



Artificial Intelligence's View of Significant Firms in the Document Assembly and Automation Space



Open AI ChatGPT 4.0 was asked to list the ten most significant companies in the document assembly and automation space. Its list wasn't a big surprise, but its second and third observations certainly were.

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The Companies and the Criteria

This experiment began as minor research in support of a book examining aspects of improving office productivity through technology. Open AI was provided the widest possible discretion in order to get an accurate view of the industry through the eye of generative intelligence and distributed computing.

In assure objectivity and independence of the experiment, the questions used to stimulate Open AI's creation of these three lists are included in the *Notes* and *Adjustments* sections at the end of the paper. We would expect that following the same steps will create the same results. No questions were tested prior to inclusion in the experiment.

Ten Most Significant Companies in the Document Assembly and Automation Space

- | | |
|--------------------------------------|-----------------------|
| 1 Docusign | 6 LegalZoom |
| 2 HotDocs | 7 Smokeball |
| 3 Thomson Reuters - Contract Express | 8 Templafy |
| 4 TheFormTool | 9 Automation Anywhere |
| 5 XpressDocs | 10 Kofax |

Open AI's Choices of the Criteria for Selection

According to Open AI, "The phrase 'ten most significant companies' refers to the companies that have the greatest impact, influence, or leadership in a particular industry or sector. In this context, 'significance' could be measured by factors such as:

- **Market Share:** Companies with the largest portion of the market.
- **Innovation:** Those driving technological or process advancements in the industry.
- **Reputation:** Companies widely recognized for their products or services.
- **Customer Base:** Firms serving a large number of users or high-profile clients.
- **Revenue/Profitability:** Financially successful companies with strong revenues or profits.
- **Global Reach:** Companies with operations or influence across multiple countries or regions.
- **Product Quality:** Organizations known for offering superior or industry-leading products.
- **Longevity:** Established companies that have been significant players over time.
- **Industry Leadership:** Companies that set trends, standards, or best practices in the field.
- **Innovation and Growth Potential:** Companies investing in future technology, R&D, or expansion into new markets."

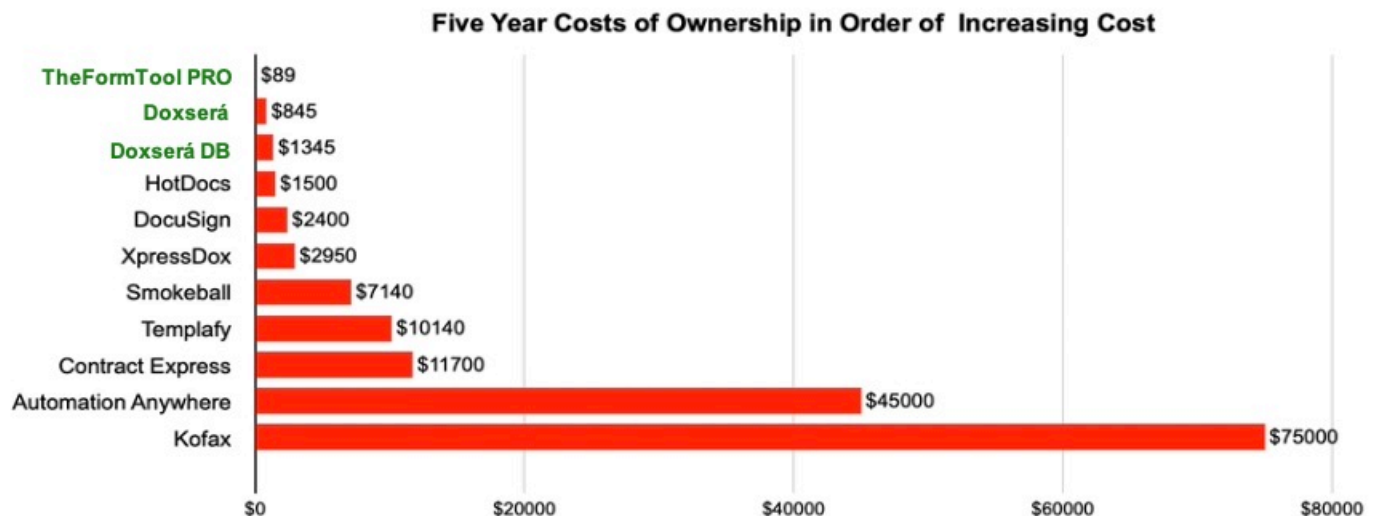
Comparison of the Products of the Companies

