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NTT DATA

MARKET IMPACT REPORT

The seven critical levers for scaling GenAI

A playbook for IT leaders

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Contents

Generative AI (GenAI) has the power to revolutionize industries, but scaling it is no walk in the park. Pressure is building for technology leaders to turn GenAI projects into scalable solutions for their businesses. However, succeeding with GenAI requires bold leadership, relentless modernization, and a willingness to confront harsh truths about the organization's readiness. Only by shifting from pet projects to enterprise-grade initiatives can IT leaders begin to deliver the promise of GenAI to reinvent and, in many cases, reimagine their business.

GenAI: A catalyst for growth and differentiation

> "In today's world, not doing AI is simply not an option."
>
> — VP and head of applications strategy, financial investment firm

> "AI-driven chat agents are now table stakes in our industry."
>
> — Global head of IT, banking and investment firm

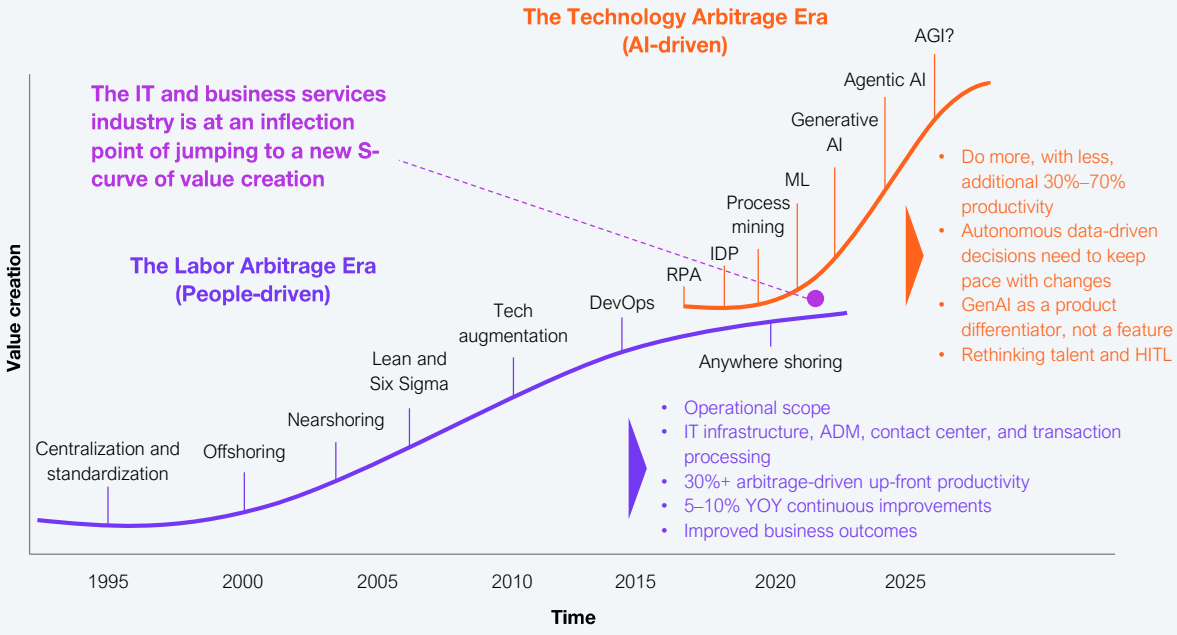
HFS Research, in partnership with NTT DATA, conducted more than two dozen interviews and discussions with IT leaders to understand their journey from proof-of-concept to delivering at scale for their enterprises. Their interests in GenAI span many aspects, from boosting productivity to staying competitive in an evolving market. Here's what's motivating organizations to dive headfirst into this transformative technology:

