Nutshell

Nutshell's Lead Gen Tool Kit

Learn how to use Nutshell's built-in features to boost your lead generation efforts and fill your pipeline
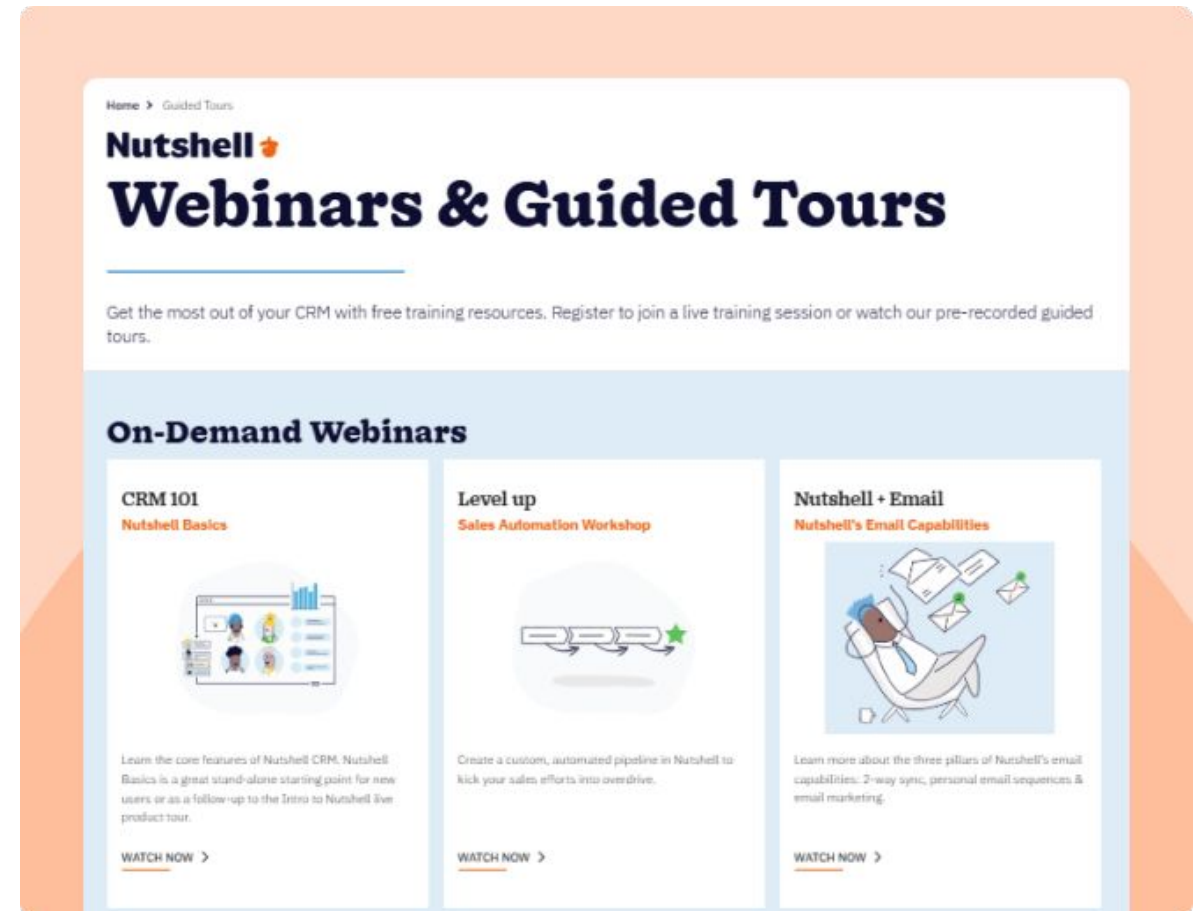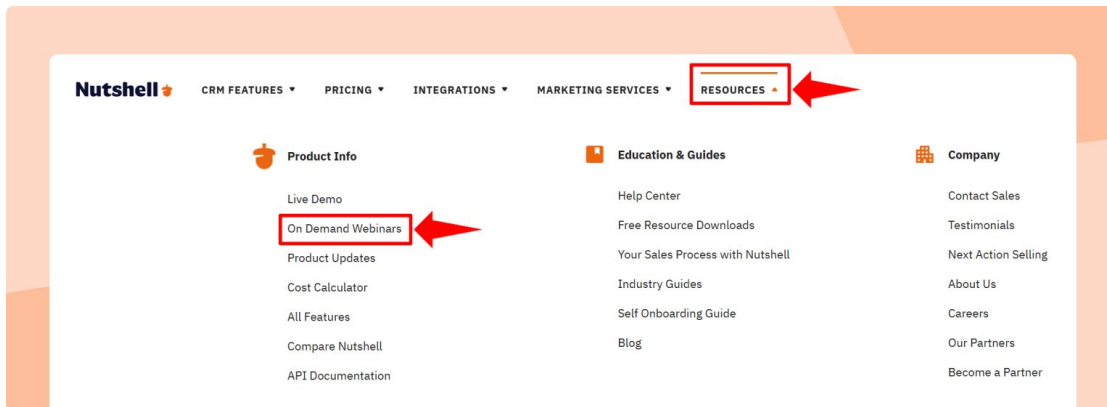
Will Gordon
Snr Director of Marketing
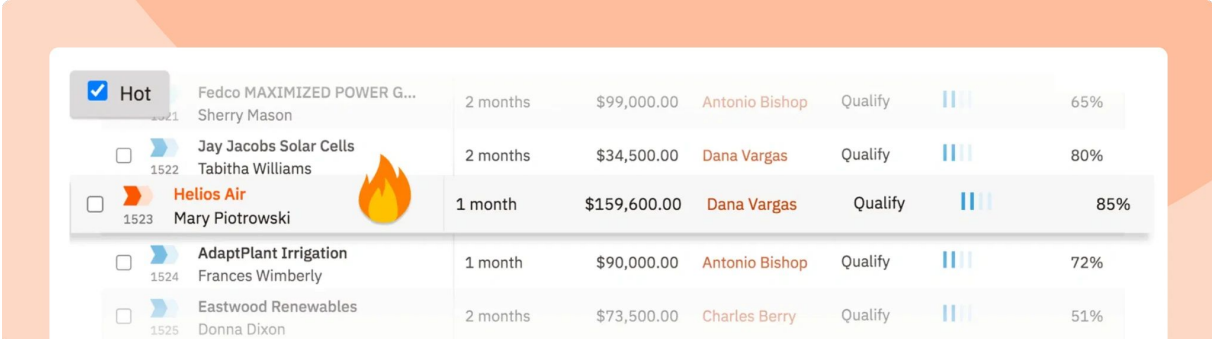at Nutshell

