

Forrester Wave™ Citation Guidelines

Executive Summary

These guidelines explain how participating companies may use Forrester Wave™, New Wave™, and Industry Wave™ research in their sales, marketing, and/or promotional materials. Please note that, in accordance with Forrester's Citation Policy, a company must either be a current Forrester subscriber or have purchased reprint rights to the evaluation in order to cite from the evaluation or use the Forrester Wave findings in any of its material.

Introduction

Thank you for participating in our Forrester Wave research. Forrester has created these guidelines to help you understand how your company (and others) can use the results in a fair and objective fashion to communicate the strengths of your service or product.

We appreciate your patience and cooperation as we strive to create guidelines that both uphold a mutually respectful environment that is fair to all players and reinforce Forrester's value as an objective and independent research provider.

In addition to the research team conducting the Forrester Wave evaluation, other key contacts at Forrester are as follows:

- › **Any external citation usage and press release/marketing approvals (required) – Email citations@forrester.com.**
- › **Reprint orders if you are currently a Forrester client: Get in touch with your Account Manager or reprints@forrester.com.**

The Forrester Wave Methodology Overview

Forrester employs a rigorous process to create a Forrester Wave. Highlights include generating a detailed taxonomy of product attributes, gathering and validating data, and creating the Forrester Wave graphic.

The Forrester Wave also includes a spreadsheet tool that is designed for end users to create their own shortlists based on their own particular needs. For every company, we also create a Vendor Scorecard, Forrester's assessment of the company's product or service.

The Forrester New Wave contains QuickCards highlighting each companies' position, ratings and customer reference quotes.

The Forrester Industry Wave contains an overall score and individual criteria scores for each company.

Approval Process

Forrester must approve all requests to reference any Forrester Waves (or any Forrester product) prior to dissemination. This includes press releases, marketing materials, presentations, quotes on the Web, and other uses intended to

communicate beyond your company. Please review these citation guidelines before submitting requests. Send requests for approval to citations@forrester.com. Please note that:

- › **Forrester requires a minimum of two business days to respond to requests.**
- › **Permission is granted on a case by case basis.**
- › **Materials submitted prior to the publication of a Forrester Wave evaluation will be given an initial review but will not be approved until the evaluation is finalized for publication.**
- › **Approved materials cannot be released or referenced prior to a Forrester Wave publication.**
- › **Prior approvals do not guarantee approvals of future requests. You must request permission for every use.**

Citation Guidelines

After Forrester publishes the final version of a Forrester Wave evaluation, companies may issue their own press releases and other materials about the results of their own product. When crafting the release or other materials, companies must adhere to the following guidelines:

- › **Only Forrester clients have the right to cite Forrester** – While we invite clients and non-clients alike to participate in the Forrester Wave process, the right to cite our research is reserved for current Forrester clients only. Non-clients may not issue press releases or other materials citing the Forrester Wave results. We understand that all parties involved have invested considerable time and effort into the research process and would like to benefit as much as possible from the published results. If you are not a current client of Forrester, please speak with a Forrester sales representative about obtaining rights to cite the evaluation in a press release or other marketing materials.
- › All citations of Forrester Wave research are subject to Forrester's Citation Policy – (<https://www.forrester.com/marketing/policies/citations-policy.html>). All citations of Forrester Wave research must be limited in scope and cited verbatim from Forrester's written research.
- › **Companies may only claim that they are a Leader/Strong Performer when citing their overall Forrester Wave and New Wave results** - Companies may not use descriptor words such as "Overall Winner", "Best In Class", or "No. 1" when describing overall wave results for any Forrester Wave. A company may not claim to be the Leader/Strong Performer in a field where more than one Leader/Strong Performer was named in the evaluation. Although scores for a particular company's product may average the highest or total more than competitor's products, our Forrester Wave methodology does not name a company as "No. 1", a "winner", or other superlatives.
- › **Companies may use wording such as "highest score" or "top ranked" only when citing their Strategy, Current Offering, and/or Market Presence results from the Forrester Wave or criteria scores from the Industry Wave** – Although Forrester does not name an overall "winner" in Forrester Wave results, we permit companies to highlight their results when they receive the highest scores in a given category. Companies that tie for a top score with another company may use language such as "among the highest scores" or "highest scores possible" (if applicable).
- › **Companies may use wording such as "differentiated rating" or "on par rating" when citing their specific criteria results from the New Wave** – Although Forrester does not name an overall "winner" in Forrester Wave results, we permit companies to highlight their results for specific ratings in a given criterion.
- › **Companies may draw attention to the detailed results in the underlying spreadsheet, if applicable, including subcategories.**

