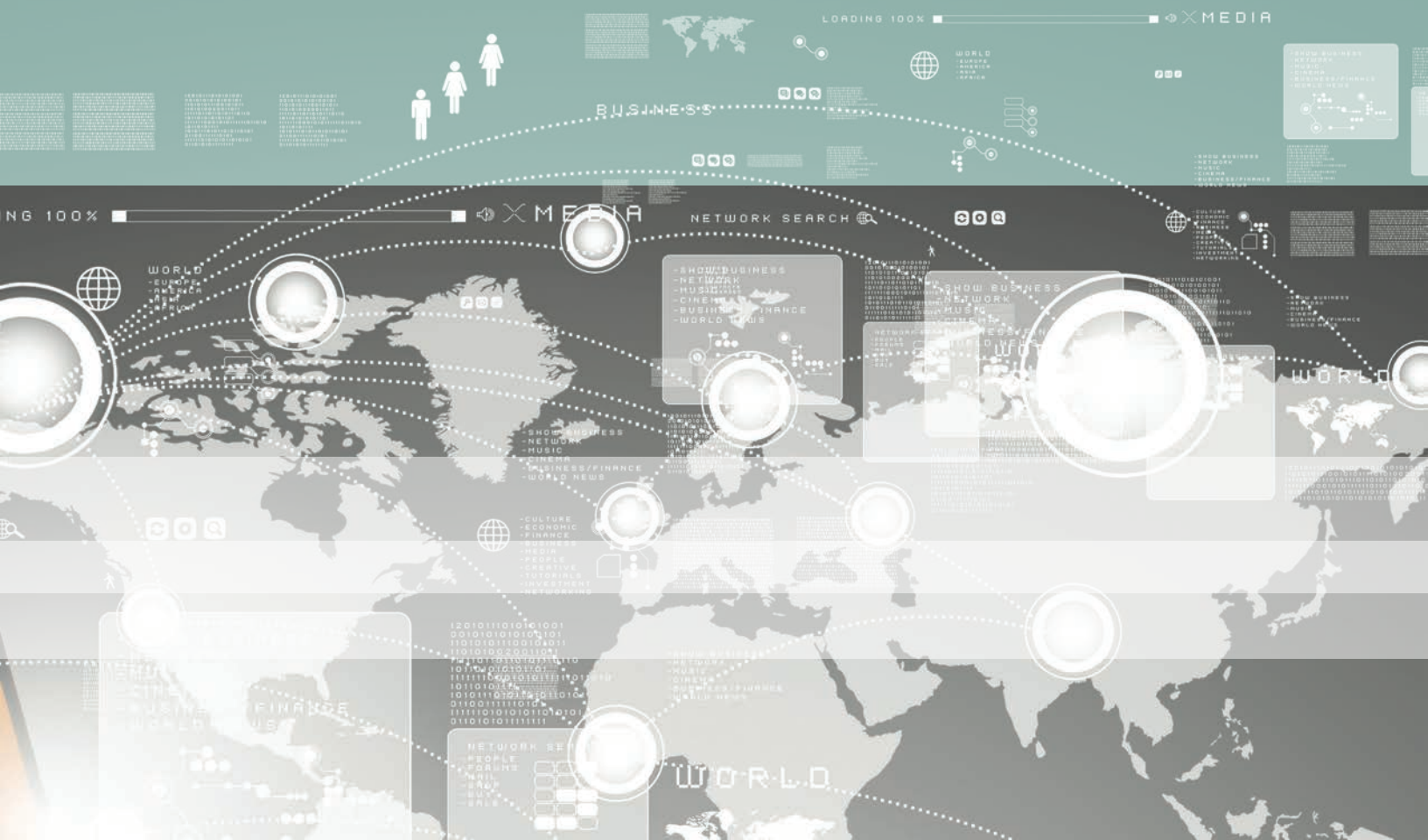


Conversational Intelligence Intelliview

Evaluating Eleven Firms That Surface Insights from First Party-Data



 **opusresearch**



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Conversational Intelligence has taken on first-order importance among customer experience, contact center, and Digital Transformation professionals as a fundamental business asset. Successfully leveraging NLP and AI-infused analytics to capture and analyze customer conversations is improving sales and marketing campaigns, customer experiences, and employee productivity. In this document, Opus Research evaluates the products, services, positioning and potential of eleven firms that show leadership in helping enterprises make the most of Conversational Intelligence, i.e. the value of conversational analytics derived from chats, phone calls, and voice discussions with both live and virtual agents.



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Key Findings

Culling insights, action items, and other triggers from the conversations between companies and their customers or prospects have taken on heightened importance over the past fifteen months of pandemic-driven lock-down. In this document, Opus Research evaluates the products, services, positioning, and potential of eleven firms that show leadership in helping enterprises make the most of Conversational Intelligence, i.e. meaning derived from the chats, phone calls and voice discussion with both live and virtual agents.

