Nutshell

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

Nutshell

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!
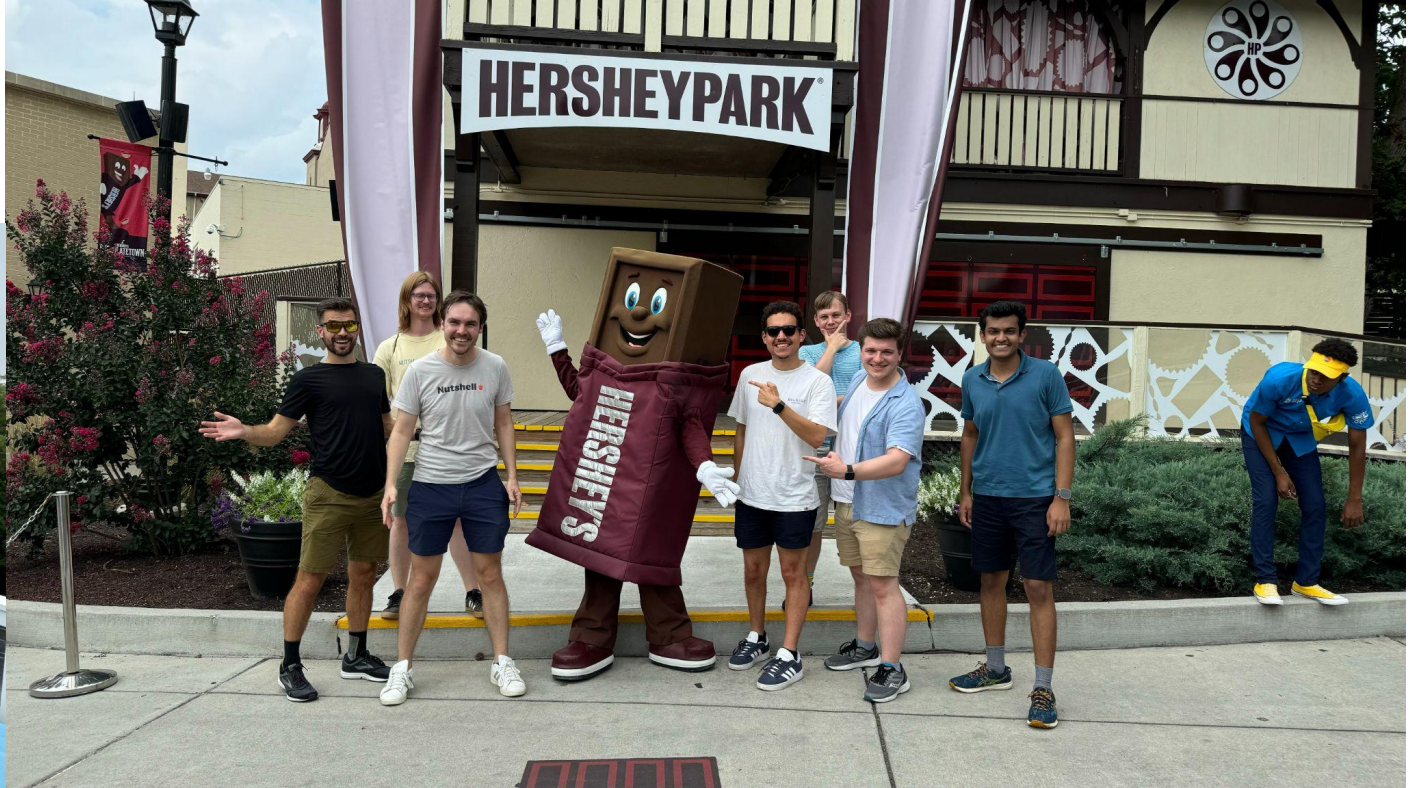
Nutshell

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

FXFest 2024

Nutshell🌰

New digs!

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)

Nutshell

Chrome extension 2.0
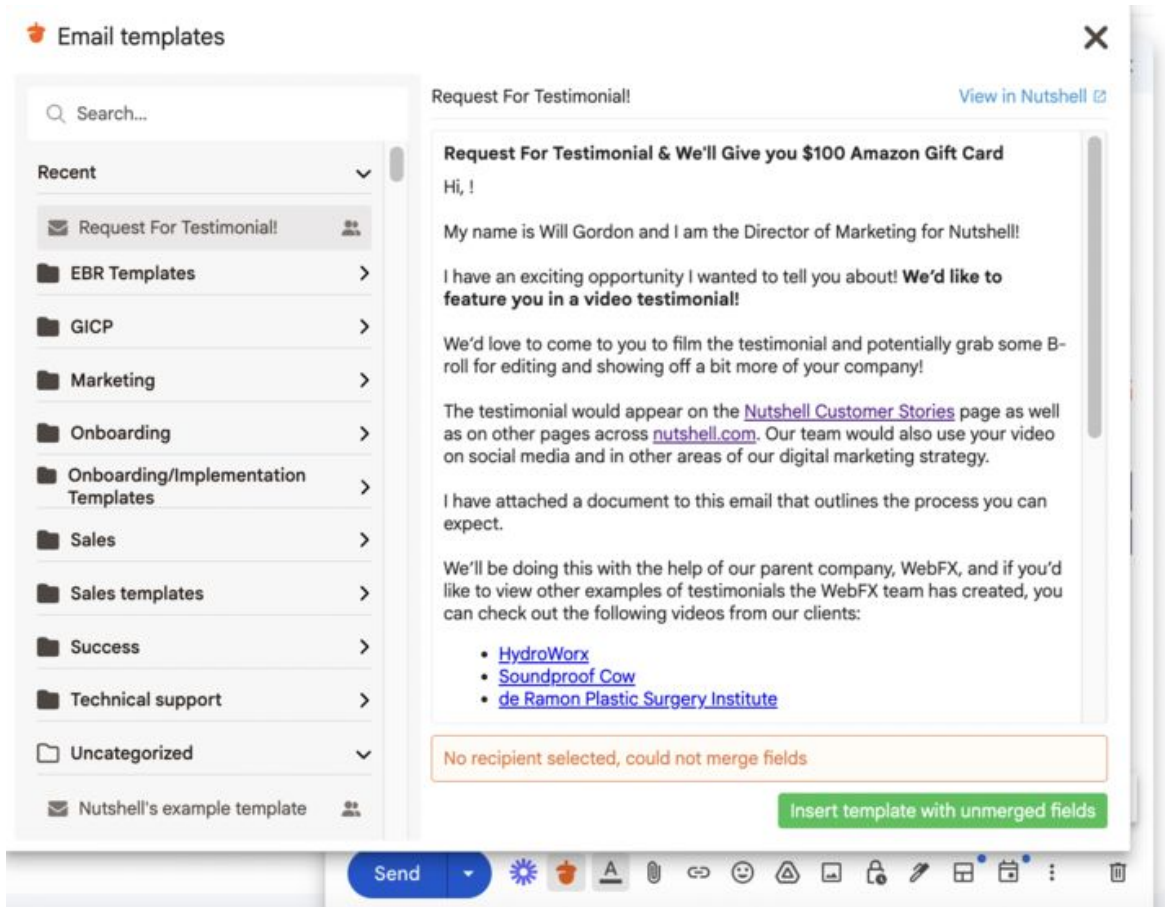
- Do more with the **Nutshell Chrome extension**
  - Track email opens and clicks
  - Create new contacts and tasks in Nutshell
  - Share emails with Nutshell from your message list
  - View scheduled activities
  - Track timelines of past communication
  - Write notes
- Send emails with your Nutshell templates—right from Gmail *(Available on Nutshell Business and above)*