- **Doing more with less:** Many firms see GenAI as a game-changer for efficiency. A large investment firm is leveraging AI to automate routine tasks such as generating email campaigns and saving valuable time for consultants. Similarly, a global insurance firm built an AI platform to simplify daily workflows for more than 15,000 employees, improving operational efficiency and creating a differentiated service.
- **Keeping pace versus falling behind:** Competitive pressure also fuels adoption. GenAI is no longer optional in fast-paced industries—success with GenAI is required to stay relevant.
- **Differentiating products and services:** Firms are leveraging GenAI to create innovative, customer-centric offerings that stand out in crowded markets. For example, a large North American retailer uses GenAI-powered chatbots to enhance customer experience by reducing wait times.
- **Talent attraction and retention:** GenAI is a magnet for top talent, offering exciting opportunities for innovation and skills enhancement.

> "It's a carrot for those eager to experiment with cutting-edge tech."
>
> — CIO, global financial firm

GenAI is leading a transition from people-driven uses of technology and services to technology-driven solutions for problem-solving. This new era of technology arbitrage is based on the maturing of technology and associated skills to fully realize the benefits of automation, process mining, and artificial intelligence. It is based on firms using generative AI projects to rethink their workforce, differentiate products, and expedite how data enhances organizational decision-making. As illustrated in Exhibit 1, this inflection point drives enterprises (and their partners) to create value for the foreseeable future.

Exhibit 1: An AI-led technology arbitrage drives a new S-curve of enterprise value creation



Source: HFS Research, 2024

Despite bold ambitions to be technology-driven, most enterprises are getting stuck in their POCs

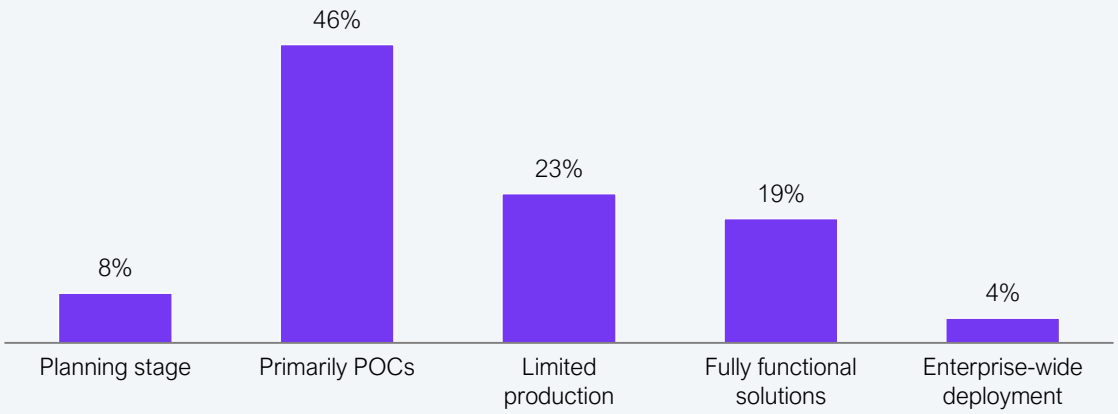
> "Every one of our clients is experimenting with 30, 40, 50 GenAI use cases at a minimum. They are testing out the technology. They are seeing what works. And they're learning about the quality of their data. But they're all focused on this pretty maniacally."
>
> — Client growth officer, NTT DATA

As part of the new 'S-curve,' many firms are quickly evolving their data, analytics, and automation projects, including GenAI. However, when HFS asked a select group of IT leaders about the maturity of their GenAI solutions, fewer than 25% of technology leaders indicated deployment of production-ready scalable enterprise solutions (see Exhibit 2). The majority have not realized any significant impact on their enterprise to date.

This survey shows that nearly 70% of these projects stall at proofs-of-concept (POC) and pilots. When asked why, many executives express challenges in identifying realistic use cases beyond how GenAI enhances productivity. Too often, GenAI projects have focused on capturing value lost due to inefficiencies in existing processes or enabling teams to allocate 'just a bit more time' to other projects.

