



Unlocking the Power of Workflow Platforms:

A Strategic Guide to Maximize ROI and
Business Value

FOREWORD

In today's volatile and complex macro-economic landscape, businesses are rethinking their investment strategies to address new challenges and demands. While technological innovation remains pivotal to business transformation, many enterprises are adopting a more cautious approach, prioritizing the maximization of their existing ServiceNow platforms over investing in new solutions.

Workflow platforms, at the heart of operational agility, often represent untapped potential for organizations, and 8 out of 10 enterprises proactively seek to increase the value of their current investments.

The reasons?

Heavy customizations, siloed systems, misalignments with strategic objectives, ignoring platform maturity, and not partnering with the right third-party providers. These challenges create a gap between expectations and the value organizations realize—one that must be bridged for businesses to achieve true ROI and operational excellence.

This whitepaper by Everest Group, **"Unlocking the Power of Workflow Platforms: A Strategic Guide to Maximize ROI and Business Value,"** provides a roadmap to help CIOs and business leaders achieve maximum

realization from their workflow platform investments.

How inMorphis Leveraged the Value Realization Framework

This whitepaper also discusses how inMorphis helped one of the **World's largest** telecom providers drive a structured approach to enhancing ServiceNow utilization by leveraging **the value realization framework**, value optimization and realization.

Referring to Everest Group's maturity curve (discussed in the paper), we tapped into levers such as Services Scope and Transformation Quotient. On Services Scope, the customer referred to third-party expertise, inMorphis, to create a workflow transformation roadmap and enhance automation capabilities. Within Transformation Quotient, we focused on increasing the extent of automation within the organization.

The key challenges the client was facing were:

- Over 50 ticketing systems scattered, with each having data in a silo
- Underutilized automation module licenses
- Disparate processes across operational groups

To consolidate their ticketing systems, connect disparate data systems, unify processes across operational groups, and provide them with maximum value realization, we prioritized Mean Time to Repair (MTTR) and the automation index through the following solutions:

- » Building capabilities to attain ZeroOps (automated resolution of incidents, effectively eliminating manual efforts)
- » Expanding automation in the IT landscape and beyond
- » Integrating ServiceNow with other monitoring solutions, such as Dynatrace, to improve metric tracking and strengthen platform governance

Taking a phased approach helped them realize the following **operational and business benefits**:

- » Achieved automation index of around 80% for IT processes and approximately 30% for organization-wide processes
- » Led to a reduction of MTTR by 90%
- » Automated resolution of 20,000 alerts per month
- » Greater visibility of processes that can be automated

Evidently, most current contracts with partners are not outcome-based. Drawing on industry insights, best practices, and real-world use cases, this guide equips you with the tools and strategies to bridge the gap between expectations and outcomes. Whether it's optimizing existing investments or overcoming integration challenges, the ideas presented here are designed to inspire action and enable your enterprise to lead with confidence in an increasingly competitive landscape.

Let's move beyond mere implementation and focus on outcomes with **inMorphis**, a **ServiceNow-invested partner**, an awardee of "**10 Best GRC Companies to Watch 2024**" by the prestigious CIO Coverage, and the pioneers of workflow platform value realization.

To discover more about value realization [Click Here!](#)



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Introduction

As enterprises navigate an increasingly complex and uncertain macroeconomic landscape, they are updating their investment strategies to meet new demands and challenges. While technology innovation continues to be vital in driving business transformation, several organizations are adopting a cautious approach to new investments, particularly in workflow automation. Businesses seek to maximize their existing platforms' value instead of looking for new solutions.

However, a significant gap remains between expectations and the value enterprises currently realize from their workflow platforms. According to our research, 64% of enterprises are dissatisfied with the value they derive from their current workflow investments. Heavy customizations, a lack of integration across systems, and misalignment with strategic objectives cause this underperformance. Yet, 77% of organizations actively seek ways to unlock increased value from their existing solutions, signaling a widespread recognition of the untapped potential in their current investments.

Enterprises must adopt a well-thought-through strategy to bridge the gap between expectations and value realization to maximize ROI and the value from current workflow platform investments. This includes maximizing value through value optimization and value addition strategies, while leveraging providers to drive success and partially own ROI.

