



Nutshell's 2025 Roadmap

Explore New Features Planned for 2025

Nutshell had a busy year in 2024, and we plan to release plenty more features and enhancements in the new year. Join the Nutshell team to discuss the features we shipped in 2024 and our plans for 2025.



Andy Fowler
CEO & Co-founder of
Nutshell



Chris Cain
VP of Product
Development



Will Gordon
Director of Marketing

Today's Agenda

- | | |
|----------------------|------------|
| - 2024 Recap | 15 minutes |
| - 2025 Q1 Roadmap | 15 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!

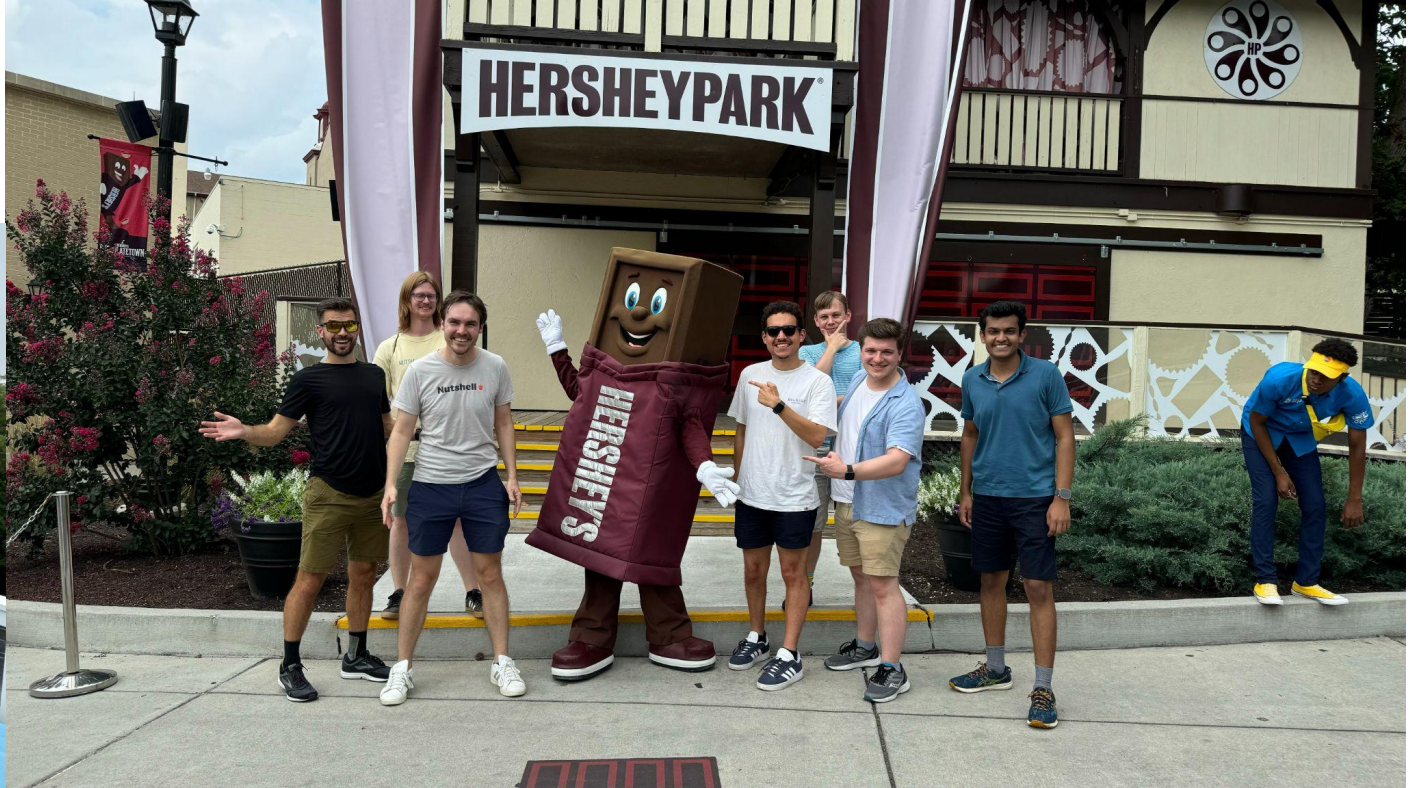
Get to know Nutshell

- Launched in 2010
- Growing from Ann Arbor, Michigan
- Named a “Leader” in G2’s Grid® Report for CRM every quarter since 2020
- Currently serving **20,000+** users across **5,000+** companies



Nutshell 

FXFest 2024



New digs!



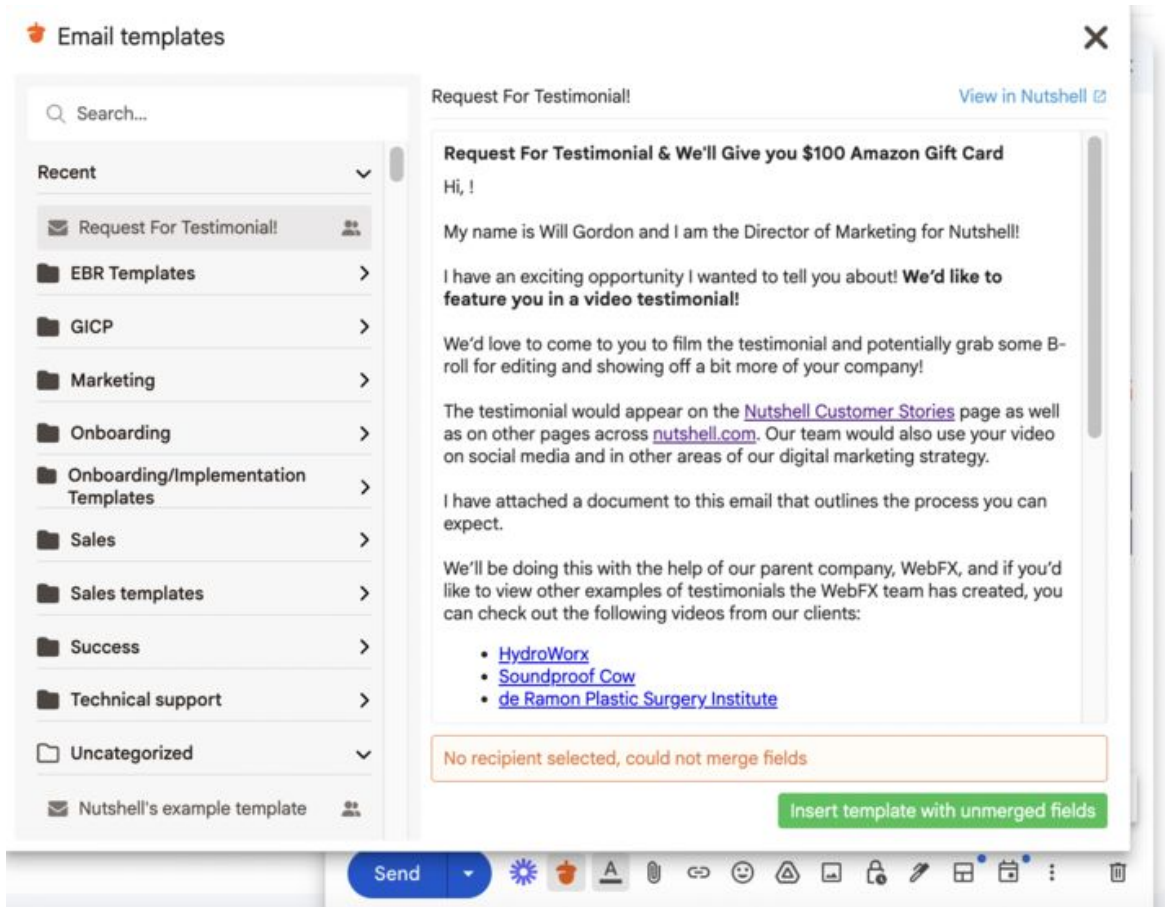
Nutshell

Past Year Recap: 2024 Shipping News

2024 at-a-glance

- Landing Pages (January 2024)
- A/B Testing in Nutshell Campaigns (January 2024)
- Customizable Lead Board Updates (March 2024)
- Nutshell Forms Spam Prevention (April 2024)
- Email Booster and Chrome Extension Updates (April 2024)
- New Email Sync Controls (April 2024)
- Nutshell Notetaker (May 2024)
- PeopleIQ (May 2024)
- Company Hierarchy (May 2024)
- Nutshell Campaigns privileges (June 2024)
- Multiple attendees for Scheduler meetings (July 2024)
- Nutshell Forms individual address fields (August 2024)
- ProspectorIQ (August 2024)
- Marketing email templates (September 2024)
- Log an activity in Nutshell with Zapier (September 2024)
- Custom fields descriptions (September 2024)
- Marketing dashboard (October 2024)
- Nutshell SMS (October 2024)
- Scheduler round-robin assignment (November 2024)
- Click-to-call AI (December 2024)
- Nutshell Chat (December 2024)
- Inbound SMS (December 2024)
- Per-pipeline custom fields (December 2024)

Chrome extension 2.0



- Do more with the **Nutshell Chrome extension**
 - Track email opens and clicks
 - Create new contacts and tasks in Nutshell
 - Share emails with Nutshell from your message list
 - View scheduled activities
 - Track timelines of past communication
 - Write notes
- Send emails with your Nutshell templates—right from Gmail *(Available on Nutshell Business and above)*

Pipeline custom fields

Per-Pipeline Custom Fields

Create a new field

Name:

Description:

Entity: ☒ Lead ☐ Company ☐ Person

Field type:

Field options:

Which pipeline should this field be shown?

