



Zoom AI Features

Zoom Call Logging, Transcribing, & Summarizing Made Easy in Nutshell

Discover how Nutshell's enhanced Zoom AI integration features make capturing meeting details easier than ever before.



Will Gordon
Director of Marketing
at Nutshell

Today's Agenda

- What are our recent Zoom AI features? 15 minutes
- Zoom AI walkthrough 5 minutes
- How to access Nutshell's Zoom AI features 5 minutes
- Q&A

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

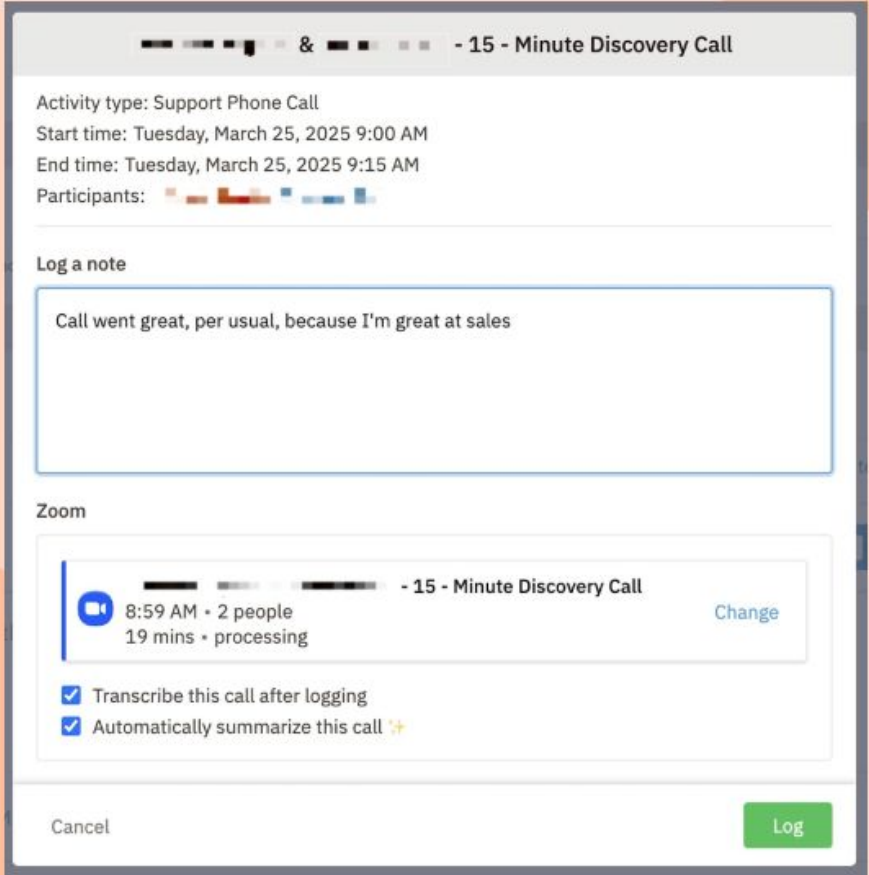
What are our recent Zoom AI features?



Leverage AI to capture meeting transcriptions & summaries

- Generate **meeting transcriptions** directly from your Zoom call activity
- Use generative AI to **summarize Zoom meetings** with the click of a button
- **Add notes** in your Zoom activity modal to keep your team in the loop
- **Automate** meeting transcription and summarization as soon as the activity is logged

*Note: Zoom does offer transcriptions, but you are required to be on their Business tier and have closed captioning enabled.



The screenshot shows a modal window titled "- 15 - Minute Discovery Call". It contains the following information:

- Activity type: Support Phone Call
- Start time: Tuesday, March 25, 2025 9:00 AM
- End time: Tuesday, March 25, 2025 9:15 AM
- Participants: [Avatar icons]

Below this is a section titled "Log a note" with a text input field containing the text: "Call went great, per usual, because I'm great at sales".

Underneath is a "Zoom" section containing a video call icon, the text "8:59 AM • 2 people", "19 mins • processing", and a "Change" link.

