Nutshell

Scheduler

Book and Manage Appointments From Your CRM

Join us to discover Nutshell's built-in online meeting scheduler. With Scheduler, you can easily plan, collect, and manage bookings with your team and prospects, all without leaving Nutshell.

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Director of Marketing at Nutshell

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Today’s Agenda

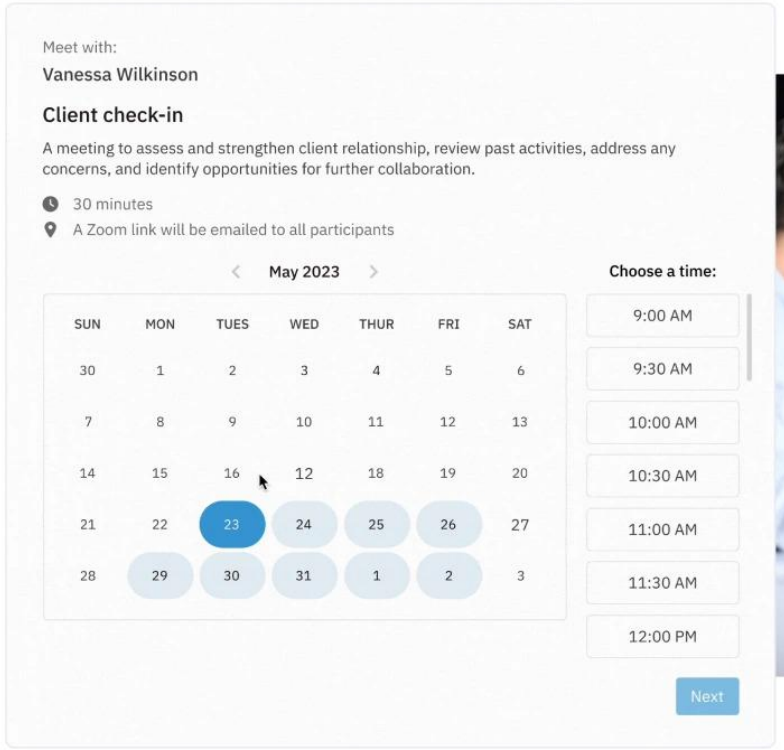
- What is Scheduler? 5 minutes
- Benefit of having Scheduler in your CRM 5 minutes
- How to use Scheduler 10 minutes
- Walkthrough video 5 minutes
- How to get started 5 minutes

- Q&A

Please ask your questions in the chat throughout the presentation and we’ll answer what we can!

What is **Scheduler**?

- Meeting scheduling software in your CRM
- Allow invitees to book time based on your availability
- Collect information through forms, and **more!**