[This viewpoint serves as a strategic guide for enterprises to maximize ROI and value, addressing the following:](#)

- Key challenges hindering full value realization
- Assessing the current maturity of workflow platforms and the value realized
- Best practices and approaches for value optimization and value realization
- Effectively leveraging third-party providers to maximize platform investments' value

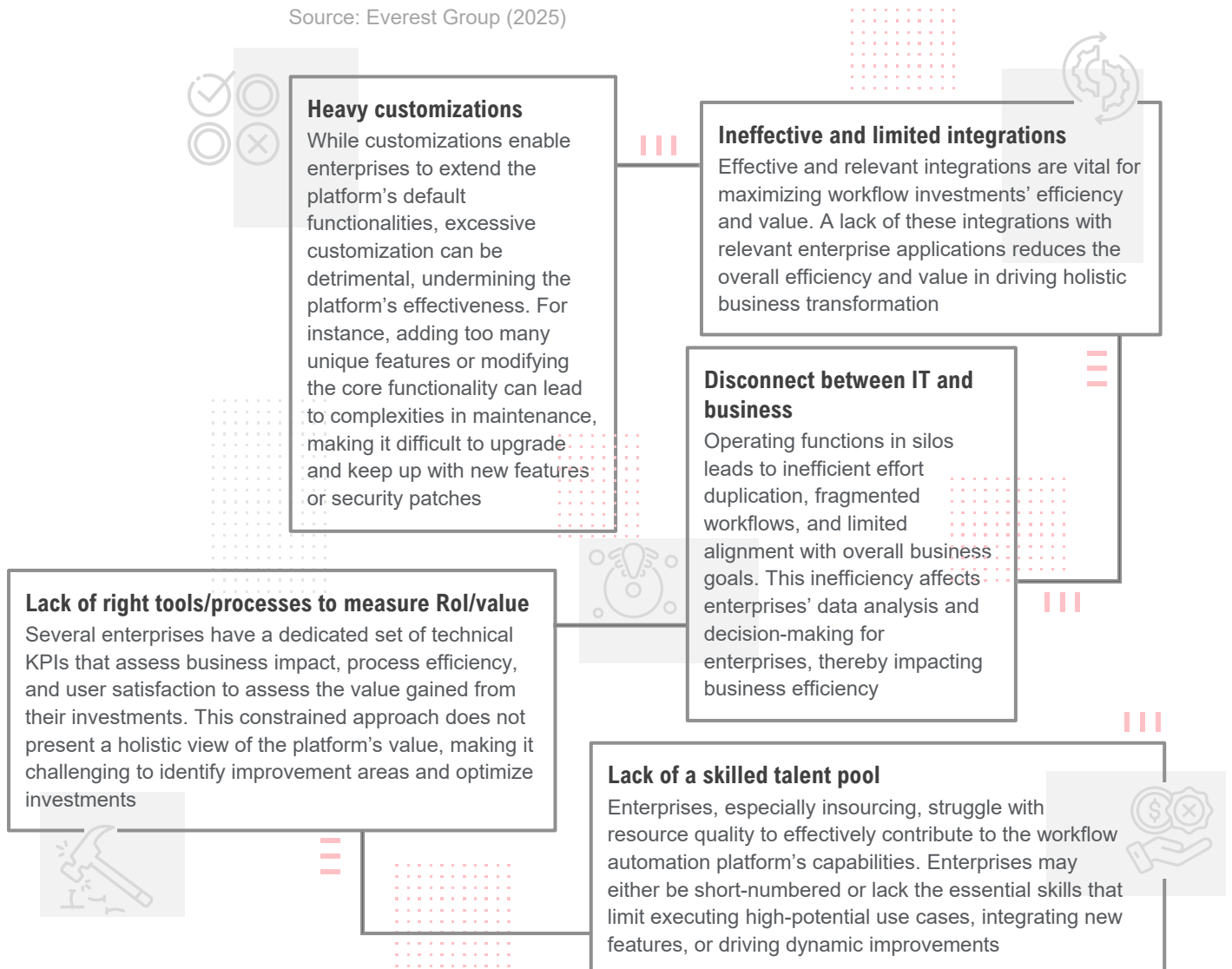
Key challenges hindering full workflow platform value realization

Enterprises begin with optimizing and automating workflows to drive business efficiency, reduce costs, and create incremental value. However, they must identify key challenges that may arise and develop strategies to mitigate them effectively, thereby maximizing RoI.

Exhibit 1 lists key challenges preventing enterprises from fully realizing the value of their workflow investments.