Our analysis is informed by the following:

- First-party data is the ideal basis for understanding the true “Voice of the Customer” and is fundamental for every company pursuing a customer-centric strategy.

- Customers are more comfortable than ever using self-service by employing automated assistants and are calling on those “bots” to do more. In addition to Q&A and intelligent routing, they expect their intelligent virtual assistants to be able to recognize, or even anticipate, the purpose of their call.

- Chatbots, voicebots and other Intelligent Assistants have been called upon more frequently to complete increasingly complex sets of tasks on behalf of both customers and employees. This requires them to understand and rapidly respond to natural language input.

- Both virtual assistants and live agents are best informed by a panoply of technologies to capture conversations, rapidly recognize (or even predict) the intent of each contact, and trigger responses based on a dynamic array of information or intelligence ingrained in call recordings, chat transcripts, product documentation, and the dynamic output of automated systems and processes. Opus Research calls the content of these sources or repositories “Conversational Intelligence” (CI).

- CI has taken on first-order importance among Customer Experience, Contact Center, Marketing, Product Management and Digital Transformation professionals, as well as C-Suite execs. Solution providers start with call recordings or chat transcripts, subject them to AI-supported analytics, augment them with related metadata for context, and transform them into the foundation for successful customer experiences and improved employee productivity.

Whether they are dealing with an intelligent virtual assistant or an agent/advisor in a contact center, callers expect to benefit from resources in the “back office” or “in the cloud” that provide consistently correct answers, recommendations or actions 24/7/365 at a high scale. That moves the center of gravity in automation and self-service efforts from shallow “conversational user interfaces” to more useful automated assistants or agents. The difference is that they are informed by an amalgam of resources that Opus Research calls “Conversational Intelligence.”

Conversational AI Infuses Sales, Marketing, and Support

All businesses face organizational and technical challenges as they try to align sales & marketing, increase revenue, and provide better visibility into customer behaviors and insights. Successful Conversational Intelligence initiatives promote collaboration, accelerate sales, enhance employee productivity and job satisfaction, enable agent training, improve chatbots and intelligent assistants, and provide a defined competitive advantage.

Conversational Intelligence has important roles to play in qualifying leads and increasing the productivity of salespeople. Pre-sales and sales assistants provide important functions for live reps, such as scheduling sales calls, composing and delivering follow-up emails and other activities to transform leads into qualified customers. The overall objectives are to:

- Expand pipeline and grow revenue
- Improve business processes and accelerate opportunities
- Make appointments
- Minimize repetitive tasks and improve job satisfaction
- Identify what customers, prospects are talking about
- Improve sales outcomes / sales performance
- Competitive differentiation
- Optimize sales approach to deliver better CX
- Decrease in the percentage of follow-up calls
- Provide B2B sales coaching

Firms offer technologies that enable companies to capture conversations and detect the “triggers” that inform marketing or sales personnel to help each individual along the continuum – from search and discovery to the selection of items and brands, and, ultimately, to checkout. CI informs processes that:

- Enable predictive routing
- Provide insights into marketing & advertising efforts
- Create a personalized, cross-channel customer experience
- Support data-based decisions to improve digital marketing performance
- Show which channels, campaigns, and creative driving high value
- Surface new customer insights, proactive notifications
- Deliver insights into business processes, platform performance and ROI optimization

Many large, sophisticated enterprises and brands have invested in computing resources that monitor customer interactions (call center recordings, chat transcripts, etc.) to detect patterns that correlate with successful interactions or detect when companies must take remedial action. Their purposes are to:

- Enable improvements in customer experience, retention, operations
- Interpret VOC feedback
- Accelerate and improve automation (e.g. inputs/training for bots, IVR flows, call dispositions/summaries)
- Detect root cause analysis of failures
- Provide real-time or near-real-time input for better outcomes, reduced agent training
- Enable supervisors, trainers, coaches, and analysts to populate forms, annotate transcripts
- Transition from viewing CSAT results to listening/reviewing recordings or transcripts
- Provide insights to contact center personnel, analysts and other company team members.

