2019
WINTER
CUSTOMER SUCCESS REPORT

DOCUMENT AUTOMATION SOFTWARE CATEGORY

featured customers

DOCUMENT AUTOMATION SOFTWARE OVERVIEW

Document automation is a procedure to automatically generate digital documents. It utilizes logic to create new documents based on existing data. This information could be a paragraph of text (such as a legal disclaimer) or facts from a database (like an individual's name and contact details). Document automation software makes it fast and easy to create complex documents, sales proposals, legal letters, and certain kinds of marketing collateral.

A big advantage of document automation software is you can swiftly update multiple files. You don't need to individually analyze each document but can update all your files at once. When you import external information and update your smart fields, the solution will dynamically update each document to display the new info. This minimizes the risk of human error and gives all team members the collateral they need, fast - a win-win scenario.

Customer Success Report
Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings. The overall Customer Success ranking is a weighted average based on 3 parts:

Content Score is affected by:

1. Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
2. Customer reference rating score
3. Year-over-year change in amount of customer references on FeaturedCustomers platform
4. Total # of profile views on FeaturedCustomers platform
5. Total # of customer reference views on FeaturedCustomers platform

Market Presence Score is affected by:

1. Social media followers including LinkedIn, Twitter, & Facebook
2. Vendor momentum based on web traffic and search trends
3. Organic SEO key term rankings
4. Company presence including # of press mentions

Company Score is affected by:

1. Total # of employees (based on social media and public resources)
2. Year-over-year change in # of employees over past 12 months
3. Glassdoor ranking
4. Venture capital raised

Customer Success Report Award Levels

Market Leader

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.

Top Performer

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.

Rising Star

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

2019 Customer Success Awards

Check out this list of the highest rated Document Automation Software software based on the FeaturedCustomers Customer Success Report.

MARKET LEADERS

Adobe

conga

ESKER

HOTdocs

nintex

nitro

TOP PERFORMERS

ActiveDocs
DOCUMENT AUTOMATION SOFTWARE

Foxit
Do More With Documents

OCTIV

windward studios

RISING STARS

Templafy

XD

OVERALL BEST

OF DOCUMENT AUTOMATION SOFTWARE

BEST IN CATEGORY

HOTdocs™

HOTDOCS™

TRUSTED BY

EADS
European Aeronautic Defence and Space Company

THOMSON REUTERS™

DEPARTMENT OF JUSTICE

HSBC

GE
General Electric

ABOUT HOTDOCS

HotDocs is the leading provider of automated document assembly technology, globally. HotDocs is a part of the AbacusNext group of companies. Their software allows organizations to transform frequently used documents and forms into intelligent templates that enable the superfast production of custom documentation. Aside from time savings, HotDocs offers reduced risk, enhanced compliance and operational efficiency when producing documents.

81

Customer references from happy HotDocs users

VIEW ALL REFERENCES

"The attorneys at Fenwick   have really jumped in with both feet. HotDocs has been integrated with their SharePoint environment to provide effective template management and remote access for attorneys. In an average month, over 850 legal documents were generated from 89 different HotDocs interview sessions."

Mark Gerow
Director of Application Development & Business Process, Fenwick & West LLP

"The result is better quality documents, customer satisfaction, and a vast improvement in the production time frame. We've also seen improvements in overall issue resolution and a reduction in the potential for legal challenges."

Mark Robinson
Development Manager, Project Agreement Construction Tool, California Department of Transportation

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"The software is very easy to understand from a programming perspective, so we have the ability to modify our templates internally. The granular control we have allows us to react immediately to regulatory and process changes requested by our legal department."

Paula Olufs
Vice President of Loan Documentation, American AgCredit

"Time savings is the major benefit of HotDocs, but the consistency and quality of the documents we're producing are just as important. Once we get the templates done, there are no worries in terms of compliance, and documents require minimal review."

I.T. Systems Analyst
Brock & Scott, PLLC

Adobe

conga

ESKER

nintex

nitro

Adobe

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ABOUT ADOBE

Adobe is the global leader in digital marketing and digital media solutions. Adobe tools and services allow customers to create groundbreaking digital content, deploy it across media and devices, measure and optimize it over time, and achieve greater business success. Adobe help customers make, manage, measure, and monetize content across every channel and screen.

