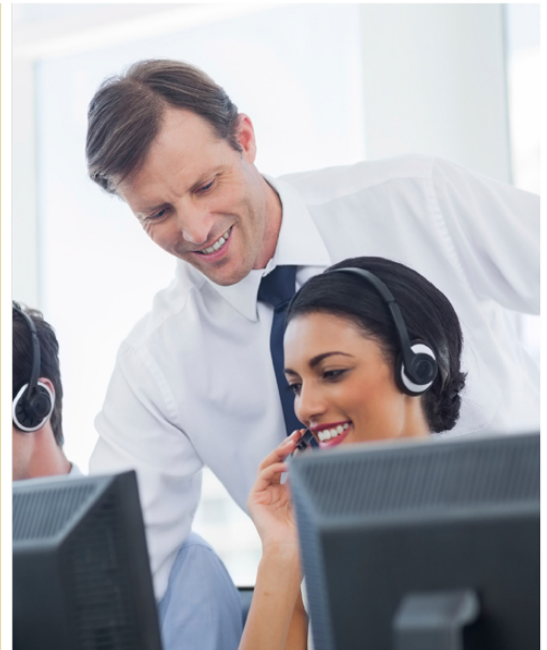


DMG
CONSULTING LLC



Speech and Text Analytics Product and Market Report Reprint

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NICE[®]

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1. Speech Analytics Market Activity

Figure 1 presents the market activity, number of customers and seats for the speech analytics market, as of March 31, 2015. This chart shows market activity for the 16 best-known speech analytics competitors, many of whom also sell text analytics applications. This Figure also includes an “Other” category, which accounts for the unlisted speech analytics vendors from all over the world.

As the speech analytics market matures, there is more clarity on many of the vendor claims, which presents DMG with some challenges. Mattersight is one of those challenges, as they use speech analytics in their offerings but do not actually sell a dedicated speech analytics solution. Their offerings have evolved over the years and they continue to move further away from being a traditional provider of either post-call or real-time speech analytics. However, since we included them in prior years, we continue to include them, even though their solutions are different from the other offerings in this analysis.

As of March 31, 2015, there were 2,632 speech analytics customers using 3,507,795 seats. This averages to 1,333 seats per implementation, up from an average of 1,317 seats per initiative in 2014. However, these averages are slightly misleading, as they include a few very large deals with many thousands of seats, and a large number of relatively small deals. Speech analytics is being adopted by contact centers of all sizes, although it's more common to find it in contact centers with at least a few hundred seats than in environments with fewer than 100 agents.

NICE continued to be the speech analytics market share leader in 2014, based on both customer and seat count. NICE's share of the speech analytics market increased from 30% in 2013 to 34.5% in 2014. Verint came in second place, accounting for 23.8% of all speech analytics seats in 2014. HP is estimated to have been in third place with 400,000 seats, responsible for 11.4% of the market. CallMiner, an LVCSR-based best-of-breed speech analytics provider, came in fourth place with a 9.2% share of the market. Nexidia, a phonetics-based best-of-breed provider, is estimated to have been in fifth place, accounting for 8.7% of the market. And Interactive Intelligence, a later entrant to the market who offers a home-grown real-time speech analytics solution, came in sixth place, accounting for 2% of the market.

In the past 12 months there have been a few significant deals and partnerships that could have a major impact on the market in the next couple of years. A couple of large telecom carriers picked a speech analytics partner to provide as a component of their cloud services. If these vendors learn how to sell speech analytics solutions, this could alter the dynamics of the market and greatly increase its adoption rate.

Figure 1: Speech Analytics Activity, as of March 31, 2015

Vendor	Total		Seats
	Customers	Seats	Market Share
NICE ¹	704	1,210,000	34.5%
Verint ¹	624	834,732	23.8%
HP ²	254	400,000	11.4%
CallMiner	174	321,657	9.2%
Nexidia ³	195	305,000	8.7%
Interactive Intelligence	138	70,934	2.0%
Mattersight ^{3,4}	56	56,000	1.6%
Avaya (Aurix) ⁵	67	53,372	1.5%
Genesys (UTOPY) ^{3,6}	55	51,000	1.5%
Calabrio	63	23,485	0.7%
inContact ⁷	85	17,087	0.5%
Aspect ^{3,8}	27	16,500	0.5%
ZOOM International	45	8,000	0.2%
Castel ^{3,9}	28	7,617	0.2%
CTI Group ³	24	7,000	0.2%
OnviSource	31	3,994	0.1%
Other ¹⁰	129	169,319	4.8%
Subtotal	2,699	3,555,697	N/A
Less: Double Count ¹¹	(67)	(47,902)	(1.4%)
Total ¹²	2,632	3,507,795	100.00%