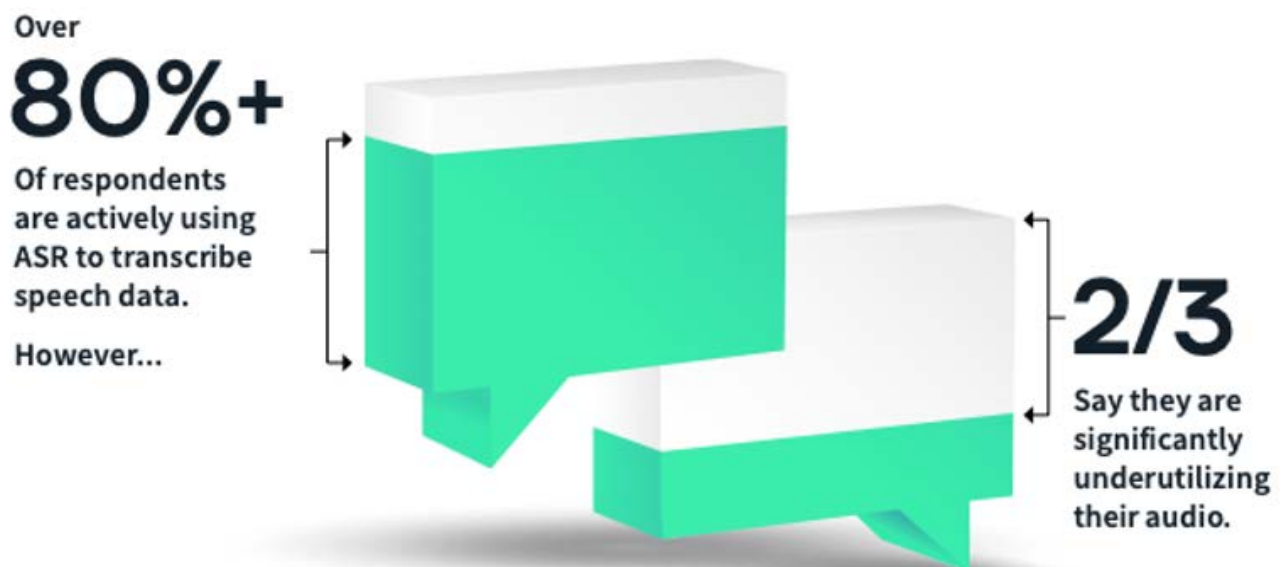
Conversational Data Is an Underutilized Asset

Opus Research recently fielded a survey of 400 decision-makers seeking to assess how businesses view speech recognition technologies used to capture, transcribe, and analyze conversations. The specific areas of interest centered on current and planned uses of “automated speech recognition” technologies and how capturing speech data aligns with a company’s enterprise strategy.

The 400 respondents represented eight vertical industries (Banking / Financial Services, Contact Center, Government / Public Sector, Healthcare / Medical Services, Insurance, Retail, Telecom, Travel & Hospitality, Media & Entertainment). The survey sought to understand how treating all conversations as Conversational Intelligence enables businesses to maximize self-service and support digital transformation goals.

In Figure 1 below, an overwhelming majority (80%) actively transcribe speech data, but two-thirds of these organizations fail to fully leverage conversational assets for business objectives. This data indicates that many companies understand there is a treasure trove of knowledge hidden within their unstructured speech data but don’t know how to make the best use of it.

Figure 1: Percentage of Businesses Underutilizing Conversational Assets



Who Should Use This Document?

The value of this report in carefully evaluating Conversational Intelligence solution providers is based on the criteria described below. The criteria carry different weights depending on the core role of the executives involved in decision making. In general, those who should care about optimizing Conversational Intelligence data and technologies include:

- Executives in charge of digital marketing and transformation should pay close attention to solutions that save time, money and resources involved in monitoring and extracting meaning from conversations over voice, text messaging, and other digital channels.
- Contact center and customer experience administrators will find value in solutions whose results lead to cost savings from greater efficiencies without decrementing key measures of customer satisfaction.
- Chief revenue officers and sales executives will attach greatest importance to end-to-end solutions that detect and identify the personnel or conversations that represent speed bumps in your sales processes.
- Marketing executives look for solutions that generate insights that help hone advertising spending, promotional efforts, and channel strategies.

Selection of Conversational Intelligence Solution Providers

The 11 solution providers evaluated in this report responded to a request for information about their firms and the products, services and capabilities they bring to the marketplace. We believe their offerings define current state-of-the-art capabilities for enterprises evaluating options for enabling more services and complete more tasks on behalf of customers.

Here is a summary of the criteria Opus Research employed for evaluating respondents:

- **Candidates come from adjacent yet contiguous lines of business** – Spanning Call Recording; Automated Speech Recognition; Natural Language Processing; Machine Learning; Speech and Text Analytics; and Call Tracking.
- **Enterprises seek explicit business solutions** – Including speed-to-value, low-cost points of entry, reporting capabilities that map to familiar Key Performance Indicators (KPIs) and well-defined integration points with backend IT and support systems.