SALES

Nutshell

Pipeline custom fields

- 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
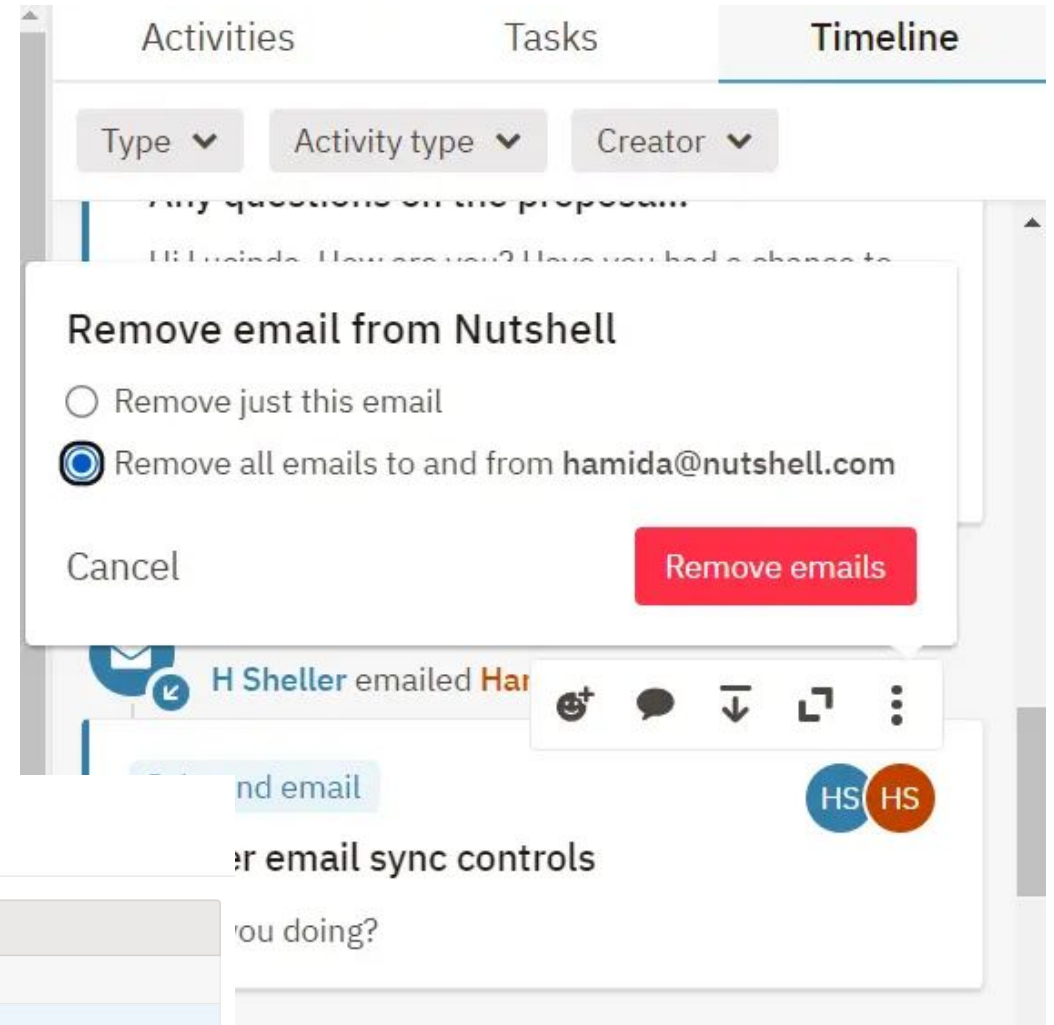
SALES

Nutshell

Stronger email sync controls

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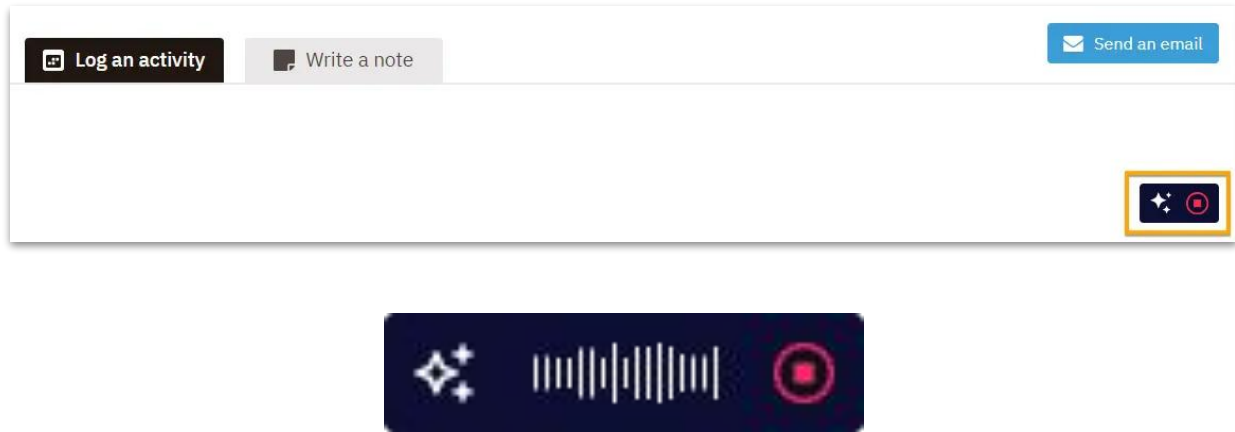 - Company blocklist