Notes:

1. Based on company guidance and DMG Consulting estimates.
2. HP shared their seat count for 2014. The number of customers is a DMG Consulting estimate. HP sells speech analytics, typically as part of an enterprise search deal.
3. DMG Consulting estimate.
4. Mattersight (NASDAQ: MATR) 2014 revenue was \$30.3 million. Although they publish their financials, they do not share their market activity. They are a services company and primarily sell a personality-based software application that uses speech analytics. According to their first quarter 2015 10-Q, they claim that there are less than 180,000 seats of this software in North America, but they do not share their number of seats.
5. Avaya acquired Aurix, a phonetics-based speech analytics engine, in 2011. Avaya plans to end-of-sale the Avaya Aurix solution in July 2015 and focus on their new Real-Time Speech Snap-In, which is a component of their Engagement Development Platform. Avaya's market activity numbers do not include customers from the OEM of Verint's Voice Analytics solution. (These customers and seats are included as part of Verint's market activity.)
6. Genesys acquired UTOPY in January 2013.
7. inContact acquired Uptivity in 2014. inContact sells an Aurix-based application acquired from Uptivity, as well as the Verint speech analytics solution.
8. All Aspect activity is considered double count because they sell third-party speech analytics solutions. In prior years, Aspect shared their market activity with DMG.
9. In prior years, Castel shared their market activity with DMG.
10. "Other" is estimated to be 5% of the named vendor total.
11. A number of vendors partner and/or OEM their solution. The double count for the duplicated activity has been removed. Avaya (Aurix) and Verint are the primary applications sold by third parties in 2014 - 2015. DMG estimates for Avaya, 57 customers and 45,402 seats; for Verint, 10 customers and 2,500 seats.
12. Rounding errors may occur.

Source: DMG Consulting LLC, June 2015

2. Vendor Satisfaction Analysis

On an annual basis, DMG Consulting conducts independent customer satisfaction surveys to measure end-user satisfaction with vendors and their products as well as their service, support, professional services, training and innovation. DMG conducts these analyses because they provide great insights into general market trends and end-user issues and concerns. DMG strongly recommends that prospects conduct their own satisfaction analysis by contacting at least 5 customers of their preferred vendor.

This study evaluates the performance of the 6 vendors analyzed at a detailed level in the *2015 - 2016 Speech and Text Analytics Product and Market Report: Avaya, CallMiner, Genesys, inContact, NICE and Verint*. DMG obtained a completed survey from 3 customers for each of these vendors. Since confidentiality is important to survey participants and respected throughout our process, the names of references and the companies that they represent are not directly attributed to any of the comments or ratings contained in this Report.

The research for DMG Consulting's customer satisfaction survey was conducted as follows:

1. The speech analytics vendors were asked to provide contact information for five customers who had agreed in advance to participate in the satisfaction survey.
2. DMG Consulting sent the participating customers an email with a link to a Web survey.

The survey consisted of 13 questions, which fell into the following categories:

1. Customer background – name of their speech analytics vendor, top 3 – 5 business issues that speech analytics was expected to solve, top 3 - 5 benefits realized and which business units were using the information surfaced by speech analytics. The survey also asked whether or not text analytics was also being utilized from the speech analytics vendors, and if so, what were the top 3-5 ways text analytics was being used.
2. Product satisfaction – detailed questions about 21 aspects of product satisfaction including: ease of use/configuration/maintenance, ease of integration with third-party applications, ease of creating searches and queries, accuracy and business relevance of results, ability to fine-tune results, call analysis capabilities, text analytics capabilities, emotion detection/sentiment analysis capabilities, ability to conduct automated root cause analysis, ability to conduct discovery and surface previously

unknown issues or new and breaking trends, ability to correlate seemingly unrelated issues, ability to serve as an early warning system to identify issues before they escalate and impact a large number of customers, ability to make results actionable, real-time capabilities, reporting and dashboards, ability to support analytics-enabled quality assurance processes, ability to improve quality and agent coaching, ability to improve compliance with regulatory requirements, ability to detect fraud, ability to reduce customer effort, and ability to improve customer engagement.

