

Nutshell 

Nutshell's PeopleIQ & VisitorIQ

Track down more contacts from your current customers & new companies & people that visit your site but aren't in your pipeline with PeopleIQ and VisitorIQ.

Nutshell 

Today's Agenda

- PeopleIQ 12 minutes
 - What does it do?
 - When to use it
 - How to set it up

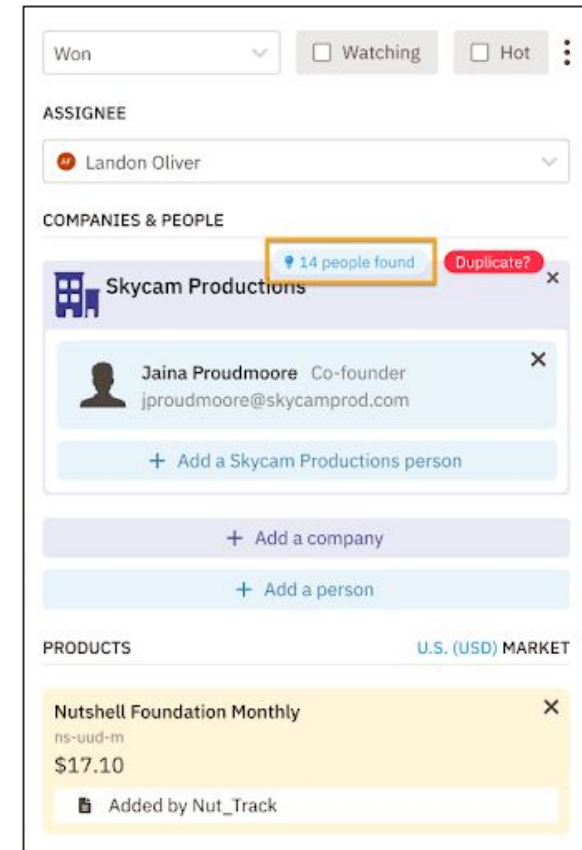
- VistitorIQ 12 minutes
 - What does it do?
 - When to use it
 - How to set it up

- Q&A

Please ask your questions in the chat throughout the presentation

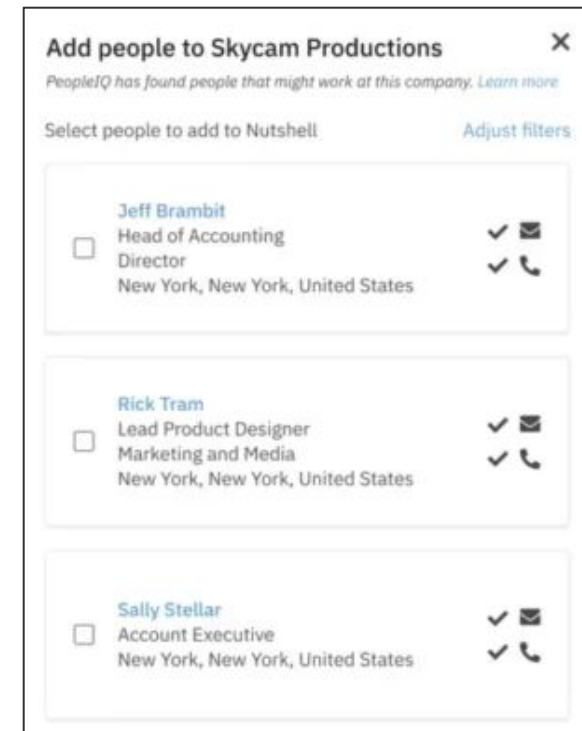
What does PeopleIQ do?

- PeopleIQ helps you find additional people / points of contact at a company
- Easily create new People records in Nutshell with just a few clicks
- Filter out what types of Employees you see
 - *Controlled by Admins*
- Provides you with contact information
 - Email
 - Phone
 - LinkedIn profile



