

Nutshell 🍷

Marketing Suite

Manage Marketing Efforts in Nutshell

Join us to discover Nutshell's new Marketing Suite, which offers powerful tools to help teams manage marketing campaigns and generate more sales opportunities.



Will Gordon
Director of Marketing
at Nutshell

Nutshell 🍷

Today's Agenda

- Nutshell's Marketing features 5 minutes
- What is Nutshell Marketing? 15 minutes
- LIVE walkthrough 5 minutes
- How to access Nutshell Marketing 5 minutes

- Q&A

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

Nutshell's Marketing features

- Email Marketing
- A/B testing in email campaigns
- Web forms
- Landing Pages
- Marketing dashboard
- Custom domains
- CompetitorSpy Recently renamed from *CompetitorIQ*
- Lead attribution
- Audiences

Demo Pipeline for New Customers

Qualify 25% | Schedule 1:1 Demo 50% | Complete 1:1 Demo 75% | Close 90%

Automated emails

Start sending: Let's Talk | Sales Welcome Sequence

Let's Talk Solar! 1

2 business days later, if no reply 1

3 business days later, if no reply 0

Add follow-up email

Ann New

Ann New clicked <https://calendly.com/cberry> from Let's Talk Solar!

Ann New opened Let's Talk Solar! 3 times

Add to list: Newsletter

ARROWGRID

Save money. Save energy.

Small businesses can benefit in big ways from going solar. In a small business, efficiency matters.

LEARN MORE

Hi Ann,

While gathering around the virtual water cooler, we had this bright idea. Let's use the bright ideas our users have given us.

Best,
Charles Berry

Send to 15,209 recipients

Automated emails

Let's Talk Solar! 1

2 business days later, if no reply 1

3 business days later, if no reply 0

Add follow-up email

Let's Talk Solar!

First name,

First things first, thanks for considering ArrowGrid! My name is Charles and I'm here to help you.

Let's connect! I'm here to help, so please [use this link to find time on my calendar](#) that works for you.

I'm looking forward to hearing back.

Thanks!
Charles

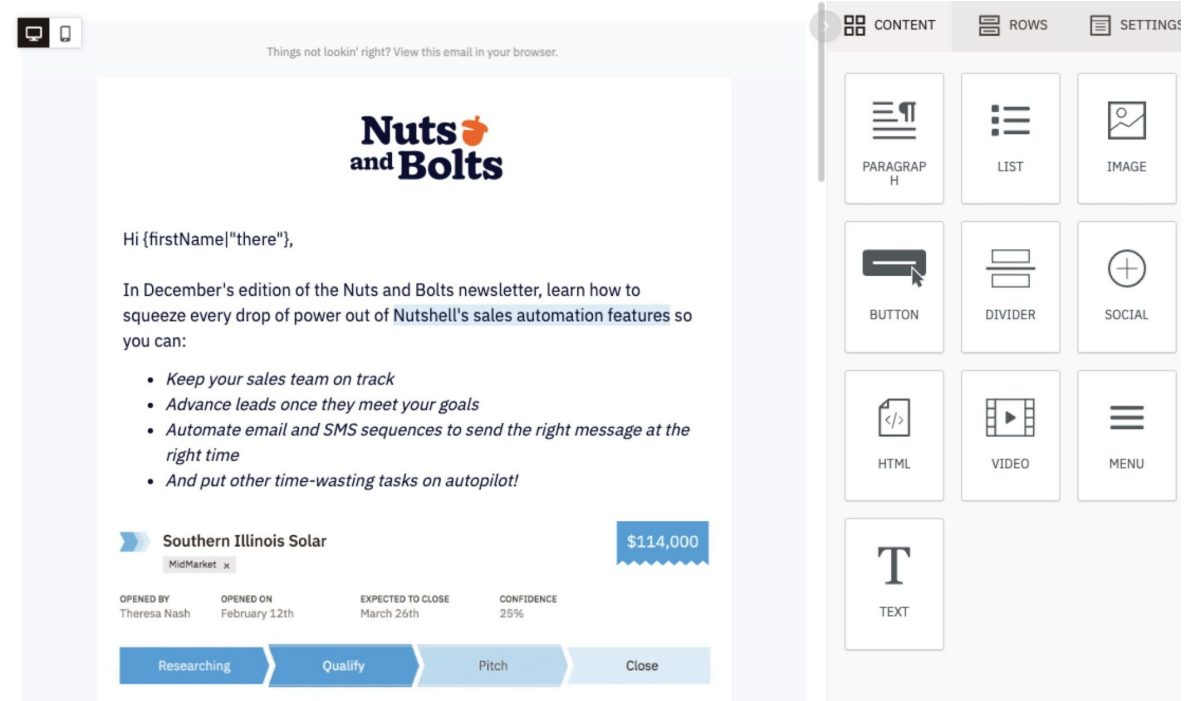
ARROWGRID

What is Nutshell Marketing?