SALES

**Nutshell**

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

Nutshell

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*
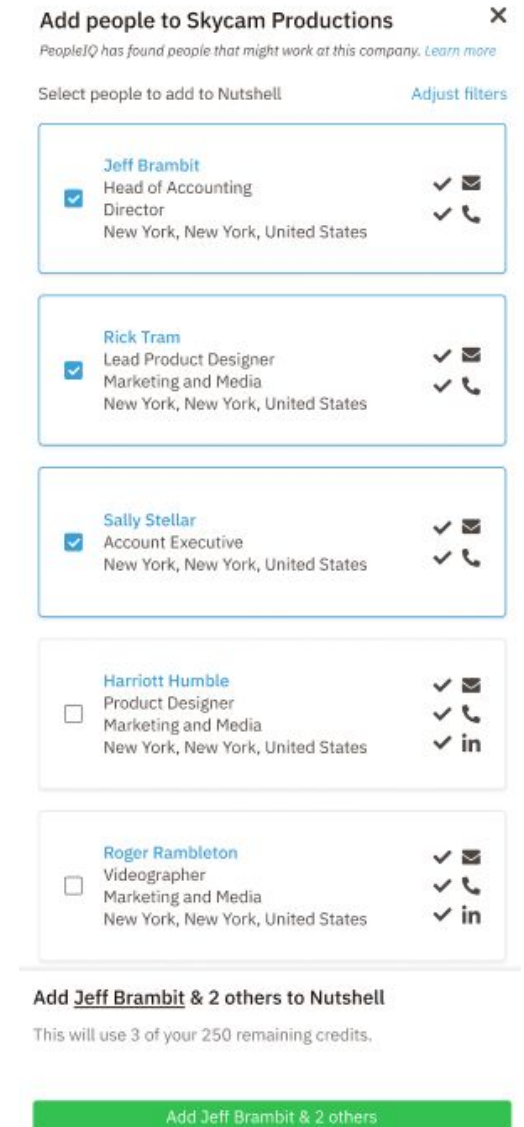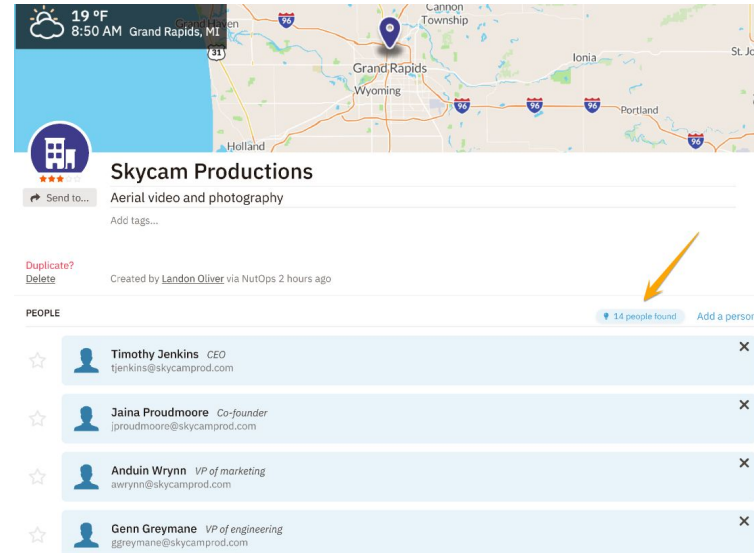
SALES

Nutshell

Company hierarchy

- 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

Nutshell

Scheduler round-robin assignment

Scheduler Round-Robin

Create new meeting

○ 👤 Solo
   You'll be the only host.

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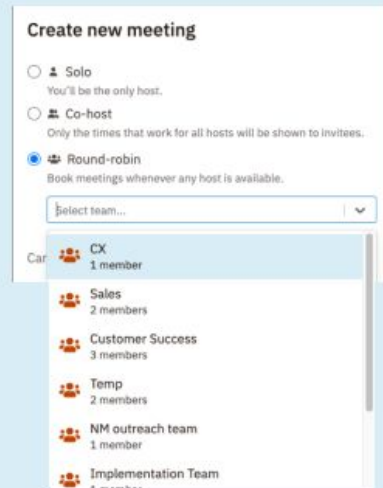   Only the times that work for all hosts will be shown to invitees.

● 👥 Round-robin
   Book meetings whenever any host is available.

   [Select team...   ▼]

   👥 CX
      1 member

   👥 Sales
      2 members

   👥 Customer Success
      3 members

   👥 Temp
      2 members

   👥 NM outreach team
      1 member

   👥 Implementation Team
      1 member

Rotate bookings between team 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