Exhibit 2: Despite bold ambitions, most enterprises are stuck in the GenAI POC trap

Q. On a scale of 1-5 (1=planning; 2=primarily POCs and pilots; 3=limited production use cases; 4=Fully functional), how mature is your GenAI effort?



Sample: N=26 IT executives currently leading GenAI programs
Source: HFS Research, 2024

But don't abandon hope. Even in these early days of GenAI's promises, some firms are beginning to move past the pilot stage toward production use cases at scale. These use cases should interest IT leaders who are being held accountable for the past 24 months of investments.

For example, a large financial firm is increasing its adoption of GenAI by using private data centers and a personalized large language model (LLM) to manage costs and risks. This firm is seeing results where GenAI integrates into workflows and data sources for existing platforms alongside the addition of internal chat-based applications. These applications enable large amounts of client and market data to be contextualized as a new product. They use enormous amounts of historical and new data to create tailored investor profiles with real-time market indicators. By using GenAI for what it does best —crunch limitless data sources and figures—and contextualize it into information human agents can use to provide better advice to clients, this firm has differentiated its services at scale.

However, the transition from POC to scalable solutions is generally more cautious and controlled in many cases. A large North American healthcare payer investing in GenAI to fulfill payment obligations requires its IT and business teams to demonstrate how risk has been mitigated as part of the ROI. For this firm, the sensitivity of its data is stalling the POC.

While the pilot remains limited in production, its commercial viability is questioned until risks, reporting, and regulatory concerns are solved.

Even with POC failures, it is still possible to find the right path. Another firm was forced to cancel its GenAI practice due to cost overruns. Yet they believed in the potential value, and a reset of the POC with a new services partner is gaining traction and has begun delivering the expected gains. This again shows how the inflection point cited in Exhibit 1 may force many organizations to rethink whether their current partners are right for their future plans.

One thing is clear —no one is willing to give up on these new technologies. As cited by the CIO of a global financial services firm, the journey to deliver AI-driven business transformation is actively underway. While companies are seeing results in POCs and scaling solutions in some enterprise programs, this is only the beginning.

> "We're not at the very beginning, but by no means are we mature. I would say we're somewhere in the middle because we're past proofs-of-concept. We have GenAI use cases deployed. I'm not going to declare victory yet."
>
> — CIO, global financial firm

Breaking through cost, complexity, and culture to scale GenAI is difficult

Scaling GenAI from POC to enterprise-wide deployment is fraught with challenges beyond technology. In an additional survey of 2,300 IT and business leaders (see Exhibit 3), 90% believe legacy technologies and practices add to the costs.

Here's a deep dive into the most significant hurdles:

- **Hidden costs:** Scaling GenAI is expensive; unforeseen costs can derail even the most well-planned projects. Without meticulous cost planning, organizations risk ballooning expenses that undermine the ROI.

> "We wasted $10 million on a vendor that didn't understand our business, an expensive lesson in choosing the right partner."
>
> — VP of apps, financial investment firm

Exhibit 3: The existence of legacy hinders GenAI adoption

Top 5 initiatives

Data modernization

Many companies are building or upgrading data platforms, such as data meshes or centralized data lakes, to enhance data sharing and analytics.

Cloud migration

Several companies are migrating to public or hybrid clouds to leverage scalability and AI capabilities.

Security enhancements

Focus on strengthening security architecture and compliance to safeguard AI systems.

AI tool integration

Some prioritize integrating advanced AI and ML tools into their platforms to boost productivity and decision-making.

Semantic and search enhancements

Initiatives such as semantic search and article summarization are seen as key to improving operational efficiency and customer experiences.

Sample: N=2,300
Source: HFS Research, NTT DATA, 2024

- **Garbage in, garbage out:** Data is the lifeblood of GenAI, but poor data quality and fragmented sources create significant bottlenecks. GenAI models produce unreliable results without clean, well-governed data, leading to mistrust and failed initiatives.