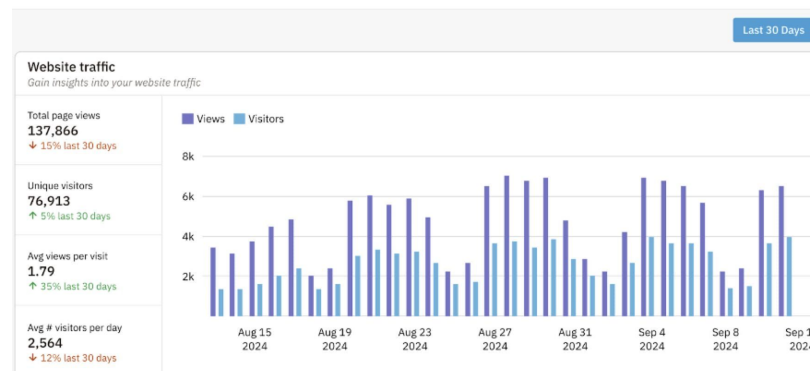


Email Marketing FOUNDATION

- No-code drag-and-drop email builder
- Design broadcasts, newsletters, and drip sequences
- Track audience engagement
- Automate email marketing by pipeline stage
- Email campaign reporting



Dashboard The all in one dashboard for you and your marketing



Website buyer journey & lead attribution



- View all the pages a contact visited in their journey on your site, from becoming a lead to closing
- Track which marketing channels bring your best leads

11:30 AM on May 2, 2023
Jewell July visited 2 pages on www.nutshell.com

Site visit Mac OS · Flint, MI

Via **google**

/blog/announcing-nutshell-marketing
/marketing

2 28s

8:26 AM on May 2, 2023
Jewell July visited 1 page on www.nutshell.com

Site visit Mac OS · Flint, MI

Via **direct**

/blog/sales-multithreading-guide

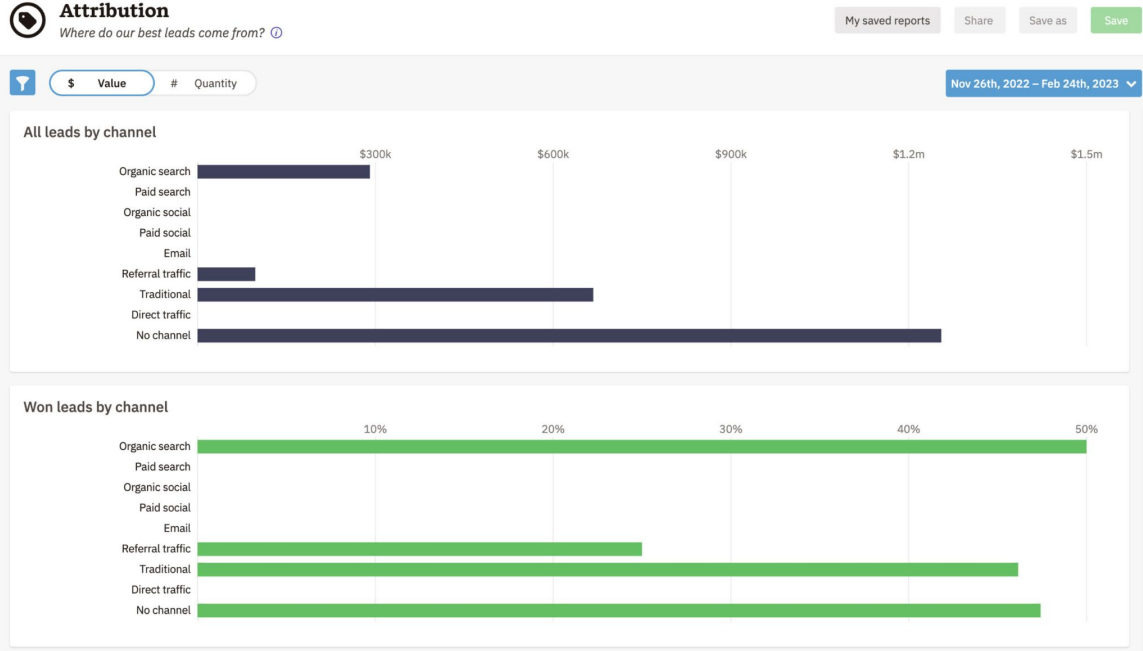
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4:16 PM on May 1, 2023
Jewell July visited 2 pages on www.nutshell.com

