



Everest Group Research Citation and Award Recognition Policy

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.

Submit any materials for review via this form: [Everest Group | Brand Reviews](#)

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 the below 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 custom-profile report can be (gated) 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

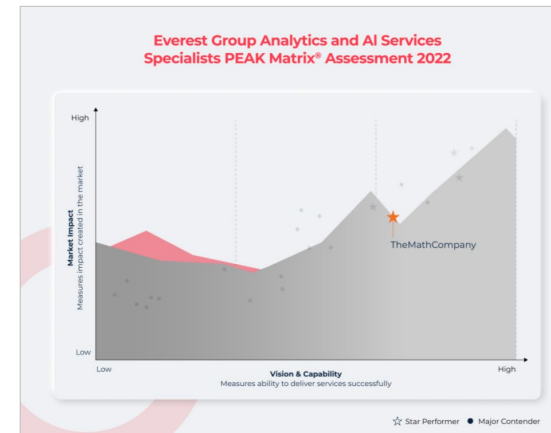
PEAK Matrix proper references

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](#)”

-  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 highest category designation

If a PEAK Matrix® designation is the highest in a 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.

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.

-  “[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 designated 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”

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

Lists and Awards Citation Policy

Top 50 reports

Referencing a recognition on a provider list

Everest Group often ranks providers in various disciplines, such as the BPS Top 50™, Engineering Services Top 50™, and the AI Top 50™, among others.

Providers that are featured in the top list reports **require a license to promote their recognition**. The license includes a badge that can be used in marketing. All marketing channels can be used to promote recognition, including media. Before publishing, please submit all materials for review and approval via this form [Everest Group | Brand Reviews](#).

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

Top Employers

Referencing a recognition on an employer list

Everest Group often ranks enterprises in various areas such as Top Employers for Tech Talent™ in India, the US, and the UK and Top GBS Employers™ in India, the Philippines, and Poland, among others.

Employers that are featured in the top list reports have access to assets to promote their recognition free of charge; no license is required. Assets include a badge and an executive brief version of the report that can be used in marketing. All marketing channels can be used to promote recognition, including media. Before publishing, please submit all materials for review and approval via this form [Everest Group | Brand Reviews](#).

Elevate Honors

Elevate Honors™ are a unique recognition program to select and showcase best in class service and technology providers across the following categories: Growth Honor of the Year, Impact Sourcing Honor, Voice of the Customer Honor – Service Excellence, Voice of the Customer Honor – Value Excellence, Voice of the Customer Honor – Technology Provider, Voice of the Partner Honor – Data and Analytics, Voice of the Partner Honor – AI Platforms, Voice of the Partner Honor – Enterprise Platforms.

Awardees receive an Elevate Honors digital badge to promote their recognition free of charge; no license is required. All marketing channels can be used to promote recognition, including media.

Before publishing, please submit all materials for review and approval via this form [Everest Group | Brand Reviews](#).

Sponsored Thought Leadership Citation and Asset Use Policy

Sponsored thought leadership

Sponsored thought leadership report asset use policy

- The licensed version of the report will include the Customer's logo and a licensing statement on the front cover; the licensed version of the report is not rebranded or custom authored report. Customer does not acquire any ownership rights to the report, its contents, or any Everest Group intellectual property.
- Sponsored research is not a “partnership” or “collaboration.” Therefore, it must always be positioned as Everest Group's thought leadership.
- The Customer is solely responsible for all promotional activity and circulation of the report.
- 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 does not participate in promotional activity for the licensed report; however, may offer limited promotion of events involving an Everest Group analyst (e.g., website or social media mention).
- Any promotional add-ons, such as blog posts, infographics, or participation in Customer-hosted events, must be agreed with Everest Group as part of the original agreement and are subject to additional fees.
- **All** marketing materials - including assets, press releases, social media posts, website landing pages, etc.- must be reviewed and approved by Everest Group's brand team. Please submit all materials for review and approval via this form: [Everest Group | Brand Reviews](#).