- › **Claims from companies about how they performed in a Wave that are not verbatim from the report must include opinion language such as “We believe”, “We think”, etc... so it is clear that they are not Forrester statements. For example:**

Not permissible:

“We are thrilled to be named a leader in this Wave evaluation and that Forrester validates what our customers have been saying....”

Permissible:

“We believe being named a leader in this Wave evaluation validates what our customers have been saying...”

- › **Companies may compare only their scores with the high and low scores of the category** – Forrester does not allow direct comparisons with other companies or products.
- › **All citations must be based on Forrester’s Weightings** – Clients may not publicly cite or display custom scores from the Forrester Wave Vendor Scorecards.
- › **Companies may not cite their physical placement within the Wave graphic**, - e.g., “[client name]” placed highest, in the top right than any other evaluated company in the Wave graphic.”
- › **Forrester analysts may not provide verbal quotes for companies’ press releases, websites, or marketing and sales materials** – All citations must come directly from the written research itself.
- › **Comparisons or references to past Forrester Waves on the same market, such as “A Leader for the second year in a row”, are prohibited unless cited verbatim from the current Forrester Wave evaluation text.**

Press Release Guidelines

- › Client press release titles, headers, and/or sub-headers may not include the words “Forrester” or “Forrester Research” or “Wave” or “New Wave” or “[Industry] Wave”.
- › **Clients may use “Independent Research Firm” in place of Forrester’s name.** – For example:
[Company name] Cited As A Strong Performer/A Leader By Independent Research Firm

Or

Independent Research Firm Cites [Company name] As A Strong Performer/A Leader In [Report Topic]

- › **With permission, companies in the Forrester Wave may use the following verbiage for press releases, newsletters, and websites:** –

[Company name] was among the select companies that Forrester invited to participate in its [Date] Forrester Wave™ evaluation, [Report Name]. In this evaluation, [Company name] was cited as a Leader/Strong Performer in [Wave Category Name].

Or

[Company name] was among the select companies that Forrester invited to participate in its [Date] Forrester Wave™ evaluation, [Report Name]. In this evaluation, [Company name]’s top scores were for [Criteria Name 1], [Criteria Name 2], [Criteria Name 3].

- › **Forrester does not name a Forrester Wave “winner”** – Although scores for a particular company’s product may average the highest or total more than competitor’s products, our Forrester Wave methodology does not name any company as “No. 1”, a “winner”, or other superlatives. Companies are placed in one of four “waves”: Leaders, Strong Performers, Contenders, and Challengers. Similarly, a Forrester Wave is not a validation or endorsement of any company or its products, and sentences that state this explicitly or implicitly may not be used.
- › **Other companies and their products should not be named** – Forrester’s current Citation Policy does not allow for the mention of or comparison with the other companies or products included in the category evaluation. We advise that you use the press release to highlight your own product’s scores and performance and not to disparage another company.
- › **Citations must be taken verbatim from the published text** – When citing Forrester Research, do not paraphrase the text. Analysts also may not give custom verbal quotes on a product’s evaluation.

Other Usage Guidelines

- › **Clients may use the Forrester Wave graphic in presentations to live audiences as long as the Forrester Wave graphic is shown in its entirety, unaltered, and with the original title and date of the publication** – The following disclaimer must be legible on the slide:

The Forrester Wave™ is copyrighted by Forrester Research, Inc. Forrester and Forrester Wave are trademarks of Forrester Research, Inc. The Forrester Wave is a graphical representation of Forrester’s call on a market and is plotted using a detailed spreadsheet with exposed scores, weightings, and comments. Forrester does not endorse any company, product, or service depicted in the Forrester Wave. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change.