Categories Under Analysis

In this document, Opus Research analyzes the product and service offerings of a select group of solution providers whose suites of products and services help brands make the most of Conversational Intelligence. It is an emerging opportunity area and participants come from firms that specialize in platform features to capture, record, transcribe, and analyze conversational data and intelligence. Specifics can include:

- Inputs (e.g., Voice streams, recordings, transcripts, email, SMS, messaging platforms)
- Outputs (e.g., Categorizations, training models for bots, scripts, alerts, scorecards, quality and compliance, etc.)
- Functions (e.g., Record, ingest, transcribe, analyze, trigger)
- Capabilities (e.g., ASR, Transcription, NLP, ML, Tone Analysis (emotion detection), dialog models, real time agent guidance, reporting and analytics.)
- Tools (e.g., Developer tools, SDKs, performance dashboard.)
- Metrics Supported (e.g., Accuracy, speed, scale, cost, CSAT, ROI, customer retention)
- Impact Areas (e.g., Self-service, contact center efficiency (routing), sales , marketing, compliance, product development, security, authentication, personalization, “back office”, executive suites)
- Partnerships (technology, go-to-market)

Figure 2: Example of Vendor Evaluation By CI Category

Inputs	Outputs	Functions	Capabilities	Tools	Metrics	Impact	Partners
✓+	✓+	✓	✓	✓-	✓	✓+	✓

- Check plus ✓+: exceeds standards
- Check mark ✓: solid standard offering
- Check minus ✓-: room for improvement

[NOTE: This document (Appendix A) provides brief profiles of each company’s Conversational Intelligence offerings and also positions them on an “Intelliview Landscape” (below) based on the strength of their product offerings and market positions.]

Opus Research gives the highest rankings to solution providers able to:

Breadth of Service:

- **Capture** (or ingest) user-generated content: Referring to “first-party data” which includes call recordings, transcriptions, chat logs, emails and other forms of “unstructured data” originated by specific individuals. It has been redefined of late as companies merge second-party info from CRM systems or mobile carriers and third-party data purchased from credit bureaus and aggregators like Adobe.

Scoring: Left of scale is voice only. Moving right: ingesting conversational data and metadata from a number of sources.

- **Analyze:** Starting with categorization or rapid recognition of the intent of a conversation. Solution providers now focus their analytic engines on sentiment analysis, biometrics-based authentication and other tools for establishing trusted, secure and effective conversations.

Scoring: Left of scale: recognizes intent and scores sentiment based on word spotting and basic analytics. Moving right: means they have biometrics to apply other pattern recognition engines. Special attention is paid to labor- and cost-saving associated with minimizing human input when categorizing calls.

- **Apply:** Triggering specific actions based on analysis of captured conversations. A basic function is to ascertain the purpose of a phone call and route to the proper resource. Other real-world examples include providing live agents with scripts regarding the next-best action during a voice- or chat-based conversation.

Scoring: Left of scale is basic functionality in contact centers. Moving right adds deep integration with systems that also inform other departments and work-flows.

- **Learn:** Establishing a feedback loop that enables an automated system to refine its responses over time. It has become almost self-evident that “your best agents” or other subject matter experts are required to supervise the learning activities.

Scoring: Left of scale is the simple application of machine learning (ML) with minimum human assistance to provide for constant improvement. Green expedites learning in two different ways. It provides an explicit role for subject matter experts as well as customers to identify best answers. It also closely links outcomes to specific business outcomes.

Intelliview Maps for Conversational Intelligence Providers

To assist decision makers in evaluating competing solutions providers, Opus Research represents their positioning in a series of "Intelliview Maps." In reference to Figures 3, 4, and 5 that follow, we have arrayed the solution providers to relative market positioning and success. Each axis of the Intelliview Map reflect two, all-important factors:

- **Product Completeness/Flexibility** – Providers receive the highest assessments of “completeness” for services, functions and features.
- **Market Presence** – This metric captures how established leading firms are in reach, scalability and strategic potential for servicing current and evolving technology requirements in Conversational Intelligence sales, marketing, support and beyond.

The size of the ovals represents each vendor presence based on company-provided or publicly available information of current financial strength (revenue, profitability, financial banking, longevity and size of customer base).

The colors of the ovals indicate which of two categories a vendor is assigned. They are defined as follows:



Capture/Analysis: A group specializing in ingestion and analytics of the content of conversations. Content can be in the form of call recordings (for voice channels) or transcripts of chats or messages between individuals and agents or advisors.



Applied CI: A cohort of solution providers that employ Conversational Intelligence to inform actions that support the goals of business units, primarily sales acceleration, marketing/targeting, contact center efficiency and general operations.

Below, Opus Research provides graphics that depict the relative size and positioning of solution providers in specific domains for Conversational Intelligence.