☐ All pipelines

☒ Specific pipelines

- ☒ Trade: Nurshell
- ☒ Trade: High-Touch Sales Pipeline
- ☒ Trade: Low-Touch Sales Pipeline
- ☒ Trade: Sales Webinar Pipeline
- ☒ Nurshell IQ - Outbound
- ☒ Pre-Trial Pipeline
- ☒ Customizable Onboarding Program
- ☐ Trade: self-service
- ☐ Upsell Opportunities - Sales
- ☐ Trade: demo-driven sales
- ☐ AppConnect - Form Requests
- ☐ Trade: High-Touch Sales Pipeline
- ☐ Trade: High-Touch Sales Pipeline
- ☐ Trade: High-Touch Sales Pipeline
- ☐ Trade: High-Touch Sales Pipeline

☐ Allow more than one option to be selected

Collect and organize the right data

Leads

Business deals with your companies and people

Assignee Status Only hot Default Pipeline trade 20 leads found Remove filters

Prospecting 5	\$237k	Qualify 6	\$398.7k	Pitch 4	\$366.6k	Close 5
<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$7.5 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon 158399		<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$48 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon
<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$7.5 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$42 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$51 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon
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<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$77.1 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$75 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon	\$192.6 k	<input checked="" type="radio"/> Trade Silicon Carol Reynolds Trade Silicon
con	\$135.6 k					

Customize lead cards

Select up to 8 fields to see on your lead cards in the 'Board' view for this pipeline.

Choose fields (8/8) Re-order fields

Fixed

Lead name

Value

Reorderable

- Age
- Assignee
- Team size indicated at sign-up
- Related person
- Phone number
- Anticipated closed date

- Customize how leads appear in the Board view for each pipeline
- Select the most important fields to appear right on the lead card and reorder them for your needs
- Designate custom fields to apply only to leads in specific pipelines

For example: Collect rental start and end dates for your Equipment Rental pipeline, but leave that custom field out of your Equipment Sales pipeline

Stronger email sync controls

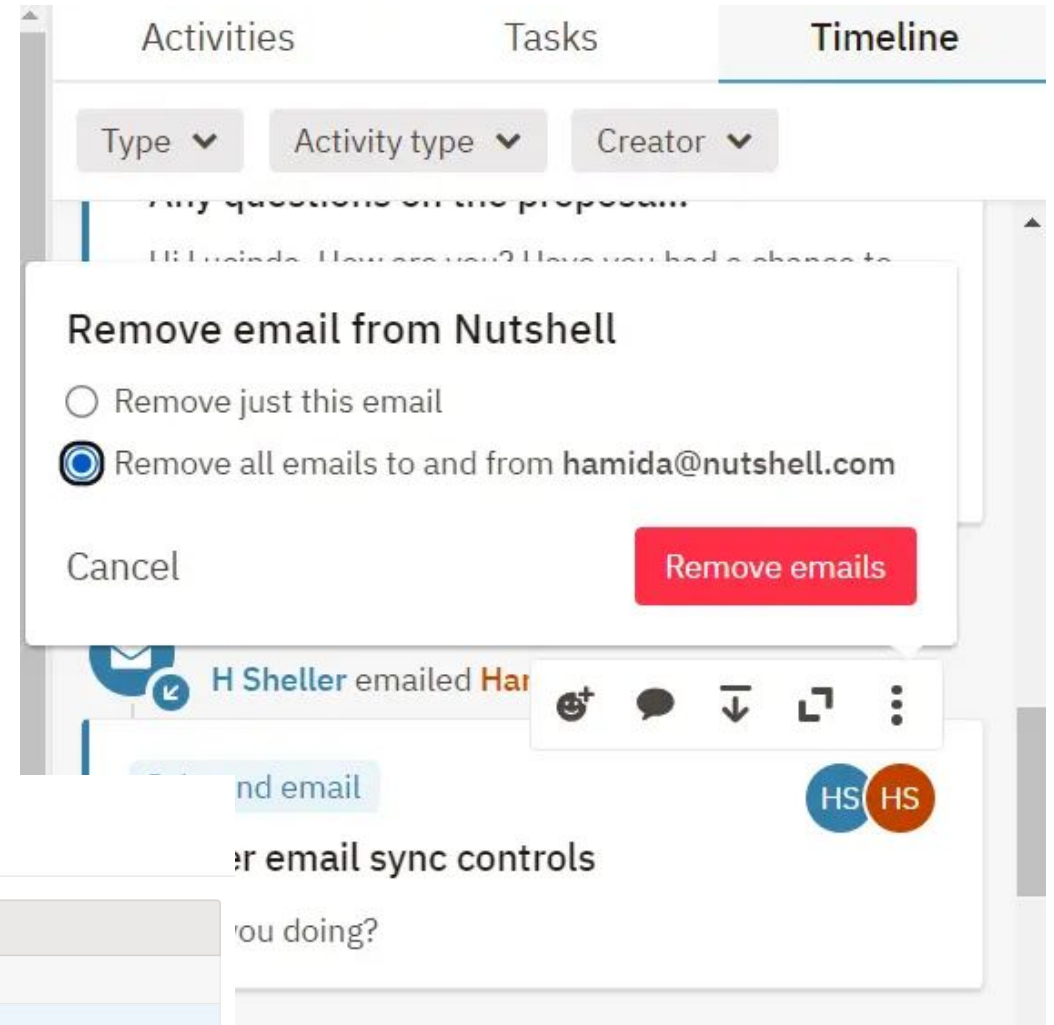
- Take control over which emails sync in Nutshell through three new methods:
 - Internal domains
 - Timeline controls
 - Company blocklist



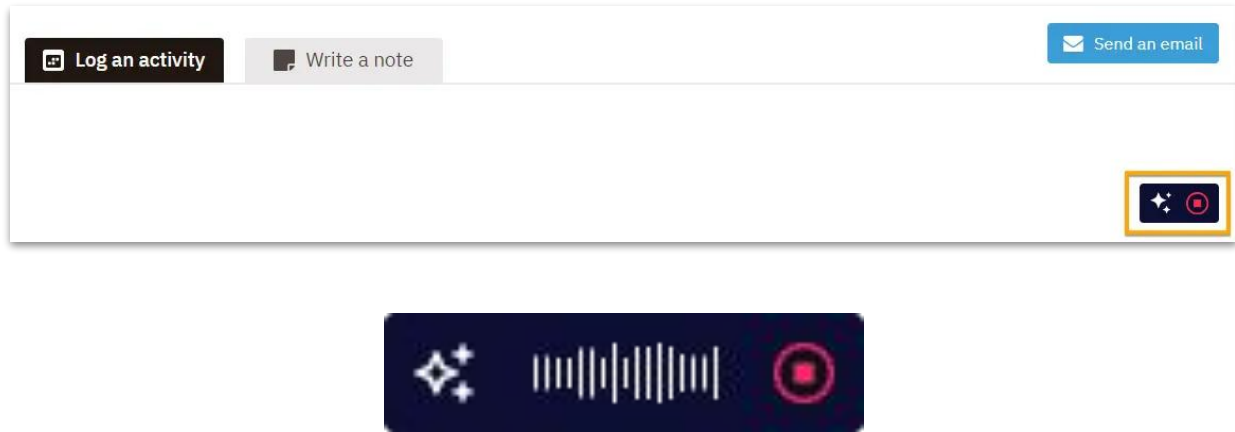
Email blocklist

Add email addresses to this blocklist to keep their correspondence out of Nutshell

Email blocklist (1)	
Email address	Date added
+ Add email address...	
payroll@myhrprovider.com	May 03, 2021



