

High-Value Companies Primed for AI Disruption

Some of these companies survive. Some don't. But every company here built serious value before GPT around a workflow that AI can now collapse, absorb, or rebuild into a better product.

🕒 Already disrupted

- **Chegg** — homework help. Peak ~\$14B in 2021, now roughly ~\$60M. Better AI product: an adaptive study coach with memory, practice loops, and teacher-aware workflows.
- **Stack Overflow** — acquired for \$1.8B in 2021. Better AI product: codebase-aware debugging and execution-aware help, not generic public Q&A.
- **Fiverr** — peaked near \$10B. Better AI product: outcome-driven delivery with review loops and guarantees, not commodity task listings.

🎯 Single-feature SaaS

- **Linktree** — link-in-bio, valued around \$1.7B in 2022. Better AI product: a living personal conversion page that rewrites itself by audience and intent.
- **Calendly** — scheduling, valued at \$3B in 2021. Better AI product: an agent that negotiates time, prep, travel, and follow-up, not just booking slots.
- **Typeform** — forms, valued around \$935M in 2022. Better AI product: adaptive intake flows that branch, summarize, and act automatically.

✦ Writing and content

- **Grammarly** — valued at \$13B in 2021. Better AI product: end-to-end writing intent, tone, research, drafting, and collaboration inside the work surface.
- **Jasper** — peaked near \$1.5B. Better AI product: brand-aware content systems tied to workflow and distribution, not prompt-in prompt-out copy generation.
- **Mailchimp** — acquired for \$12B. Better AI product: campaign orchestration with audience reasoning, content generation, and automatic adaptation.

📄 Support and ops

- **Zendesk** — taken private for \$10.2B in 2022. Better AI product: full-resolution agents that act, not ticket systems that wait.
- **Gong** — valued at \$7.25B in 2021. Better AI product: deal copilots that improve pipeline outcomes, not just call summaries and dashboards.
- **DocuSign** — peaked near \$60B. Better AI product: contract workflows that draft, negotiate, redline, route, and explain risk.