SALES

Nutshell

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

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

- 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

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

- **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**

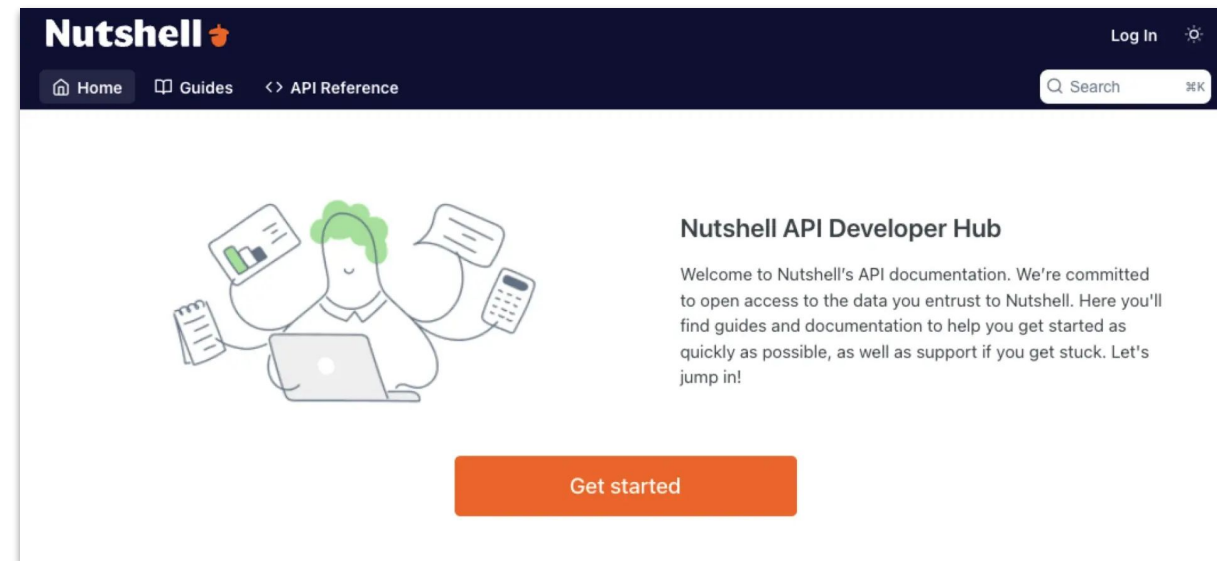SALES

Nutshell🌰

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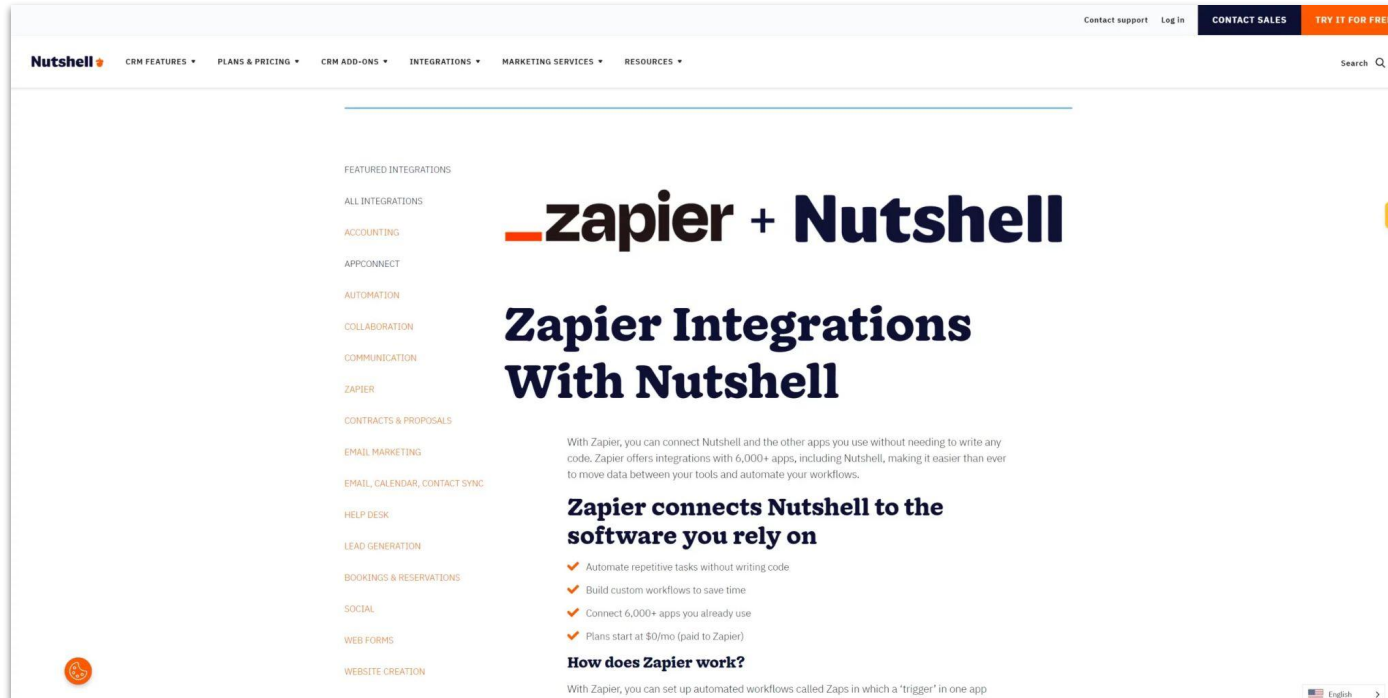
- Log an activity in Nutshell when something happens in another app via our powered-up **Zapier integration**

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

Nutshell

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/**

Nutshell

🏠 Home   📖 Guides   <> API Reference   Log In

🔍 Search ⌘K

Nutshell API Developer Hub

Welcome to Nutshell's API documentation. We're committed to open access to the data you entrust to Nutshell. Here you'll find guides and documentation to help you get started as quickly as possible, as well as support if you get stuck. Let's jump in!

Get started

SALES

Nutshell

ProspectorIQ

- 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

SALES

Nutshell

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

SALES

Nutshell
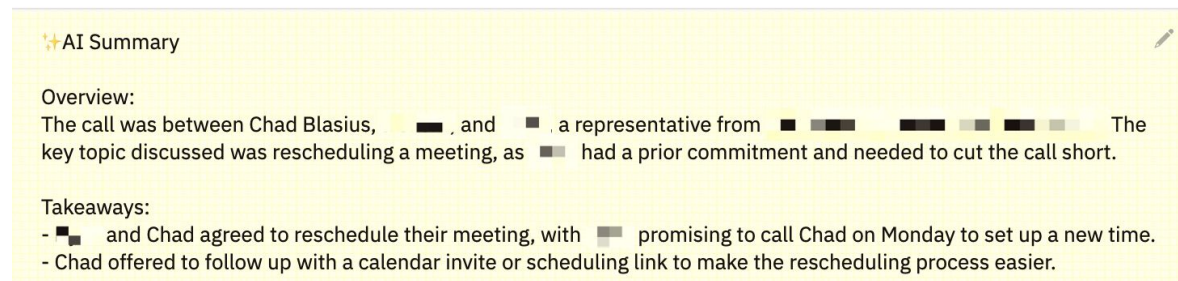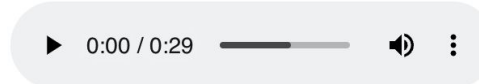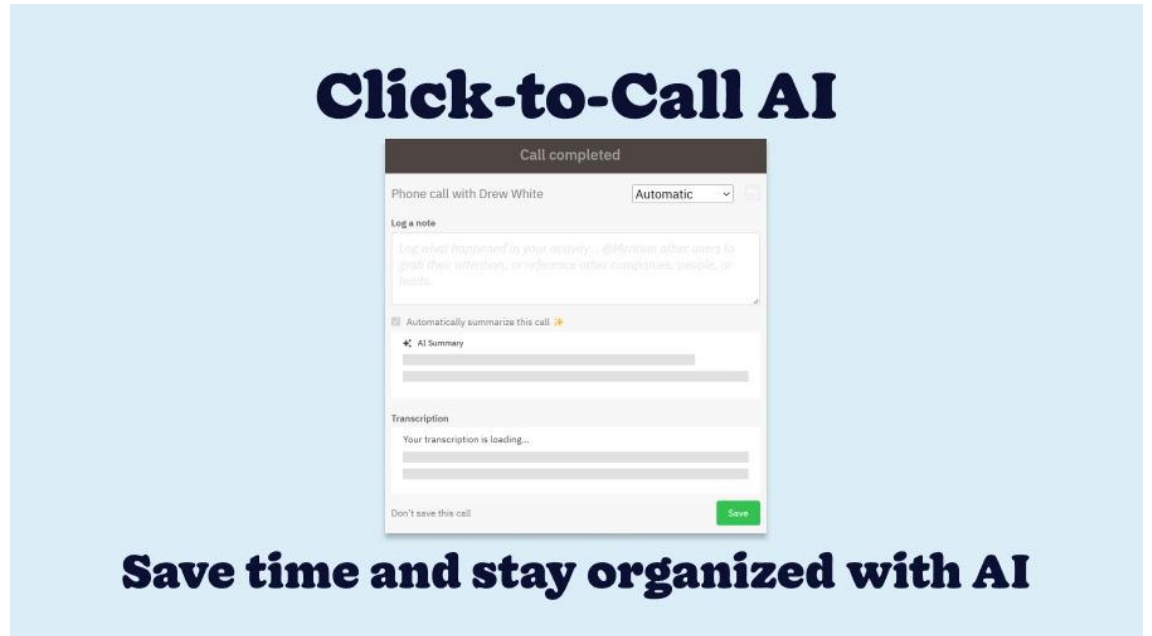
Custom field descriptions