> "We had to rebuild several database tables to ensure accurate insights, delaying deployment and adding costs."
>
> — Information technology infrastructure manager, North American manufacturer

- **Legacy IT strikes again:** Legacy systems are ill-equipped to handle the demands of GenAI, from data processing to real-time analytics. Scaling GenAI requires robust, scalable infrastructure, but legacy systems often slow progress.

> "Maintaining legacy and GenAI systems in parallel has significantly increased our costs."
>
> — CIO, North American healthcare firm

- **One breach away from disaster:** Handling sensitive data in GenAI projects introduces heightened security risks and regulatory scrutiny. Balancing innovation with security and compliance is a tightrope, especially in regulated industries.

> "Our GenAI efforts vary by region to comply with stricter laws like GDPR and California's CCPA."
>
> — IT director, North American retail firm

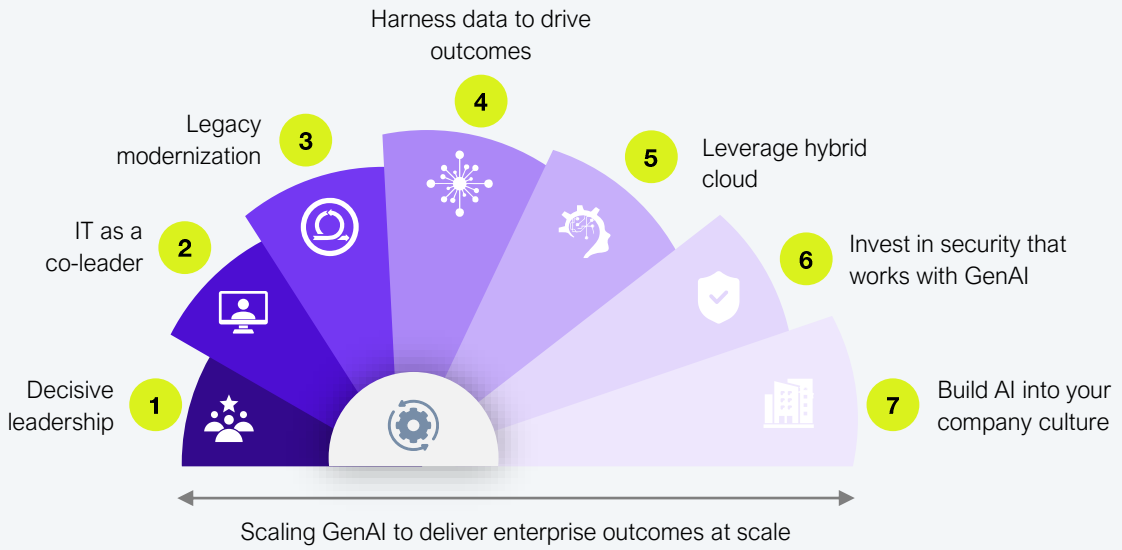
- **The human factor:** GenAI requires technical expertise, cultural alignment, and workforce buy-in. Without the right skills and a supportive culture, even the best GenAI strategies will falter.

> "We're learning as we go because we don't have enough in-house expertise to guide us."
>
> — VP, Advanced Product and Technology Strategy, financial investment firm

Seven critical change levers for IT leaders to scale GenAI without failing

Through our in-depth interviews, HFS uncovered seven pillars of change that IT leaders must consider for harnessing GenAI without falling for the usual traps.