Figure 3: Leaders in Conversational Intelligence: Capture & Analyze

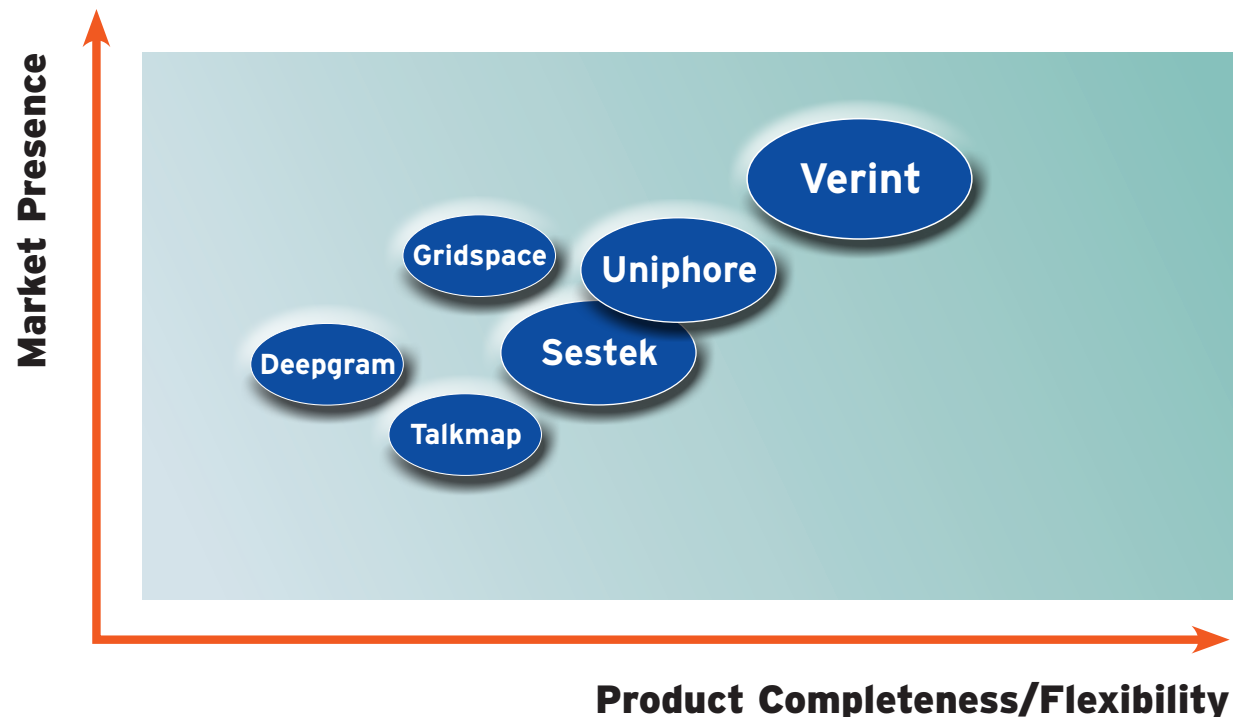


Figure 4: Leaders in Conversational Intelligence: Applied CI

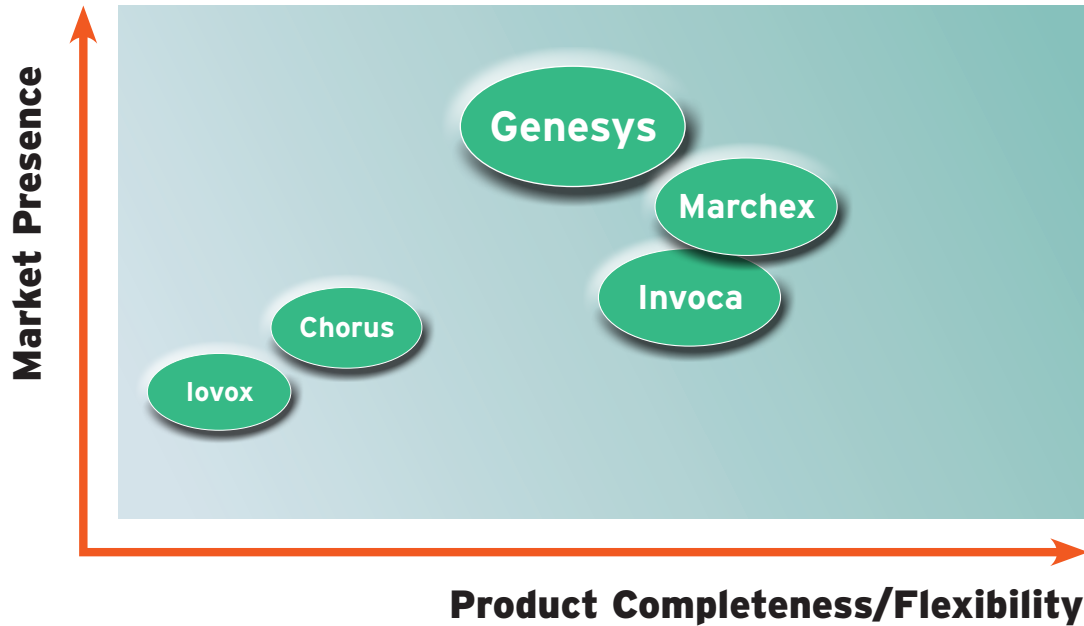
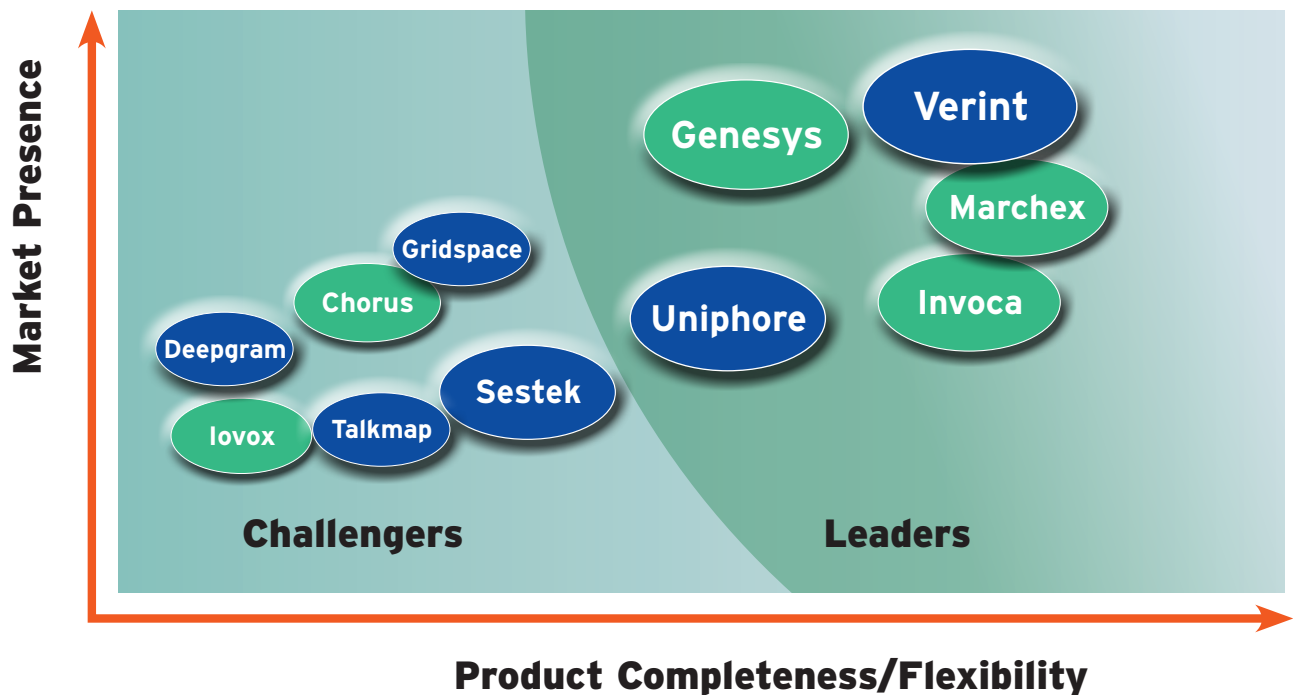


Figure 5: Intelliview for Leading Conversational Intelligence Solutions Providers



VERINT

							
Inputs	Outputs	Functions	Capabilities	Tools	Metrics	Impact	Partners
							

Verint

- Year business started: 1994
- Investment/Funding: NASDAQ (VRNT) and \$400M Apex Partners investment
- Number of employees: 4500
- Revenue: Fiscal year ended January 31, 2021 revenue of \$1.28B prior to cyber intelligence business spinout of Cognyte (CGNT)

Core Product Offering(s):

- 1) **Verint Interaction Insights:** Speech Analytics, Text Analytics, Desktop Process Analytics
- 2) **Real-Time Work:** Real-Time Agent Assist
- 3) **Self Service:** Intelligent Virtual Assistant, Voice Self Service
- 4) **Experience Management:** Enterprise Experience, Digital Behavior Analytics, Digital Experience, Interaction Experience, Predictive Experience
- 5) **Quality and Compliance:** Automated Quality Management

Enabling Technologies:

- **Speech Analytics:** Verint's Speech Analytics solution utilizes machine learning in all its flows, from language model building and adaptation through the speech recognition and speech analytics applications, indexing and post-call semantic intelligence. The Speech Analytics solution contains machine learning algorithms, both semi-supervised, e.g., the speech recognition engine, and unsupervised, e.g., the Semantic Analytics engine. There are many feedback loops to reinforce the learning process, e.g., Phonetics Boosting and Language and Accent Customization. Another semi-supervised capability is Continuous Accuracy Tuning, which enables users to annotate engine transcriptions to customize specific terminology and improve accuracy.
- **Speech Analytics Model Building:** The process of building a language model includes training using ML technology based on Deep Neural Networks (DNN). DNN models have helped provide most accurate transcription compared to other models.
- **Text Analytics:** Verint Text Analytics utilizes ML and NLP technology to extract topics, relations, emerging trends and sentiment from textual interactions such as chat and email. The engine leverages both supervised and unsupervised techniques to retrain on customer data, once deployed. Sentiment is applied at the utterance and interaction level, and presented in a unique conversational flow. Verint includes Interaction Analytics workspace that combines KPIs, unified themes and trends from both voice and text interactions into a unified view.
- **Intelligent Virtual Assistant – Self Service:** Verint's intelligent self-service solutions include AI-driven natural language understanding for fully automating voice and chat interactions. Verint Intelligent Virtual Assistant provides market-leading conversational AI

