Ovum Decision Matrix: Selecting a CRM Solution for Telcos, 2014–15

SUMMARY

Catalyst

Telcos need to provide the best possible service to ensure they hold on to their existing customer base. As a result, telcos are investing in customer relationship management (CRM) solutions that will help them provide proactive services to reduce churn, improve service effectiveness, provide a single source for customer data, and unify marketing and promotional communications. Although CRM is a mature market from an enterprise software application perspective, Ovum's recent ICT Enterprise Insights survey shows that telcos globally are upgrading their CRM technology to enhance the overall customer experience and integrate digital channels, particularly social media. As a result, the competitive landscape for CRM in the telecoms sector has become crowded with a large and diverse set of solution providers, making the selection process difficult for telcos.

This Ovum Decision Matrix examines the competitive dynamics for CRM in the telecoms market, and provides telcos with analysis to inform the selection process based on a product's strength, market impact, and ability to support various aspects of a telco's CRM. This is essential reading for telco executives looking to invest in a CRM solution over the next 12–18 months.

Ovum view

Competition among CRM software vendors has intensified in last three years, with major players competing internationally for broader market penetration and more widespread adoption within the telecoms vertical. Vendors are acquiring niche companies or investing internally to add marketing, social media, mobile solutions, analytics, cloud options, and Big Data capabilities to their core CRM platform. Horizontal CRM vendors such as SAP, Oracle Siebel, Salesforce.com, and Microsoft Dynamics CRM, and telco-specific vendors such as Amdocs and AsiaInfo-Linkage (AsiaInfo), have pulled ahead of the pack with innovative product development strategies and verticalized CRM product suites for the
telecoms industry. Oracle Siebel, Amdocs, and Salesforce.com have mature and sophisticated offerings and are the overall leaders in the CRM market for telecoms. Ovum anticipates that CRM will continue to be an exceptionally competitive market over the next five years.

The value of CRM tools for telcos rests with their ability to help telcos execute their customer relationship management strategies across various customer touchpoints and throughout the customer lifecycle. Accordingly, a decision to purchase one solution over another will be based on a broad array of factors, including the degree of alignment between the solution’s features and functionality and the specific objectives of a telco’s customer experience management strategy. As a result, Ovum’s designations of vendors as leaders, challengers, and followers should be interpreted only within the context of a telco’s specific solution requirements.

This Ovum Decision Matrix (ODM) takes a close look at the competitive landscape for CRM in the telecoms market. While the list of included vendors is not intended to be exhaustive, Ovum believes that is representative of the market, offering readers an in-depth analysis of the leading vendors in the telecoms sector, as well as an illustrative view of some unique and innovative approaches.

Overall, vendors are making tremendous progress with sophisticated capabilities built specifically for the telecoms industry. The telecoms vertical's immense growth potential makes it equally attractive to large horizontal CRM companies and those already in the sector supplying other telecoms software and solutions. All vendors analyzed in this ODM have their eyes set on a broader CRM prize than simply the sales, marketing, and service trio. This is manifested in two ways: first, in the continued investment by all vendors; and second, through the development of flourishing partner ecosystems. Vendors continue to launch products and integrate different customer channels, such as e-commerce, digital marketing, enterprise social networking, and community management, with realtime and predictive analytics to support a more customer-centric, cross-channel, and context-aware customer experience.

As more vendors enter this arena, the CRM selection process for telcos will become increasingly complicated. However, the increase in complexity is partly the result of stronger product offerings with broader functionality, which is good news. The selection challenge now warrants a longer and more detailed evaluation process of both telco requirements and vendor offerings.

Key findings

- Oracle Siebel, Salesforce.com, and Amdocs provide the most sophisticated and advanced CRM functionalities for telcos. These vendors are the market leaders of this ODM, providing a strong breadth of functionality, commitment to the telecoms industry, industry-specific applications, and well-designed user interfaces.

- Microsoft Dynamics CRM, SAP, and AsiaInfo offer compelling solutions that telcos should consider, particularly when factoring in their unique needs or contexts that may not be met by the leading vendors.

- Oracle Siebel is the overall leader with the highest scores in the three categories.