Site visit Mac OS · Flint, MI

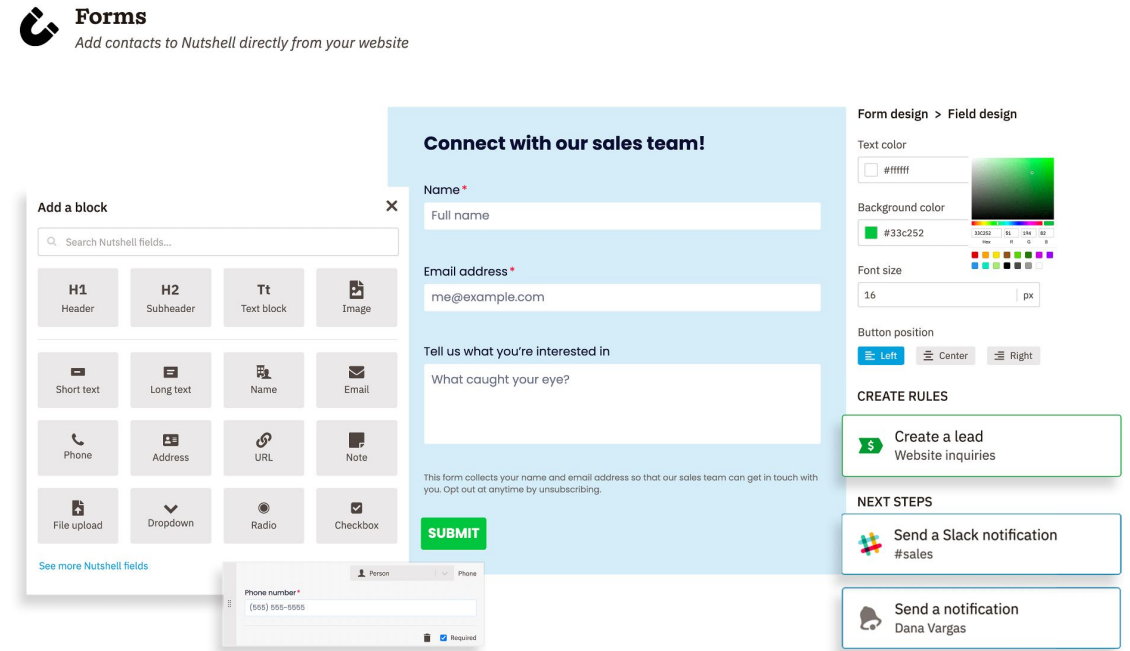
Via **google**

/blog
/blog/crm-for-marketing-strategies



Web forms

- No-code drag-and-drop web form builder
- Map form fields to custom fields in Nutshell
- Create new contacts and leads with each form submission
- Get notified of new submissions immediately
- Track submissions for easy analysis and follow-up



Forms
Add contacts to Nutshell directly from your website

Form design > Field design

Connect with our sales team!

Name*
Full name

Email address*
me@example.com

Tell us what you're interested in
What caught your eye?

CREATE RULES

- Create a lead
Website inquiries

NEXT STEPS

- Send a Slack notification
#sales
- Send a notification
Dana Vargas

Add a block

Search Nutshell fields...

- H1 Header
- H2 Subheader
- Tt Text block
- Image
- Short text
- Long text
- Name
- Email
- Phone
- Address
- URL
- Note
- File upload
- Dropdown
- Radio
- Checkbox