Nutshell Notetaker



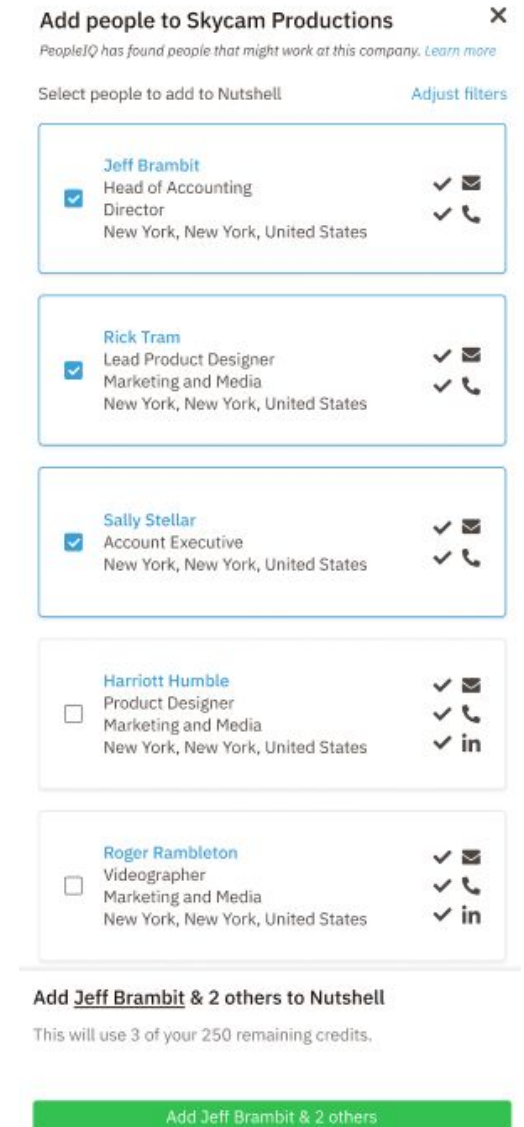
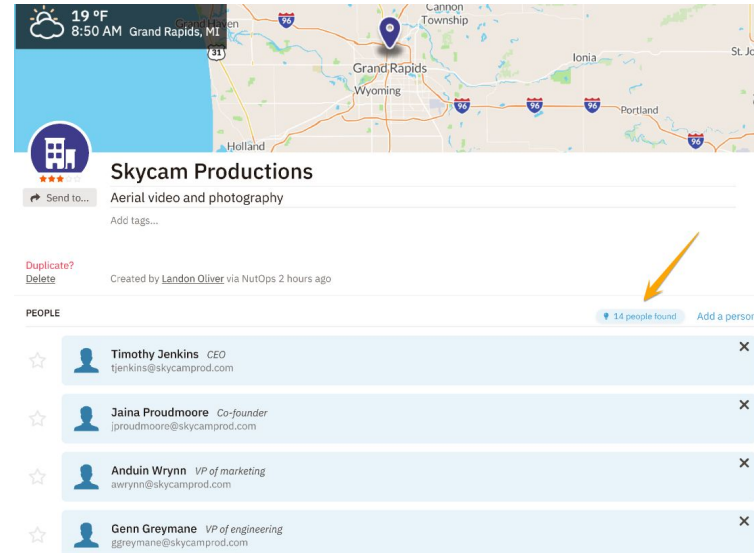
- Take better notes with conversational AI in your CRM
- Use AI-powered voice-to-text to log activities, write notes, and compose emails faster

Limited availability for Nutshell Pro teams and below


PeopleIQ


- Gain more opportunities by identifying points of contact at the businesses you already have in Nutshell
- Uncover contact information like email, phone number, and LinkedIn so you can get in touch
- Customize PeopleIQ filters to see only the most relevant contacts

*PeopleIQ is part of the **Nutshell IQ add-on**, starting at \$37/month for 100 IQ credits*



Company hierarchy





33

★★★★☆

Send to...

Delete

account-contact


Q2-2024 Top 15

Created via Trial S

Blue Nose Aerial Imaging

Optional description...

CHILD COMPANIES




Blue Nose Aerial 1

Matt Clark

Overland Park, KS


×



Blue Nose Aerial 2

Christian Leonhard, Sr.

×



Blue Nose Aerial 3

Steve Hand

×

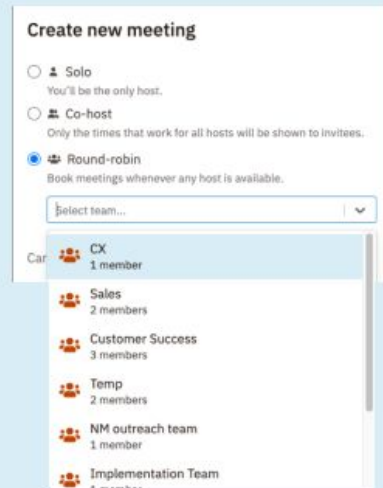
[View all 33 child companies](#)

[Add a child](#)

- Track and manage connections across a large organization with company hierarchy
- See all leads and sales with subsidiaries of a parent company at a glance, plus dive into the data

Scheduler round-robin assignment

Scheduler Round-Robin



The screenshot shows a 'Create new meeting' dialog with three options: 'Solo', 'Co-host', and 'Round-robin'. The 'Round-robin' option is selected, and a dropdown menu is open showing a list of teams. The teams listed are: CX (1 member), Sales (2 members), Customer Success (3 members), Temp (2 members), NM outreach team (1 member), and Implementation Team (4 members). The 'CX' team is highlighted.

Create new meeting

☐ Solo
You'll be the only host.

☐ Co-host
Only the times that work for all hosts will be shown to invitees.

☒ Round-robin
Book meetings whenever any host is available.

Select team...

Car CX 1 member

Sales 2 members

Customer Success 3 members

Temp 2 members

NM outreach team 1 member

Implementation Team 4 members

- Offer more availability to your bookings with round-robin assignment
- Assign a team to a Scheduler meeting and automatically rotate assignments between team members based on availability

Rotate bookings between team members

Multiple Scheduler attendees

PREVIEW

Meet with:
Jewell July

Testimonial Interview

We'll have a conversation about how your team has used Nutshell and what benefits you've experienced.

🕒 30 minutes

📧 A Google Meet link will be emailed to all participants

📅 No time selected

< January 2025 >

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Choose a time
Eastern Standard Time (11:13 AM)

2:30 PM

3:00 PM

3:30 PM

4:00 PM

4:30 PM

REMINDERS

Send a reminder email to avoid manual follow-up with invitees:

- ☒ When the meeting is booked
- ☒ 1 day before
- ☐ 30 minutes before

MINIMUM NOTICE

The minimum amount of notice required before someone can book this meeting:

3 Hours

START TIMES

Show invitees time slots in the following increments:

30 minutes

BUFFER TIME

Reserve time before or after this meeting is booked

- ☒ Buffer before 15 minutes
- ☒ Buffer after 15 minutes

ALLOW ADDITIONAL ATTENDEES

- ☒ Allow invitees to invite additional attendees to this meeting

- Get every decision maker in the room by enabling multiple attendees for Scheduler meetings
- Invitees can invite additional guests when booking and send them an invitation email

Meet with:
Hamida S

30-minute discovery call

🕒 30 minutes

📍 No location

📅 July 18, 2024 at 9:45 AM (South Africa Standard Time)

Name *

Charles Berry

Email address *

charles.berry@arrowgrid.com

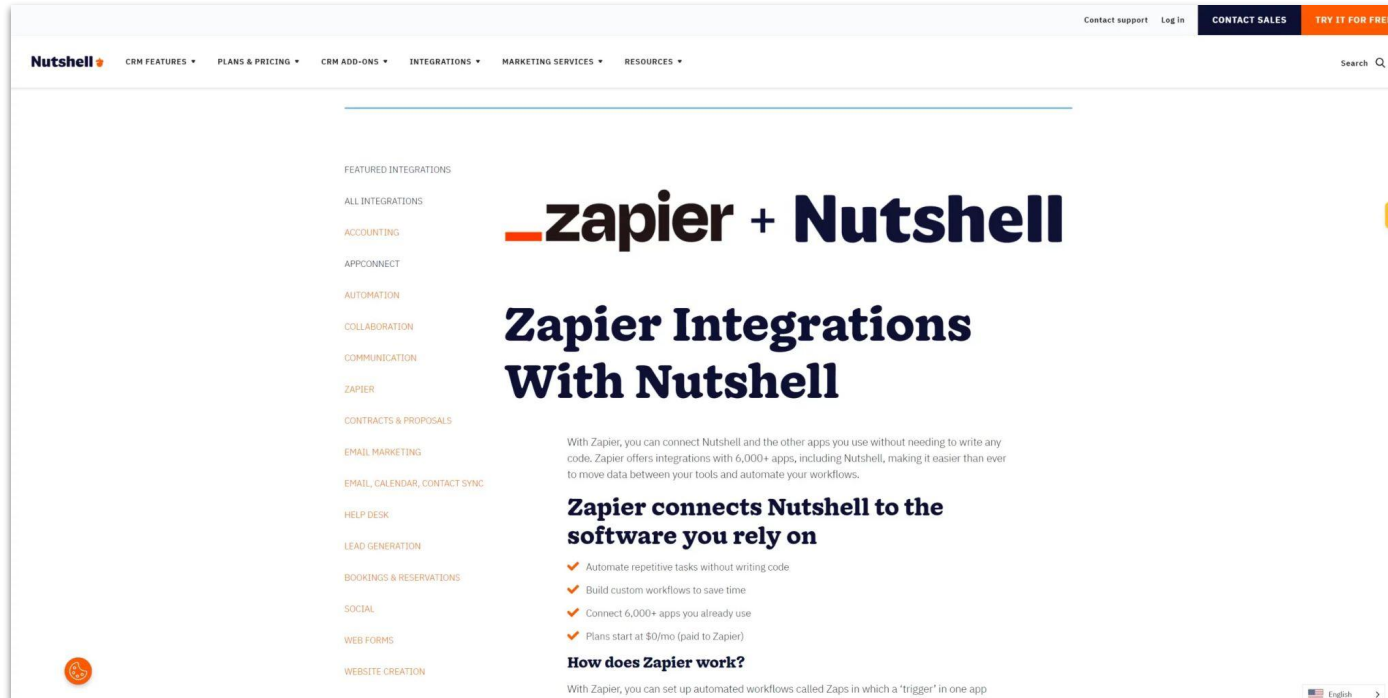
[+ Invite additional guests](#)