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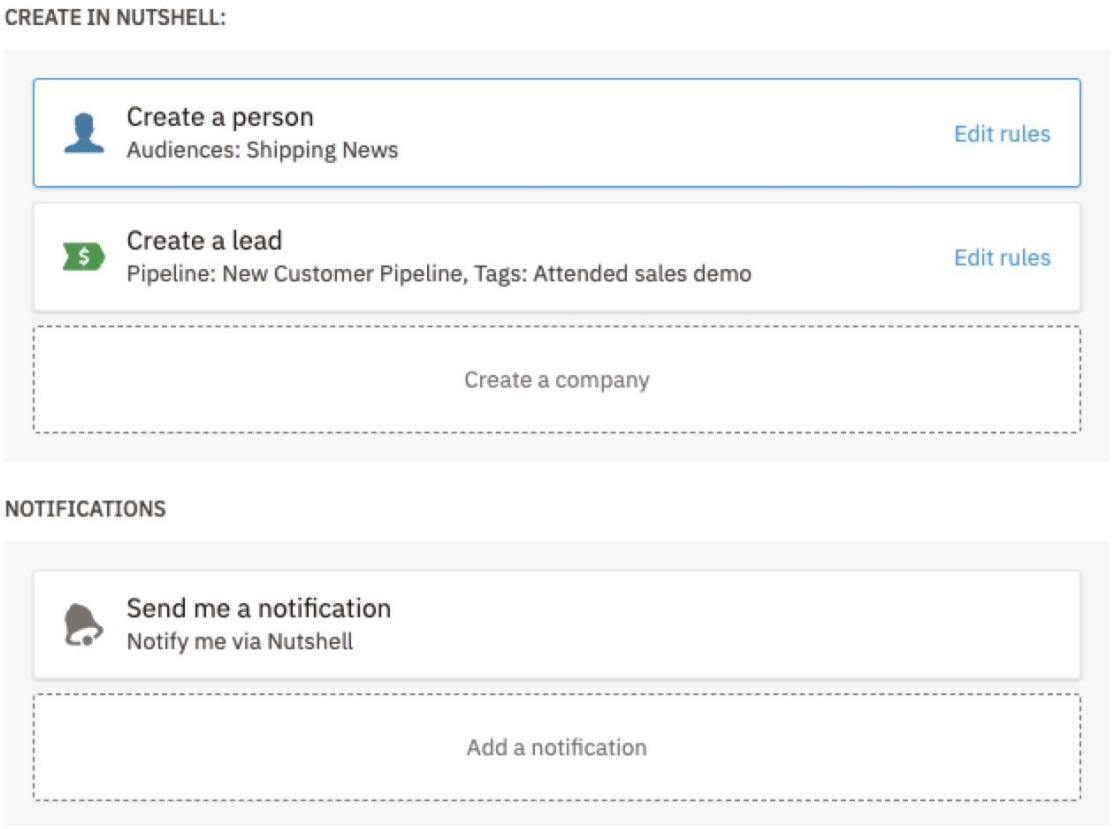
Why do I want my meeting tool in my CRM?

- Collect information from invitees via custom forms
- Automatically add Nutshell People, Companies and Leads with each invitee
  - Add invitees to marketing audiences
  - Channel invitees through pipelines
  - Assign tags to People, Leads, and Companies
- Log meetings as activities in Nutshell
- Automate your sales process
- Be notified of new bookings in Nutshell
- Get rid of an integration