Exhibit 4: Seven critical levers that IT leaders should pull to scale GenAI without failing



Source: HFS Research, 2024

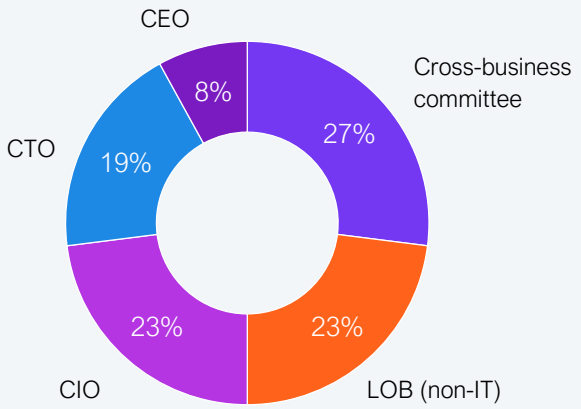
1 Decisive leadership: Who's in charge? If it's not clear, you're already behind

GenAI initiatives thrive on decisive leadership. Someone needs to own the strategy, whether it's a chief AI officer or a cross-functional coalition. While IT leadership is held accountable, companies with CEOs who are invested in and driving the transition of company culture toward understanding how GenAI is crucial to their operations are most likely to move from POC to enterprise scale. The CIO of a sizeable financial group remarked on their CEO's passion for conducting internal and external discussions about how GenAI tools will reshape their business to glean stakeholder insights.

Our interviews with IT leaders were insightful as they showed how fragmented GenAI leadership can be. In our research and the roundtable discussion, HFS found that 50% of companies have a leadership committee or a team led by a line-of-business (LOB) leader. Meanwhile, 42% lean on the CIO or CTO to drive AI efforts. After a lengthy debate, IT agreed on how it plays a crucial role in delivery. Still, adoption at scale across the organization must depend on the business leadership showing a passion for its application and their willingness to own the vision.

Exhibit 5: Decisive leadership and IT as a co-leader

Who is the champion for your firm's GenAI strategy?



Sample: N=26
Source: HFS Research, 2024

Who's in charge? If it's not clear, you're already behind.

- How is your organization structuring leadership for GenAI initiatives? Is your CEO driving the vision, or do you rely on a chief AI officer or cross-functional coalition?
- How is IT positioned in your GenAI journey? Are they co-leaders driving innovation or primarily enablers?
- What leadership structure and IT role would best position your organization to scale GenAI from POCs to enterprise-wide impact?

Why are CEOs talking about GenAI and their business in financial and investor reporting but not often showing up as internal champions? An insight came to light during our research/roundtable when a participant stated that "CEOs don't do POCs." This simple statement reflects an underlying challenge. As companies become more mired in POCs, it's less likely they'll get the executive sponsorship needed to scale. Therefore, the onus is on IT and business leaders to partner effectively on skills, technologies, and objectives.

> "Our new CEO's vision for the company is to bring us to the forefront of technology, cultivate ourselves as leaders, and emerge to the future. We've always been an organization that follows trends. So, with the CEO's vision, we hope to get out front. For GenAI, we have teams internally, and we've built our own internal LLM that helps us navigate going from POC to scale within our organization."
>
> — COO, North American insurance firm

In a global financial management firm, the CEO is responsible for large-scale education and advocacy of GenAI. This solution allows teams to co-create solutions, decide which aren't scalable, and develop cross-functional training to ensure multiple groups see how advancement benefits their workflows.

> "No more of us versus them; it's all hands on deck under our CEO's sponsorship."
>
> — CIO, North American financial firm

In some cases, firms told HFS they are naming a chief AI officer—a departure from the trend of appointing chief data officers in the 2010s. The chief AI officer must be very familiar with business operations, processes, and products. They must see data and AI from a businessperson's point of view, not a technologist's.

2 IT as a co-leader: From backend to boardroom

If your IT team still thinks their job is to 'keep the lights on,' you're doomed. IT must evolve from a support function to a strategic powerhouse. Make IT a co-leader in your GenAI journey, as it holds the keys to your data kingdom. The IT team should know how to wield this data to help business leaders achieve their desired outcomes.