Note: Everest Group engages in sponsored thought leadership only when the topic is relevant, differentiated, and aligned with our brand and research priorities.







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.

All sponsored research is developed solely by Everest Group, based on our internal methodologies and standards.

All references to sponsored research must clearly reflect that it is Everest Group's intellectual property (IP). Your organization may say it is sharing or supporting the report – but not co-authoring it.

-  “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”

Sponsored thought leadership

Key principles | optional promotional add-ons (additional fees apply)

The following promotional add-ons may be included in the original agreement for an additional fee:

- **Wrapper:** personalize the licensed version of the report by adding a front and/or back page to “wrap” around the report; Customer’s team develops this content based on Everest Group’s specifications
- **Event participation:** an Everest Group analyst participates in a Customer-hosted event (led online or an in-person) to share industry expertise and key findings from the report
- **Blog post:** authored by an Everest Group analyst and focused on market or industry trends (not provider-centric content) to be published on the Customer’s website; the Everest Group logo may only appear beneath the analyst’s name
- **Infographic:** a standalone graphic derived from the thought leadership report; may use Customer branding (may not feature Customer’s logo)
- **Video clip:** a short Everest Group-branded video featuring insights from an Everest Group analyst serving as a subject matter expert
- **Social media graphics:** visual assets formatted for use on social platforms

Sponsored thought leadership

General requirements for promotional add-ons

- Add-on content **must not** be co-branded or co-authored
- Topics should be insight-driven and industry-relevant, rather than focused on the Customer's capabilities
- All materials and content **must**:
 - Clearly attribute Everest Group as the content source
 - Be submitted to Everest Group's brand team for review and approval before publication or use
 - Comply with Everest Group's editorial and brand standards
 - Not alter or misrepresent Everest Group's research, findings, or analysis
- The Everest Group logo must not appear side by side with the Customer logo or on Customer branded materials, except where specifically permitted
- Everest Group maintains full editorial control and IP ownership
- Any usage beyond what is explicitly licensed requires prior written approval

Sponsored thought leadership

Key principles | wrapper (optional add on – additional fees apply) | page 1 of 2

The Customer version of the report may be personalized and branded by adding pages at the beginning and an “about us” at the end of the document. This “wrapper” acts as an introduction and allows the Customer to incorporate its own branding to the report while maintaining the integrity and authorship of Everest Group’s research.

- A two- to four-page branded wrapper can be designed to act as a cover and conclusion for the Customer version of the report, with the body of the report remaining intact and unaltered
- The wrapper may use Customer’s brand identity and messaging style to provide relevant context to the topic
- A typical wrapper includes
 - A branded cover page
 - An introduction to the paper at the front and
 - An “about us” section at the back
- All wrapper content must refer to the thought leadership report as Everest Group’s
- All wrapper content must be submitted to Everest Group’s brand team for review and approval before publication and use

Sponsored thought leadership

Key principles | wrapper (optional add on – additional fees apply) | page 2 of 2

- The wrapper text **MUST NOT**:
 - Position the report as authored or owned by the Customer
 - Describe the report as a collaboration or partnership with Everest Group
 - Include the Everest Group logo or branding
 - Visually mimic Everest Group’s report style or layout; wrapper must be clearly distinguishable from the report

Sponsored thought leadership

Key principles | event participation (optional add on – additional fees apply)

To preserve Everest Group's objectivity and avoid any perception of bias, Everest Group does not co-host or co-sponsor events. However, if included within an agreement, an Everest Group analyst may participate in Customer-hosted event (e.g., in-person event, webinar, or virtual roundtable) to discuss the findings from the thought leadership report and share industry expertise.

Customer responsibilities:

- Host and manage the event entirely
- Create all promotional materials for the 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

Everest Group support:

- May offer light promotional support (e.g., event listing on our website or social channels)
- Branding Requirements:
- The event must not appear co-branded or jointly hosted
- Promotional materials must not describe the event as a collaboration with Everest Group

Stay connected

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