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Let’s Walk Through

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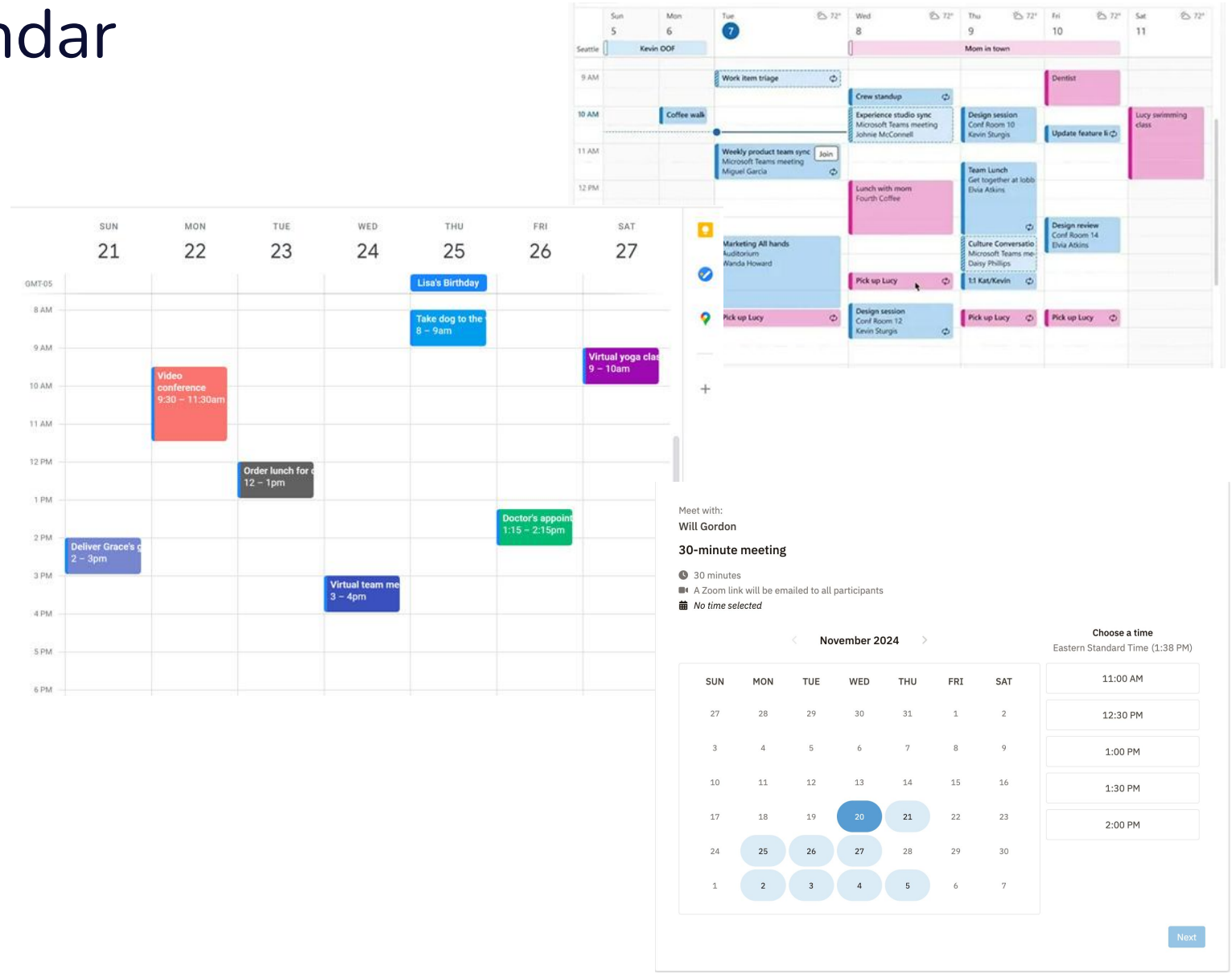
Syncing with your calendar

- Sync your Google or Office 365 calendar for accurate availability
- Scheduler will only show time slots where you have openings in your calendar
- Bookings from Scheduler will automatically appear in your calendar



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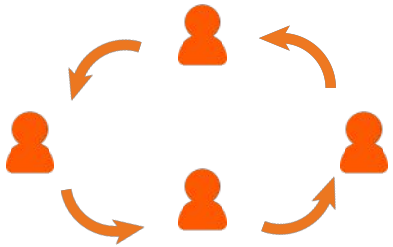
Meeting types

Solo

- For 1-on-1 meetings between you and a customer/lead
- Only considers your calendar availability and Scheduler meeting settings

Co-host

- For meetings with 2 people at your company and a customer/lead
- Considers both host's calendar availability and Scheduler meeting settings



Round-robin

- For 1-on-1 meetings between a member of your team and a customer/lead
- Considers all potential hosts' calendars
- Will **maximize your availability** to prospects, and fairly distribute meetings