IT is foundational in enabling GenAI projects by providing infrastructure, data management, and security. For instance, a VP of IT corporate technology noted: "Our responsible AI program is headed by IT but works closely with privacy and legal teams to ensure compliance." IT collaborates with business units to deliver GenAI solutions.

As one CIO commented: "We've conquered the buy versus build debate. IT partners with third-party vendors to ensure scalability and integration." IT often provides the technical backbone for deploying and scaling GenAI. In another firm, the global head of essential technology and innovation developed an internal GenAI platform, with IT ensuring data security and cost efficiency. IT departments frequently act as gatekeepers, ensuring GenAI initiatives align with organizational standards.

> "IT was ahead of the business on GenAI, guiding them on what's possible."
>
> — IT director, global consumer products company

3 Legacy IT modernization

Legacy IT systems pose a barrier to scaling GenAI. As part of their GenAI efforts, IT leaders must adopt a phased approach to modernize legacy systems, prioritizing data readiness and workforce training. As there is often resistance to change among resources accustomed to legacy systems, the support of executives and employees is crucial while transitioning to new technologies. Additionally, these leaders must be prepared to deal with regulatory challenges related to data privacy and jurisdiction, requiring mechanisms for data tracing and security enhancements.

> "We have mainframes like every financial company. And we have systems that are old and older and all that. Our GenAI projects are forcing us to speed up modernization efforts as we need more robust data, security, and cloud capabilities."
>
> — VP IT –corporate technology, financial investment firm

As shared by IT leaders in the finance, insurance, and healthcare industries, legacy systems are often embedded in specific company needs. GenAI's advantages are seen in customer-related systems such as CRM and new tools. Security is a significant concern, with firms anticipating stricter regulatory demands for AI solutions, necessitating adherence to bias and transparency controls while recognizing the likely need to evolve security to include AI.

4 Harness data to drive automation and outcomes

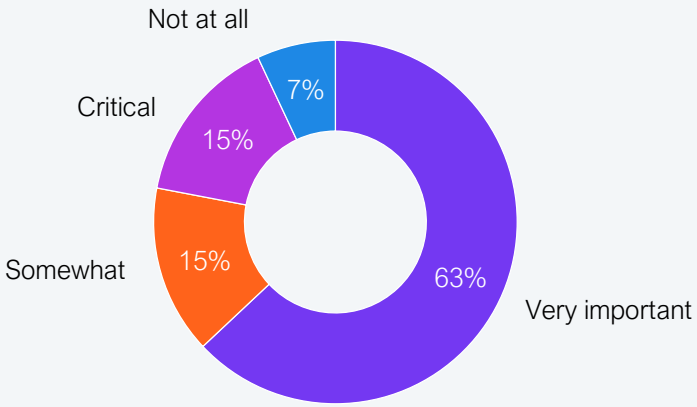
A large financial firm, for example, successfully created new revenue streams by providing data in a format its customers can directly access and use without extensive manipulation. This approach is a potential growth opportunity because it saves customers time and effort, making them willing to accept a premium price for better services.

When asked how important it was to ensure their data can leverage the scalability of both public and private clouds as part of their GenAI efforts, the overwhelming response was "very important" (see Exhibit 6). Many executives indicate that their data may never be perfect. So, rather than continuing on this idealistic mission, they focus on getting good data in critical business processes that GenAI could significantly improve.

> "Our firm is adopting a data strategy it calls 'ready data.' We believe that our customers can consume the data directly into their models without spending too much time finagling it or massaging it. That is where we think there's an opportunity for us to generate revenue with a premium service, as this is a huge amount of savings for the customer."
>
> — Strategy director, global food and beverage firm

Exhibit 6: Data is a crucial part of GenAI strategy

How important is ensuring your data can leverage the scalability of both public and private clouds as part of your GenAI efforts?



Source: HFS Research, 2024

5 Leverage hybrid cloud

An important discussion point among many IT leaders is about deploying and scaling GenAI in a hybrid environment. All technology leaders agree that enterprise data must be able to transit seamlessly across on-premises, private, and public cloud architectures.