Exhibit 1: Challenges preventing enterprises from realizing their workflow investments' value

Source: Everest Group (2025)



Assessing enterprise maturity for workflow performance

Several enterprises, especially disruptors and value realizers, recognize periodic platform assessments' significance to ensure they fully leverage their platform's features and capabilities to realize value. Without periodic assessments, businesses risk missing opportunities that enhance efficiency and reduce operational costs.

With focused assessments, enterprises can map their current maturity levels and understand how well their workflows align with long-term strategic goals. This maturity assessment allows organizations to identify inefficiencies and gaps, ensuring their platforms are strategically optimized to support their business objectives. Moreover, it offers a clear reference point for making informed decisions about future strategies. It also enables enterprises to prioritize improvements, refine goals, and plan for scaling or enhancing workflow automation efforts to drive sustained, long-term value.

“Before implementing any strategic product/functionality, we holistically assess our ServiceNow platform strategy. As the journey progresses, we keep optimizing it to create incremental value. That is one of the key KPIs for me.”

– Vice President, Enterprise IT, a global US-based bank

Workflow platform maturity and the value realization framework

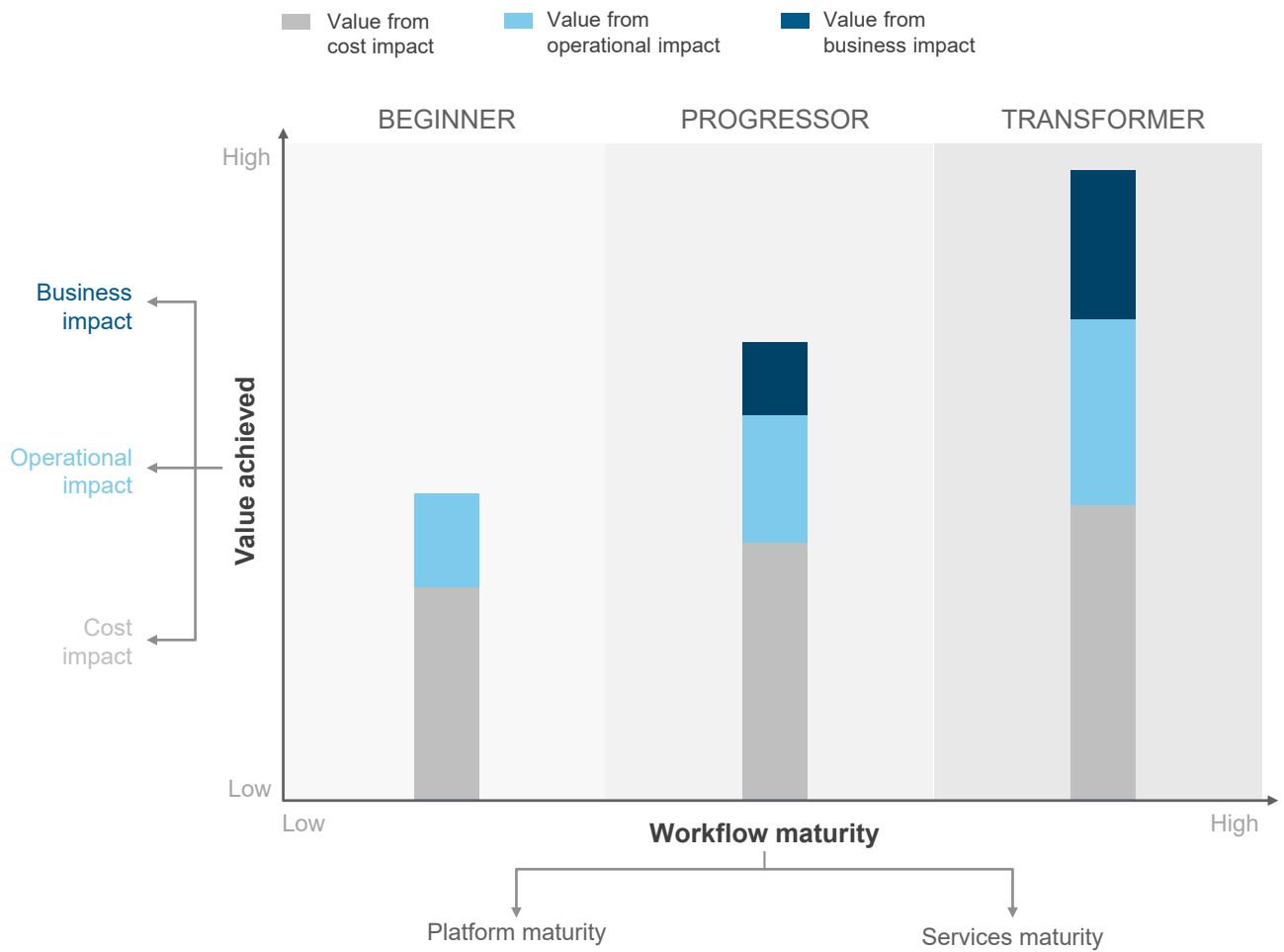
In this section, we discuss a comprehensive framework to help enterprises understand and assess their current workflow transformation maturity and the value realized from their workflow platform investments. This framework offers a structured approach to measure and optimize the value derived from workflow platform investments.