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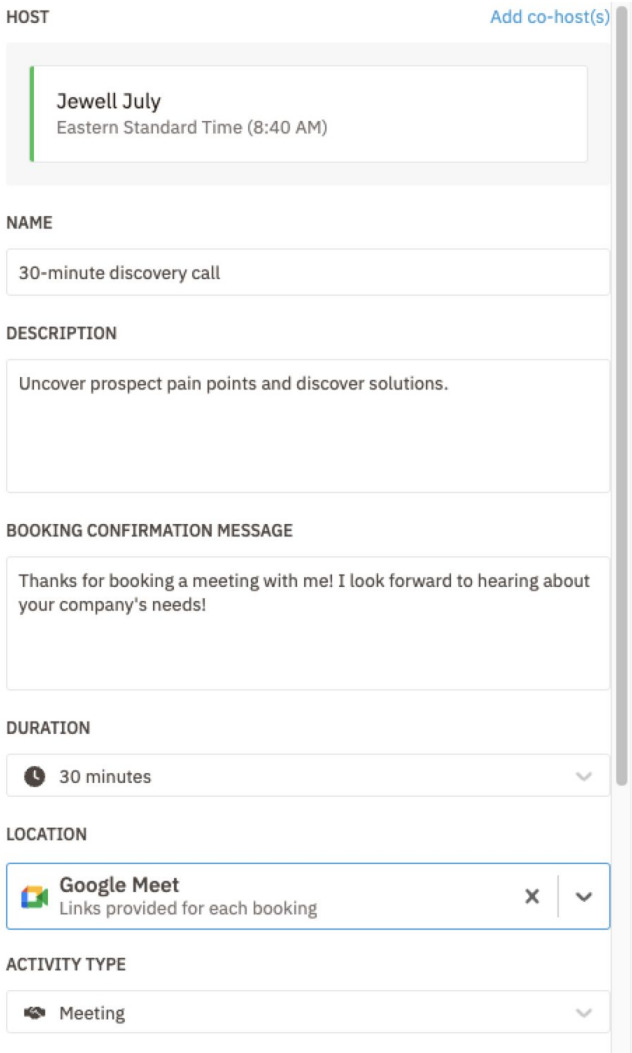
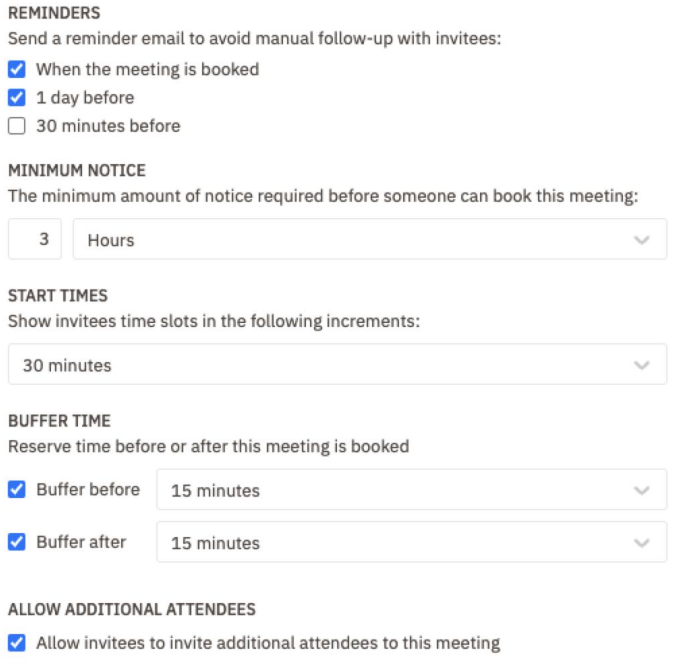
Setting up a new meeting

- Configure meeting details:
  - Name & Description
  - Booking confirmation message
  - Meeting duration
    - Minimum notice
    - Buffer time
  - Location (virtual, in-person, phone call)
  - Activity type
  - Reminders
  - Additional attendees