If You Don't Get The Recording

- Check your email **spam folder**

- Not there? Head to our **Webinars & Guided Tours page** to find this and all past webinars

Note: You can also subscribe to the Nutshell YouTube Channel to ensure you get notified whenever we publish a new video.

The Importance of Lead Generation

- Consistent lead generation is the lifeblood of **ANY** business

- Attracting and capturing new leads is essential for **growth & revenue**

- From inbound to outbound and relationship-based sales, lead generation helps you **keep your pipeline full**

- We're here to help you build your revenue-boosting **lead generation strategy**

☑ Hot	Fedco MAXIMIZED POWER G... Sherry Mason	2 months	$99,000.00	Antonio Bishop	Qualify		65%
☐ 1522	Jay Jacobs Solar Cells Tabitha Williams	2 months	$34,500.00	Dana Vargas	Qualify		80%
☐ 1523	Helios Air Mary Piotrowski	1 month	$159,600.00	Dana Vargas	Qualify		85%
☐ 1524	AdaptPlant Irrigation Frances Wimberly	1 month	$90,000.00	Antonio Bishop	Qualify		72%
☐ 1525	Eastwood Renewables Donna Dixon	2 months	$73,500.00	Charles Berry	Qualify		51%

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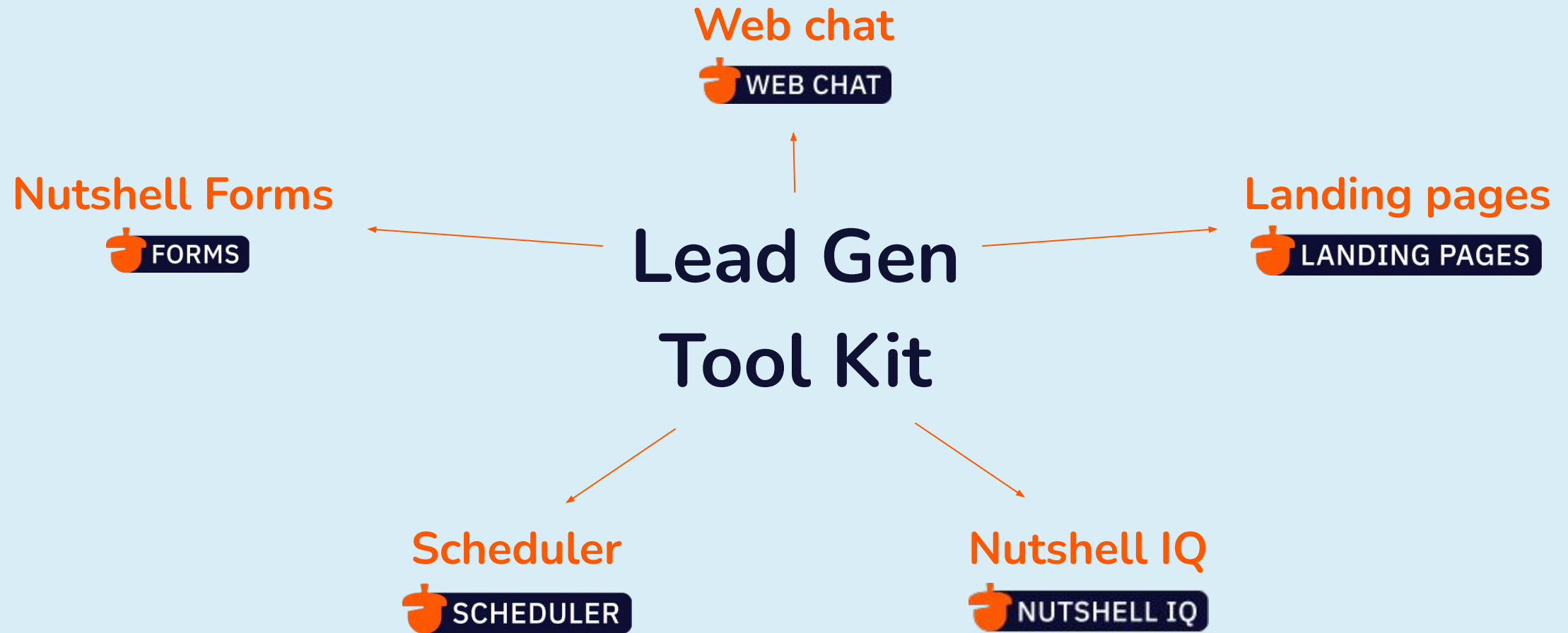
3

What We're Not Talking About Today

- **Lead generating marketing initiatives:**

  - Traditional advertising:
    - TV ads, Newspaper ads, Billboards, Mailers, Trade shows, and more

  - Digital marketing channels:
    - SEO, PPC, Social media, Connected TV, Omni-SEO, and more

Traditional advertising

Digital marketing channels

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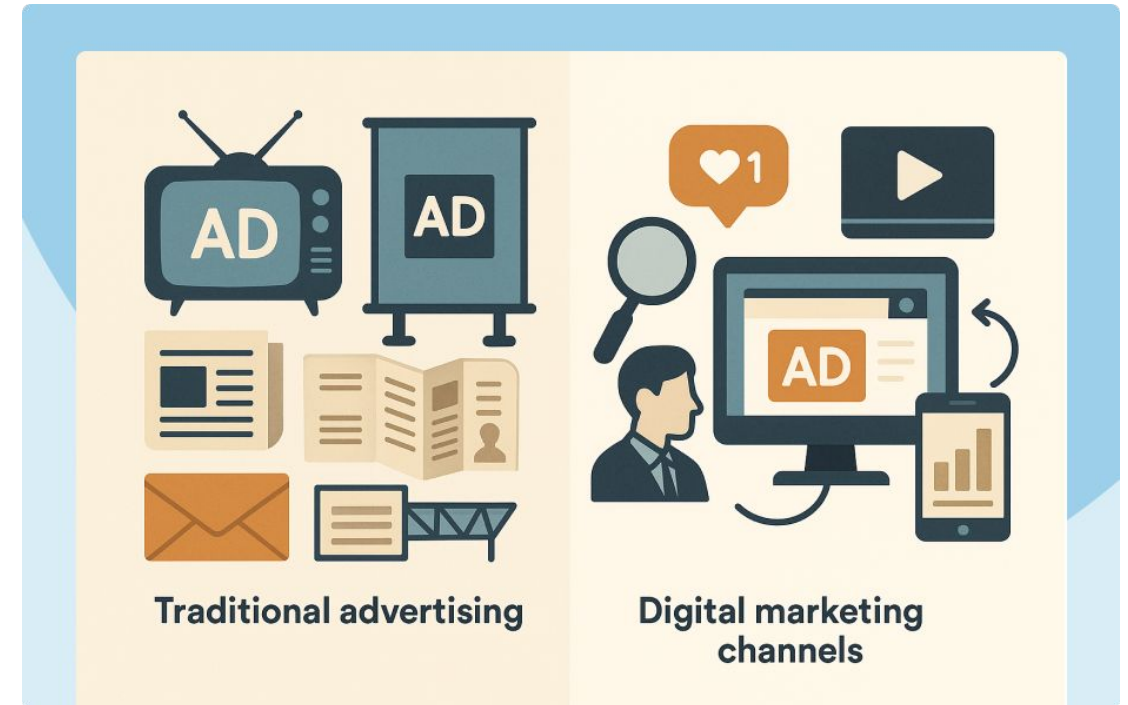
Our Digital Marketing Partner: WebFX

- Need help with your **lead gen marketing initiatives**?