Back

Schedule meeting

We'll email you an invitation with event details and a link to change or cancel this booking

Log an activity with Zapier

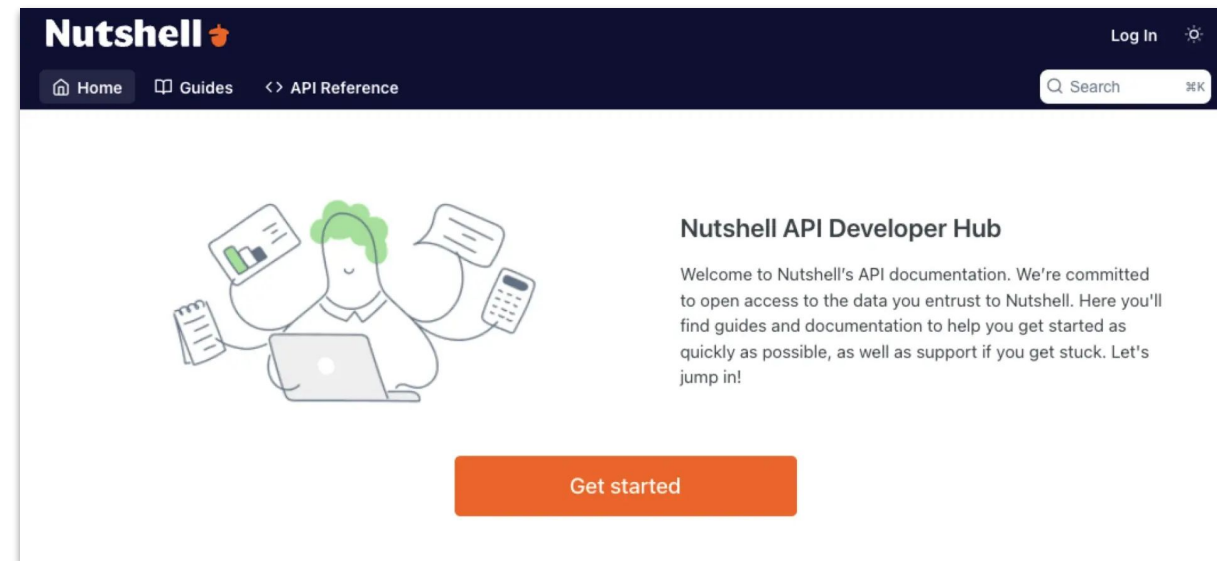


- Log an activity in Nutshell when something happens in another app via our powered-up **Zapier integration**

For example: Automatically log a phone call activity in Nutshell when you complete a call in a communications app

New REST API and API documentation

- Launched broad swaths of API access via REST API along with comprehensive documentation
- Enables easier integration between Nutshell and gives you more control over how you use the platform.
- **<https://developers.nutshell.com/>**



ProspectorIQ

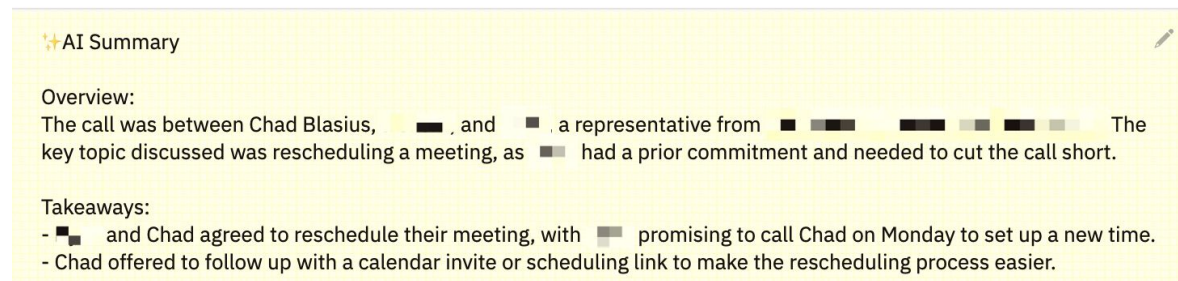
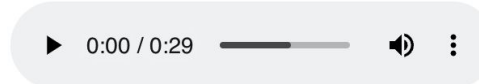
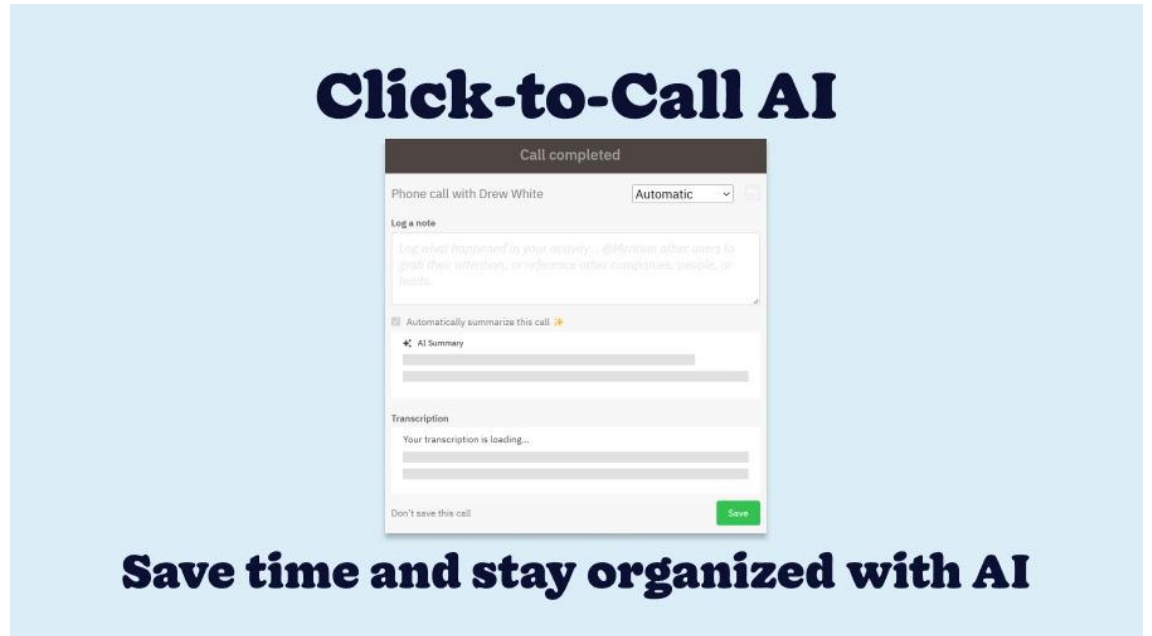
The screenshot displays the ProspectorIQ web application interface. On the left is a sidebar with navigation menus for 'EMAIL MARKETING', 'WEBSITE', and 'LEAD GENERATION'. The main area shows a search filter for 'Person name' set to 'Is exactly' with the value 'Harriot Humble'. Below this, a list of search results is shown, each with a checkbox, a profile picture, name, title, company, location, and contact details. A modal dialog is open over the results, titled 'Add Harriot Humble and 1 other to Nutshell', with options to 'Also create 2 new leads' and a dropdown for 'New customer pipeline'. At the bottom of the modal are 'Cancel' and 'Add Harriot Humble and 1 other' buttons. The interface also shows a 'Credits used' section at the bottom left and 'Save as' and 'Save' buttons at the top right.