Exhibit 2 presents the matrix framework to assist enterprises in assessing and evaluating their current workflow platform maturity and the value realized from it. By mapping these two dimensions, workflow platform (X-axis) maturity and value achieved (Y-axis), enterprises can better understand their positions in the workflow transformation journeys and identify improvement areas.

- **Workflow platform maturity:** The X-axis represents the enterprise’s workflow platform’s maturity level. It evaluates the platform’s maturity and the maturity of services delivered (internally and by other providers)
- **Value realized:** The Y-axis measures the workflow platform’s value realized. This value is based on the outcomes achieved, which are categorized as impacts across three categories: business impact, cost impact, and operation impact

Exhibit 2: Workflow platform maturity and the value realization framework

Source: Everest Group (2025)



Having understood the overall approach and assessment framework, we discuss each axis to discern key parameters and dimensions to effectively assess workflow platform maturity and value realization.

To unlock value, enterprises need to look at aspects related to both platforms and services. They should assess their platform and services maturity and the levers they can leverage to advance on the maturity curve.

Assessing workflow platform maturity

Several factors are vital to ensure an accurate assessment when defining an enterprise's workflow platform maturity. This assessment is key to understanding an enterprise's current state and improvement areas. We have categorized these into two parameters: platform maturity and services maturity.

- **Platform maturity** anchors on the enterprise's ability to leverage the focused platform by optimizing key capabilities, aligning platform functionalities with organizational objectives, and driving continuous improvements. Overall, it comprises four key sub-parameters: transformation quotient, QA quotient, platform scope, and governance mechanism
- **Services maturity** measures the enterprise's ability to derive additional value from services delivered internally and by third-party providers. It considers the engagement model's scope and structure, the talent pool's capabilities, and the effectiveness of performance management processes in delivering technical, operational, and business outcomes

Exhibit 3 outlines enterprise workflow platform maturity, key sub-parameters, and influencing factors.

Exhibit 3: Enterprise workflow platform maturity and its key sub-parameters

Source: Everest Group (2025)

Parameter	Sub-parameter	Description	Key factors influencing the focused sub-parameter
Platform maturity	Transformation quotient	Measures an enterprise's ability to use its digital ecosystem for workflow transformation by prioritizing integration, coherence, and end-to-end automation across functions	<ul style="list-style-type: none"> Adopts/Integrates other extended synergistic technologies/application, such as RPA, IPA, and other enterprise applications Extends automation leveraging AI and generative AI
	QA quotient	Assesses investments into QA and testing systems and processes to support workflow improvements and address vulnerabilities	<ul style="list-style-type: none"> Offers cross-platform support to ensure fewer compatibility issues Increases workflows' reliability by developing advanced QA frameworks
	Platform scope	Evaluates modules and features implemented and utilized across IT and non-IT workflows	<ul style="list-style-type: none"> Extends customization to reduce technical debt Leverages new modules to get a competitive edge
	Governance mechanism	<ul style="list-style-type: none"> Assesses the enterprise's governance framework to understand how effectively it maximizes value from the workflow automation platform Involves monitoring platform health, performance, and license utilization 	<ul style="list-style-type: none"> Prioritizes coverage and tracking health metrics, such as system uptime and timely upgrades framework Uses license to track and optimize resource allocation
Services maturity	Services scope and engagement model	<ul style="list-style-type: none"> Evaluates the enterprise's insourcing and outsourcing strategies for service delivery and value creation Prioritizes alignment with long-term goals and roadmap, efficient implementations, and comprehensive maintenance 	<ul style="list-style-type: none"> Uses engagement models such as outcome-based or output-based models Leverages scope of services, such as consulting, implementation, managed services, and OCM
	Talent quotient	<ul style="list-style-type: none"> Measures talent readiness, assessing workforce capabilities across modules to support platform demands and innovation demand Focuses on skilled resources' availability, covering core functions and emerging areas, such as AI-driven automation and analytics 	<ul style="list-style-type: none"> Prioritizes metrics, such as FTE availability, certification numbers and quality, cross-functional support capability, and scalability to meet platform growth Ensures availability of and leveraging external talent/ecosystem
	Performance management	<ul style="list-style-type: none"> Monitors automation performance from a services perspective Covers technical, operational, and business aspects 	<ul style="list-style-type: none"> Includes technical metrics, such as error rates and system performance, for reliability Covers operational metrics, such as functional alignment Includes business outcomes, such as RoI, cost savings, and user satisfaction