3. Vendor performance – satisfaction levels with the vendor's implementation, training/workshops, ongoing service and support, professional services, innovation, responsiveness to product enhancement requests, communication, product pricing, and the customer's overall satisfaction with the vendor/solution.
4. Open-ended questions – top 3 – 5 strengths of their speech analytics solution; enhancements/additional capabilities they would like to see, the biggest impact that speech analytics has had on the contact center; the one thing they wish they knew about the solution before they made the purchase; and an open invitation for participants to express general thoughts about their experience with the vendor and solution.

A total of 18 customer responses (3 from each vendor) were received and analyzed. The vendor satisfaction ratings reported in this analysis were calculated by averaging the scores provided by customers for each vendor and category, using the point scale illustrated in Figure 3.

Figure 3: Customer Survey Rating Categories

Satisfaction Rating	Points Assigned
Completely satisfied	5
Highly satisfied	4
Satisfied	3
Somewhat satisfied	2
Not satisfied	1

Source: DMG Consulting LLC, June 2015

2.1 Summary of Survey Findings and Analysis

The Figures and analyses that follow represent the results of DMG Consulting's 2015 – 2016 speech analytics customer satisfaction survey. This section of the analysis examines customer satisfaction ratings across the 10 major survey categories, including: product, implementation, training/workshops, ongoing service and support, professional services, innovation, responsiveness to product enhancement requests, communication, product pricing, and the customer's overall level of satisfaction with the vendor/solution. Vendor product satisfaction scores were derived by averaging the results of the 21 product satisfaction components found in Figure 5: Product Satisfaction Ratings, by Category.

As seen in Figure 4, 38.3 % of the satisfaction scores for all vendors in the 10 major categories surveyed fell into both the highly satisfied range (4.0 to 4.66) and satisfied range (3.0 to 3.66). 15% of the average ratings were completely satisfied (5.0) and 8.3% were somewhat satisfied (2.0 to 2.66). Overall, the speech analytics references were highly satisfied (4.00 to 4.11) in 4 of the 10 categories they were asked to rate: implementation, innovation, communication and overall vendor satisfaction. The remaining six categories – product, training, ongoing service and maintenance, professional services, responsiveness to product enhancement requests and product pricing – achieved an average satisfaction score of satisfied (3.55 to 3.94). As was the case in the prior year's survey, it is important to note that the ranges between the high and low score in 8 of the 10 categories were 2.0 or higher. This suggests that significant disparities remain among the speech analytics solutions and vendors.

The most notable results were achieved by NICE and CallMiner. NICE achieved a perfect score, 5.0, in 6 categories: implementation, training, professional services, innovation, responsiveness to product enhancement requests and overall vendor satisfaction. CallMiner earned a perfect score in 3 categories: implementation, professional services and communication. CallMiner also achieved the top score in 3 other categories: product (4.50), ongoing service and maintenance (4.66), and pricing (4.66).

Among the ten categories that participants were asked to rate, communication and overall vendor satisfaction achieved the highest average scores, 4.11 (highly satisfied). CallMiner achieved a perfect score for communication, followed by NICE with 4.66. NICE achieved a perfect score for overall vendor satisfaction, with CallMiner following at 4.66. Implementation was the second-highest-ranked category, 4.05. CallMiner and NICE were tied for the top spot, each with a perfect score of 5.0. Genesys and inContact were tied in second, each with scores of 4.33 (highly satisfied). Innovation rounded out the top three categories with an average score of 4.0. Here, NICE led with a perfect score, followed by CallMiner and Genesys, each with scores of 4.33.

Professional services was the fourth-highest-ranked category, with 3.94. CallMiner and NICE achieved a perfect score, 5.0. Genesys, with 4.33, came in second.