- Uncover more leads that are a good fit for your business, then add them to Nutshell and start reaching out
- Customize your filters, then let ProspectorIQ search through our database of over 200 million contacts

*PeopleIQ is part of the **Nutshell IQ add-on**, starting at \$37/month for 100 IQ credits*


Click-to-call AI summaries

- Transcribe and summarize click-to-call phone calls with AI-powered voice recognition
- Generate call transcriptions and summaries with the click of a button—so you can keep team members in the loop about important conversations



Custom field descriptions

- Keep your team organized by adding descriptions to custom fields
- Use custom fields descriptions to:
 - Define abbreviations
 - Help team members remember where custom fields are used
 - Provide guidance to sales reps
 - Simplify onboarding for new employees

 **Custom fields** 2 / ∞
Customize the information your team collects about companies, people, and leads.

Lead custom fields
[+ Add custom field...](#)

Fields in center of lead (max 3)

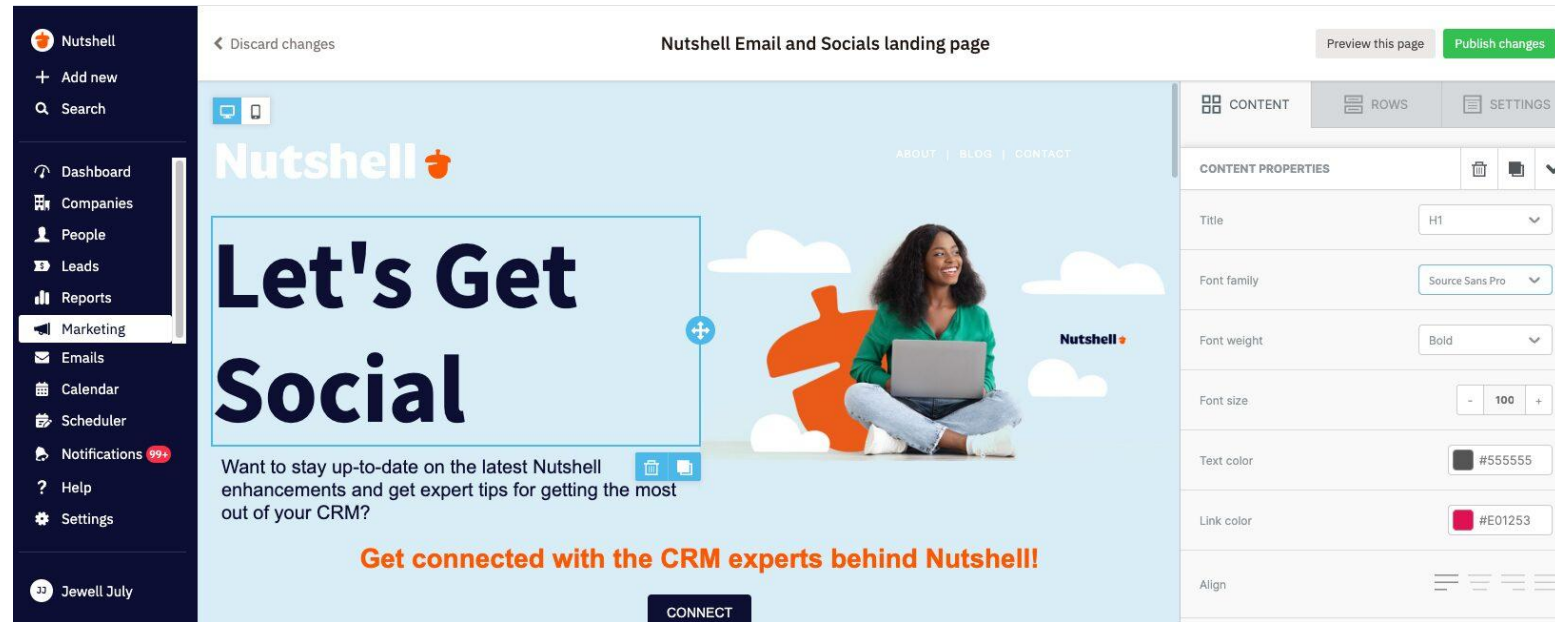
Name	Description	Type
No fields in this section		

Fields in sidebar

Name	Description	Type
Application		Decision
ICP	Ideal Customer Profile - fits size and b...	Long Text
GICP	Golden ICP - fits size, budget, and inte...	Text

Landing pages

- Design and host branded landing pages for your marketing campaigns—all from inside Nutshell
- Seamlessly generate leads by embedding **Nutshell Forms** and **Scheduler** on your pages
- Host landing pages from your custom domain



A/B testing in Nutshell Marketing

Version A

Version B

HOW IS THE WINNING VERSION CHOSEN?
Select the criteria that will determine a winning version after your test duration.

Open rate
The winner is the cohort with the highest open rates.

Click rate
The winner is the cohort that clicks the most messages.

HOW WOULD YOU LIKE TO DISTRIBUTE YOUR TEST?
Choose a percentage of recipients for the first round of test messages. The winning version will then be sent to the remaining recipients.

5% 10% 15% **20%**

10% A **10% B** **80%**
Receives winning version

HOW SOON WILL A WINNER BE DECLARED?
After sending your initial batch of messages for comparison, determine how long Nutshell should wait before declaring a winner and sending that version to the rest of your audience.

2 hours **4 hours** 8 hours 24 hours

WHAT IF THERE'S A TIE?

- Optimize email campaigns for your audiences with A/B testing
- Test subject lines, preview text, and email content
- Customize how Nutshell picks a winner, what percentage of your audience should receive the test, and how long the test should run


Nutshell Forms spam prevention

- Keep bots out by adding captchas to your Nutshell Forms
- Choose whether to always display a captcha or only to suspected spammers

This is a header block

Email address

charles.berry@arrowgrid.com

☐ I am human  hCaptcha
Privacy - Terms

Submit

What is spam protection?

Spam protection is designed to help filter unwanted bot submissions to your forms.

- **Mostly invisible:** 99% of people who fill out your form won't see anything. We will show an "Are you a human?" test to the 1% that might be spam.
- **Always on:** Actively prompts all form submissions to maximally reduce bot spam.
- **Off:** Disables prompts and filtering, allowing all submissions to reach your page.

All suspected spam will still be saved in Nutshell, and you will have the opportunity to mark it as not-spam.

We use a privacy-focused service to provide this spam protection.

Done

Separate Address Fields in Nutshell Forms

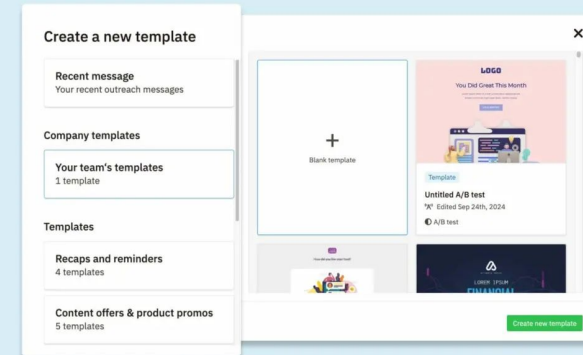
- Make it easier for submitters to provide accurate addresses and keep your form data clean
- Add individual fields for:
 - Country
 - City
 - State
 - Street
 - Postal code

The screenshot shows the Nutshell Forms editor interface. At the top, there are links for '< Discard changes' and 'Copy of Sales request', along with 'Preview form' and 'Save changes' buttons. The main form area contains a header block with the text 'This is a header block', an email address field with the value 'charles.berry@arrowgrid.com', and a large empty text area with an 'Add a block' button. A green 'Submit' button is located at the bottom right of the form area. On the right side, there is a 'Form design' panel with options for 'Background color' (set to #F7F3F5) and 'Font' (set to Arial). A checkbox labeled 'Use your website's font on embedded forms' is checked.

Marketing email templates

- Keep your brand consistent with company-wide email marketing templates
- Create and share templates with team members to enable seamless branding