- 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

SALES

Nutshell

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

MARKETING
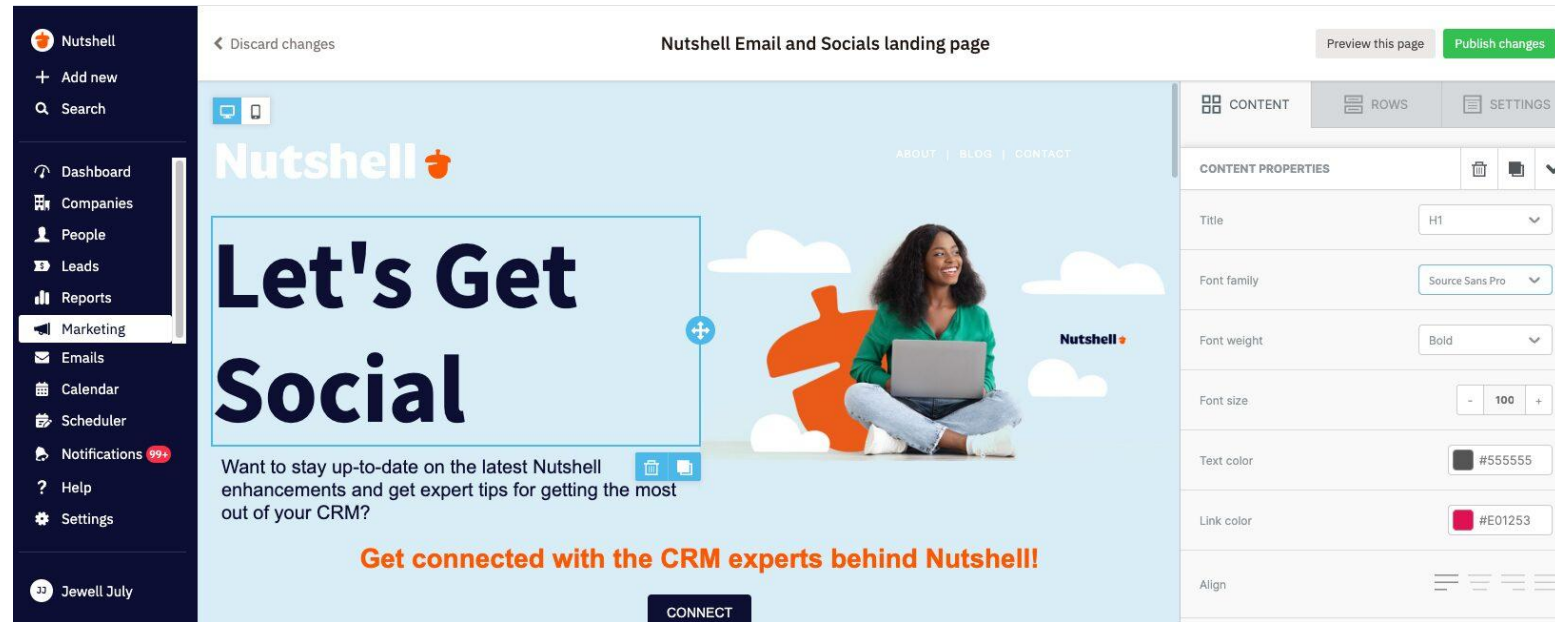
Nutshell

A/B testing in Nutshell Marketing

- 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

MARKETING

Nutshell

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

MARKETING

Nutshell

Separate Address Fields in Nutshell Forms
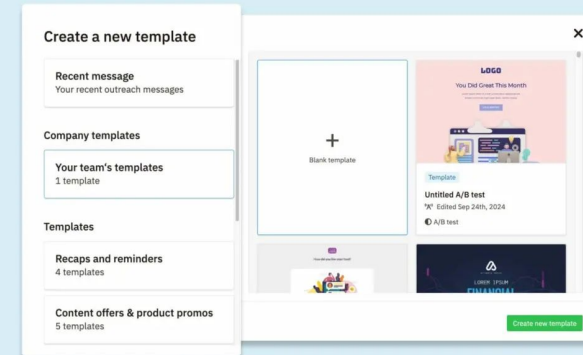
- Make it easier for submitters to provide accurate addresses and keep your form data clean

- Add individual fields for:
    - Country
    - City
    - State
    - Street
    - Postal code

MARKETING

Nutshell

Marketing email templates

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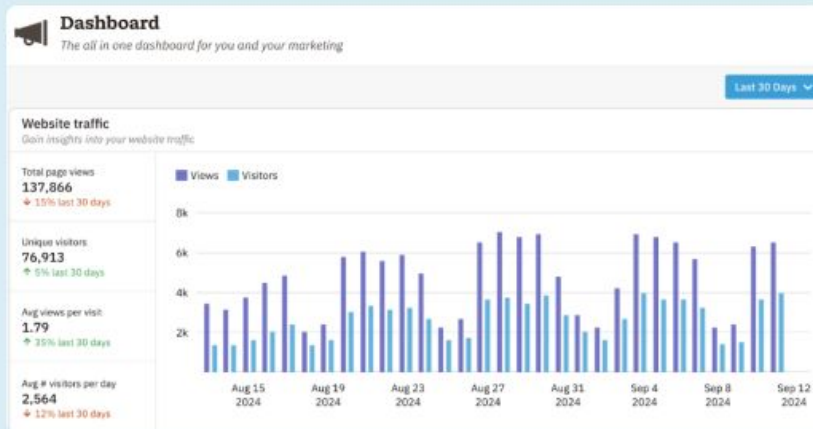

MARKETING

Nutshell

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**
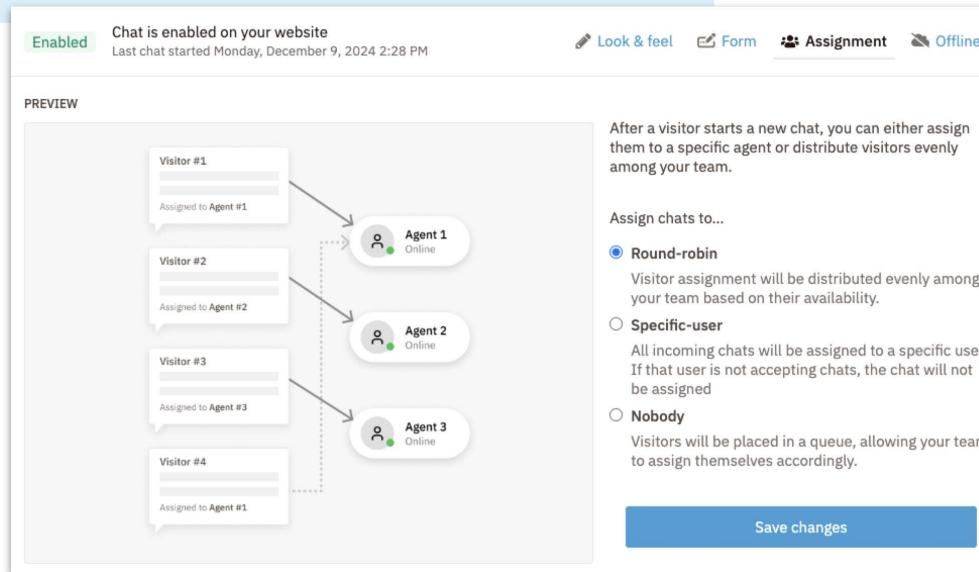 - Includes support for redirecting phone calls!

