

| Phase 2                              |              |                  |                                  |   |
|--------------------------------------|--------------|------------------|----------------------------------|---|
| Feature                              | Current Plan | Phase-2 Priority | Notes                            | Why Important                           |
| Self-Signing (Myself)                | Hold         | Must Have        | Phase-1 held                     | Core self-signing workflow              |
| Advanced Document Fields             | No           | Medium           | Checkboxes, Notes, etc.          | Makes templates more flexible           |
| Bulk Send                            | No           | High             | Enterprise feature               | Send to multiple recipients efficiently |
| Content Library                      | No           | Medium           | Reusable blocks                  | Reuse templates & content               |
| Smart Content                        | No           | Low              | Automated templates              | Productivity enhancement                |
| Embedded Videos                      | No           | Low              | Optional enhancement             | Enrich documents                        |
| Themes & Branding                    | No           | Medium           | Branding for business plans      | Professional look for enterprise        |
| Custom Branding                      | No           | Medium           | Logos, colors                    | Enterprise branding                     |
| CRM Integrations                     | No           | Medium           | HubSpot, Salesforce              | Enterprise workflow integration         |
| API                                  | No           | High             | Needed for enterprise            | Developer & partner integration         |
| Webhooks                             | No           | Medium           | Event automation                 | Real-time workflow triggers             |
| Workflow Automation Tools            | No           | Low              | Advanced logic                   | Enterprise automation                   |
| Workflow Automation                  | No           | Low              | Advanced business logic          | Similar to above                        |
| Renewal Notifications                | No           | Low              | Contract workflows               | Enterprise customer management          |
| Team Workspaces                      | No           | Medium           | Organization-level collaboration | Required for enterprise adoption        |
| Custom Roles / User Roles            | No           | Medium           | Admin control                    | Enterprise permission control           |
| SSO (Single Sign-On)                 | No           | Medium           | Enterprise requirement           | Secure login for corporate users        |
| Purchase Plan Visibility             | No           | Low              | Monetization                     | Shows user their plan and limits        |
| Chat Support                         | No           | Medium           | Add later                        | User assistance                         |
| Mobile Signature Capture Link        | No           | Medium           | Mobile workflow                  | Capture signatures via mobile link      |
| Touchscreen Signature Enhancement    | No           | Medium           | Fine-tuning                      | UX improvement for tablets/mobiles      |
| Web Forms                            | No           | Medium           | Collect data / sign              | Expand use cases                        |
| Two-Factor Authentication            | No           | Medium           | Security                         | Improves trust & compliance             |
| SMS Verification                     | No           | Medium           | Security / verification          | Adds trust                              |
| Passcode Verification                | No           | Medium           | Security                         | Additional authentication               |
| QES (Qualified Electronic Signature) | No           | Low              | Advanced legal compliance        | Required for some industries            |
| Premium Support                      | No           | Low              | Enterprise-only                  | Optional support for big accounts       |
| Dedicated Customer Success Manager   | No           | Low              | Enterprise-only                  | Customer retention & enterprise support |