The desire for AI and data to be available on a private cloud was assumed to be very important. However, our roundtable discussions revealed a general lack of interest in a dedicated private cloud for their GenAI project. While the IT leaders agreed on the importance of a firm leveraging a hybrid cloud model to scale GenAI, they are generally pushing to get their infrastructure extensively into the public cloud. While they have a valid point, HFS believes that it remains essential for a company to ensure its data is private. Thus, a private instance to develop a POC, and in some cases to run LLM/GenAI, should be part of the strategy—whether hosted or on-premises. Interviews with executives indicate they are increasingly likely to lean on their IT services partners' capabilities in data, cloud, and cloud-integrated services as their GenAI experiments mature.

For example, a large retail firm cited a successful hybrid cloud strategy as crucial to its GenAI project development. This approach enables the firm to balance the benefits of scalability and cost-effectiveness offered by hyperscalers, providing public and private cloud offerings with the control and security offered by a hybrid model.

> "We must have a hybrid cloud strategy that can scale based on our GenAI project and data needs. Our partner helps us gauge the POC using private cloud and our data, and then our CEO steers us toward the best long-term platform."
>
> — IT director, North American retail firm

Given its choice to use a hybrid cloud architecture, the firm balances on-premises cloud capabilities to run POCs and sensitive data processes while ensuring data security and compliance. It then leverages hyperscaler clouds for scaling and integrating broader datasets. Additionally, having mechanisms to migrate between cloud providers within a multicloud infrastructure creates manageable overheads, facilitating the desired flexibility and efficiency in deploying GenAI solutions. With their partners' support, this strategy also helps mitigate computing costs, scaling, and data protection uncertainties as projects move from POCs to enterprise production.

6 Invest in security and compliance frameworks that work with GenAI

Implementing an AI council or a similar governance body with representatives from various business units including IT, risk and compliance, and legal, is essential for baking GenAI into the business. The role of this council is to oversee the development and enforcement of guardrails for safe, secure, and compliant GenAI use. They ensure that humans remain in the loop and that there are programs to address security, bias, and usage.

The AI Center of Excellence (COE) is responsible for anticipating and preparing for any regulatory demands that might develop as the technology and industry oversight mature by ensuring that GenAI systems adhere to existing IT general controls and potential new controls related to AI advancement, such as those addressing bias and transparency in financial markets. It is also crucial for these groups to ensure that business and technology teams are engaging in ongoing testing and oversight to identify and mitigate potential vulnerabilities, especially in multicloud environments. These efforts often include cybersecurity measures and regular audits to ensure compliance with security standards.

7 Build AI into your company culture

For a long time, companies have focused on integrating data and information into organizational culture. Systems and applications were implemented to create an order of operations. This culture of effectiveness and efficiency is the bedrock of a 'well-oiled machine.' Scaling GenAI requires fostering a company culture that embraces AI. Providing education, frameworks, and recognition to employees can help overcome resistance to adopting AI projects.

> "Wall Street is looking at us. Are we embracing technology in the right way, and can we demonstrate the benefits we're gaining from it? We believe committing to using GenAI as part of how we work helps attract, retain people, and build the right talent."
>
> — CIO, Global financial firm

GenAI is expected to impact people and culture within organizations positively. For instance, it could help attract and retain talent by demonstrating technological advancement and offering career growth opportunities and exposure. This positive perception is also expected to extend to shareholders and regulators as firms embrace technology in beneficial ways. Additionally, challenges to cultural change management are anticipated, as employees need to adapt to new technologies and processes, which includes setting realistic expectations about what GenAI can achieve and addressing any skills gaps.

In our interviews, executives shared crucial dos and don'ts with their peers, as shown in Exhibit 7. Based on feedback from executives, firms implementing AI should have strong data, clear outcomes in mind, and active engagement from business partners. While these seem like motherhood and apple pie, the real insights come from the 'don'ts' shared by the executives.