with capabilities that range from Do-It-Yourself to the highest-quality, expertly managed conversational AI to drive strategic business objectives by contextually supporting customer journeys and employees during interactions.

- **Real-Time Agent Assist:** Verint Real-Time Agent Assist leverages Verint DNN model to generate transcription in Real-Time with the best accuracy results. The models are built and validated by Verint Research to guarantee best results. The solution includes a unique combination of linguistic, acoustic and desktop triggers to provide the full context of a live interaction for most accurate trigger identification. These triggers are fed into Verint's Work Assist application providing real-time guidance and assistance to live agents driving better call outcomes. The solution includes a set of APIs to leverage additional actions including real-time contextual knowledge.
- **Experience Management:** Verint Experience Management (XM) enables the collection of both the qualitative view of the customer experience as well as the attitudinal and contextual data that power real-time automation, AI and ML. All XM modules can leverage XM Experience Assist to intelligently link survey and feedback responses to Knowledge Management, IVA and other Verint products to create intelligent response capabilities that use both AI and the contextual data collected from the XM solutions.
- **Automated Quality Management:** AQM can fully and accurately automate evaluation and assessment of up to 100% of all interactions without requiring human assistance. This evaluation combines employee activity on the desktop with the conversation between the employee and the customer to provide a complete view of performance and behavioral compliance.

Platform Features:

Omni-channel capabilities	A single pane of glass, including management dashboard with trends and themes from multiple channels, interaction KPIs, etc. On the digital side, text channels supported are surveys, emails, social, chats and chatbots; voice side: calls and IVR feedback.
Post-call (historical) analysis	Discovery of trends and themes, analysis of interactions, interaction KPIs and metrics, category building and tracking, root cause analysis, sentiment analysis, reporting, charts, transcription and tuning.
Real-time analysis	Real-Time Speech Analytics allows users to create real-time alerts, categories, API triggers and keyword spotting. Real-Time Agent Assist can "listen" to voice interactions as they happen and automatically identify opportunities to guide interactions toward better outcomes.
Forensic search	Forensic search is supported; users can perform keyword searches powered by AI predictive search, create complex queries and personal and shared saved searches, including or excluding data, filter on metadata, view all results in the same interface, share reports and export items with various formats.
Query building	Enhanced query-creating ability includes unique Boolean operators such as AND, OR, NOT IN, NEAR, START, END, C: (customer) A: (agent) etc. and user-defined metadata filters.
Search, retrieval and playback	Users can search and retrieve interactions and play them back with a unified visual map of every interaction with the full synchronized transcription, searched terms, interaction KPIs, desktop application, automated and manual annotations and category hits.
Speaker-separated analysis	Speaker-separated analysis is supported and visualized for both mono and stereo recordings.

Conversation analytics	The following conversational analysis metrics are supported in the product: average duration, average silence time, average employee talk time, average customer talk time, average talk-over time, average number of holds, average total hold time, average number of transfers. Silence Time and Overtalk can also be detected in real-time to assist employee while serving customer.
Transcription	Transcription of interactions is deployed in over 80 different languages and dialects. Verint has a dedicated team for building and maintaining language models. Verint is capable of exporting transcription both in real-time and offline in several file formats.
Emotion detection	Emotion detection is supported per interaction and comes as an out-of-the-box category with Speech Analytics. The user can finetune and/or download from Verint's Marketplace. The system provides highlights in the player regarding the emotional part of the call for quick navigation within the call.
Sentiment analysis	There are five levels of sentiment, from very negative to very positive. Corresponding colors range from green to red. The system highlights the terms and phrases that have sentiment impact. Sentiment identification is based on ontology, machine learning algorithms, categories and metadata.
Real-time agent guidance	Real-Time Agent Assist is an innovative solution that can "listen" to voice interactions as they happen and automatically identify opportunities to guide interactions toward better outcomes for your customers and organization.
Language support	Over 80 language models deployed with ability to tune and refine.