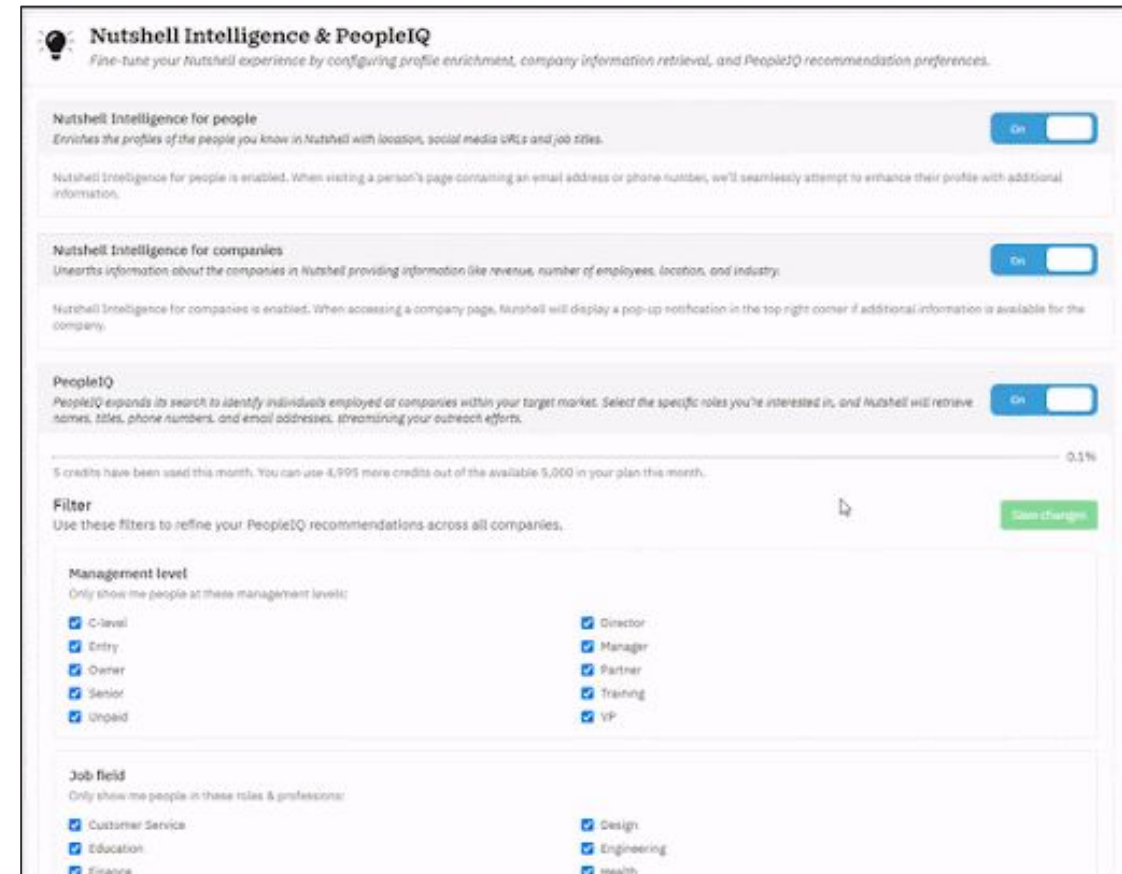
Use cases for PeopleIQ

- Your point of contact leaves the company
 - PeopleIQ can help you find the right person to keep working on the lead or growing the business.
- Your sale/upsell stalls out in one department
 - PeopleIQ helps you connect with someone who can move the deal along.
- Sell to another branch/franchise
 - Find your point of contact's counterpart at another branch to grow your business.



Setting up PeopleIQ

- Only Admins can change PeopleIQ settings (any user can use PeopleIQ)
- Settings > Data > PeopleIQ
- Toggle “On”
- Set your filters for:
 - Management level
 - Job field
 - Contact information



Let's Walk Through



What does VisitorIQ do?

- Shows you what companies are visiting your website and what pages they view
- Shows you company firmographic information like:
 - Address, industry, # of employees, revenue, and company website
- Shows you employees who work for the company
- Create Company, Contact, and/or Lead records in a few clicks



The screenshot shows the VisitorIQ dashboard interface. At the top, it says "VisitorIQ Identify potential customers and opportunities visiting your website". There are navigation tabs for "Visitors" and "Settings". A search bar indicates "2,648 visitors". Below this is a table with the following columns: Company name, Full address, First visit, Region, # of Visits, Industry, # of Employees, Date added, and Revenue. The table contains 18 rows of data, each representing a different company visitor.