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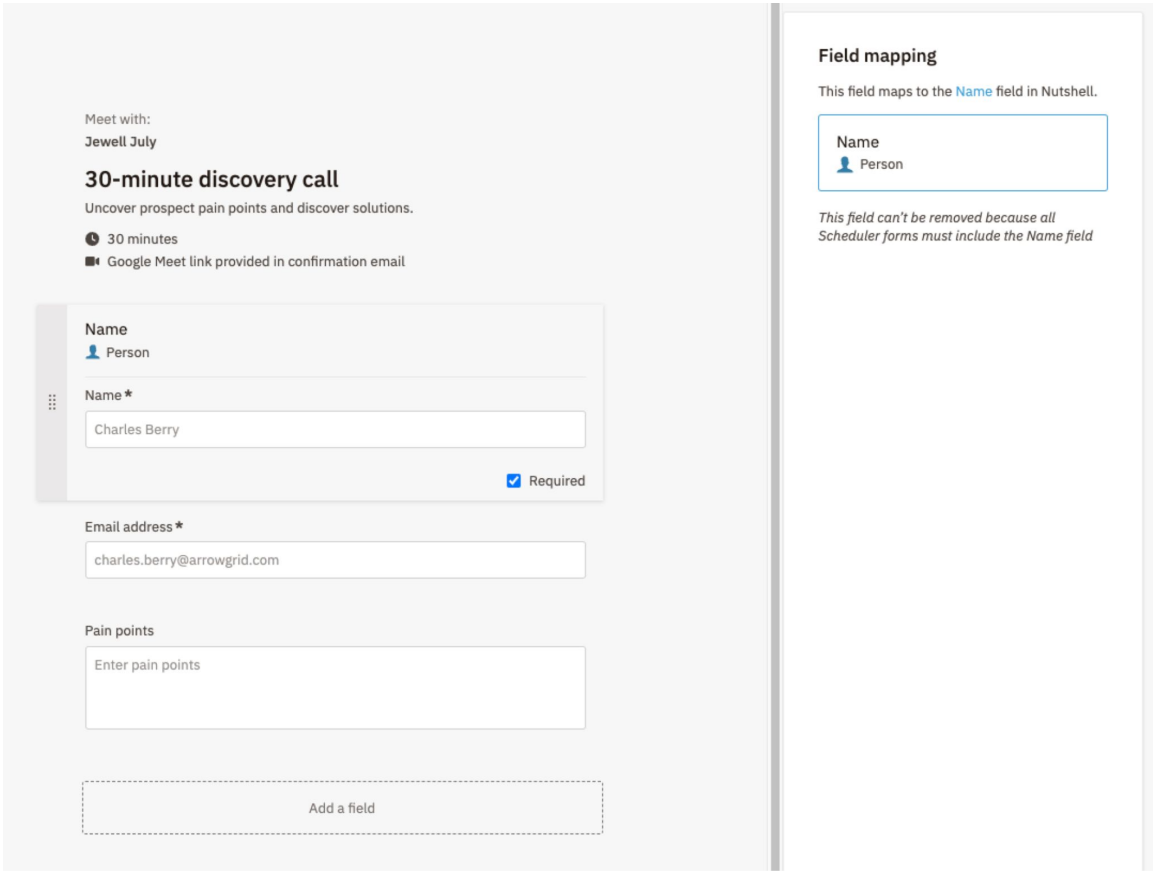
Combining Scheduler & Nutshell Forms

- Set up a form
- Add the custom fields to collect the information you'd like to receive before the meeting
- Create/Update a Person, Company or Lead record in Nutshell
- Automatically add Tags or add to a marketing Audience
- Set up notifications for an extra indicator that a meeting was booked.



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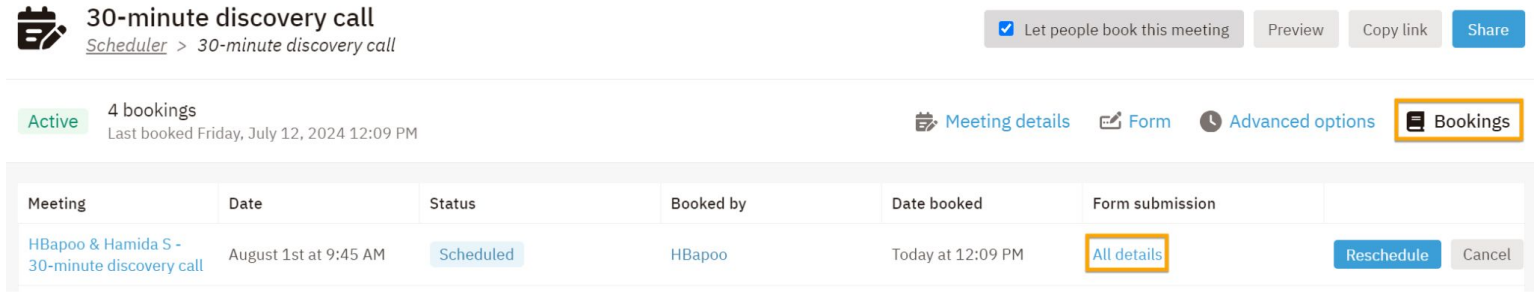
Publishing, Sharing and Managing Scheduler Meetings