Training, with an average score of 3.89, ranked in fifth place. Training was led by NICE with a perfect score of 5.0, followed by CallMiner at 4.33. With an average score of 3.88, product landed in sixth place for customer satisfaction. Product satisfaction scores were derived by averaging the results of the 21 product satisfaction components seen in Figure 5. CallMiner led with a score of 4.50, followed by NICE with 4.32.

Ongoing service and maintenance earned a category average of 3.86, seventh place among the 10 categories. CallMiner achieved the top score, 4.66, followed by inContact and NICE, each with scores of 4.33. Responsiveness to product enhancement requests, 3.83, was the eighth-ranked category. NICE achieved a perfect score, 5.0, followed by CallMiner with 4.33. Pricing was the lowest-scoring category, earning an average score of 3.55. CallMiner achieved the top score, 4.66, followed by NICE with 4.33.

Figure 4 shows the average customer satisfaction ratings by category for each of the 6 vendors featured in this Report.

Figure 4: Average Satisfaction Ratings, by Category

Vendor	Avaya	CallMiner	Genesys	inContact	NICE	Verint	Category Average	Range
Product ¹	3.29	4.50	3.88	3.78	4.32	3.53	3.88	1.21
Implementation	3.00	5.00	4.33	4.33	5.00	2.66	4.05	2.34
Training	3.00	4.33	3.66	4.00	5.00	3.33	3.89	2.00
Ongoing service and maintenance	3.50	4.66	3.66	4.33	4.33	2.66	3.86	2.00
Professional services	2.66	5.00	4.33	3.66	5.00	3.00	3.94	2.34
Innovation	3.33	4.33	4.33	3.66	5.00	3.33	4.00	1.67
Responsiveness to product enhancement requests	3.00	4.33	3.66	4.00	5.00	3.00	3.83	2.00
Communication	3.00	5.00	4.33	4.33	4.66	3.33	4.11	2.00
Pricing	2.66	4.66	3.33	4.00	4.33	2.33	3.55	2.33
Overall vendor satisfaction ²	3.00	4.66	4.33	4.33	5.00	3.33	4.11	2.00

Notes:

1. Product satisfaction scores were derived by averaging the results of the 21 product satisfaction components in Figure 5.
2. These scores do NOT represent the average of the other categories; this is a separate category where customers were asked to rate their overall satisfaction with all aspects of their vendor relationship.

Source: DMG Consulting LLC, June 2015

2.2 Detailed Survey Findings and Analysis

Product Satisfaction by Category

Survey participants were asked to rate their satisfaction with their vendor's speech analytics solution for 21 key components, including: ease of use/configuration/maintenance, ease of integration with third-party applications, ease of creating searches and queries, accuracy and business relevance of results, ability to fine-tune results, call analysis capabilities, text analytics capabilities, emotion detection/sentiment analysis capabilities, ability to conduct automated root cause analysis, ability to conduct discovery and surface previously unknown issues or new and breaking trends, ability to correlate seemingly unrelated issues, ability to serve as an early warning system to identify issues before they escalate and impact a large number of customers, ability to make results actionable, real-time capabilities, reporting and dashboards, ability to support analytics-enabled quality assurance processes, ability to improve quality and agent coaching, ability to improve compliance with regulatory requirements, ability to detect fraud, ability to reduce customer effort, and ability to improve customer engagement.

It's important to note that not all of the vendors offer the same number and type of functional modules, nor are all of the survey participants utilizing every module that their vendors offer. For this reason, DMG included N/A as a response option in the product satisfaction section of the survey. Scores that are not based on an average of three scores have been footnoted, as applicable.