Available in U.S. and Canada. More countries coming soon.
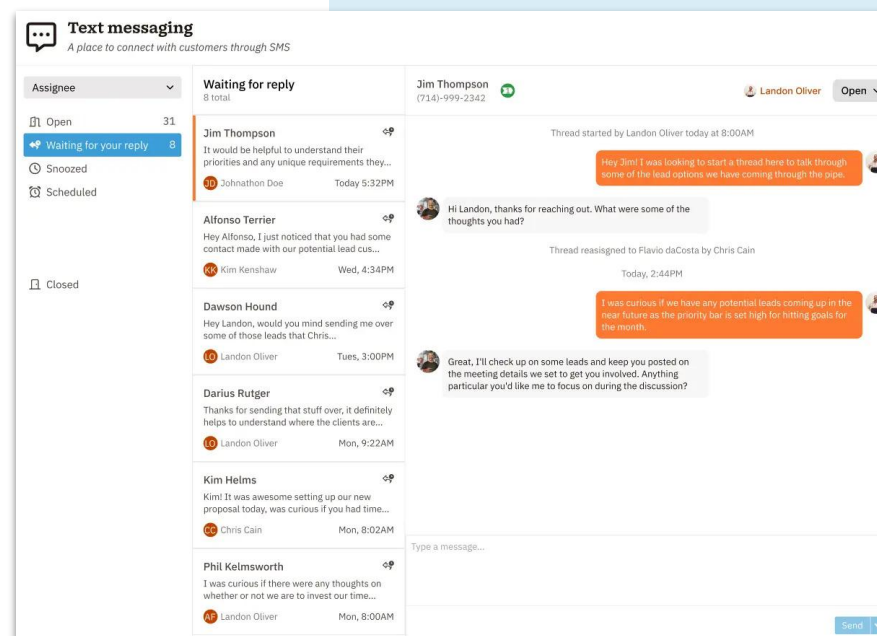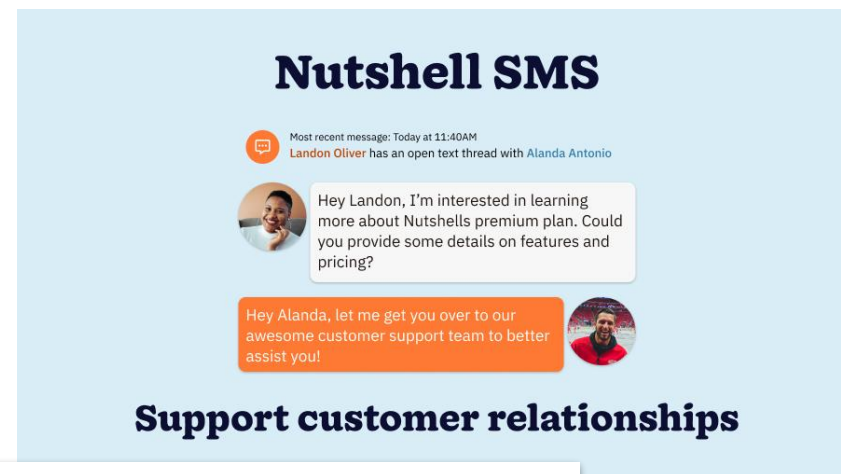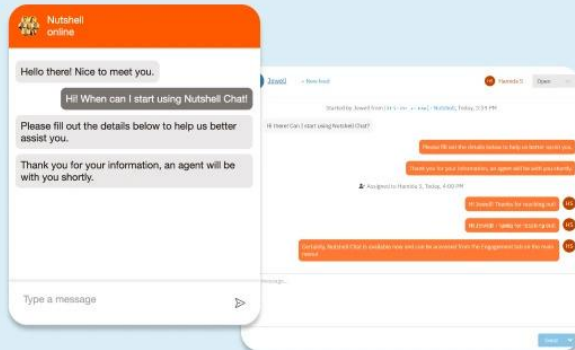
Nutshell Chat