- Oracle Siebel and Amdocs are leaders in the technology assessment category. Oracle Siebel is the leader in the strategy assessment category, closely followed by Amdocs and Salesforce.com. Oracle Siebel and Salesforce.com have the highest scores in the market impact category.
Advanced Big Data analytics, social media management, and mobile self-service capabilities have emerged as key differentiators for telco CRM solutions.

**MARKET DRIVERS AND DEVELOPMENTS**

**CRM is set to cross multiple channels**

The majority of telcos prioritize using CRM solutions to obtain a single view of the customer and provide proactive care. Ovum’s *ICT Enterprise Insights – Global: Telecoms* survey found that multichannel integration is a major priority for telcos in 2014. More than half the telco respondents highlighted that they would increase their investment in multichannel integration considerably in the coming months.

**Figure 1: Telcos IT spending plans for telco software, 2013**

Source: Ovum ICT Enterprise Insights: Global Telecoms
Vendors serving the telco CRM space have made huge investments in creating seamless workflows and business processes to integrate data from various touchpoints, but the progress and maturity of vendor offerings varies widely. Vendor product strategies must evolve to offer multiple channels to their customers, adjust their channel mix to customers’ communication preferences, and strike a smart balance between automation and human interaction.

**Uptake in cloud-based CRM**

The telecoms industry is highly regulated with strict data security and data privacy laws, and telcos are very possessive and protective about their customer data – their most strategic asset. As a result, telcos have been very apprehensive to deploy cloud-based CRM systems. Issues such as telco aversion to hosting confidential data on public clouds may take time to dispel, but telcos can no longer ignore cloud CRM as a business and consumption model. Cloud-based CRM is gaining traction as telcos seek to replace legacy systems with easier-to-deploy alternatives, add new applications, and provide alternative complementary functionality. The success and uptake of Salesforce.com among telcos clearly highlights this trend. In addition, all leading CRM vendors now offer various on-premise and cloud-based deployment options to telcos. Cloud-based deployment overcomes many challenges that telcos face around flexibility, agility, and scalability of CRM systems.

**Increased use of Big Data analytics tools**

Telcos cannot achieve better services without an intelligent and integrated approach in their operations. This explains why technology that enables more effective analysis of customer, network, and operational information has become a major focus for telco providers, and therefore suppliers. As the amount of accessible customer information increases, so does the need to use intelligent tools such as Big Data analytics to obtain actionable insights in order to improve overall customer experience management. Strong vendor activity is evident, with vendors increasingly integrating Big Data analytics into their core CRM platform using sophisticated, telco-specific models. Telcos are using these tools to profile customers, predict customer purchases, provide proactive customer assistance, determine network outages, and determine cross-sell opportunities. For example, in 2013, SAP acquired KXEN to introduce predictive analytics into its CRM offering, and Amdocs announced its Big Data capabilities with the aim of integrating proactive care capabilities into its CRM offering.

**Social and mobile CRM capabilities have taken center stage**

Forward-looking CRM vendors offer comprehensive social media and mobile applications that integrate into traditional CRM processes. The new “social CRM” applications enable telcos to analyze social media interactions to generate leads, resolve service tickets, provide information, and map overall sentiment toward the brand. In addition, most vendors have an opt-in model in which customers can provide their social media identities, such as their Facebook and Twitter accounts, to telcos so that they can map the social profile to the telco’s smart agent desktop and customer database.

Mobility for CRM has increased dramatically over the past few years and will continue to do so. Vendors such as Amdocs, AsiaInfo, and Salesforce.com have introduced sophisticated mobile apps that have empowered customers to monitor their accounts and submit request tickets wherever they may be. Most vendors analyzed in this ODM have introduced mobile applications for all devices.
Integration with billing systems is key

To deliver business as usual with speed, consistency, and efficiency, telcos must ensure their mission-critical processes and systems are optimized and integrated. Telcos require holistic, robust, and agile CRM systems that fully integrate with their billing system. Generally, 80% to 90% of calls to call centers relate to billing, so telcos must ensure their CRM representatives are well equipped with billing data and do not have to juggle multiple business systems to extract the relevant customer information. Telcos are looking for more substantive integration, even to the extent where billing data exists within CRM systems. This would enable them to share important data points, provide communications capabilities, and ensure that valuable relationship or interactional data persists over the course of the entire customer lifecycle. Vendors that provide billing systems have an added advantage, as deploying a CRM system from the existing vendor requires less time in the integration process. As a result, Amdocs, AsiaInfo, Oracle Siebel and SAP are well positioned here.