Based on the assessment methodology and key workflow maturity characteristics, enterprises are categorized into Beginner, Progressor, and Transformer.

Exhibit 4 summarizes the evolution of enterprise characteristics as they progress along the workflow platform maturity journey from Beginner to Transformer. This journey represents growth and improvement, inspiring enterprises to strive for higher maturity levels.

Exhibit 4: The evolution of enterprise characteristics across the workflow platform maturity journey

Source: Everest Group (2025)

————— Increasing order of workflow maturity —————>

Parameter	Sub-parameter	BEGINNER	PROGRESSOR	TRANSFORMER
Platform maturity	Transformation quotient	Has limited automation and investments in AI and analytics	Adopts broader automation by proactively leveraging AI into workflow processes	<ul style="list-style-type: none"> • Embeds advanced automation across functions • Actively uses AI capabilities for mature use cases
	QA quotient	Has limited investments in QA automation and is mainly dependent on manual testing	Has a QA automation set up that includes performance and compatibility tests	<ul style="list-style-type: none"> • Includes a dedicated QA automation team • Prioritizes security and usability
	Platform scope	Has limited product coverage, with adoption focused on core functionalities	<ul style="list-style-type: none"> • Possesses moderate non-IT workflow adoption • Has a cautious approach, avoiding full-scale transformation 	<ul style="list-style-type: none"> • Has mature platform adoption, including end-to-end products/functionalities • Frequently upgrades to leverage recent/new modules
	Governance mechanism	Adopts a reactive governance approach with no established governance mechanism	<ul style="list-style-type: none"> • Has a basic governance framework and little coverage of the overall platform health metrics • Lacks timely system upgrade frameworks 	<ul style="list-style-type: none"> • Has a robust governance mechanism with well-defined health and performance metrics • Has robust periodic system upgrade frameworks

Exhibit 4: The evolution of enterprise characteristics across the workflow platform maturity journey (continued)

Source: Everest Group (2025)

————— Increasing order of workflow maturity —————→

Parameter	Sub-parameter	BEGINNER	PROGRESSOR	TRANSFORMER
Services maturity	Services scope and engagement model	Leverages third-party providers moderately, with standard implementation and maintenance	Employs third-party providers from a more strategic focus and includes advisory services	<ul style="list-style-type: none"> Engages third-party providers optimally with focused insourcing Strategically partners to bring innovation Engages in an outcome-based mode
	Talent quotient	Has limited in-house talent setup to manage the workflow automation system	Has a growing certified resources pool with some reliance on external support for intricate maintenance	<ul style="list-style-type: none"> Has in-depth expertise and cross-functional experienced talent and talent scale Leverages external support for specialized roles
	Performance management	Tracks basic technical metrics, such as uptime and response time	Conducts regular and structured performance reviews and partial alignment of performance data with strategic goals	<ul style="list-style-type: none"> Holistically tracks operational and business outcome metrics Engages in continuous and dynamic performance improvement measures/interventions backed by comprehensive data

Three-fifths of enterprises do not effectively track the value realized from their workflow platforms.¹

Measuring the value realized

Enterprises see their investments' overall value from two broader views: technology and business workflows. While technology workflows prioritize task automation and uptime improvements, business workflows enhance user experience (customers, business users, or employees). Enterprises map the overall value realized across three key sub-parameters as below:

- **Cost impact:** Realizing value through cost savings is vital for enterprises, and they achieve it by tracking ticket reduction, FTE reduction, and CapEx savings.