Company name	Full address	First visit	Region	# of Visits	Industry	# of Employees	Date added	Revenue
[Redacted]	[Redacted]	February 24, 2023	Dallas, Texas	1	Administrative Sup...	250		\$1
[Redacted]	[Redacted]	February 24, 2023	Provo, Utah	4	Administrative Sup...	25000		
[Redacted]	[Redacted]	February 24, 2023	Costa Mesa, California	6	Administrative Sup...	25000		
[Redacted]	[Redacted]	February 26, 2023	Louisville, Colorado	3	Administrative Sup...	50		
[Redacted]	[Redacted]	March 2, 2023	Mountain View, California	11	Administrative Sup...	500		\$1
[Redacted]	[Redacted]	March 3, 2023	Salt Lake City, Utah	2	Administrative Sup...	50		
[Redacted]	[Redacted]	March 6, 2023	Los Angeles, California	2	Administrative Sup...	250		\$1
[Redacted]	[Redacted]	March 6, 2023	US	1	Administrative Sup...	10		
[Redacted]	[Redacted]	March 10, 2023	Seattle, Washington	1	Administrative Sup...	25000		
[Redacted]	[Redacted]	March 11, 2023	Santa Clara, California	1	Administrative Sup...	10		
[Redacted]	[Redacted]	March 14, 2023	Santa Monica, California	1	Administrative Sup...	2500		\$21
[Redacted]	[Redacted]	March 16, 2023	Olympia, Washington	1	Administrative Sup...	50		
[Redacted]	[Redacted]	March 20, 2023	Raleigh, North Carolina	1	Administrative Sup...	2500		\$21
[Redacted]	[Redacted]	March 21, 2023	Dallas, Texas	1	Administrative Sup...	10		
[Redacted]	[Redacted]	March 23, 2023	Alexandria, Virginia	1	Administrative Sup...	10		
[Redacted]	[Redacted]	March 24, 2023	New York, New York	5	Administrative Sup...	250		\$1
[Redacted]	[Redacted]	March 24, 2023	El Cajon, California	1	Administrative Sup...	50		
[Redacted]	[Redacted]	March 24, 2023	North Charleston, South Caro...	1	Administrative Sup...	500		\$1
[Redacted]	[Redacted]	March 29, 2023	Roswell, Georgia	1	Administrative Sup...	50		

Use cases for VisitorIQ

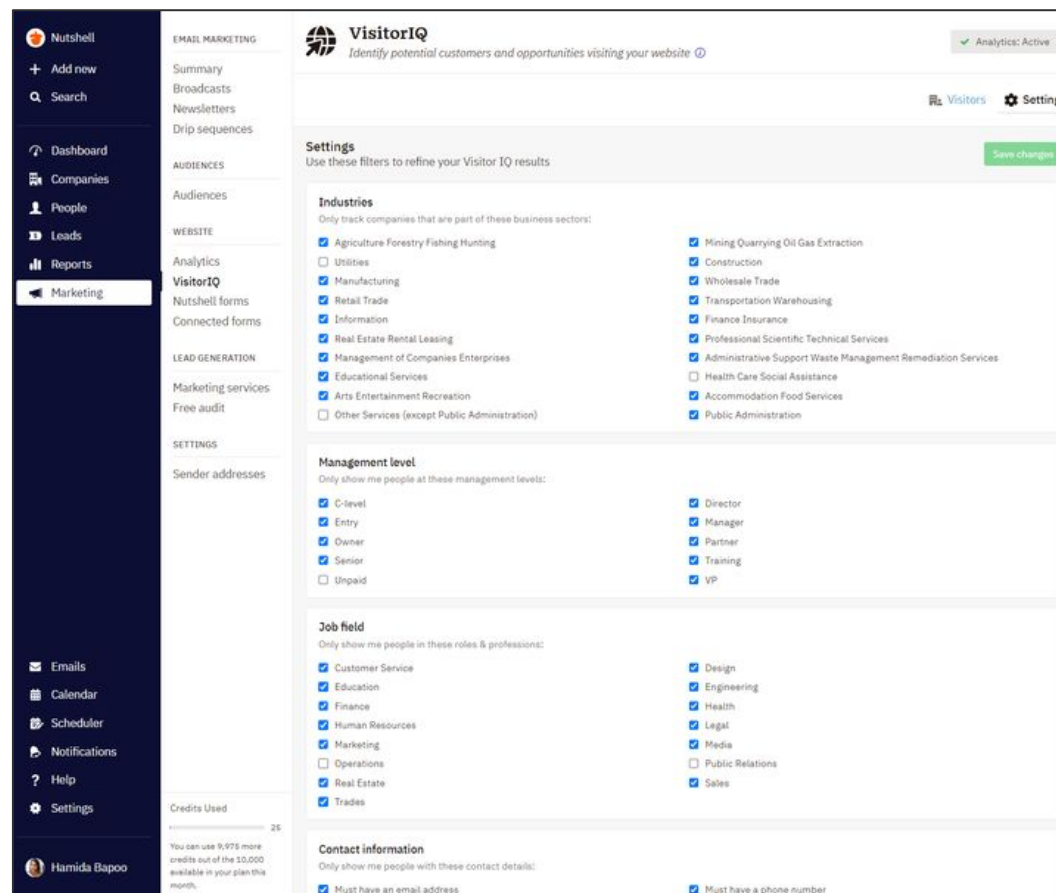
- Add interested website visitors who didn't fill out a lead form to your cold outreach process.
- Take early action on your **dream** customers.
- Add interested website visitors to your advertising and remarketing audiences
 - LinkedIn, Google Ads, Microsoft Ads, etc.