- 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

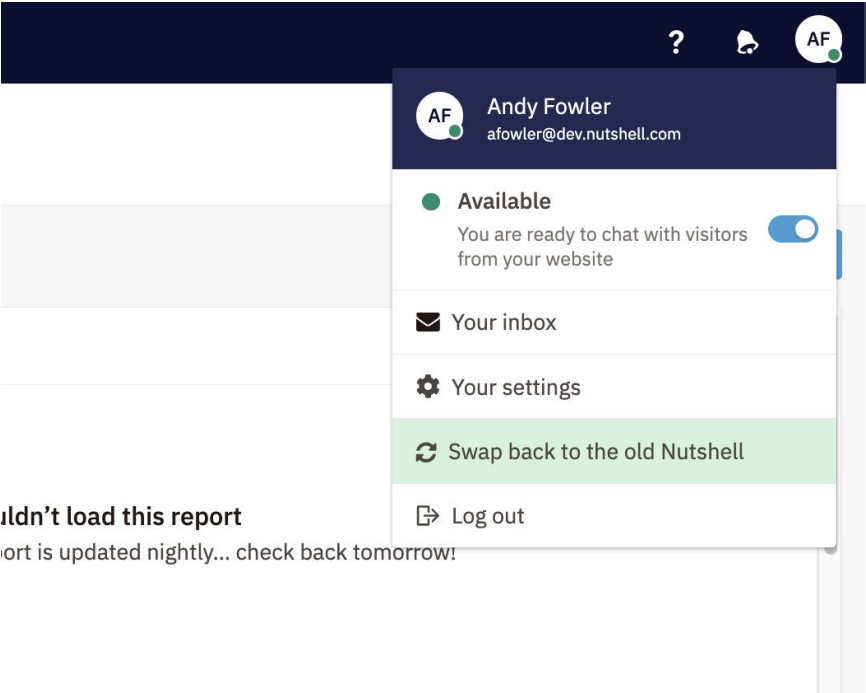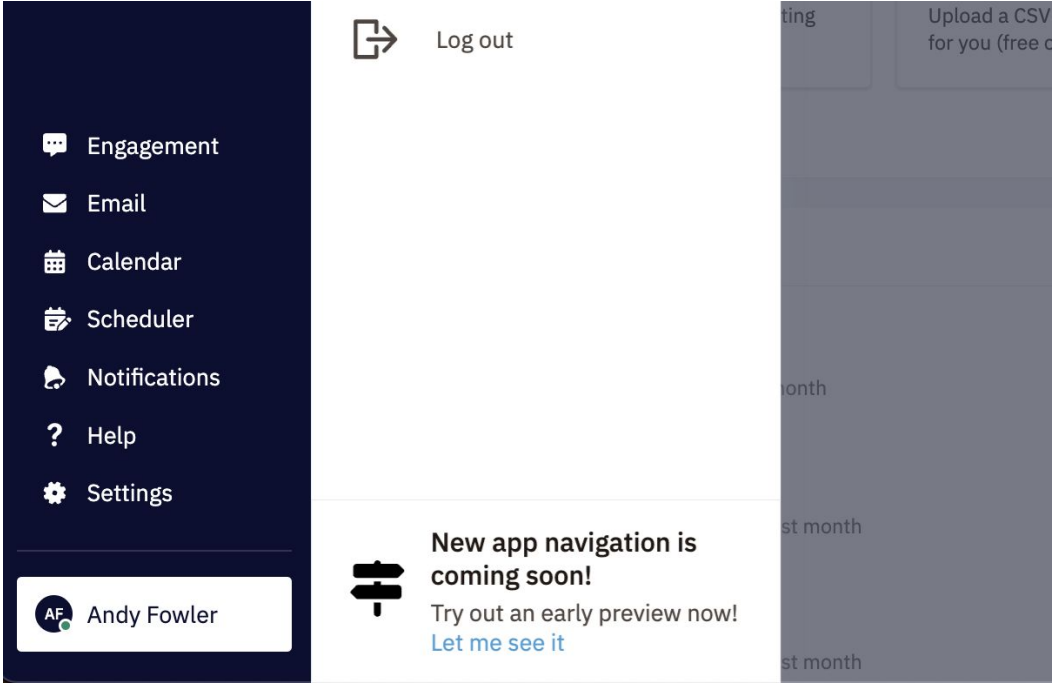- Manage and assign chats through the Engagement inbox

ENGAGEMENT

Nutshell

2025:
Where Nutshell is going

Nutshell 🌰

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...

Nutshell 🌰

Early access to Nutshell's new navigation

Search...

?   56

Dashboard

Email

Broadcasts

Newsletters

Drip sequences

Audiences

Templates

SMS

Website

Lead generation

Setup

Sales

Marketing

Engagement 1

Companies

People

Leads

Reports

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

- 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

Scheduler

- Multiple calendar support

- Create shared events for multiple attendees

- Customizable URLs & landing pages for all your Scheduler events

Nutshell

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

Nutshell

Collect more data when creating leads

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

Nutshell

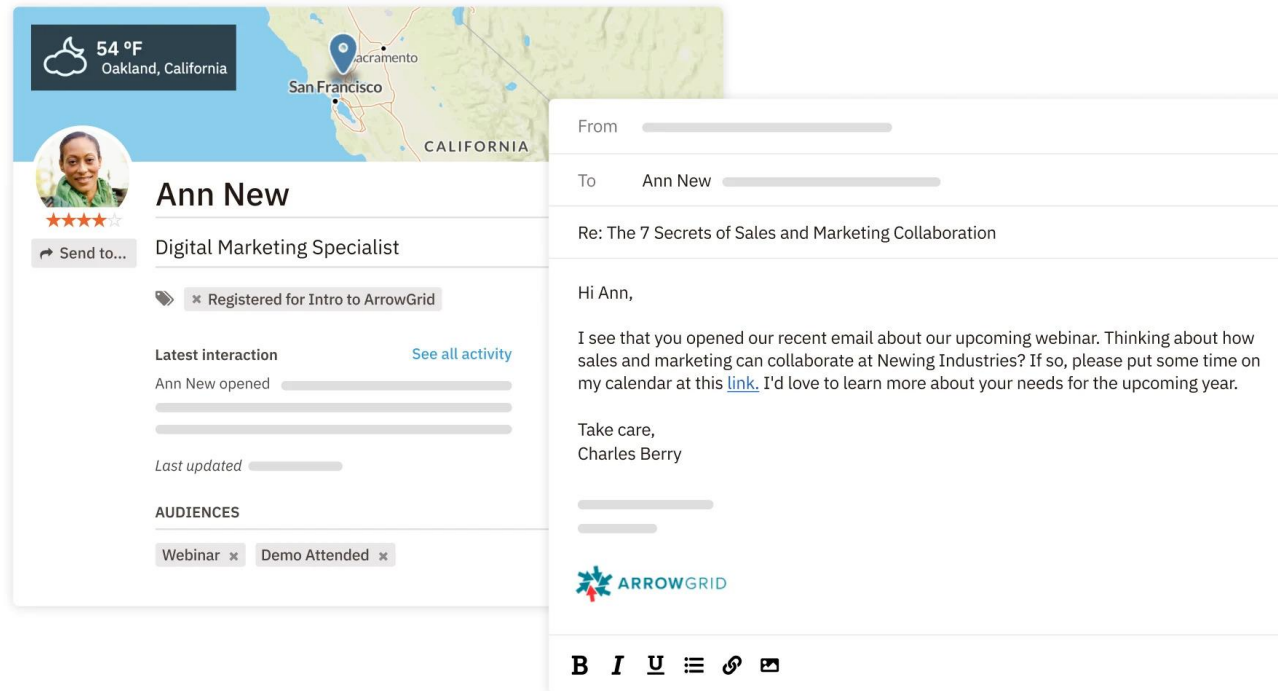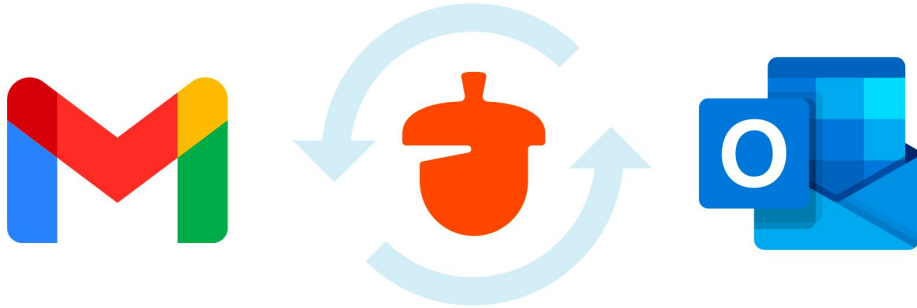# AI email reply starters