¹ Based on market conversations with over 160 enterprises as part of Everest Group's enterprise platform services research

“In the past, we had mostly focused on reaping operational and cost benefits. We entirely missed having a view of business-specific outcomes. We recently started tracking these benefits with an outcome-based construct.”

– Automation Head, Customer Service, a leading European telecommunication company

Outcome-based engagements with implementation partners enhance cost impact, driving incremental value through robust automation systems

- **Operational impact:** It tracks platform performance in key use cases, including efficiency improvements, reduced downtime, faster response and resolution times, improved incident management, and increased productivity. Enterprises set target KPIs with providers to monitor ongoing progress and ensure value alignment
- **Business impact:** It measures how enterprise investments translate to improved business experiences. Key factors include topline growth, customer and employee satisfaction, compliance, and risk management. Mature enterprises align these factors with their business goals to maximize investment value

Unlocking incremental value from workflow platforms

While enterprises aim to adopt workflow platforms to accelerate their transformation journeys, several fail to realize the expected benefits. In this section, we explore best enterprise practices and strategies to maximize the value derived from their workflow platforms:

- **Value optimization** focuses on maximizing the returns from existing investments in workflow platforms, ensuring efficient use of current resources
- **Value creation** measures the enterprise’s current maturity state by adding more platform investments and co-investing in capabilities to create exponential business value

Exhibit 5 outlines potential enterprise journeys to enhance value by optimizing existing investments or moving up on the maturity scale through additional investments to create incremental value.

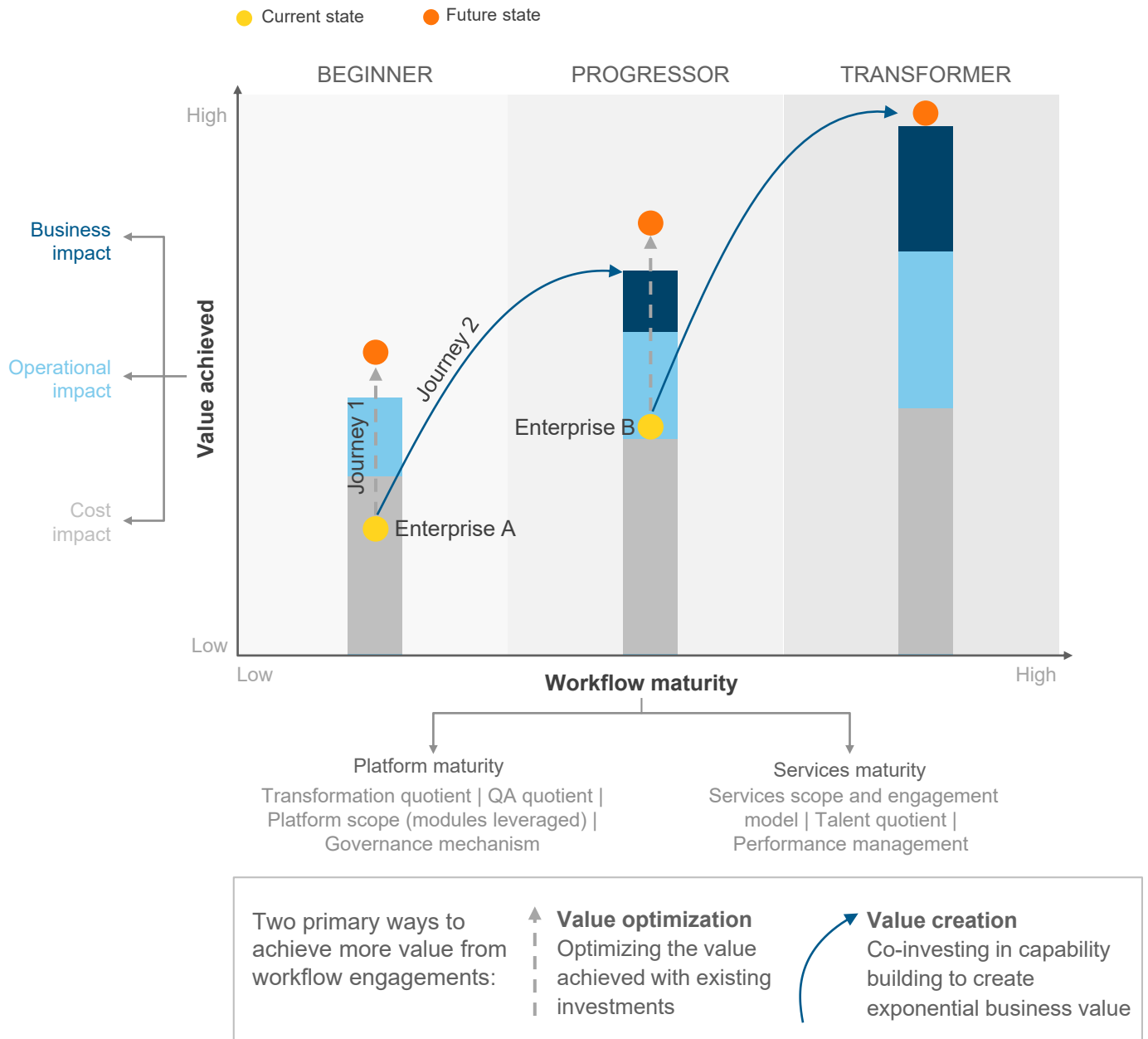
Around 64% of enterprises are unsatisfied with the value realized from their current workflow investments.²