- Preview & Save your Scheduler meeting
- Invite participants by:
  - sharing a direct link
  - embedding Scheduler on your website or landing page
- Manage bookings from your Scheduler page
  - View invitees and form details



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Scheduler & automations within Nutshell

- Sync meetings with your calendar
- Log activities in Nutshell
- Create/Update People, Company & Lead records
  - Collect additional data
  - Add a tag
  - Add to Audience
- Activity appears on timeline
- Progress to next pipeline stage if the activity is your stage goal
- Zoom Meeting transcription and summarization *(Business+ feature)*

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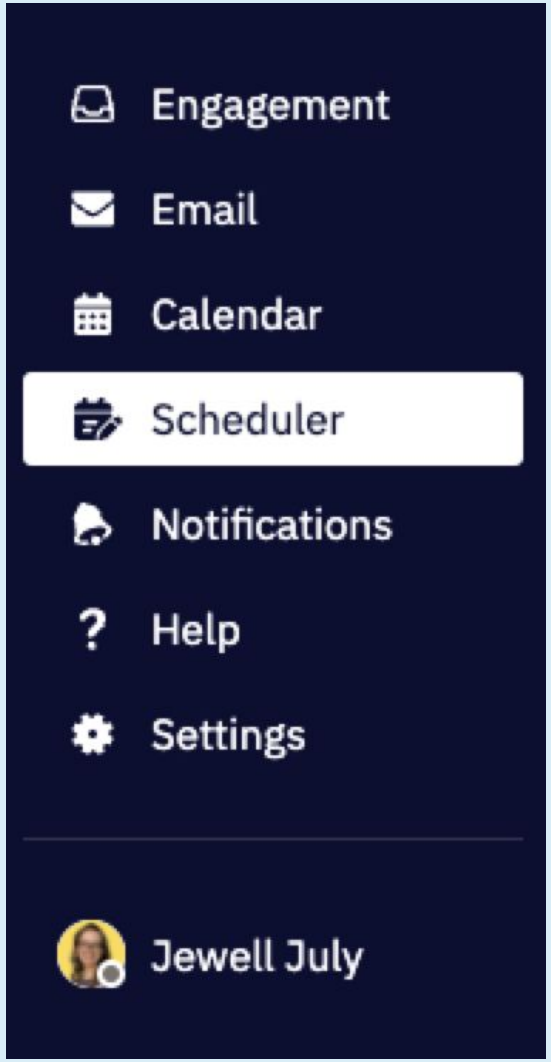
How to access Scheduler

- Scheduler is now included in Pro and above
- **Scheduler Lite -** *available on Pro CRM plan*
  - Standard capabilities
    - Multiple attendees
    - Unlimited usage
    - Nutshell branded
- **Scheduler -** *available on Business and Enterprise CRM plans*
  - Round-robin assignment
  - Host Scheduler links on your custom domain instead of Nutshell-provided domain
  - No Nutshell branding



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Q&A

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Join our monthly support-led webcast

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-best-practices

Our next Nutshell Best Practices webcast will be on November 27, 2024 at 12:00 PM EST.

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Thanks for joining us today!

Recent releases:

- **Marketing dashboard:** track how your Nutshell marketing efforts are performing, all in one place
- **SMS:** leverage text messaging in your CRM
- **Marketing email templates:** ensure consistent branding across your company emails
- **Log an activity in Nutshell with Zapier:** when something happens in another app, Nutshell will create/log an activity
- **Custom domains:** use your custom domain to host Forms, Scheduler links, and marketing email editions

Upcoming releases:

- **Nutshell Chat:** enable conversations directly from your company website
- **Click-to-Call AI transcription & summarization:** Transcribe and summarize click-to-call phone calls using AI

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

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