- Use smart email reply starters to streamline emailing your contacts

SALES

Outlook extension updates

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

Nutshell

SMS campaigns and drips

- Leverage text message Broadcasts and Drip Sequences to turn contacts into customers

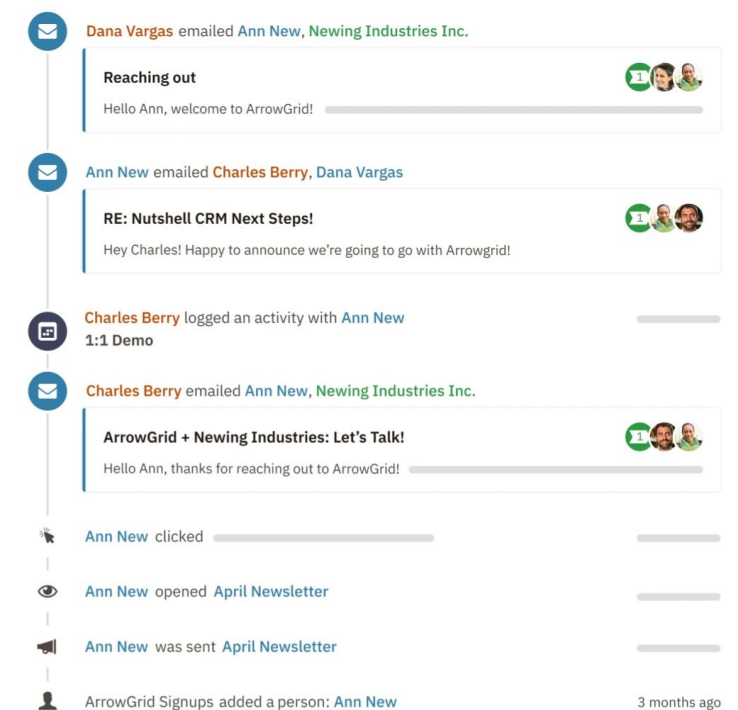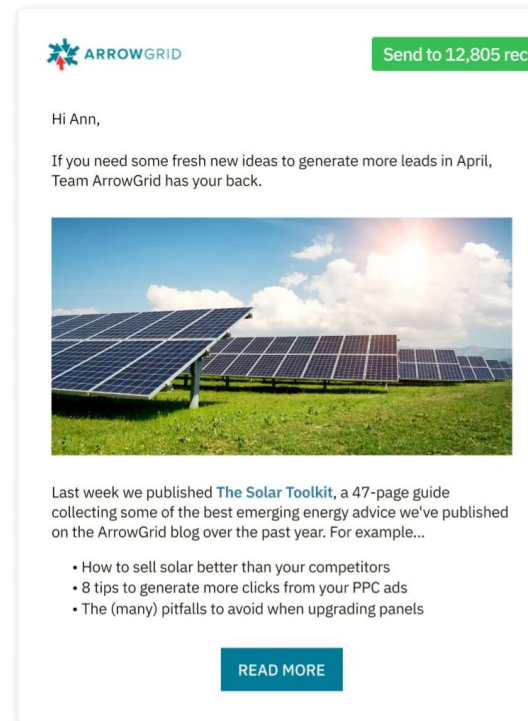- Use automation to start more conversations with less work

Smart audiences

- Streamlining CRM and marketing audiences
- Uniting "Saved lists" and "Audiences"

Nutshell

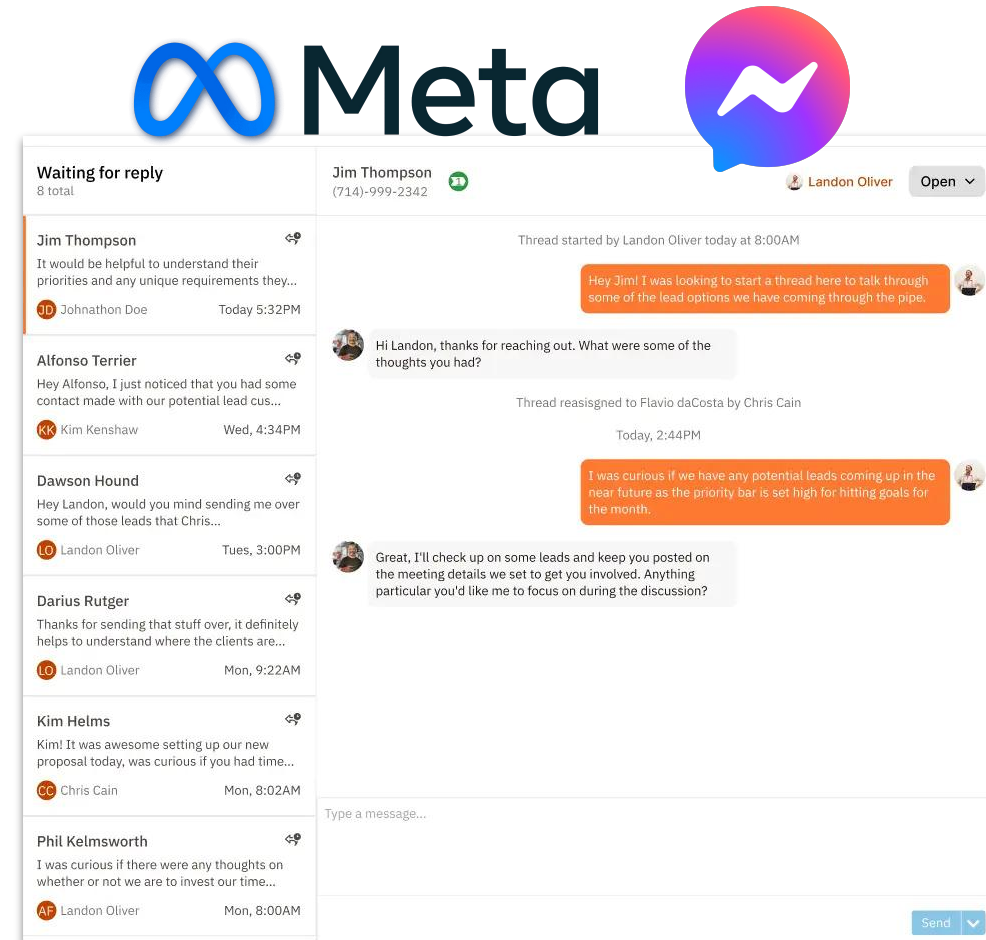# Link engagement report

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

Nutshell

Meta/Facebook Messenger support in Engagement

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

Automatically set Chat agent availability

- Set agent availability on a regular schedule

Nutshell

Want to learn more?

Want to get monthly updates about what's new in Nutshell? **Subscribe to the Shipping News newsletter** to be the first to know about new product launches, upcoming webinars and more!

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**.

Nutshell

Q & A

Nutshell

Thanks for joining us today!

Nutshell