1675
Customer references from happy Adobe users

VIEW ALL REFERENCES

"Previously, we would have to work with a developer just to change a single letter on a website. With Adobe Experience Manager, we virtually eliminated the hidden costs associated with waiting time, which is a huge benefit."

Tsuyoshi Tanaka
Manager, Office of Communication Technology, Digital Marketing Center, Kao Corporation

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"After implementing Adobe Primetime, the iTunes app rating jumped from 2.5 to 4 stars. We're also seeing increased app and video engagement, indicating that we're providing a stronger customer experience."

Sree Kotay
Chief Software Architect, Comcast Business

"Adobe CQ supports the optimization of an enterprise digital channel by delivering content that promotes new customer acquisition, deep customer insights, and improved conversion rates and brand engagement."

Kensuke Inoue
Director of the Production & Sales IT Department, Corporate Affairs Office, Mitsubishi Motors Corporation

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"Acrobat makes it easy to collaborate, both internally and externally. We use the review, commenting, and "stamp" functions to mark up the PDF and deliver it to our agencies for desktop processing and layout."

Richard Shepherd
Senior Product Specialist, Canon

conga®

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ABOUT CONGA

Conga® developed its suite of enterprise-grade Intelligent Document Automation solutions to help businesses optimize their CRM investments. The Conga Suite, which includes Conga Composer, Conga Contracts, Conga ActionGrid, and Conga Sign, simplifies and automates data, documents, contracts, signing, and reporting. As a Salesforce Platinum ISV Partner, Conga is committed to providing its customers with enterprise-grade infrastructure, security, and solutions. In fact, more than 650,000 users in 85 countries across all industries rely on Conga applications to fully utilize their Salesforce data, including Hilton Worldwide, Schumacher Group, and CBRE.

167
Customer references from happy Conga users

VIEW ALL REFERENCES

"The Conga solution has enabled us to improve the efficiency of creating grant award packets by more than 95%, saving us a huge amount of manual labor, printing and mailing costs. As a small division serving a large constituent group, these savings are critical to our continued success."

Jeanette Albert
Salesforce Administrator, Colorado Creative Industries

"We tested many tools that claimed to offer an Excel®-like experience; ActionGrid is the most complete, elegant, user-friendly and responsive. Very well thought out."

Gwenn Bezard
Partner, Aite Group

"Conga Composer lets us standardize our executive briefing reports. Now our execs get the full story on an account before a key meeting, and our reps don't have to re-key lots of data. Every day, I think of more ways this application can help us. This is just one example."

Jane Isaac
Director of Sales Operations, Open Solutions

"With Conga Collaborate, we have only one system to maintain, and only a single template for all of our contracts. The Conga Collaborate integration with Salesforce enabled us to create a single document that acts as a universal template that will adapt itself to each and every sales opportunity."

Evan Robinson
Director of Sales, InsightSquared

ESKER

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GE Healthcare **TOSHIBA** **NYC** Department of Education Microsoft **Whirlpool** CORPORATION

ABOUT ESKER

Esker is a worldwide leader in cloud-based document process automation software. Organizations of all sizes use its shared platform of solutions, offered on-demand or on-premises, to automate accounts payable, order processing, accounts receivable, purchasing and more. Esker's solutions are compatible with all geographic, regulatory and technology environments, helping over 11,000 companies around the world in their efforts to Quit Paper™.

526
Customer references from happy Esker users

VIEW ALL REFERENCES

"We have reduced costs because we no longer buy paper and the other materials associated with printing, we no longer spend money on postal mail delivery and overall, [and] the accuracy of our order fulfillment has improved."

Kirk Jones
Director of IT, ALCAN

"Esker has given us the ability to reduce the bottom line costs of our customer invoices by around 30%. This has been achieved through the time saved from eliminating 100% of the paper in the process."

Jason Howell
Customer Service Development & Operations Manager, MK Electric

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"The Esker solution was a game-changer for us — the price, the presentation, the experience, the SAP certification. It was designed exactly for what we needed it to do."