VENDOR SOLUTION SELECTION

Inclusion criteria

A broad range of solutions fit under the “CRM in telecoms” umbrella, and each vendor defines the space slightly differently. To identify appropriate solutions, we have defined three criteria for a vendor solution to be included:

• The vendor must have significant mid-to-large tier-1 CRM telco customers.
• The vendor’s CRM products must possess significant brand awareness within telcos in multiple geographies.
• The vendor solution must be able to provide a 360-degree customer view across multiple customer support channels.

Exclusion criteria

It is not feasible to do a comparison of all CRM solutions that target telcos, so a few strong contenders had to be excluded. We did not include vendors that:

• solely provide point solutions; solutions known for their strength in a major area, such as customer service or case management, rather than their full suite
• offer only solutions with a significant portion of functionality delivered through third-party products
• show growth in maintenance revenue only.

Methodology

Ovum’s evaluation processes requires each of the vendors included in the research to provide a technical demo and at least one strategic briefing from a senior product/portfolio manager from product development or management teams. We assessed the solutions against three core categories:
• Technical competence
• Strategy assessment for customer support
• Market impact

Each category is subdivided into further criteria, which are described below. Each criterion is given a score between one and 10, where 10 is the highest or most positive score.

**Technology assessment**

CRM solutions cover a broad range of functionality and tools, so Ovum has identified seven key areas of CRM functionality. The criteria are as follows:

- **Interoperability and integration** – the ease and extent to which a technology offering can exist, interface, combine, and work with products, services, and solutions from other vendors, and its ability to integrate across multiple data sources, operating platforms, and applications, both native and third party.
- **Offering maturity** – the extent to which an offering is complete and provides end-to-end CRM solutions. CRM vendors generally offer a range of discrete products, so it is important to consider the maturity of the whole as well as the individual CRM parts.
- **Deployment options** – covers the capability of the solution to be deployed rapidly and maintained, and the various deployment options such as on-premise or cloud-based.
- **360-degree customer view** – the ability to offer an end-to-end and contextual view of data and interactions across all channels.
- **Information delivery** – the ability to create sophisticated and user-friendly dashboards and graphs, and how well the solution supports the notion of “information at your fingertips.” Many telcos excel at data collection, but it is through CRM information delivery that this data becomes actionable.
- **Advanced analytics** – range and depth of predictive and advanced analytics functions integrated in the core CRM platform.
- **Integrated billing** – the solution must ensure that telco representatives are well equipped with billing data and do not have to juggle multiple business systems to extract the relevant subscriber information. Integrated systems ensure that CRM representatives can access all billing data in one location to answer queries promptly, enhancing customer experience.

**Strategy analysis – customer support initiatives**

We assess an offering’s ability to support end users on a scale from one to 10 based on various touchpoints where end users need vendor support, as well as more generic relationship management capabilities. For strategy analysis, we review the capabilities of the solution in the eight key areas:

- **Product quality** – overall functionality and aesthetic appeal of the offering.
- **Professional services** – the extent to which the vendor has a knowledgeable and accessible team of consultants that are able to support product and geographically specific engagements, as well as change management and strategic planning initiatives.
• **Strategy and execution** – a vendor’s CRM strategy and its ability to execute against it. We consider factors such as financial stability, training options, support policies, and maintenance options, as well as deployment services and implementation partners.

• **Ease of use** – intuitive and self-service capabilities of the offering.

• **Mobile CRM** – the extent to which the vendor has a clear and executed strategy for enabling solutions to be delivered to and accessed from a mobile environment.

• **Social CRM** – the extent to which the vendor has a clear and executed strategy for analyzing, responding, and integrating social media interactions into the customer profile.

• **Call center** – how well the agent desktop provides unification with billing, order, service, and financial management systems to gather information and solve inquiries quickly and competently, and how well designed and flexible the user interface, aesthetics, and workflows are.

• **Industry outreach** – how well the vendor engages with telcos to enhance their offerings through industry groups and work groups to help overcome challenges or standardize industry frameworks.