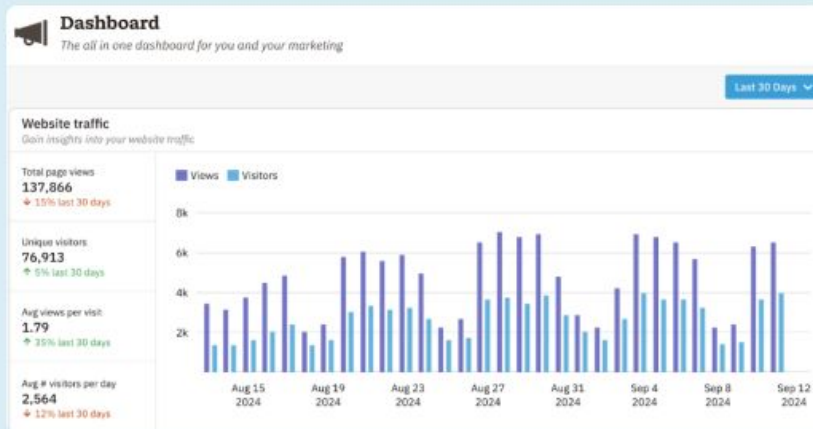
Marketing email templates



Keep your brand consistent

Marketing dashboard

Marketing Dashboard

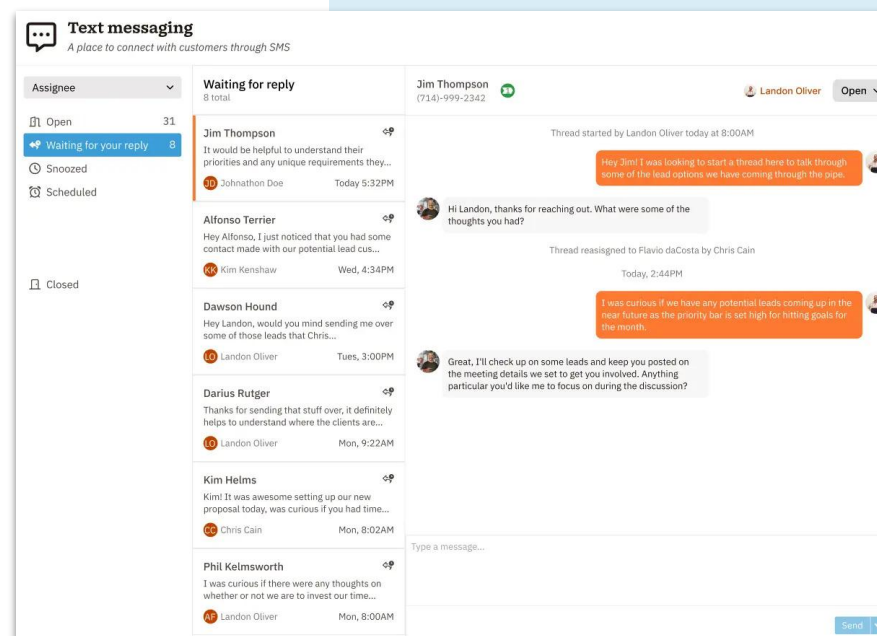
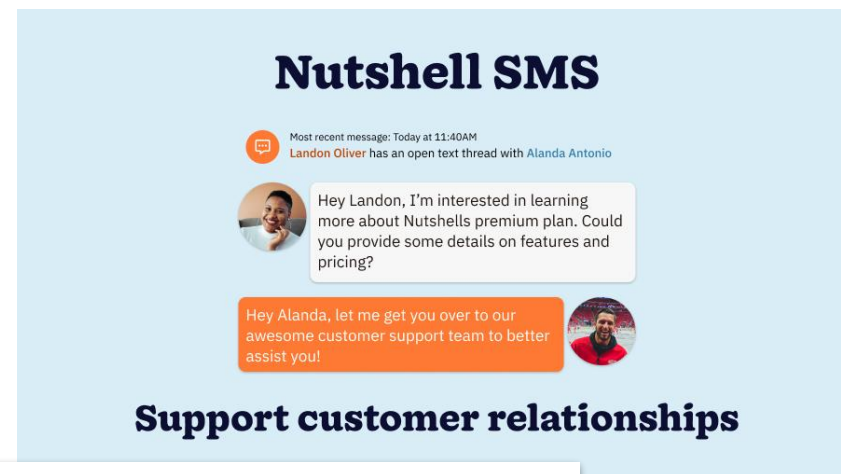


Track your marketing performance

- Optimize marketing performance by diving into marketing metrics
- Track the performance of:
 - Website traffic
 - Broadcasts and newsletters
 - Forms
 - Drip sequences
 - Landing pages
 - Connected forms
 - Audiences
 - VisitorIQ contacts

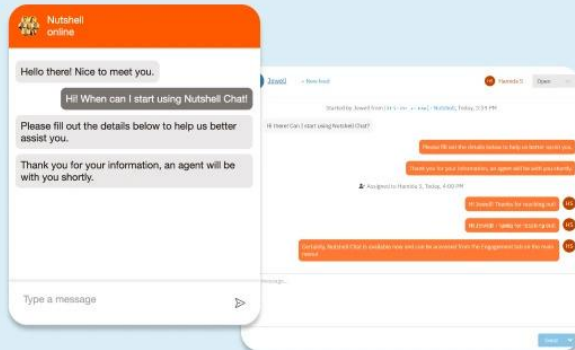
Nutshell SMS

- Stay better connected with leads throughout the sales process using **SMS**
- Leverage automation to send the right text at the right time
- Track and manage all SMS conversations from your Engagement inbox
- Automatically create & route leads when an inbound SMS is received
 - Includes support for redirecting phone calls!

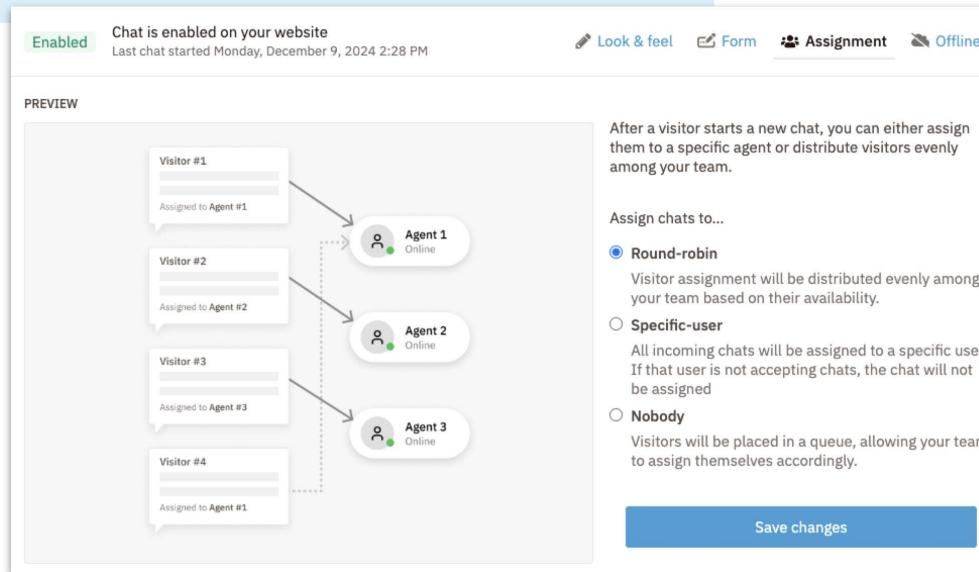


Nutshell Chat

Nutshell Chat



Engage with website visitors through chat



- Open the gateway to connect with visitors to your website in realtime
- Customize your Chat widget and prompt messages
- Gather information about visitors via forms
- Create leads from chat conversations
- Manage and assign chats through the Engagement inbox

2025: Where Nutshell is going

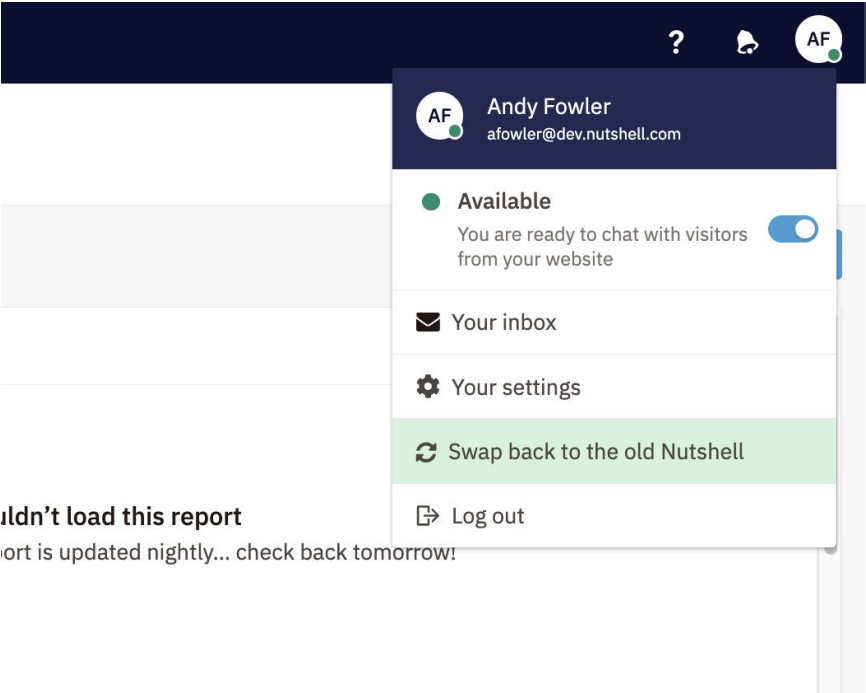
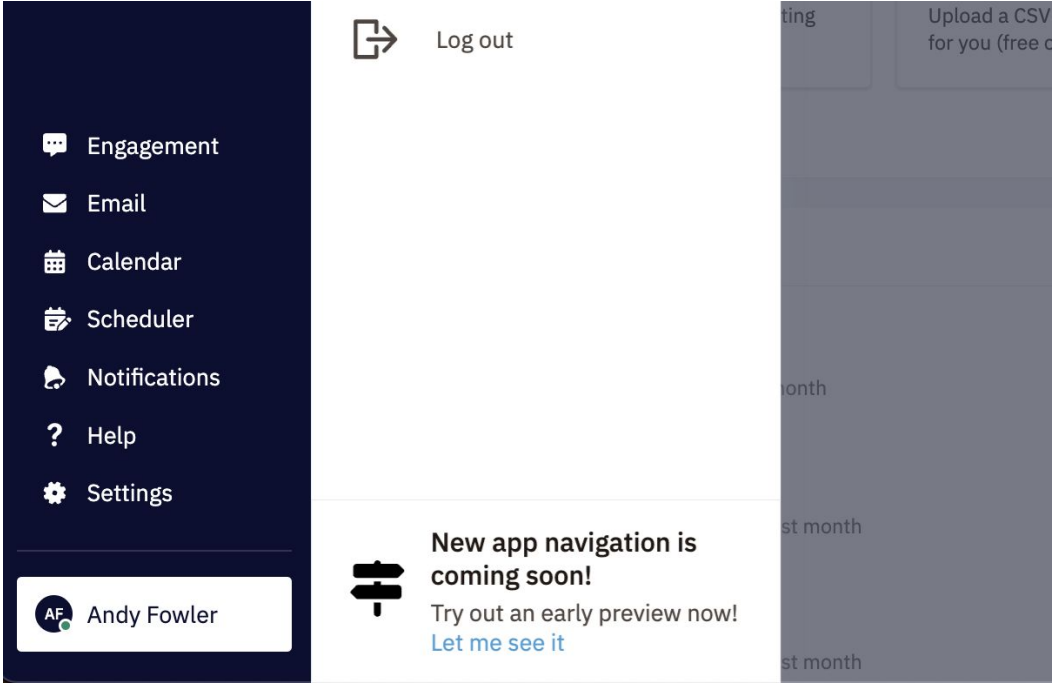
Nutshell Suites