See more Nutshell fields

Phone number*
(555) 555-5555

Person Phone

Required

Text color: #ffffff

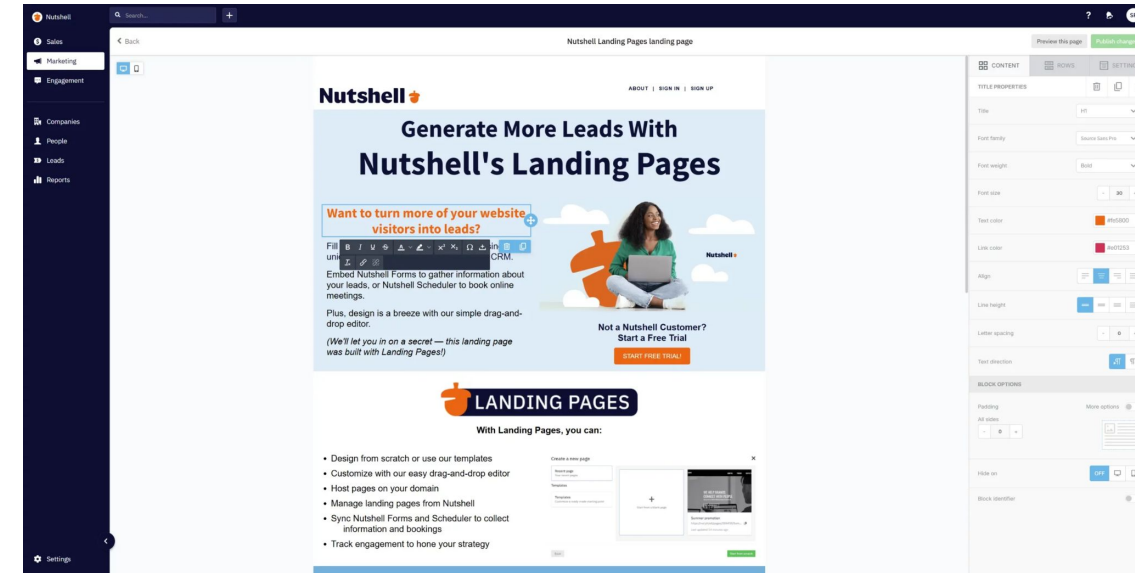
Background color: #33c252

Font size: 16 px

Button position: Left, Center, Right

Landing Pages /

- No-code drag-and-drop landing page builder
- Host unlimited landing pages on your company's custom domain
- Choose from over 30 templates or start from scratch
- Add web forms and Scheduler meetings to your page to collect information about visitors