² Ibid

Exhibit 5: Value optimization and value creation across the workflow platform maturity journey

Source: Everest Group (2025)

[ILLUSTRATIVE EXAMPLE]



Approximately 77% of enterprises proactively seek to increase value from their current workflow platform investments.³

3 Ibid

Value optimization

Enterprises should evaluate and implement some interventions to optimize the value of their current workflow platform investments (traversing through the Y-axis – Journey 1 in Exhibit 5). These interventions are listed below.

- **Maximize platform utilization and license efficiency:** Firms must optimize platform capabilities and licenses, ensuring all features are fully leveraged and utilized. They should conduct periodic business performance reviews to assess utilization, identify inefficiencies, and mitigate potential risks related to using licensed resources
- **Prioritize integration and flexibility:** Enterprises should design workflows and automation systems to seamlessly integrate with existing platforms and applications, enabling synergy to drive greater efficiency and alignment with business goals
- **Ensure continuous operational performance:** Companies must run automation systems smoothly with minimal downtime and leverage real-time indicators to monitor operational efficiency and prevent bottlenecks
- **Engage providers on an outcome-based model:** Firms should adopt a performance-driven partnership, involving providers in the value realization process to drive enhanced innovation
- **Invest in skill development:** Enterprises must enhance internal teams' capabilities by offering them training and development opportunities. They should equip them with the necessary skills to effectively manage, optimize, and innovate on the platform

Value creation

Enterprises should evaluate and implement some interventions to create additional value through the acceleration journey (traversing both the X-axis and Y-axis – Journey 2 in Exhibit 5). These interventions are listed below.

- **Upgrade platform maturity:** Enterprises must build on their current capabilities to advance to a higher platform maturity level. This process involves assessing existing demand-supply gaps and investing in a technology roadmap by adopting advanced modules and Out-of-the-Box (OOTB) solutions
- **Invest in maintenance and support:** While enterprises aim to optimize their existing investments by maintaining a healthy automation system, those seeking to accelerate value generation must also invest in platform maintenance and support. They should stay updated with the latest platform features to sustain a competitive advantage and create additional value. Other key investment areas include adopting advanced data security frameworks and proactive system health checks, enabling enhanced scalability
- **Focus on impact-driven KPIs:** To create value, firms must leverage workflow automation platforms to deliver high-impact KPIs, such as end-user experience, compliance levels, and risk management. Enterprises should align their platform capabilities with organizational goals to maximize business impact and achieve long-term success

- **Foster cross-functional adoption:** Enterprises should prioritize cross-functional adoption, such as aligning IT, operations, and business units to ensure seamless adoption, execution, and continuous automation strategy improvements. Effective collaboration and adoption help ensure that workflows are optimized to meet business objectives and firms can scale them across departments
- **Leverage synergistic technologies/products:** As workflow platforms evolve, enterprises should integrate complementary technologies and products to enhance their overall capabilities. Organizations can unlock new efficiencies by integrating platforms with AI, ML, IoT, or other innovative solutions to automate more complex tasks and drive in-depth insights. This synergy enables enhanced decision-making, greater scalability, and more adaptive business processes aligning with evolving market demands

Role of third-party providers as catalysts

In enterprise workflow transformation journeys, partnering with a third-party provider has become a strategic decision for organizations aiming to accelerate their initiatives and maximize their investment value. Providers bring extensive implementation experience, in-depth technical expertise, industry insights, and specialized talent at scale; these resources extend beyond typical workflow automation platform implementations. Thus, providers serve as catalysts, helping businesses bridge capability and technology gaps while driving innovation and enabling sustainable growth.