Jean-Mathieu Farret
Senior Manager for Customer Service, BioMerieux

"We can do so many things that we couldn't before: take payments over the phone, automatically send out weekly payment reminders, deliver e-invoices to customers at the time of billing. This benefits not only our staff, but our customers as well — and we've seen that through an increased collections rate and lower DSO."

Patrick Powers
Credit Manager, Wine Warehouse

nintex

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World Vision

box

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YAMAHA

BRIDGESTONE

ABOUT NINTEX

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes.

236

Customer references from happy Nintex users

VIEW ALL REFERENCES

"Nintex Promapp integrates risk and compliance requirements directly into processes, which has promoted risk and compliance awareness across the business to an everyday activity."

Narelle Iacono
Internal Audit and Risk Manager, Aioi Nissay Dowa Insurance

"The Nintex drag-and-drop functionality has enabled our team to create workflows and get them deployed faster than we could have imagined. It's really made a huge difference in our department's productivity."

Jayesh Jina
Head of IT, National Metrology Institute of South Africa

"Using Nintex Workflow, we can now make changes to processes quickly and easily it doesn't require any knowledge of programming."

Ekaterina Sumerkina
Head of Legal, KupiVip

"When I saw Nintex, I was really shocked because I can now build a form, build its workflow, drag and drop using the browser no need for deployment or sophisticated methods."

Asem Nairat
BI and SharePoint Team Lead, Wataniya Mobile

nitro

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ABOUT NITRO

Nitro is a document productivity company. They make it easy for business teams to convert, edit, share, sign, and analyze documents anywhere on any device. Founded in 2005 in Melbourne, Australia and headquartered in San Francisco, Nitro is used by more than 600,000 businesses, including over half of the Fortune 500.

68

Customer references from happy Nitro users

VIEW ALL REFERENCES

"Nitro is used to change file sizes, edit wording in PDFs, create PDFs, and all other PDF needs. It has taken the burden off of one person that was always editing everyone's documents."

Joe Hefler
IT Administrator, The Cleveland Clinic Foundation

"The ease of handling and processing documents across our companies and operations has generated monthly time savings of about 300 hours."

Gérard Korda
Head of IT Support, ZFV

"I feel like we're actually giving people better tools to do their job, for less money. Ultimately, Nitro is helping me achieve my goal to enable our workforce to improve cost efficiencies and productivity."

Sarah McCullough
Business Applications Manager, Pacific National

"We've started using Nitro within our organization and have been blown away by how much faster, more functional and cost effective it is compared to what we used before."

Enda Quain
Head of Technology Integration and Assurance, AIB

ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

Foxit

Do More With Documents

OCTIV

windward studios

ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

TOP PERFORMER

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ABOUT ACTIVEDOCS

ActiveDocs is a document automation specialist. They work with you to give you total confidence in your high-value documents – with over 25 years of experience, they know what works where, and they will share their expertise with you. Their software is chosen by the world's top organizations. It's intuitive and lets you design templates for your documents, configure how and when documents are produced, and what happens to them after. Together, they can come up with a future-proof solution and deploy it thoughtfully to get it right the first time.

100

Customer references from happy ActiveDocs users

VIEW ALL REFERENCES

"The implementation of our quality documents solution has shown that ActiveDocs Opus is a key piece of our content management puzzle. It works seamlessly with the SharePoint and Nintex products. It's been gratifying to me that it's worked so well, and this solution provides a good template for the future."

Stewart Cowen
Enterprise Systems Manager, Silver Fern Farms

"It saves the sales people a lot of time. Eighty percent of the content they need is already created, so they just have to select and change it through the Opus system. They can customize proposals for each prospect, depending on what the prospect is interested in."

Rick Petford
Communications Manager, Ricoh

"We can put documents together in well under an hour now, just going through simple, rule-driven wizard steps. Once that's done ActiveDocs builds the document. It's very quick now. It was something we would have spent one or two weeks on. Condensing that into an under-an-hour task is pretty awesome."

Joel Fitzgerald
Solutions Architect, TechnologyOne

"With ActiveDocs Opus, we can quickly and easily do all the content merging that creates our documents. We can run thousands of documents in a short time, versus our previous manual process that could take weeks."