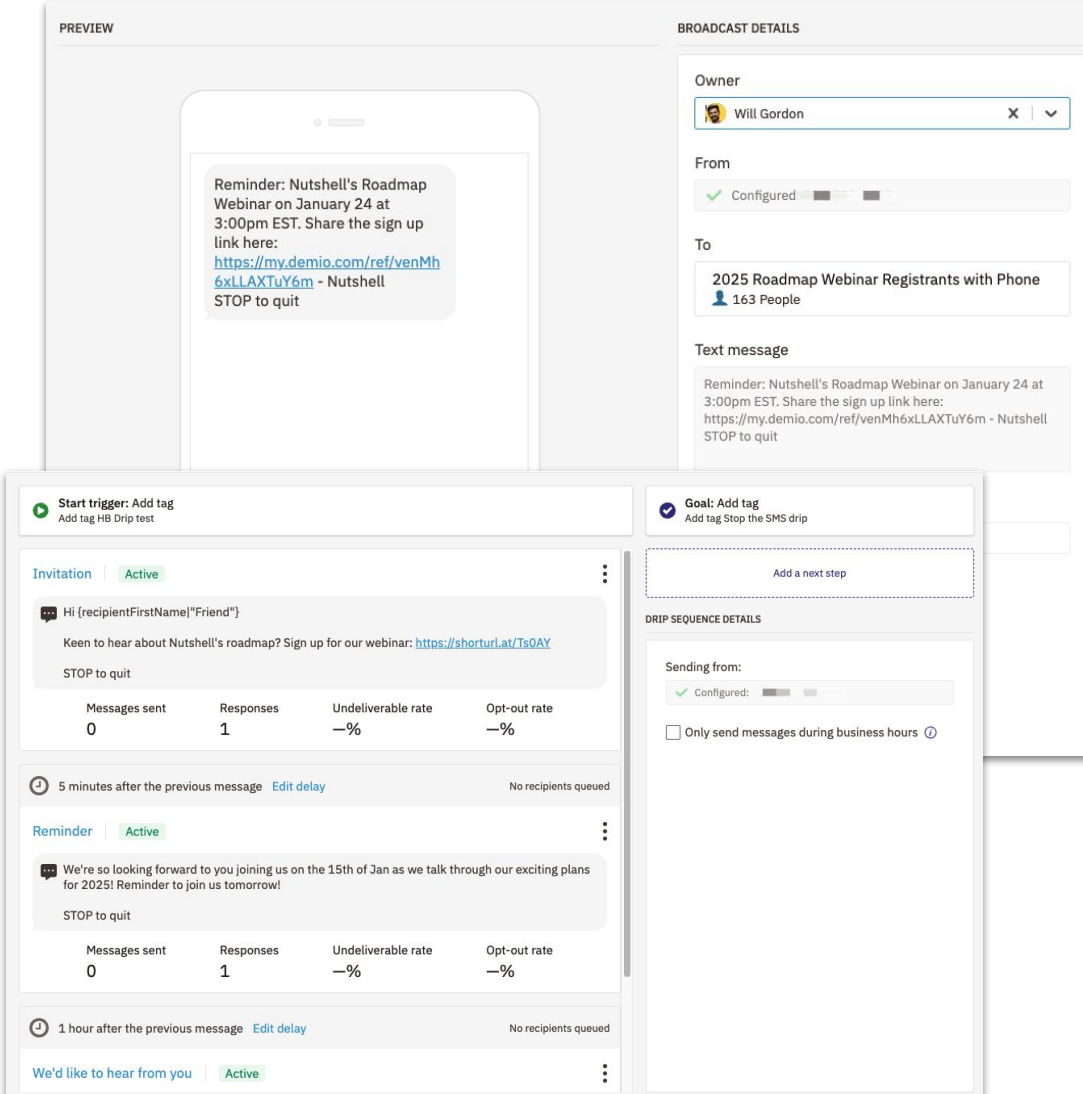
CompetitorSpy

- Track your top competitors' website traffic and break down their top-performing marketing strategies
- Identify opportunities to invest in your marketing strategies and widen the gap between you and your competitors!



SMS marketing

- Design and send SMS broadcasts and drip sequences to your marketing audiences
- Track message engagement
- Enrollment for a SMS number can take upwards of 2 weeks
 - In the app go to Marketing > Setup > SMS
 - we suggest enrolling before you purchasing Marketing Pro
- If you are currently an Engagement Pro customer and have a Nutshell SMS number, no additional enrollment is needed!



The screenshot displays the Nutshell SMS marketing interface, divided into several sections:

- PREVIEW:** Shows a mobile phone screen with a text message: "Reminder: Nutshell's Roadmap Webinar on January 24 at 3:00pm EST. Share the sign up link here: <https://my.demio.com/ref/venMh6xLLAXTuY6m> - Nutshell STOP to quit".
- BROADCAST DETAILS:**
 - Owner:** Will Gordon
 - From:** Configured
 - To:** 2025 Roadmap Webinar Registrants with Phone (163 People)
 - Text message:** Reminder: Nutshell's Roadmap Webinar on January 24 at 3:00pm EST. Share the sign up link here: <https://my.demio.com/ref/venMh6xLLAXTuY6m> - Nutshell STOP to quit
- Start trigger:** Add tag (Add tag HB Drip test)
- Invitation:** Active. Message: "Hi {recipientFirstName} 'Friend'" "Keen to hear about Nutshell's roadmap? Sign up for our webinar: <https://shorturl.at/Ts0AY> STOP to quit".

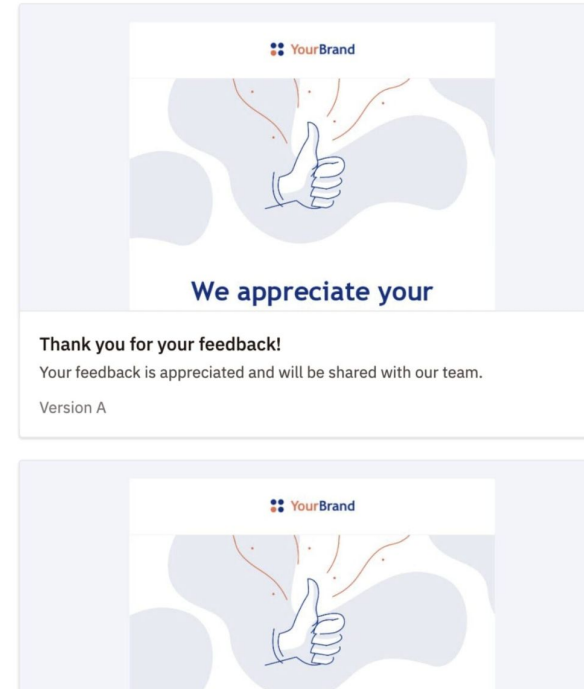
Messages sent	Responses	Undeliverable rate	Opt-out rate
0	1	—%	—%
- 5 minutes after the previous message:** Edit delay. No recipients queued.
- Reminder:** Active. Message: "We're so looking forward to you joining us on the 15th of Jan as we talk through our exciting plans for 2025! Reminder to join us tomorrow!" STOP to quit".

