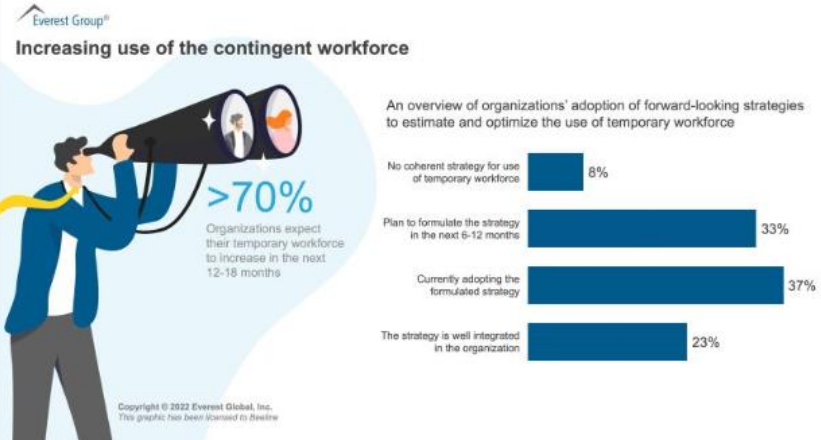
**Beeline Europe**
5,843 followers
1mo • 🌐

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



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%

>70% Organizations expect their temporary workforce to increase in the next 12-18 months

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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

Everest Group | Shirley Hung | Vignesh Kannan | Krishnan Raghunathan | Manish Vora | Archana Raghuram | Beadle N. | Dorin Ioanas | Nitin Pant



>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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Blog

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