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.



Today's Agenda

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

12 minutes

12 minutes

- 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



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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.



elect	people to add to Nutshell	Adjust filter
	Jeff Brambit Head of Accounting Director New York, New York, United States	くいいく
	Rick Tram Lead Product Designer Marketing and Media New York, New York, United States	~ E ~ C
	Sally Stellar Account Executive New York, New York, United States	✓ 20 ✓ 10



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 Ο
 - Job field Ο
 - Contact information Ο



Nutshell Intelligence & PeopleIQ 0 Fine-tune your Nutshell experience by configuring profile enrichment, company information retrieval, and PeopletQ recommendation preferences. Nutshell Intelligence for people Erriches the profiles of the people you know in Nutshell with location, social media URLs and job titles. Nutshell Intelligence for people is enabled. When visiting a person's page containing an email address or phone number, we'll seamlessly attempt to enhance their profile with additional Nutshell Intelligence for companies Uncorths information about the companies in Nutshell providing information like revenue, number of employees, location, and industry Nutshall Intelligence for companies is enabled. When accessing a company page, Nutshall will display a pop-up notification in the top right corner if additional information is available for the People10 PeopleD expands its search to identify individuals employed at companies within your target market. Select the specific roles you're interested in, and Matchell will retrieve nomes, titles, phone numbers, and email addresses, streamsning your outreach efforts. 5 credits have been used this month. You can use 4,995 more credits out of the available 5,000 in your plan this month Filter D. Use these filters to refine your PeopleIQ recommendations across all companies. Management level Only show me people at these management levels: C-level C Director C Entry Manager C Owner D Partner Senior Senior Training

C VP

C Design

Engineering T mealth

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Job field

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Customer Service

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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



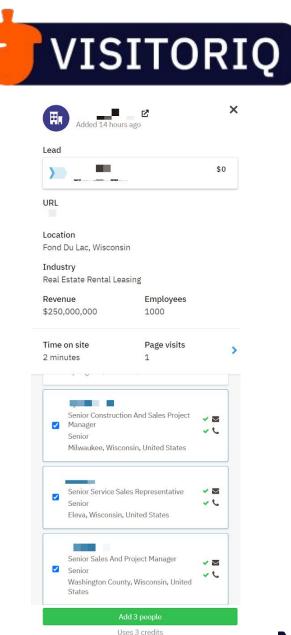
									P. Visitors	🔅 Settings
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1-50 of 2648				< Prev 1 2	3 4 5 Nex	t >				
Company name	Full address		First visit	Region	# of Visits		Industry ↓↑	# of Employees	Date added	Revenue
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# 2	1		February 24, 2023	Provo, Utah		4	Administrative Sup	25000		
# 1			February 24, 2023	Costa Mesa, California		6	Administrative Sup	25000		
#2			February 28, 2023	Louisville, Colorado		3	Administrative Sup	50		
# 2			March 2, 2023	Mountain View, California		11	Administrative Sup	500		
			March 3, 2023	Salt Lake City, Utah		2	Administrative Sup	50		
R			March 6, 2023	Los Angeles, California		2	Administrative Sup	250		
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₩2.			March 10, 2023	Seattle, Washington		1	Administrative Sup	25000		
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ą			March 24, 2023	El Cajon, California			Administrative Sup	50		
#:			March 24, 2023	North Charleston, South Caro		1	Administrative Sup	500		

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.





Setting up VisitorlQ

- 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



Nutshell	EMAIL MARKETING	VisitorIQ Identify potential custamers and opportunities visiting yo	✓ Analytics: Active •
+ Add new	Summary	· · · · · · · · · · · · · · · · · · ·	a weater of
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Dashboard	Drip sequences	Settings	Savo changte
	AUDIENCES	Use these filters to refine your Visitor IQ results	
Companies	Audiences	2.2.2.2	
People	WEBSITE	Industries Only track companies that are part of these business sectors:	
Leads	WEDSITE	Agriculture Forestry Fishing Hunting	Mining Quarrying Oil Gas Extraction
Reports	Analytics	Utilities	Construction
- 11 - 1	VisitorIQ	Manufacturing	🖸 Wholesale Trade
Marketing	Nutshell forms	🗹 Retail Trade	Transportation Warehousing
	Connected forms	Information	Finance Insurance
		Real Estate Rental Leasing	Professional Scientific Technical Services
	LEAD GENERATION	Management of Companies Enterprises	Administrative Support Waste Management Remediation Services
	120.002000000000	Z Educational Services	Health Care Social Assistance
	Marketing services	Z Arts Entertainment Recreation	Accommodation Food Services
	Free audit	Other Services (except Public Administration)	Public Administration
	SETTINGS	1 22 10 10 23 2020	
	Sender addresses	Management level Only show me people at these management levels:	
		C-level	Director
		Z Entry	Manager
		Owner	Partner
		Senior	Training
		Unpaid	C VP
		Job field	
🖾 Emails		Only show me people in these roles & professions:	- Second
- chails		Customer Service Education	 Design Engineering
Calendar			Health
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Notifications		Marketing Operations	Public Relations
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		Real Estate	Sales
Settings	Credits Used	Trades	
Hamida Bapoo	You can use 9,975 more credits out of the 10,000	Contact information Only show me people with these contact details:	
a marmoa oapoo	evailable in your plan this month.		
	- Andrews	Must have an email address	Must have a phone number



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



PEOPLEIQ	On
Find people yo	u don't know that work at companies & leads in Nutshell
Up to 100 credits	\$ 37 per month
100	5,000
What is People	IQ?



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.