Featured Use Cases & Case Studies:

Contact center	Handles all relevant contact center KPIs to decrease costs, improve processes, improve CX, improve NPS/CSAT, measure Sentiment e.g., reduce AHT, silence time, repeat calls, etc. QM leverages Da Vinci Engine transcription for automatic evaluations of 100% of interactions. Verint XM leverages to present customer's journey across channels and unify VoC KPIs.
Back office	Leverages analytics to capture customers' complaints about mistakes and errors created by the back office and fixes the back-office processes accordingly. Leverages Desktop Process Analytics to enrich Analytics with information from employee's desktop activity.
Collections	Leverages analytics capability to find which scripts are better for higher ratio of successful collections. Also leverages script adherence such as "Mini-Miranda" to ensure employees are adhering to compliance.
Fraud/security	Learns the behaviors of previous fraud calls and uses them to predict fraud on new calls; leverage voice biometrics to decrease fraud; uses Interaction Insights and/or AQM to validate employees are utilizing proper identification, verification processes.
Compliance/risk	Uses Analytics to validate employees are utilizing proper terminology/avoiding statements that can put organizations at risk. AQM is capable of scoring 100% of employee interactions and report and dashboard on employees that are out of adherence.
Sales	Leverages analytics capability to find scripts and terms that are generating higher success ratios. Able to compare automatically prominent terms/phrases and meta data of successful sales vs unsuccessful sales calls.
Marketing	Uses Analytics to validate that employees are selling new marketing campaigns and to measures campaign effectiveness by analyzing trends. Using Analytics, organizations are capable of capturing customer's feedback of marketing campaigns and finetuning messaging and perception.

Product development	Uses Analytics to capture feedback and suggestions from customers that can be implemented in products and services. Customers share both positive and negative feedback. This information is then shared with the Product Management team
Executive suite	Uses Interaction Insights, AQM, Scorecards and Experience Management (XM) to define C-Level KPIs, which can then be automatically reported, scheduled and presented in a dashboard.

Track Record, Partnerships, & Customer Base

- **Go-to-Market:** Market Research – attending several activities and events; Migration to Verint Cloud; Customer Outreach Program; Marketplace; User Group; Verint Engage event; Partners; Elevate Program; Press Releases; CSAT Survey
- **Affordability:** 250 seat contact center On-Premises Deployment: Total 1st year cost ~\$367,250 - \$392,250; 250 seat contact center Cloud-Based Deployment: One-time cost ~\$125,000-\$150,000; Total annualized ongoing cost ~ \$255,000
- **Speed to deploy:** On-premises: 1 - 3 months; Cloud/SaaS: 0.5 - 1.5 months
- **Verint Business Managed Services** – Verint provides a multi-phase approach to a Business Managed Services engagement. The five phases are: Discovery, Planning, Implementation, Onboarding and Partnership.
- **Go-to-market partners:** Avaya, Five9, British Telecom, Telus, Activeo, Sabio, Odigo, NTT Group and more.
- **Technology partners:** Amazon, Five9, Google, Avaya, British Telecom, Adtech.

Future Vision & Roadmap:

- 1) **Verint Da Vinci transcription engine** - Introduction of an AI-enabled transcription engine to deliver enhanced market-leading accuracy and performance.
- 2) **Enrichment services and APIs** - Enhancements to sentiment detection, a redaction API and an intent API.
- 3) **Verint Marketplace enhancements** - Additional speech and text categories, AQM rules, real-time triggers, reports, and support for multiple languages.
- 4) **Real-time agent-assist enhancements** - Based on input from customers additional out-of-the-box linguistic triggers will be added, for example specific compliance statements, sales opportunities etc. Additional acoustic and application triggers also planned.
- 5) **Machine Learning Driven AQM** - Innovation of Machine learning driven AQM. AI/ML will use analysis of the interactions and previous evaluations to automatically suggest auto-scoring to increase accuracy, reduce effort for start-up and tuning of the solution.

Key Differentiators:

- 1) **Broadest Customer Engagement Platform** - Verint's holistic and open customer engagement platform powered by da Vinci AI combines the broadest solution set with proven and quantifiable ROI for the world's leading organizations. Automatically identifies new customer needs and their employee actions.
- 2) **Highest Rated and Most Used Conversational Intelligence Platform** - Consistently rated as the best solution in the market for multiple years. With over 2000 customer deployments globally in over 80 different languages and dialects it is by far the most used conversational intelligence platform in the world.
- 3) **The Most Open and Flexible Platform Supporting Digital and Cloud Transformation** - Verint's cloud and on premises platforms, open API and engagement data management approach allows for the ultimate flexibility for organizations to take advantage of the latest innovations, with existing investments and ecosystems; Unify all their conversational and interaction data in a single unified platform.



About Opus Research

Opus Research is a research-based advisory firm providing critical insight and analysis of enterprise implementations of software and services that support multimodal customer care and employee mobility strategies. Opus Research calls this market “Conversational Commerce” with tailored coverage and sector analysis that includes: Self-Service & Assisted Self-Service, Voice & Call Processing, Web Services, Personal Virtual Assistance, Mobile Search and Commerce and Voice Biometrics.

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