Or

The Forrester New Wave™ is copyrighted by Forrester Research, Inc. Forrester and Forrester Wave™ are trademarks of Forrester Research, Inc. The Forrester New Wave™ is a graphical representation of Forrester’s call on a market. Forrester does not endorse any vendor, product, or service depicted in the Forrester New Wave™. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change.

Or

The Forrester [Industry] Wave™ is copyrighted by Forrester Research, Inc. Forrester and Forrester Wave™ are trademarks of Forrester Research, Inc. The Forrester [Industry] Wave™ is a graphical representation of Forrester’s call on a market. Forrester does not endorse any company, product, or service depicted in the Forrester [Industry] Wave™. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change.

- › **Clients with reprint rights to a Forrester Wave may display the entire, unaltered Forrester Wave graphic on their website home page or as part of a web page exclusively dedicated to the entire authorized reprint of the evaluation and vendor summary reprint.**

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- › All other uses of the Forrester Wave graphic are prohibited.
 - ›
 - › Clients with reprint rights to a Forrester New Wave™ may display their entire, unaltered Quick Card in their marketing and promotional material and on their website.
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 - › “Forrester”, “Forrester Research”, “Forrester Wave”, “New Wave”, and “[Industry] Wave” may not appear in the subject lines of emails.
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 - › **Forrester Citations must approve all citations** – To ensure the proper representation of our research, all citations must be approved by Forrester. To obtain approval, please send an email to citations@forrester.com with the citation in its full context (e.g., press release draft, website text, etc.).
 - ›
 - › **Clients may not provide copies of Forrester Wave reports to members of the press, nor can they facilitate interviews with Forrester analysts and the press. Please direct all press inquiries regarding Forrester’s research to press@forrester.com or +1 617 613 6061.**

Policy Violations

Forrester Wave research and other materials are proprietary to Forrester and constitute:

1. Works of original authorship, including compiled content of preexisting material that Forrester has created, gathered, or assembled.
2. Information that has been created, developed, and maintained by Forrester or its licensors at great expense of time and money such that misappropriation or unauthorized use by others for commercial gain would unfairly and irreparably harm Forrester.

Forrester reserves the right, at its sole discretion, to immediately terminate any uses of its intellectual property that are in violation of these guidelines or that otherwise abuse, harm, or damage any Forrester intellectual property. Forrester also reserves the right to alter these guidelines at any time to uphold fair and ethical use of its products and trademarks.

Reporting a Suspected Violation

Forrester monitors press outlets and other sources for violations, but, because of sheer volume, is not able to uncover all abuses. Anyone who encounters a suspected misuse should report the instance to citations@forrester.com.

Other Restrictions

The Forrester Wave, New Wave, Industry Wave, and all other written research is proprietary to Forrester. Forrester Waves are protected by United

States and international copyright laws and may not be printed, reproduced, altered, or excerpted for use in press materials, sales, or promotional collateral; marketing and advertising campaigns or materials; websites; presentations; or any other forms of media, including print, broadcast, web-based, and electronic.

Electronic Reprint Restrictions

A company may post a digital version of a Forrester Wave evaluation on its website, provided it has purchased reprint rights from Forrester. This does not include the underlying Forrester Wave spreadsheet. Companies may introduce the evaluation link with one of the following headers:

- › **The Forrester logo by itself with review and approval by the Citations team.**
- › **“[Company name] was among the select companies that Forrester invited to participate in its [Date] [The Forrester Wave™: {Category Name}, QX 20XX”] evaluation. In this evaluation, [Company name] was cited as a Leader/Strong Performer in [category name]. The findings were based on [Company’s top three attributes].**
- › **A limited and accurate summarization of the Forrester Wave evaluation. This must be approved by the Forrester Citations team before the page goes live.**

Supplemental Material

Online Resources

You can find Forrester’s Citation Policy on our website.

Go to <http://www.forrester.com/marketing/policies/citations-policy.html>, or visit the “About Us – Policies” section of the site and select “Citation Policy”.