“Partnering with third-party providers has become essential for accelerating our automation initiatives and fostering innovation. They bring the right talent at the scale we need. We have also moved to an outcome-based engagement model, holding them partially accountable for delivering results.”

– Chief Information Officer, a US-based financial services company

What do third-party providers bring to the table?

While workflow transformation solutions are vital for enterprises' digital transformation initiatives, not all enterprises can effectively develop and maintain these solutions in-house. By leveraging third-party providers, firms can refocus on their core business rather than struggling to assess readiness and establish a roadmap to attain the desired goals, leveraging third-party providers.

Now, we discuss some key reasons why enterprises opt for third-party providers.



Operational costs

Enterprises choose outsourcing to drive workflow transformation in a defined budget. With onshore/offshore options and cross-skilled talent scale, providers help deliver business value and optimize costs.



Industry best practices

As businesses grow, they face challenges in managing increasing data volumes, adapting to dynamic customer and employee expectations, and delivering faster RoI. Third-party providers, leveraging their experience and in-depth technical and domain expertise, introduce industry best practices to help enterprises streamline operations and optimize business outcomes.



Expanded technology scope

Providers bring innovation through their digital ecosystems, investing in specialized IPs, tools, and accelerators tailored to specific use cases. These ecosystems speed time-to-market and offer enterprises plug-and-play capabilities, implementing advanced solutions quickly.



Performance- and outcome-oriented results

Several enterprises lack robust in-house mechanisms for periodically assessing their automation systems, leading to system breakdowns and reduced business efficiency. Mature enterprises rely on providers to implement tested governance frameworks that proactively mitigate platform and operational risks, ensuring sustained performance. Additionally, many enterprises hold providers accountable for mapping outcomes with focused technical and business KPIs.

"We had several disparate systems, including over 50 ticketing systems, significantly hindering our overall operational efficiency. To address this challenge, we partnered with a specialist service provider to conduct an in-depth assessment of our workflow maturity. The provider maximized value realization from existing capabilities while driving value creation through strategic, targeted investments. This partnership gave us insights into our investment priorities and accelerated our workflow transformation journey."

– Senior Data and Automation Manager,
a large telecommunications group

Conclusion

Enterprises are increasingly investing in workflow automation as part of their broader transformation strategies to enhance operational efficiencies and improve user experiences. Organizations can gain a competitive edge, close technology gaps, and capitalize on advanced, best-in-class workflow automation platforms to drive innovation and improve business performance by automating IT and non-IT workflows.

However, despite significant investments and strategic objectives in workflow platforms, several enterprises have failed to reap the expected benefits and proactively seek to increase value from their current workflow platform investments. To maximize the RoI and value from their current workflow platform investments, enterprises must leverage a well-thought-out strategy:



Assess the current workflow platform maturity and value realized

The first step is to comprehensively assess the organization's workflow platform maturity and the value it has realized so far. Enterprises can identify gaps, inefficiencies, and improvement opportunities by evaluating the platform's technical maturity and the value it has generated for business, cost, and operational impact. This diagnostic phase offers a clear understanding of where the organization stands and highlights high-potential areas for future investment.



Maximize value through value optimization and value addition strategies

After maturity assessment, enterprises should adopt a two-pronged approach to maximize the return on their workflow platform investments. Value optimization refines and improves existing workflows to achieve higher efficiency, and value addition enables investing in new technologies or expanding automation into additional business functions. Together, these strategies ensure that enterprises make the most of their current platforms and are in a position to innovate and scale as businesses evolve.



Leverage providers to drive and partially own RoI

Engaging with the right providers is essential in accelerating workflow automation success. Providers bring specialized knowledge, industry expertise, talent scale, and differentiated IP assets that enhance existing workflows and offer a competitive edge. By strategically partnering with these experts, enterprises can optimize their workflow platforms effectively and share the risk and benefits partially, driving faster and more impactful RoI.

A comprehensive approach to workflow automation, starting with clearly assessing current capabilities and value realized, followed by value optimization and strategic addition, and supported by focused service partnerships, ensures that enterprises maximize their investment value and position themselves for sustained growth and innovation.



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