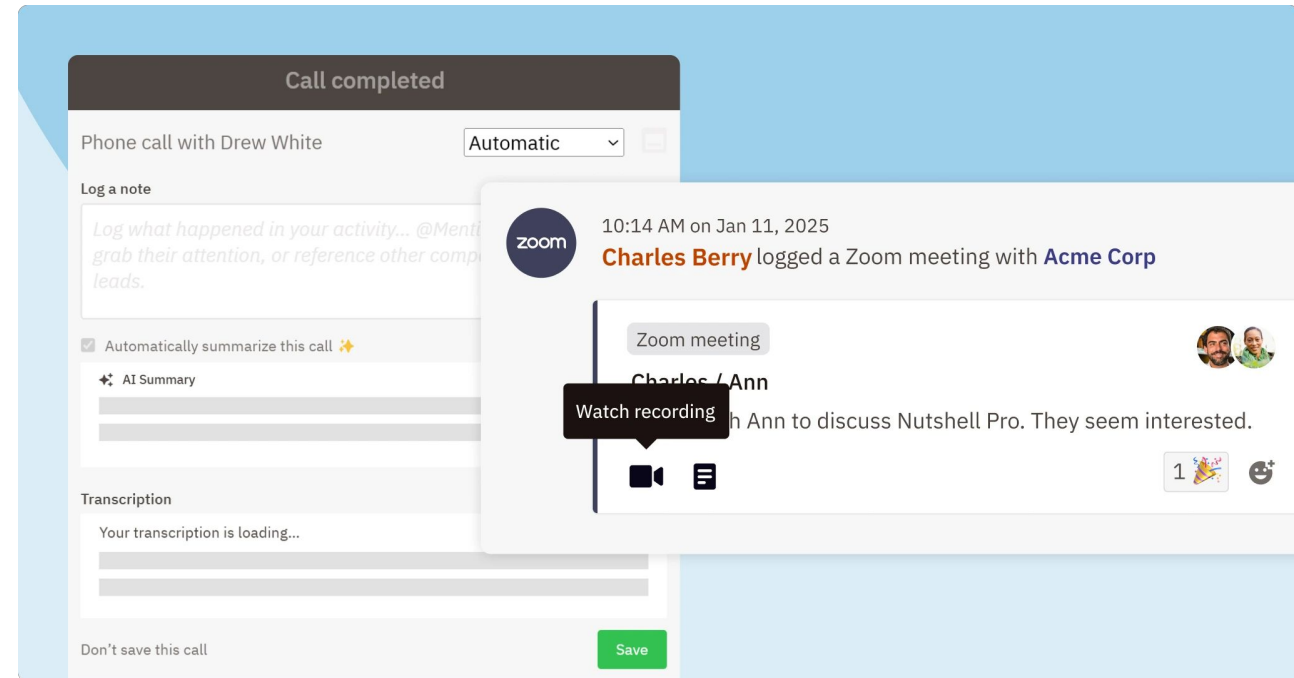
At the bottom of the Zoom section are two checked checkboxes:

- ☒ Transcribe this call after logging
- ☒ Automatically summarize this call ✨

At the very bottom of the modal are "Cancel" and "Log" buttons.

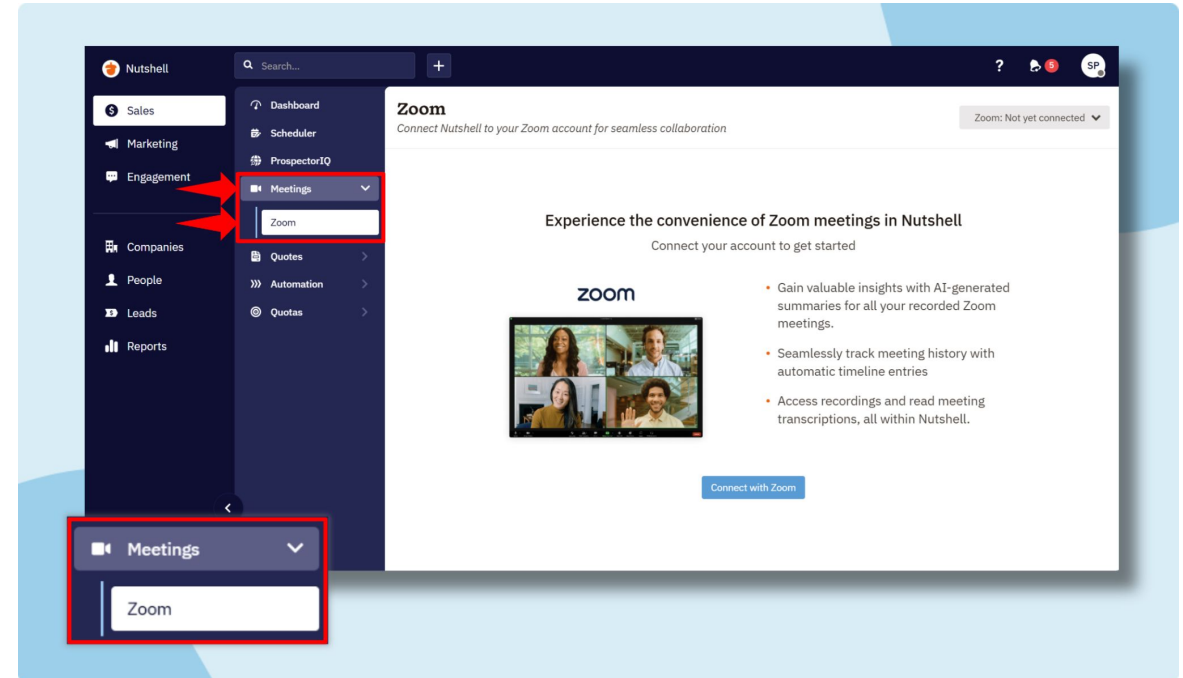
Improve Zoom call tracking in Nutshell

- Nutshell **automatically detects** and saves your Zoom activities
- Spot Zoom activities right from your Activity list with the new Zoom icon
- **Log, view, and share** Zoom calls directly from Nutshell