**Market impact**

Market impact is measured across five categories, each of which has a maximum score of 10. The higher the score the greater the positive impact on the global Telco CRM market.

• **Revenues** – global revenues are calculated as a percentage of the market leader’s total company revenues. The percentage is then multiplied by 10 and rounded to the nearest integer.

• **Revenue growth** – each vendor’s revenue growth for the last fiscal year is calculated as a percentage of the growth rate of the fastest-growing company in the market. The percentage is then multiplied by 10 and rounded to the nearest integer.

• **Geographic penetration** – the number of countries in which the vendor has a presence. This number is calculated as a percentage of the market leader’s geographic reach, multiplied by 10, and then rounded to the nearest integer.

• **CRM revenues** – estimates of each vendor’s revenues in the CRM space. These revenues are calculated as a percentage of the market leader’s revenues, multiplied by 10, and then rounded to the nearest integer.

• **Telco CRM revenues** – estimates of each vendor’s revenues in the CRM space from the telecoms industry. These revenues are calculated as a percentage of the market leader’s revenues, multiplied by 10, and then rounded to the nearest integer.

**Ovum ratings**

• **Market leader** – represents the leading solutions that we believe are worthy of a place on most telcos’ technology selection shortlists. These vendors have established a commanding market position with a product that is widely accepted as best of breed within telcos.

• **Market challenger** – solutions in this category have good market positioning, and the vendors are selling and marketing the products well. The products offer competitive functionality and a
good price-performance proposition, and should be considered as part of the technology selection for telcos.

- **Market follower** – solutions in this category are typically aimed at meeting the requirements of a particular kind of customer. As a tier-one offering, they should be explored as part of a telco's technology selection.

**MARKET AND SOLUTION ANALYSIS**

**Ovum Decision Matrix: CRM for Telcos, 2014–15**

Oracle Siebel achieved the highest combined score in this ODM, just leading its peers Amdocs and Salesforce.com. All three are market leaders.

All companies covered in this ODM can be considered CRM leaders, as they all cleared a gating process and merited inclusion. Microsoft is part of the leading pack, but should concentrate on the telco-specific features of its CRM platforms to move up the scale. Microsoft, along with SAP and AsialInfo, are market challengers. Given the maturity of the CRM software market, there are no market followers.

**Figure 2: Ovum Decision Matrix: CRM for Telcos, 2014–15**

![Ovum Decision Matrix: CRM for Telcos, 2014–15](image)

Source: Ovum
Market leaders: vendor solutions

The market leaders in CRM for telecoms are Amdocs, Oracle Siebel, and Salesforce.com. These vendors deliver robust, complete solutions that are able to support a significant portion of telcos’ operations, and they have an established presence in and commitment to the telecoms industry. These leaders gained high scores for market impact, technology assessment, and strategy assessment areas. Ovum recommends that telcos shortlist these vendors when selecting a CRM solution.

Oracle Siebel has the top on-premise solution available for telcos, with a wide array of features that cater to social CRM, mobile CRM, and contact centers. Oracle Siebel provides important multichannel integration across all customer touchpoints to manage the overall customer experience. Oracle Siebel's advanced analytics capabilities are a key differentiator of the product.

Salesforce.com is the top pure-play cloud CRM solution in this space, an enviable segment to inhabit given telcos' increasing comfort with SaaS and PaaS. Salesforce.com offers very strong usability, sales, and partner channel management functionality, as well as strong social and mobile CRM capabilities, including new CRM collaboration functionalities across internal and external stakeholders.

Amdocs is the go to CRM vendor for many telcos because it specifically targets the industry with a broad and maturing portfolio of CRM solutions. Its industry-specific CRM solution requires less customization and extension than generic applications, and this has proven attractive for many telcos. The vendor is categorized as one to shortlist, chiefly because of its niche focus on the telecoms sector.

Market challengers: vendor solutions

The large and diverse set of vendors offering CRM solutions gives telcos considerable choice when selecting a solution. While SAP, Microsoft Dynamics CRM, and AsiaInfo may not have scored as well as the leaders across our market impact, technology assessment, and strategy assessment categories, they still offer compelling solutions that telcos should consider, particularly when factoring in unique needs or contexts.