Figure 5 shows that most (43.7%) of the average satisfaction ratings for the 21 product categories surveyed fell into the highly satisfied (4.0 to 4.66) range, 37.3% fell into the satisfied range (3.0 to 3.66), 10.3% of the scores were completely satisfied (5.0), and 5.6% were only somewhat satisfied (2.33 to 2.66). 3.2% of the responses were N/A, as not all of the vendors offer the same number and type of functional modules, nor are all of the survey participants utilizing every module that their vendors offer. The 21 product categories in order of rank based on customer satisfaction are: ability to improve quality and agent coaching (4.44), ability to improve compliance with regulatory requirements (4.33), ability to support analytics-enabled quality assurance processes (4.28), ease of creating searches and queries (4.22), call analysis capabilities (4.16), ability to make results actionable (4.08), ability to improve customer engagement (4.06), ability to conduct automated root cause analysis (3.92), ability to conduct discovery and surface previously unknown issues or new and breaking trends (3.91), accuracy and business relevance of results and ability to correlate seemingly unrelated issues and ability to reduce customer effort, (each at 3.89), real-time capabilities (3.86), ease of use/configuration/maintenance, ability to fine-tune results and text analytics capabilities (each at 3.83), ease of integration with third-party applications and ability to serve as an early warning system to identify issues

before they escalate and impact a large number of customers (each at 3.72), ability to detect fraud (3.50), reporting and dashboards (3.16), and emotion detection/sentiment analysis capabilities (3.14).

The most significant range of scores, 2.50, occurred in the areas of ease of integration with third-party applications and ability to detect fraud. Seven other areas with a wide range, 2.0, included text analytics capabilities, emotion detection/sentiment analysis capabilities, ability to conduct automated root cause analysis, ability to serve as an early warning system to identify issues before they escalate and impact a large number of customers, real-time capabilities, ability to reduce customer effort and ability to improve customer engagement. The wide ranges suggest important disparities among the vendor capabilities in these areas.

CallMiner took the lead in the category of product satisfaction with an overall average score of 4.50. CallMiner achieved/shared the top score in 15 of the 21 product component categories. CallMiner achieved a perfect score, 5.0 for ease of integration with third-party applications, real-time capabilities, ability to support analytics-enabled quality assurance processes, ability to improve quality and agent coaching, ability to improve compliance with regulatory requirements, ability to detect fraud, ability to reduce customer effort, and ability to improve customer engagement. CallMiner earned/shared the top rank, 4.66 (highly satisfied), in 7 of the remaining categories: ease of use/configuration/maintenance, ease of creating searches and queries, ability to fine-tune results, call analysis capabilities, ability to conduct discovery and surface previously unknown issues or new and breaking trends, ability to correlate seemingly unrelated issues, and ability to make results actionable.

NICE came in second with an average score for product satisfaction of 4.32. NICE achieved/shared the top score, 4.66 (highly satisfied), in seven categories, including a perfect score of 5.0 for ease of use/configuration/maintenance, ease of creating searches and queries, accuracy and business relevance of results, ability to fine-tune results, call analysis capabilities, ability to conduct discovery and surface previously unknown issues or new and breaking trends, and ability to make results actionable.

Genesys, with an average product score of 3.88, rounded out the top three vendors. Genesys achieved/shared the top rank in 5 categories, including a perfect score, 5.0, for text analytics capabilities, and highly satisfied scores for call analysis capabilities (4.66), emotion detection/sentiment analysis capabilities (4.0), ability to serve as an early warning system to identify issues before they escalate and impact a large number of customers (4.66), and reporting and dashboards (4.0).

inContact had an average score for product satisfaction of 3.78, including a perfect score of 5.0 in 4 areas: ability to conduct automated root cause analysis, ability to support analytics-enabled quality assurance processes, ability to improve quality and agent coaching, and ability to improve compliance with regulatory requirements.

Verint achieved an average product score of 3.53. This included highly satisfied rankings of 4.0 across eight categories: ease of creating searches and queries, accuracy and business relevance of results, call analysis capabilities, ability to make results actionable, ability to improve quality and agent coaching, ability to improve compliance with regulatory requirements, ability to reduce customer effort, and ability to improve customer engagement.

Avaya earned an average product score of 3.29. This included highly satisfied rankings of 4.0 in two areas: ease of creating searches and queries and ability to correlate seemingly unrelated issues.

Figure 5 provides the average satisfaction ratings by vendor for each of the 21 product categories surveyed.