Manage Zoom call recordings & notes your way

- Access & manage all your Zoom meetings under the new **Meetings** section in your Sales menu (*Google Meet and Microsoft Teams coming soon!*)
- Access notes, transcriptions, and summaries for your Zoom activities from anywhere they appear in Nutshell:
 - Activities section
 - Sales dashboard
 - Person, Company, & Lead timelines
- Select manual or automatic call logging on the new Zoom Settings page



Let's Walk Through Nutshell's Zoom AI Features




How to access Nutshell's Zoom AI features

- Every plan has a small number of monthly AI credits to test out these features (and our other AI features)
- Customers on a Nutshell Sales Business or Enterprise plan can access these Zoom AI features
 - Sales Business has 50/user/month
 - Sales Enterprise has 100/user/month
- Access your Zoom settings and meetings here: *Sales > Meetings > Zoom*

Experience the convenience of Zoom meetings in Nutshell

Connect your account to get started

zoom



- Gain valuable insights with AI-generated summaries for all your recorded Zoom meetings.
- Seamlessly track meeting history with automatic timeline entries
- Access recordings and read meeting transcriptions, all within Nutshell.

Connect with Zoom

Nutshell's AI Features

- Zoom AI
 - Transcription
 - Summarization
- Click-to-call
 - Transcription
 - Summarization
- Notetaker
 - use voice to text to take notes quickly
- Timeline Summarization
 - Summarize a lengthy contact record in no time
- AI Email starters (coming soon)

- 15 - Minute Discovery Call

Activity type: Support Phone Call
Start time: Tuesday, March 25, 2025 9:00 AM
End time: Tuesday, March 25, 2025 9:15 AM
Participants: [Icons]

Log a note

Call went great, per usual, because I'm great at sales

Zoom

8:59 AM • 2 people
19 mins • processing

☒ Transcribe this call after logging
☒ Automatically summarize this call

Cancel Log

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.

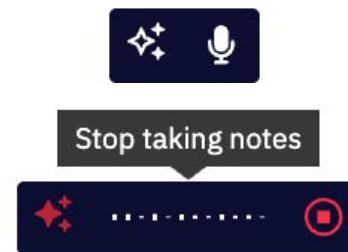
☒ Automatically summarize this call

AI Summary

Transcription

Your transcription is loading...

Don't save this call Save



AI Summary

Introduction:
Ann from Newing Industries Inc. has been interacting with several Nutshell users from ArrowGrid, including Charles Berry, Dana Vargas, Lisa Williams, and Sandra Hendrix, over the past year regarding ArrowGrid's Sundog and Sunrazor products.

Action Items:
- Follow up with Ann on the proposal for the Sundog product that Charles Berry sent over.
- Schedule a call with Dana Vargas to discuss the Sundog product and answer any remaining questions Ann may have.
- Reach out to Ann to schedule a 15-minute call with Lisa Williams to continue their conversation about ArrowGrid's products and support.

Activity:
Charles Berry and Dana Vargas have both scheduled in-person demos with Ann to showcase the Sundog and Sunrazor products. These activities suggest a high level of engagement and interest from Ann in ArrowGrid's offerings.

Dossier:
We've known Ann from Newing Industries Inc. since late 2024 when she first reached out about an issue with her Sunrazor system. Based on the timeline, Ann seems to be a long-standing customer who is interested in exploring newer, more energy-efficient models from ArrowGrid. She appears to have a good working relationship with the ArrowGrid team and is responsive to their outreach. The timeline indicates that Ann's company, Newing Industries Inc., is involved in building projects that utilize ArrowGrid's products.

Conversation Starters:
- Discuss the latest updates to the Sundog model and how it could benefit Newing Industries' upcoming projects.
- Inquire about any other pain points or needs Ann's team may have that ArrowGrid could assist with.
- Suggest a follow-up call to review the proposal in detail and address any remaining questions.

What's this? Generated February 20th, 2025

Zoom AI and all of Nutshell's AI features save your team valuable time to focus on selling and growing your business.

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 **April 23, 2025** at **12:00 PM EST**.

Thanks for joining us today!

Recent / Upcoming releases:

- **Facebook and Instagram integration in Nutshell Engagement:** Add Facebook Messenger and Instagram DMs to your engagement channels. Manage conversations with leads through Messenger and Instagram, create leads from new messages, and more. *(Released April 2nd - Webinar coming soon)*
- **Enterprise SSO:** Streamline user credential management with Single Sign-On capabilities
- **Outlook extension updates:** Send emails using your Nutshell templates right from Outlook, track opens and clicks, create new contacts and tasks, and much more.
- **AI email reply starters:** Use smart email reply starters to streamline email creation and staying in touch with your contacts

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