- Nutshell Sales
 - CRM, sales and scheduling software, and more for any stage of business and any budget
- Nutshell Engagement
 - Web chat and SMS software to help you run your business and communicate with your customers across channels
- Nutshell Marketing *Coming soon*
 - Email and SMS marketing, landing page software and more to help you connect and convert your audiences



Take a look under your chair...

Early access to Nutshell's new navigation



Broadcasts

Reach out to thousands at a time with one well-designed message

Create new broadcast

Owner

Draft

Last updated

☐ Just mine

☐ Archived

 Search broadcasts...

50 broadcasts



Nutshell Quotes

The screenshot displays the Nutshell Quotes interface. At the top, there's a header with the Nutshell logo and the word 'QUOTES'. Below this, a sidebar on the left contains navigation options like 'HANOVER INSURANCE GROUP', 'PIPELINE: Default', 'GOALS: NEW', and 'CUSTOM FIELDS'. The main content area shows a quote for 'Hanover Insurance Group > Quote 1238 - 01'. The quote is in 'Draft' status with a value of '\$179' and was last updated a few seconds ago. It includes contact information for Nutshell (206 E Huron St Suite # 206, Ann Arbor MI, 48104) and a 'QUOTE' label. The 'PREPARED FOR' section lists 'Hanover Insurance Group' and 'Orli Norris' (478 E Loula St, Olathe KS 66061). It also shows the quote was prepared by 'Hannah Mu' (Quote number 1238-01) on 'January 1, 2025', with a due date of 'January 25, 2025'. A table lists items: 'Nutshell Foundation Monthly' (5 units, \$19.00 each) and 'Campaigns' (100 units, \$5.00 each). The 'Features and Benefits' section includes a note to 'Include whatever text is helpful to your clients!'. A summary table at the bottom right shows a subtotal of \$61.00, shipping of \$50.00, taxes of \$4.27, and a total of \$65.27.

Name	SKU	Quantity	Sticker	Discount	Price
Nutshell Foundation Monthly Description: 5 users	ns-uud-m	5	\$19.00		\$19.00
Campaigns Nutshell Marketing suite		100	\$5.00		\$5.00

Subtotal		\$61.00
Shipping	\$50.00	\$50.00
Taxes	7%	\$4.27
Total		\$65.27

- Create customized quotes and proposals for your prospects from inside Nutshell
- Track drafted, sent, and approved quotes associated with leads
- Automatically measure engagement with your quotes:
 - Delivered
 - Opened
 - Accepted!



Zoom AI transcribe and summarize

- We did it with click-to-Call - now we're doing it with Zoom calls
- Automatically log & summarize your Zoom calls as soon as they complete
- Works from Zoom recordings: no high-end Zoom plan required



zoom + Nutshell

Call completed

Phone call with Drew White Automatic

Log a note

Log what happened in your activity... @Mention other users to grab their attention, or reference other companies, people, or leads.

☒ Automatically summarize this call ✨

AI Summary

Transcription

Your transcription is loading...

Don't save this call Save



Scheduler

Meet with:
Vanessa Wilkinson

Client check-in

A meeting to assess and strengthen client relationship, review past activities, address any concerns, and identify opportunities for further collaboration.

🕒 30 minutes

📍 A Zoom link will be emailed to all participants

< May 2023 >

SUN	MON	TUES	WED	THUR	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Choose a time:

9:00 AM

9:30 AM

10:00 AM

10:30 AM

11:00 AM

11:30 AM

12:00 PM

Next

- Multiple calendar support
- Create shared events for multiple attendees
- Customizable URLs & landing pages for all your Scheduler events

Enhanced login security



- Passwordless single-sign on
- Multi-factor authentication
- Making it easier to manage security for your team
- Enforce your company's security policies
- Also: aiming for SOC-2 in 2025



Collect more data when creating leads

- Automatically pull in people who work for the company, emails, and more when creating leads

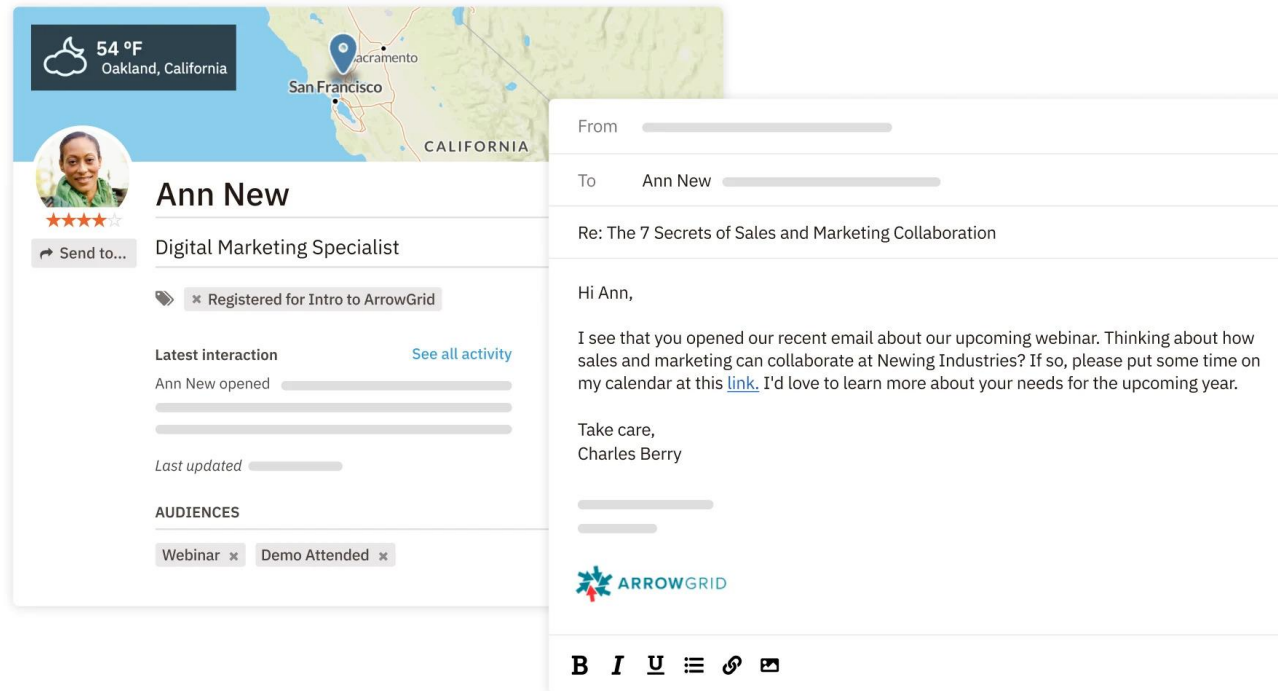
The screenshot shows a lead creation interface. On the left is a profile card for Jacqueline Garland, Sales Director at Builder's Current LLC, with a map of California and weather information (50°F in Carlsbad). On the right is a form to add more data. The form has a header "Add email, phone, url, or address" and a text input field "Enter an email, phone number, address, etc." with a green checkmark and a close button. Below the input field are several social media and contact links, each with a dropdown arrow and a close button: "work" (+1 603-648-9762), "Twitter" (@jgarland), "LinkedIn" (/jacqueline-garland/), "Vimeo" (user784152), "Flickr" (people/jgarland45380), and "Facebook" (jackie.garland). A yellow arrow points from the word "Automatic" to the form.