Open AI made its choice of the most significant features of each for comparison. We then ranked each product by the number of features listed. We treat a requirement for Internet connectivity to be a negative feature.

Products Ranked by Features	Document Assembly	Conditional Logic	Integration with MS Word	Template Management	Database Connectivity	PDF Output	Multi-Document Automation	Security Features	Mobile Support	Cloud-Based	Requires Internet Connectivity	Score
Doxserá DB	✓	✓	✓	✓	✓	✓	✓	✓				8
Doxserá	✓	✓	✓	✓		✓	✓					6
HotDocs	✓	✓	✓	✓	✓			✓		✓	✓	6
XpressDox	✓	✓	✓	✓	✓			✓		✓	✓	6
Contract Express	✓	✓	✓	✓				✓		✓	✓	5
TheFormTool PRO	✓	✓	✓	✓		✓						5
Smokeball	✓	✓		✓				✓		✓	✓	4
DocuSign	✓							✓	✓	✓	✓	3
LegalZoom	✓							✓	✓	✓	✓	3
Templafy	✓			✓				✓		✓	✓	3
Automation Anywhere	✓							✓	✓	✓	✓	3
Kofax	✓							✓	✓	✓	✓	3

Five Year Costs of Ownership of the Products

Open AI researched and reported prices for each product. We then created a five-year estimate for the cost of ownership of each product. We excluded LegalZoom because it apparently prices on a “per item” basis.



Notes and Assumptions

The Questions Used to Create Open AI ChatGPT 4.0's List of Ten Most Significant Companies in the Document Assembly and Automation Space

Notes:

This chart was created in September 2024 by ChatGPT 4.0, a generative artificial intelligence chatbot developed by Open AI. These are the questions used to stimulate ChatGPT. They are shown here in the same order as when asked.

1. "Please list the ten most significant companies in the Document Assembly and Automation space." ChatGPT responded: "Here are ten significant companies in the document assembly and automation space, known for their impact on the industry: DocuSign, HotDocs, Thompson Reuters—Contract Express, TheFormTool, XpressDox, Legal Zoom, Smokeball, Templafy, Automation Anywhere, Koufax."
2. "For each of the firms above, create a list of ten most significant features for each." ChatGPT responded: "To create a list of the ten most significant features for each company and product, I will use available information from industry sources and the primary product pages of each company listed."
3. After creating the list, ChatGPT volunteered: "If this looks good, I can create charts summarizing these features for easier comparison between firms and products."
4. "Create a Chart with products in left column and features across the columns. Use check marks to show whether the feature is available." (Instead of showing our company show our three products individually.)
5. "Can you include pricing comparisons?" ChatGPT responded: "Yes, I can include pricing comparisons for these products. However, to do so accurately, I would need to pull the latest pricing information from each company's website or other reliable sources."

Adjustments:

1. Where ChatGPT included monthly prices we multiplied by 12 for an annual figure.
2. We didn't count "Cloud-Based" as a positive for those firms that require an Internet connection to operate at full capability.
3. TheFormTool PRO is priced at \$89 for a lifetime license, so its five-year cost is \$89 for its 120 features and functions, ease of use, power, flexibility, and security.
4. LegalZoom is priced on a per-item basis. ChatGPT showed this example: LLC Formation: Starts at \$0 plus state fees for the Basic package. The Pro package costs \$249, and the Premium package is \$299, both also subject to state fees. The Premium package includes attorney consultations and rush processing