Messages sent	Responses	Undeliverable rate	Opt-out rate
0	1	—%	—%
- 1 hour after the previous message:** Edit delay. No recipients queued.
- We'd like to hear from you:** Active.
- Goal:** Add tag (Add tag Stop the SMS drip)
- DRIP SEQUENCE DETAILS:** Sending from: Configured. Only send messages during business hours

Email marketing A/B testing



- Create A/B tests of your email marketing message to optimize audience engagement
- Test email content, subject line, or preview text
- Choose how Nutshell determines a winner, then sit back and optimize your campaigns



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?

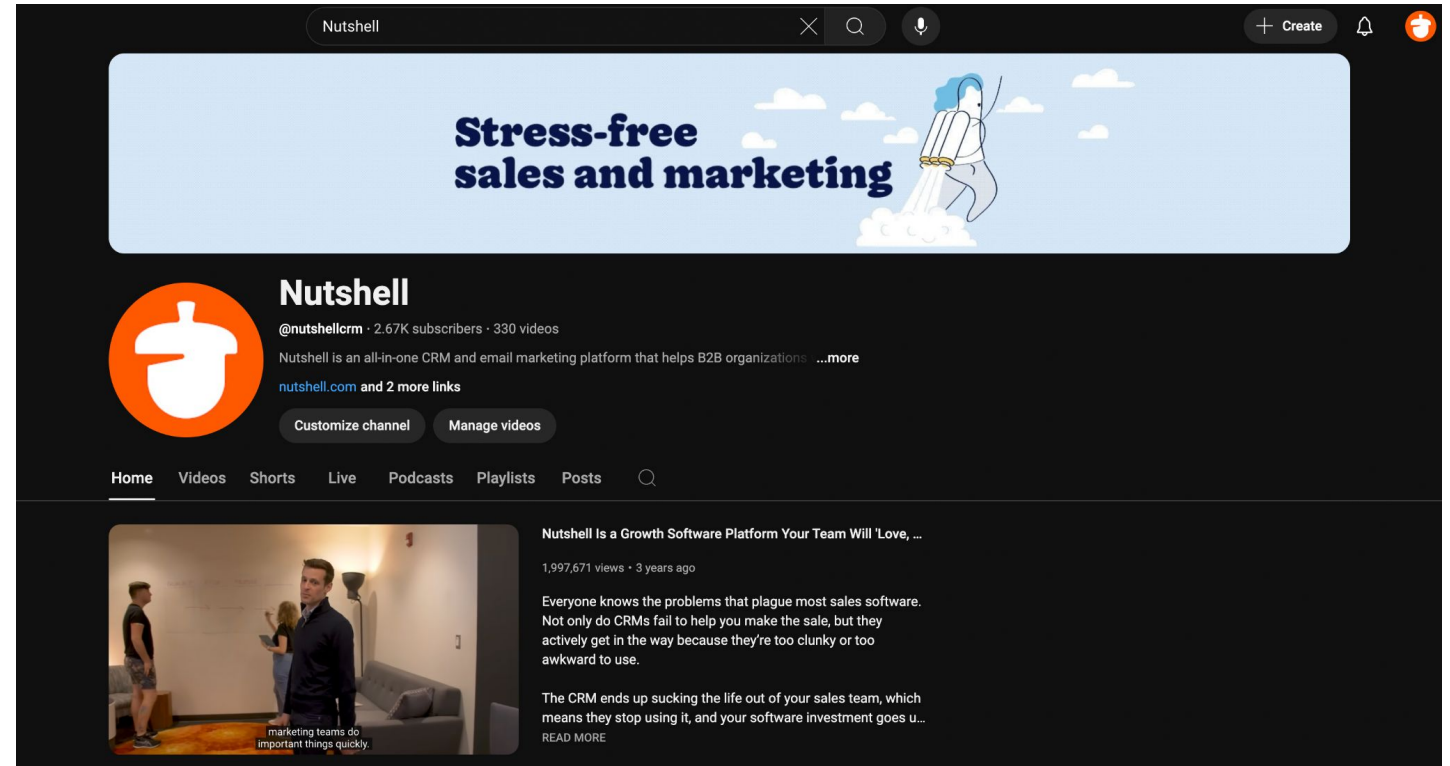
After sending your initial batch of messages for comparison, determine how long Nutshell should wait before declaring a winner and sending that version to the rest of your audience.

2 hours 4 hours 8 hours 24 hours

WHAT IF THERE'S A TIE?