SAP CRM offers an easy-to-use solution with a wide variety of sophisticated capabilities and functionalities, making it easier for non-technical users to access advanced capabilities without much training. SAP is particularly strong in its ease of use, integration, and interoperability as it possesses a broad and deep portfolio of capabilities. It is particularly useful for telcos with large existing SAP implementations.

Microsoft Dynamics CRM as a standalone solution provides a complete set of multichannel capabilities, strong configurability, and an intuitive user interface. As a solution platform, telcos using Dynamics CRM...
have the option to configure it to support their needs across the customer lifecycle. Microsoft Dynamics CRM's strength lies in its flexibility (with on premise, partner-hosted, and cloud deployment options), excellent usability, workflow, integration with the Office suite (a mainstay in most telcos), and consistent experience across web and mobile devices. Microsoft has taken a two-prong approach to bringing its Dynamics CRM solution to the telecoms industry, selling the solution directly to telcos and partnering with telco-specific vendors to configure the solution and resell it to their prospective clients.

AsiaInfo's CRM solution offers deep vertical expertise, incorporating pre-configured business processes and implementing best practice industry used cases. AsiaInfo has unmatched experience in handling large-scale deployments for the three largest operators in China. AsiaInfo also scored highly in the mobile CRM and integrated billing category, which are key criteria in this ODM.

**MARKET LEADERS**

Market leader comparison

Vendors analyzed in this report vary in focus and strengths. This section looks at the underlying patterns in the market by comparing the top vendors in each of the criteria that contribute to the technology, impact, and strategy assessment ratings. Telcos must consider the context and comment behind the scores to determine the product that best suits their individual needs. The graphs in this section show the market leaders (top three) for each criterion.
Market leaders: technology

Figure 3: Ovum Decision Matrix: CRM for telcos, 2014–2015

Figure 3 highlights the technology leadership of Oracle Siebel, Amdocs, and Salesforce.com in the technology assessment category. Amdocs features on the graph for five criteria (i.e., is among the top three vendors for five criteria), while Oracle Siebel features four times. Oracle Siebel and Amdocs are closely clustered in terms of their total technology scores, but they outperform each other in different areas. Amdocs trumps others in integrated billing; Oracle Siebel is better off than its competitors in advanced analytics; and Salesforce.com offers detailed and concise information delivery across channels.

As telcos become more experienced and sophisticated in their usage of CRM, Ovum expects a dramatic rise in the importance of using multichannel integration and advanced analytics capabilities to create a 360-degree view of the customer. Accessing a complete and actionable view of the customer experience in real-time will improve business effectiveness and efficiency. Given the long-term importance of using more robust analytical tools, other vendors should extend their capabilities in this area through either partnerships or in-house development.
Market leaders: strategy

Figure 4: Ovum Decision Matrix: CRM for Telcos, 2014–2015  

Oracle Siebel CRM scored highest overall in the strategy assessment category. Amdocs and Salesforce.com also scored high in most of the individual strategy execution categories. Oracle Siebel and Amdocs have robust product suites and long histories of success with telcos, so their high marks in strategy are not surprising. Salesforce.com is a relatively new entrant, but has gained considerable market share with its innovative approach to telco CRM.

More than in other areas of BSS investments, decisions about CRM solutions are based on strategy rather than technology. Consequently, telcos have an appetite for strong professional and technical services for implementation and usage. Recognizing this need, Oracle Siebel offers comprehensive services to support implementation, customization, and ongoing support.

Call center, social CRM, and mobile CRM capabilities are differentiators for vendors in the telecoms vertical. These require upgrades and investments to manage the evolving customer service needs of telco customers. Oracle and Salesforce.com have the most sophisticated tools for social media monitoring and engagement, and Amdocs enjoys the highest scores in mobile CRM and call center solutions.
CRM solutions tend to be complicated with various tabs and complex workflows, so ease of use is an important consideration. SAP and Microsoft outdo other leading vendors in this category with simple and intuitive drill-down capabilities. Telcos are increasing the number of departments and teams that access a central CRM system, meaning it is of utmost importance that vendors minimize the amount of intervention or training required to use their products.

