



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