Where to learn more:

- Email Marketing
- Lead attribution
- Web forms
- Landing Pages
- CompetitorSpy
- Marketing SMS
- Email marketing A/B testing



The screenshot shows the YouTube channel page for Nutshell. At the top, there is a search bar with 'Nutshell' entered and a 'Create' button. Below the search bar is a banner image with the text 'Stress-free sales and marketing' and an illustration of a person with a backpack walking on clouds. The channel name 'Nutshell' is displayed, along with the handle '@nutshellcrm', 2.67K subscribers, and 330 videos. A bio states: 'Nutshell is an all-in-one CRM and email marketing platform that helps B2B organizations... more'. Below the bio are buttons for 'Customize channel' and 'Manage videos'. The navigation menu includes 'Home', 'Videos', 'Shorts', 'Live', 'Podcasts', 'Playlists', and 'Posts'. A video thumbnail is visible with the title 'Nutshell Is a Growth Software Platform Your Team Will Love, ...' and a description: 'Everyone knows the problems that plague most sales software. Not only do CRMs fail to help you make the sale, but they actively get in the way because they're too clunky or too awkward to use. The CRM ends up sucking the life out of your sales team, which means they stop using it, and your software investment goes u...'. A 'READ MORE' link is also present.

Let's Walk Through Nutshell Marketing



Tier breakdown

FOUNDATION

- Unlimited audiences
- Website buyer journey
- Basic lead attribution
- Web forms
- No-code landing page builder (branded)
- No-code email builder
- Email campaigns (150 free monthly sends) with reporting

PRO

- A/B testing for email campaigns
- No-code landing page builder
- Advanced lead attribution
- Higher limits on web forms
- Marketing SMS campaigns (150 monthly credits included) *Usage rates apply for additional messages*
- Advanced forms and campaign reporting
- Live pop-ups *Coming soon*

How to access Nutshell Marketing

- Marketing Foundation is included with *all* Nutshell Sales plans!
- To purchase Marketing Pro:
 - Settings > Administration > Billing > Update my plan
- Go to our [Nutshell Marketing page](#) to calculate your cost
- To start using SMS Marketing, go to Marketing > Setup > SMS



Plan	Marketing Foundation	Marketing Pro
Price	\$0/month	\$49/month

Usage rates

Marketing contacts	Price
100	\$5/month
500	\$12/month
1,000	\$25/month
2,500	\$35/month
5,000	\$60/month
10,000	\$100/month
15,000	\$150/month
20,000	\$200/month
30,000	\$260/month
40,000	\$320/month
Custom pricing for over 500,000 Contacts	

Additional SMS messages (150 monthly sends free)	Price
250	\$15/month
500	\$25/month
1,000	\$40/month
1,500	\$60/month
2,000	\$80/month
2,500	\$100/month
3,000	\$120/month
4,000	\$160/month
5,000	\$200/month
10,000	\$400/month

Calculate your price on [our Nutshell Marketing page](#)

[Contact our team](#) for additional details

For current customers...

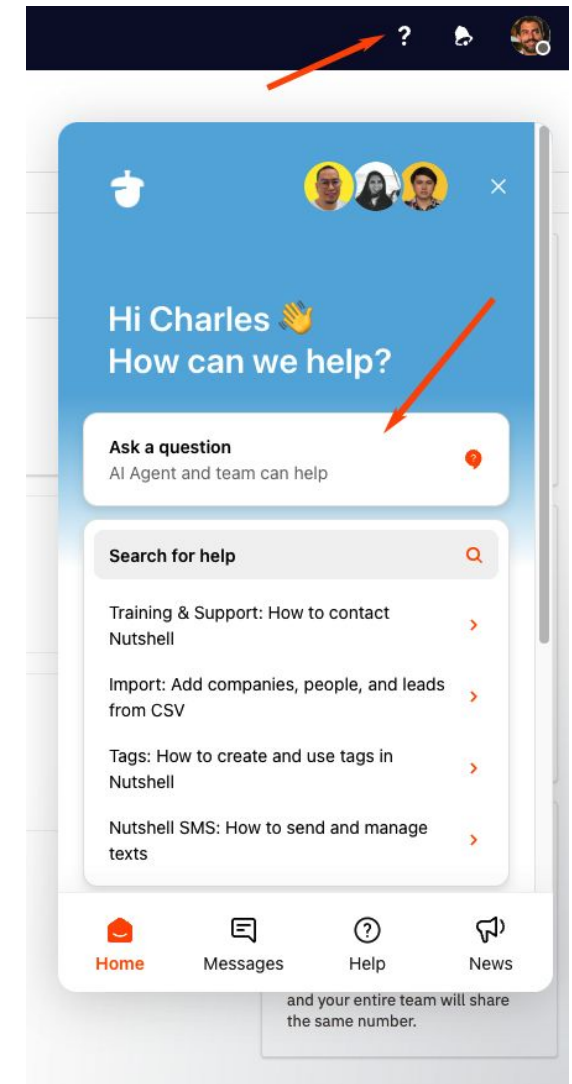
- **Do you currently pay monthly for our email marketing software?**

If yes, nothing will change on your invoice. You do now get access to all other features in Marketing Foundation.