Carrie Shomsky
Director of Application Development & Support, National Rural Electric Cooperative Association

Foxit
Do More With Documents

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GENERAL CONTRACTOR
—ESTABLISHED 1921—

FIRST AMERICAN BANK

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loomion
The Leader's Choice

THE SIMONS FIRM | LLP
Nationally Recognized – New Mexico Roots

ABOUT FOXIT SOFTWARE

Foxit is a leading software provider of fast, affordable and secure PDF solutions. Businesses and consumers increase productivity by using Foxit's cost effective products to securely work with PDF documents and forms. Foxit is the #1 pre-installed PDF software, shipped on one-third of all new Windows PCs, including those from HP®, Acer, and ASUS®. Foxit's Software Development Kits (SDKs) help developers reduce costs and improve time to market by easily integrating industry leading PDF technology into application workflows. This technology shares the same underlying technology that powers Google's open-source PDFium project.

100
Customer references from happy Foxit Software users

VIEW ALL REFERENCES

"Organizing PDF files was done in seconds just by dragging and dropping pages from the page panel. We couldn't be more convinced that Foxit was the right solution for us."

Dave Duchaj
Senior Vice President, Information Technology Services, First American Bank

"As a result, users can easily access any meeting documentation, no matter if they are at the office or on the road. Without mention, they don't have to go through the hassle of carrying out loads of documents to meetings. Also, board members can now be confident that their information is highly protective and secure."

Frank Becker
CTO, Loomion

"Foxit PhantomPDF has been extremely helpful for us; it can convert thousands of pages into PDF and put stamps and bates numbers in each page of the entire document in less than 10 minutes. The alternative would be to manually stick stamps to each page, which would take too long. Foxit has definitely improved the communication and processes...

Samantha Garcia
Paralegal, The Simons Firm

"Foxit provided me with the technical help and financial flexibility to make it work; I wouldn't be able to obtain the same or much better results with any other PDF provider than Foxit."

Winston Chen
Founder, Voice Dream

OCTIV

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GE · FIFTHGEAR accelerating commerce · ORACLE · UNIVERSITY OF NOTRE DAME Mendoza College of Business · PayPal

ABOUT OCTIV

Octiv provides a sales productivity platform designed to create efficiencies in process workflows for creating and managing documents and assets like sales presentations, quotes, proposals, and contracts. Octiv integrates data from CRM, CPQ, ERP and other systems to streamline workflows, save time and accelerate sales opportunities. Founded in 2010, Octiv serves over 400 organizations including large enterprises such as General Electric and Siemens and high-growth companies such as DoubleDutch and G/O Digital.

20

Customer references from happy Octiv users

VIEW ALL REFERENCES

"Since we've used Octiv, the reps can handle contracts from start to finish now because it's all in one place. When a contract is done in Octiv it's done right — and if it's not done in Octiv, it doesn't happen. No other company can do the kinds of things Octiv does for us."

Adam Claypool
Director of Sales Operations and Analytics, G/O Digital

"For every agreement we generate in Octiv, we save an hour and 20 minutes of draft time. We're estimating at our current volume that we'll save a full year's worth of man hours."

Ashley Bolender
Channel Contracting Leader, GE Global Operations

"Eleven days after purchasing Octiv, I created a 99-page document with 17 signature blocks in less than 30 minutes. My client was able to review and sign the document in less than five minutes."

Jordan Easley
Director of Operations, Realync

"Initially, I fell in love with the product more for the presentation than the tracking, until we started to use it. The sales team was blown away by the tracking capabilities, and adoption was instant."

Michael Crafton
Owner, 360 Services

windward studios

TOP PERFORMER

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BearingPoint®   CERN   ENVISION PHARMA GROUP *Driven by evidence, enabled by technology*   TATA CONSULTANCY SERVICES   TOWERS WATSON

ABOUT WINDWARD STUDIOS

The Windward solution is an enterprise level document automation solution. It allows users to add document automation capabilities to online, desktop, SaaS or mobile products. Windward has 3-1/2 product lines. All are built around the template designer that runs in Microsoft Office. The engine product is an API you can integrate into your application. The Maestro product is a full document automation solution that fulfills all your document automation needs. Maestro also has versions that are directly integrated into Salesforce, NetSuite, Dynamics, etc. (this is the 1/2). The Solo product is a desktop document automation product for the individual user.