Automatic



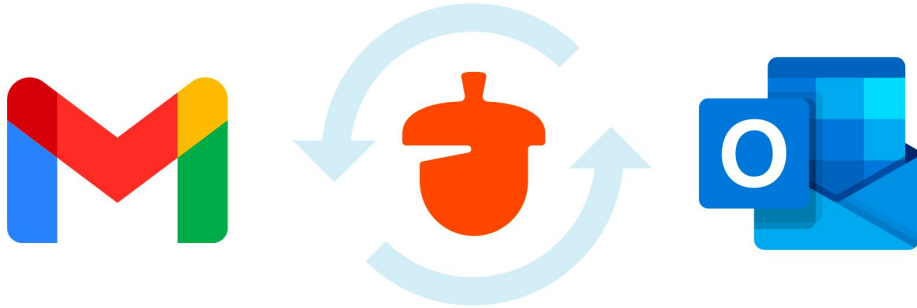
AI email reply starters

- Use smart email reply starters to streamline emailing your contacts





Outlook extension updates



- We're bringing the same updates to the Nutshell Outlook extension that we made to the Chrome extension!

SMS campaigns and drips

- Leverage text message Broadcasts and Drip Sequences to turn contacts into customers
- Use automation to start more conversations with less work

MESSAGES

Nutshell here: Hey {firstName}! Welcome to the Nutshell family. Learn more about Nutshell in our upcoming webinar <https://nutshell.com/web>

First message

🕒 3 days

Nutshell here: We have another webinar coming up on the Marketing Suite. Save your seat at: <https://nutshell.com/webinar/marketing>.

Follow up



Add a message



Follow up

[Welcome](#) > [First message](#) > [Follow up](#)

Draft

Created November 1, 2024

This drip sequence hasn't been activated yet

PREVIEW

Nutshell here: We have another webinar coming up on the Marketing Suite. Save your seat at: <https://nutshell.com/webinar/marketing>.

STOP to quit

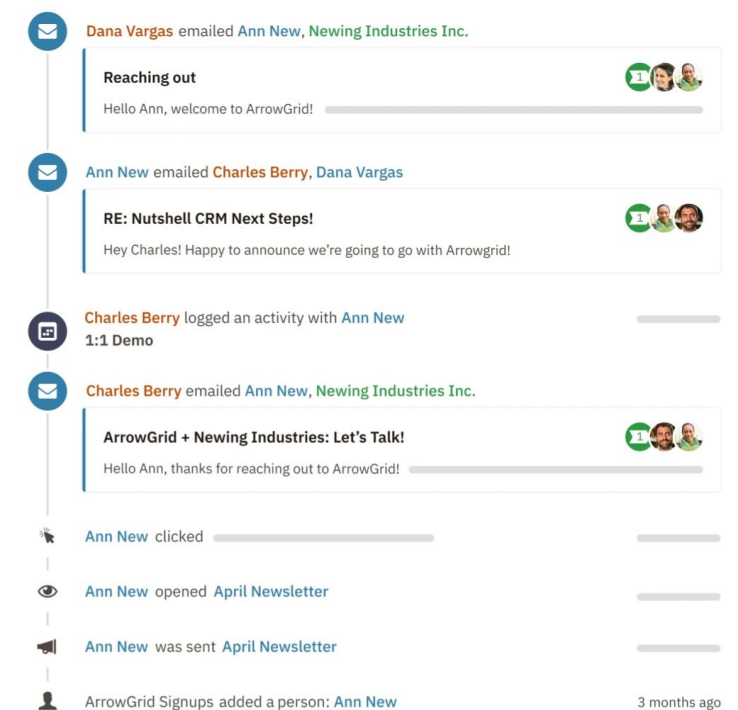
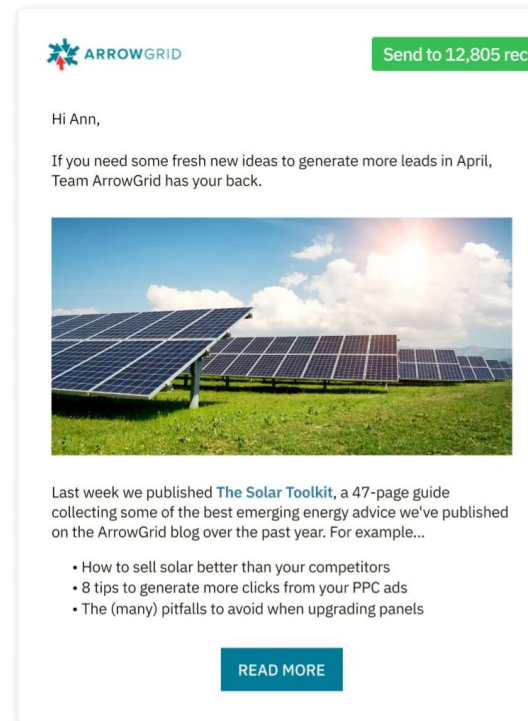
Smart audiences



- Streamlining CRM and marketing audiences
- Uniting “Saved lists” and “Audiences”

Link engagement report

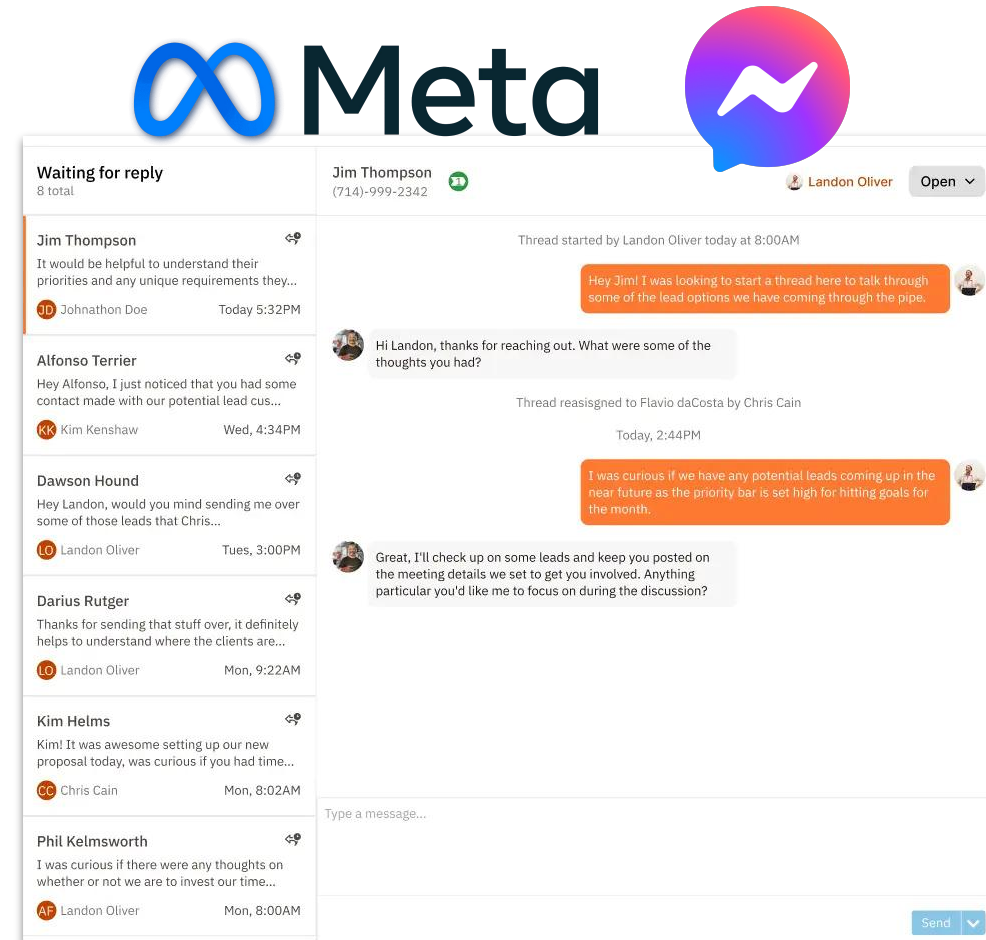
- Reveal **who** is clicking on **which** links sent through your marketing campaigns





Meta/Facebook Messenger support in Engagement

- Connect with leads wherever they are by syncing Instagram and Facebook Messenger with your Nutshell Engagement inbox



ENGAGEMENT

Automatically set Chat agent availability



- Set agent availability on a regular schedule

Want to learn more?

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Join our monthly support-led webcast where you can ask a question and be **shown** an answer. Catch the next one February 26 at 12:00 PM EST.

Got questions about using these new features? **Contact our support team.**



Q & A

Thanks for joining us today!