A screenshot of the VisitorIQ interface. At the top, it shows a lead card with a profile icon, a location pin, and the text "Added 14 hours ago". Below this, there are fields for "Lead" (with a blue arrow icon and "\$0"), "URL", "Location" (Fond Du Lac, Wisconsin), "Industry" (Real Estate Rental Leasing), "Revenue" (\$250,000,000), and "Employees" (1000). Further down, it shows "Time on site" (2 minutes) and "Page visits" (1). The main section displays a list of three potential contacts, each with a blue checkmark, a name, title, and location, and icons for email and phone. The contacts are: 1. Senior Construction And Sales Project Manager, Senior, Milwaukee, Wisconsin, United States. 2. Senior Service Sales Representative, Senior, Eleva, Wisconsin, United States. 3. Senior Sales And Project Manager, Senior, Washington County, Wisconsin, United States. At the bottom, there is a green button labeled "Add 3 people" and the text "Uses 3 credits" below it.

Setting up VisitorIQ

- You will need 'Marketing' level access in order to set up and use
- Marketing > VisitorIQ > Settings
- Set your filters for:
 - Industries, management level, job field and contact information
- Set up Nutshell Analytics:
 - Since VisitorIQ relies on your website data, you'll need to set this up to bring this data into Nutshell
 - Snippet of code to copy/paste into your website's code

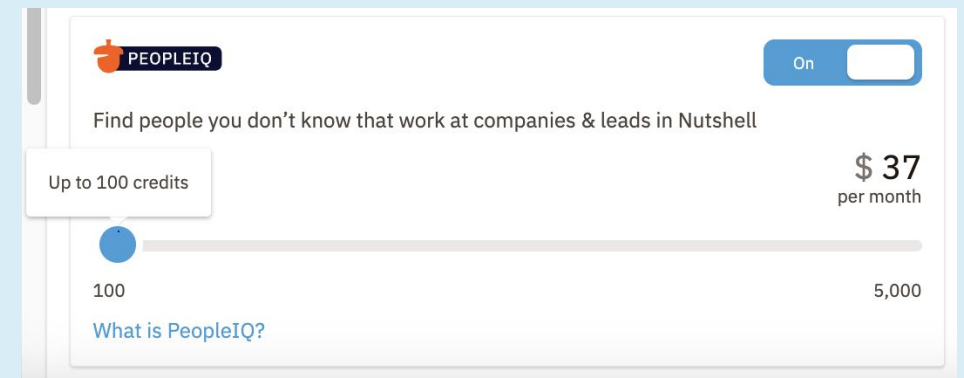


Let's Walk Through



How to get PeopleIQ & VisitorIQ

- Every Nutshell customer gets 5 free credits per month
 - These credits can be used for both PeopleIQ and VisitorIQ
 - PeopleIQ: 1 Person added = 1 credit
 - VisitorIQ: 1 Company + 1 Person added = 2 credits
 - VisitorIQ: 1 Company + 2 People added = 3 credits
- Admins can purchase PeopleIQ from our billing page
- Starting at \$37/mo for 100 credits
 - Per company, not per user



What's Next for PeopleIQ & VisitorIQ

- Augment existing contacts by using PeopleIQ to get contact information (phone & email)
 - Examples:
 - Person enters form but leaves contact information fields blank
 - Import contacts from LinkedIn and use PeopleIQ to fill in the blanks
- VisitorIQ: *Page visited filter*
 - Filter down to companies who visited a key page that typically leads to a conversion or new lead, or typically helps qualify a potential lead.



Q&A

Join our monthly support lead podcast

Join us on the 4th Wednesday of every month at Noon eastern for our recurring webcast where we go over how to set up, use, and get more out of the Nutshell essentials.

It's also a great opportunity to be able to ask a question and be **shown** an answer.

You can register at: <https://www.nutshell.com/guided-tours/nutshell-basics>

Our next Nutshell Basics webcast will be on June 26, 2024 at 12:00 PM EST.

Thanks for joining us today!

Recent releases:

- **Notetaker:** conversational AI that enables you to use a “speak to text” feature to write notes and emails
- **Form spam prevention:** additional settings for Nutshell forms to help combat spam
- **Email Booster:** a feature within our Revenue Booster add-on that allows users to use their Nutshell email templates directly within Gmail while also being able to click open and click rates.
- **Parent-child relationships:** create a company hierarchy to understand overall data and data for each subsidiary

Upcoming releases:

- **Nutshell Inbox:** text message/SMS capabilities inside Nutshell
- **Zoom/Phone Call Transcription enhancements:** automatically transcribe your Zoom and Nutshell phone calls.

Keep up to date with all of our Product Updates ([here](#)) or subscribe to our [Shipping News newsletter](#).