59

Customer references from happy Windward Studios users

VIEW ALL REFERENCES

"Clients tell us changes they can now do in 10 minutes would have cost $50,000 or more with their previous solution."

Martin Stewart
Director of Strategy, Axe Group

"Our previous solution was time-consuming and required us to deploy an entire report set to correct a single report. The ability to deploy single reports with Windward is much better and a huge benefit."

Chuck Hanebuth
CEO, HAL, Inc

"Non-programmers have a better aesthetic and bring to the process a better idea of what the report layout should look like. That helps us serve our customers better."

David Boodey
Vice President of Technology, RepLink

"Customers are ecstatic about the document automation solutions PSC put in place and are benefiting with rapid creation and maintenance of templates since this job responsibility has shifted from the IT development team to the business team. This reduces the turn-around time for making modifications and frees up valuable IT resources to..."

Hit Mistry
Director of Engagement Management, PSC Group, LLC

Templafy

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ABOUT TEMPLAFY

Templafy is a fast-growing B2B Software-as-a-Service company, helping over 1.5 million users improve productivity, branding, and compliance across business documents, presentations, and emails. Templafy's platform assists enterprise employees in each stage of the document creation workflow, delivering more productive, compliant and enjoyable ways of working in office applications. It's a solution that communications and compliance teams can control, IT can trust, and employees love using. Templafy brings custom company templates, brand assets, and best practice content together directly inside any office application, streamlining how users create on-brand and compliant documents, presentations, and emails. With Templafy, global businesses safeguard their brand integrity and increase productivity through a centrally governed, secure and easy to use platform.

47

Customer references from happy Templafy users

VIEW ALL REFERENCES

"It just works. We used to have problems with formatting, and now everyone has their email signatures in the right format. It's really easy for people to adhere to our corporate standards because it's automatic - and changes are also implemented automatically. Once the team has Email Signature Manager, boom! You know everything is correct."

Franz Rois
Marketing Director, Stanton Chase

"Our administration support on templates, documents and presentations is now easier – with Templafy, we can quickly check and correct content, and then instantly make everything available to our users."

Pia Hvid Tønnesen
Digital Project Manager, Aarhus University

"The rapidly growing number of emails sent from mobile devices and websites has increased the complexity of consistently and securely managing brand elements, marketing messages and legal disclaimers. We're excited Templafy now offers a cloud-based solution to manage enterprise email signatures while improving brand governance."

Sajan Parihar
Director, Microsoft Azure

"Templafy plays an essential role in our updated quality management system since all templates (both internal and project related templates) are managed in Templafy. And the brand and content validation features make sure our users will stay up-to-date with the latest design and content."

Mattias Eriksson
Digital Design & BIM, White Arkitekter

:: XD

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ABOUT XPRESSDOX

XpressDox is a Document Automation Software and API for Web, Servers, Apps, and Desktop, designed to be your perfect document automation suite with customizable components created to work together seamlessly. Integrates easily with databases, web services, and other APIs. Powerful and easy to use.

7

Customer references from happy XpressDox users

VIEW ALL REFERENCES

"XpressDox is a very powerful tool to automate a wide variety of templates, which allowed us to significantly increase productivity and eliminate errors."

Rachelle Thomson
Business Solutions Manager, Fasken Martineau DuMoulin

"We specialize in integrating XpressDox with web and mobile apps. Data access and ease of deployment are the stand out features for us. We couldn't be happier."

Charl Dreyer
Founder, Doccly

"The flexibility of XpressDox opened up uses that just weren't possible with the other services we tried. We can use our existing data and put document assembly tools in front of our users and clients where they need them, not where the software is."

Ned Daze
IT Director, Rosen Law Firm

"XpressDox was selected because of its superior speed in assembling a very complex template, its attractive and customizable user interface, the ease with which we could integrate with databases and the responsiveness of the vendor to our needs."

Doug Simpson
Founder, FlexClaim