Figure 5: Product Satisfaction Ratings, by Category ¹

Vendor	Avaya	CallMiner	Genesys	inContact	NICE	Verint	Category Average	Range
Ease of use/configuration/maintenance	3.66	4.66	3.33	3.66	4.66	3.0	3.83	1.66
Ease of integration with third-party applications	3.50 ³	5.00 ²	3.33	4.00 ³	4.0	2.50 ³	3.72	2.50
Ease of creating searches and queries	4.00	4.66	3.66	4.33	4.66	4.0	4.22	1.00
Accuracy and business relevance of results	3.33	4.33	4.00	3.0	4.66	4.0	3.89	1.66
Ability to fine-tune results	3.33	4.66	3.33	3.66	4.66	3.33	3.83	1.33
Call analysis capabilities	3.33	4.66	4.66	3.66	4.66	4.0	4.16	1.33
Text analytics capabilities	N/A	3.00 ²	5.00 ²	N/A	3.50 ³	N/A	3.83	2.00
Emotion detection/sentiment analysis capabilities	2.50 ³	3.33	4.00 ²	2.0 ²	3.33	3.66	3.14	2.00
Ability to conduct automated root cause analysis	3.33	4.33	3.00	5.00 ²	4.33	3.50 ³	3.92	2.00
Ability to conduct discovery and surface previously unknown issues or new and breaking trends	3.66	4.66	4.00	3.00 ³	4.66	3.50 ³	3.91	1.66
Ability to correlate seemingly unrelated issues	4.00	4.66	4.00	3.00 ³	4.33	3.33	3.89	1.66
Ability to serve as an early warning system to identify issues before they escalate and impact a large number of customers	3.33	4.33	4.66	3.00 ³	4.33	2.66	3.72	2.00
Ability to make results actionable	3.66	4.66	4.00	3.5 ³	4.66	4.00	4.08	1.16
Real-time capabilities	3.00 ³	5.00 ²	3.66	4.00 ³	4.00 ³	3.50 ³	3.86	2.00

Figure 5: Product Satisfaction Ratings, by Category ¹

Vendor	Avaya	CallMiner	Genesys	inContact	NICE	Verint	Category Average	Range
Reporting and dashboards	2.66	2.66	4.00	3.00 ³	3.66	3.00 ²	3.16	1.34
Ability to support analytics-enabled quality assurance processes	3.33	5.00 ³	4.00	5.00 ²	4.66	3.66	4.28	1.67
Ability to improve quality and agent coaching	3.33	5.00 ²	4.66	5.00 ²	4.66	4.00	4.44	1.67
Ability to improve compliance with regulatory requirements	3.33	5.00 ³	4.00	5.00 ²	4.66	4.00	4.33	1.67
Ability to detect fraud	2.50 ³	5.00 ²	3.00 ³	N/A	4.00 ¹	3.00 ³	3.50	2.50
Ability to reduce customer effort	3.00	5.00 ³	3.00	4.00 ²	4.33	4.00	3.89	2.00
Ability to improve customer engagement	3.00	5.00 ³	4.00	4.00 ³	4.33	4.00	4.06	2.00
Vendor Average	3.29	4.50	3.88	3.78	4.32	3.53	--	--

Notes:

1. Not all of the vendors offer the same number and type of functional modules, nor are all of the survey participants utilizing every module that their vendors offer.
2. Score based on one rating.
3. Score based on an average of two ratings.

Source: DMG Consulting LLC, June 2015

About NICE Systems

NICE Systems (NASDAQ: NICE) is the worldwide leading provider of software solutions that enable organizations to take the next best action in order to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE's solutions empower organizations to capture, analyze, and apply, in real time, insights from both structured and unstructured Big Data. This data comes from multiple sources, including phone calls, mobile apps, emails, chat, social media, video, and transactions. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies. www.nice.com.

About DMG Consulting LLC

DMG Consulting LLC is a leading independent research, advisory and consulting firm specializing in contact centers, back-office and real-time analytics. DMG provides insight and strategic guidance and tactical advice to end users, vendors and the financial community. Each year, DMG devotes more than 10,000 hours to producing primary research on IT sectors, including workforce optimization (quality management/liability recording), speech analytics, workforce management, performance management, desktop analytics, surveying/voice of the customer, text analytics, cloud-based contact center infrastructure, dialing, interactive voice response systems and proactive customer care. Our actionable solutions are proven to deliver a lasting competitive advantage, and often pay for themselves in as little as three months.

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