Many leaders indirectly communicated a crucial insight during our interviews —they are often challenged to recognize how GenAI POC delivers value capture versus value creation outcomes. HFS recommends that as technology and business leaders begin to ask whether POCs can be scaled, they must answer the capture versus creation concern. Making this distinction early allows for planning and executing the right resources and investments and setting goalposts.

Exhibit 7: To succeed at GenAI, there are some crucial lessons about what you should and shouldn't do

Things you should do	Things you shouldn't do
Start with clear objectives: Begin with a clear understanding of business processes and objectives. Involve cross-functional teams to ensure alignment with business needs.	**Avoid data exposure:** Do not proceed with vendors that cannot assure your data will not be used to train their models. Data privacy is a non-negotiable aspect.
Pick the right use case: Choose a use case that clearly has problem areas where success and improvement are achievable. This allows for easier identification of value and impact.	**Don't rush implementations:** Avoid rushing into implementations without proper oversight and understanding of the technology's fit for the problem.
Conduct thorough due diligence: Perform detailed process mapping and modeling to understand the current state and potential improvements.	**Don't overlook human oversight:** Ensure there is adequate human oversight in AI implementations to avoid over-reliance on technology.
Ensure data quality: Prioritize data cleanup and quality assurance as part of the project to ensure reliable outcomes.	**Avoid starting with technology:** Do not start with the technology itself. Instead, identify the business needs and use cases first before deciding on the technology.
Bias testing: Implement bias testing frameworks to ensure fairness and accuracy in AI models.	**Don't rely solely on models:** Once the models are implemented, they must be checked by humans in the loop to ensure the data makes business sense, is factual, and can be fine-tuned at a model level to improve the quality of its output.
Understand business processes: Spend time understanding the processes of internal customers to better align AI solutions with business needs.	**Let IT run the show:** Technology is a supporting actor in your GenAI projects. From the CEO to the LOB leader, they must be willing to lead the project, evangelizing a shared commitment to achieving business transformation with GenAI.

Source: HFS Research, 2024

The Bottom Line: The leap from POC to enterprise scale isn't just a technological challenge—it's a strategic one.

Leaders from organizations involved in GenAI POCs have learned much about the process, which provides lessons for peers yet to make the move. Business and technology leaders should take these insights to heart:

- Ensure your partners (software and services) respect the privacy and sensitivity of your data. This aspect of the contract must be non-negotiable.
- While it's easy to embrace GenAI as a disruptive technology to have a chance of scaling, it's crucial to focus on what business problems it will solve. This requires change; don't skimp on legacy, data, process, and training your teams.
- Don't forget the people. These technologies are not replacing employee knowledge; they are enhancing it. Losing sight of this may undermine your business's reputation—with employees and customers.

In many cases, *capturing value* can pivot to *creating value* only after broader AI adoption. Thus, wins in productivity, effectiveness, efficiency, and improved data and insights (capturing) will often be the precursor to the transformative, experience-changing solution that creates new value in the markets and customers you serve.

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NTT DATA is uniquely capable of supporting the entire GenAI journey — from strategy to infrastructure. We help clients identify their highest-value use cases, build and manage the data centers and network infrastructure that power GenAI, fortify the enabling data foundation, and then create, train, and deploy the models. Our global scale, full-stack transformation portfolio and strong alliances with hyperscalers like Microsoft Azure, Amazon Web Services and Google Cloud Platform mean we can integrate and manage technology solutions seamlessly across business operations. These capabilities, combined with our deep industry expertise, help clients keep pace with market and technological trends and achieve competitive advantage. Powered by NTT Group's deep commitment to R&D, we are at the forefront of technology innovation, using our decades of experience in AI and GenAI to build powerful platforms, tools, and accelerators that speed the delivery of results — ethically and sustainably.

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