**Market leaders: market impact**

Given the size of the companies involved, our ranking of Microsoft and Oracle Siebel as market impact leaders is not surprising. By Ovum’s estimates, Amdocs’ telco-related CRM revenues are the highest in the market, followed by Oracle Siebel. Microsoft is the largest vendor with the highest global revenues and geographical reach, and scores highest in these categories. Salesforce.com and AsiaInfo recorded the highest revenue growth rate in this category. The success of these vendors, and the others profiled in this ODM, suggests that the uptake of CRM by telcos is growing rapidly. Ovum believes that most telcos will purchase a new solution or expand an existing installation over the next few years, and that vendors will have ample growth opportunities for many years to come.
Oracle Siebel CRM: leader

Oracle Siebel CRM for telcos scored exceptionally well in the strategy assessment category, attaining a top score in five of the eight criteria. Along with its strong solution offering, Oracle Communications Consulting offers telcos a comprehensive portfolio of implementation and professional support services for the Oracle stack. The solution is well suited for any large tier-1 telco operating with different business lines. Oracle Siebel also scored highly in the tech assessment category, posting high scores in criteria for analytics and a 360-degree customer view, among others. The solution makes insightful use of social
media monitoring and engagement tools for customer service, lead generation, and brand management. In addition, realtime analytics provide context-driven search capabilities that pinpoint relevant answers by leveraging key information from service requests in Siebel Contact Center, such as product information, request summary, problem area, and sub area. Its analytics capabilities also present dashboards and realtime "next best action." Oracle Siebel has also invested in usability and efficiency tools to ensure that implementation and uptake delivers real value to telcos. Action tabs enable end users to move with a single click into the appropriate area of other transactional systems, increasing the speed of issue resolution.

Oracle has expanded its collection of CRM solutions with acquisitions that complement Oracle Siebel CRM. These include Eloqua (for marketing); ATG, Fatwire Software, and Endeca (for commerce); Rightnow Technologies and Inquira (for service); and Virtue, Involver, and Collective Intellect (for social). The solution’s augmented portfolio spans across all touchpoints of the customer lifecycle. In the next 12 months, Oracle Siebel plans to invest in capabilities to streamline the user experience on desktop and mobile, and enhance search, campaign/lead management, and customer self-service with integrations to Oracle Commerce, Oracle Marketing Cloud, and Oracle Service Cloud.

Oracle Siebel CRM enables more effective and efficient management of customer relationships, regardless of the department or process with which they are associated. It provides the cross-channel integration that telcos are looking for.

**Recommendation: shortlist**

Oracle’s Siebel CRM for telcos offers the telecoms industry a robust, complete, and future-proof solution for managing customer relationships across various channels and through each step of the lifecycle. Although some may initially perceive the solution as too comprehensive for their immediate needs, over the medium- to long-term most large telcos will need these capabilities as they move from point to enterprise-wide CRM deployments. Telcos should shortlist Oracle Siebel when considering the purchase of a CRM solution.

**APPENDIX**

Further reading

Telcos’ Next Step in CRM Systems and Processes, IT012-000087 (February 2014)

Vendors’ Next-Generation CRM for Telcos, IT012-000088 (January 2014)


2014 Trends to Watch: Telecoms IT, IT012-000085 (October 2013)

Big Data Analytics and the Telco: How Telcos Can Monetize Customer Data, TE010-000312 (May 2013)

2014 Trends to Watch: Customer Experience and Interaction, TE001-000562 (October 2013)

2014 Trends to Watch: Customer Relationship Management, IT015-001893 (November 2013)
How Telcos Can Leverage Social Media to Improve Customer Experience, TE010-000336 (November 2013)

2014 Trends to Watch: Telco Operations, TE010-000338 (November 2013)

ICT Enterprise Insights – Global: Telecoms, IN001-000008 (September 2013)

Telco Purchasing Trends, TE010-000322 (August 2013)

Global Telecoms Technology Spending Through 2017, IT012-000079 (August 2013)

Business Trends: Telecoms Technology Investment Strategies, IT012-000070 (March 2013)

Dialing into Telco Data, IT014002697 (February 2013)

Author

Shagun Bali, Analyst, Telecoms IT

shagun.bali@ovum.com

Ovum Consulting

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