- **Do you currently pay monthly for a Landing Pages subscription?**

If yes, we will be upgrading you to our Marketing Pro plan at no charge for 6 months.

Contact our team with any questions!



Q&A

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.

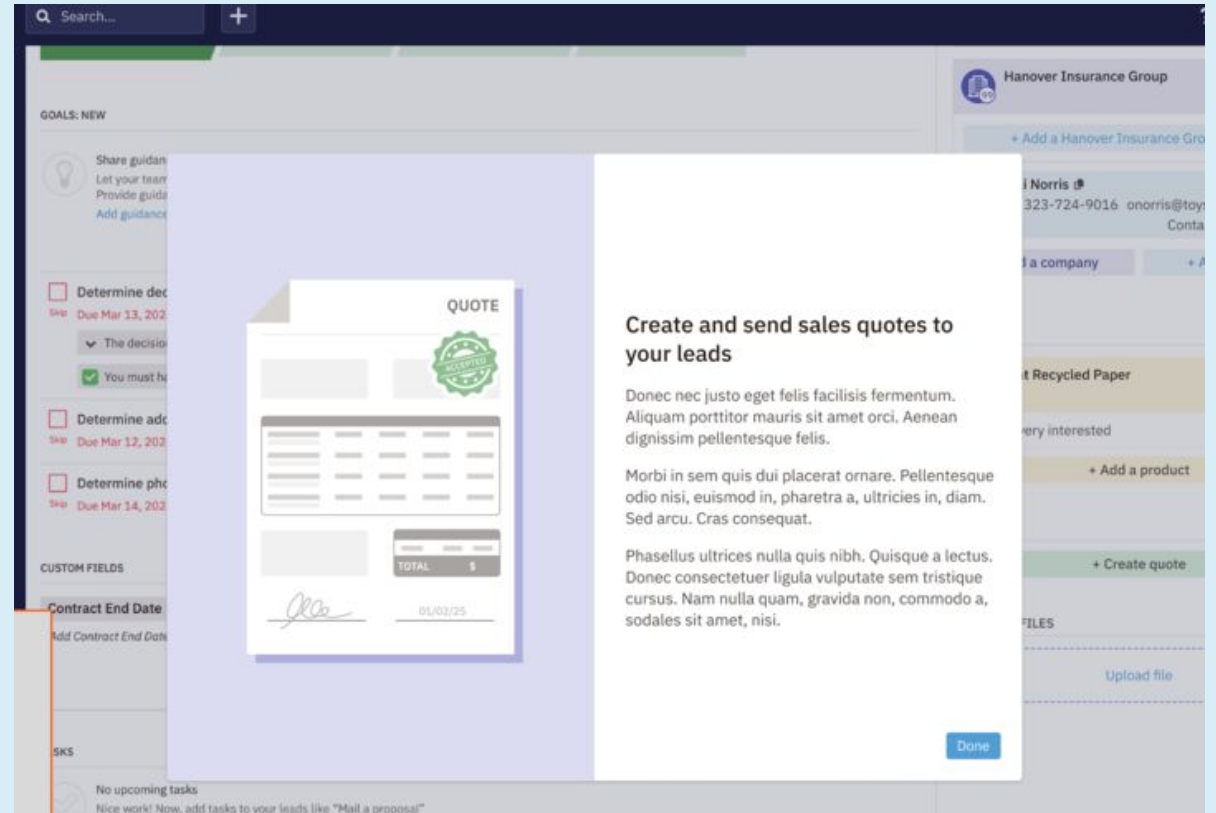
You can register at: <https://www.nutshell.com/guided-tours/nutshell-best-practices>

Our next Nutshell Best Practices webcast will be on February 26, 2025 at 12:00 PM EST.

Thanks for joining us today!

Upcoming release:

- **Nutshell Quotes:** Create and send quotes to your leads from inside Nutshell
- *Looking for Beta testers. If interested, email beta@nutshell.com with the subject line: “Beta Tester for Quotes”. If selected, our Product team will reach out with more information!*



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