- Let WebFX create a **custom digital marketing strategy** based on your business goals and industry

- **#1-rated digital marketing agency** with almost **30 years** of proven results!

- We'll send you a link to **find out more & book a consultation** (free for Nutshell customers)

46%
Avg Lead Growth for Professional Service Clients

WebFX

Nutshell

Web chat

WEB CHAT

Nutshell Forms

FORMS

Landing pages

LANDING PAGES

Lead Gen Tool Kit

Scheduler

SCHEDULER

Nutshell IQ

NUTSHELL IQ

Nutshell

Nutshell's Lead Generation Tool Kit

FORMS

Nutshell Forms: Capture leads directly from your website.

WEB CHAT

Nutshell Web chat: Engage with website visitors in real-time.

LANDING PAGES

Nutshell Landing pages: Create targeted pages for your campaigns.

SCHEDULER

Nutshell Scheduler: Simplify the process of booking meetings.

NUTSHELL IQ

Nutshell IQ: Use AI to identify and prioritize your best leads.

Q&A

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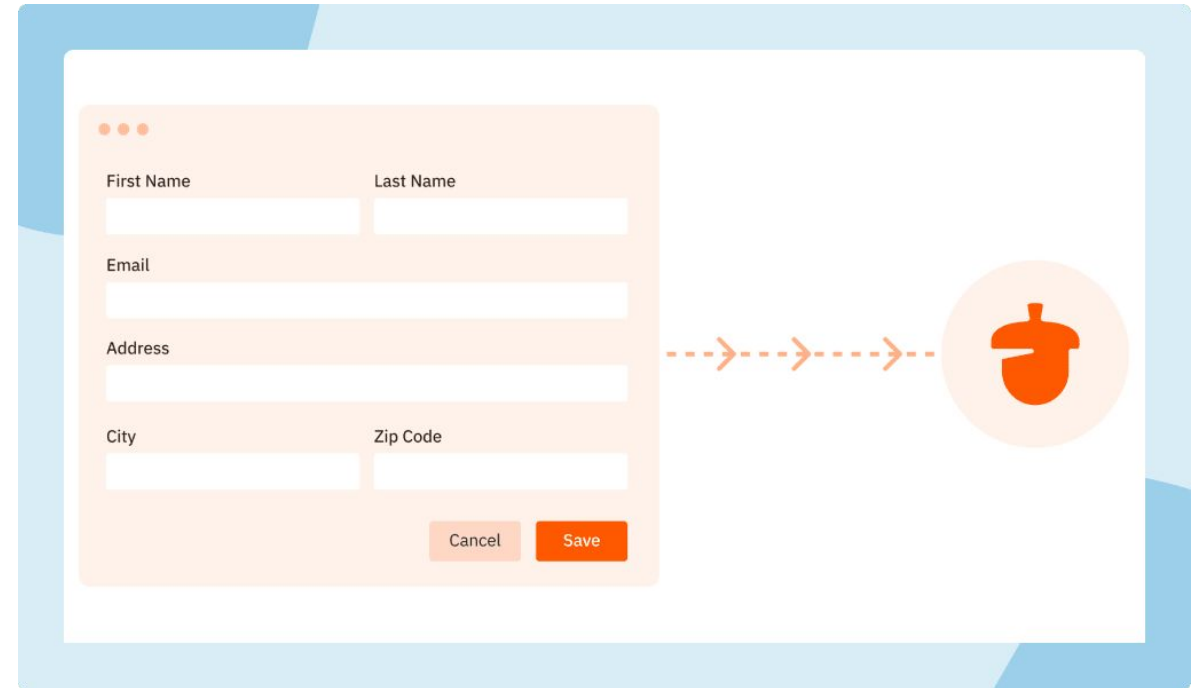
Nutshell

Nutshell Forms

What is Nutshell Forms?

- Create **customizable web forms** and add them to your website

- Easily **capture prospect info** straight from your web page

- **Automatically add prospect data** to Nutshell

- **Seamlessly integrate** your website with your sales process

- Nutshell Forms is available to **ALL Nutshell customers**

*Available on our Marketing Foundation plan, included with any Nutshell Sales plan*

Nutshell

Getting Started With Nutshell Forms

FORMS

Nutshell

Nutshell Forms Use Cases

- ## Contact Us forms:
  - **E.G.:** Landscaping company gathering info from homeowners requesting quotes

- ## Request a Demo/Quote forms:
  - **E.G.:** Software company capturing interested leads from its product page

- ## Event Registration forms:
  - **E.G:** Marketing agency gathering weekly webinar attendee registrations

- ## Forms to capture info on-the-go:
  - **E.G.:** Tradeshow / field marketing / outside sales - Teams can capture lead data using Nutshell Forms on their mobile devices
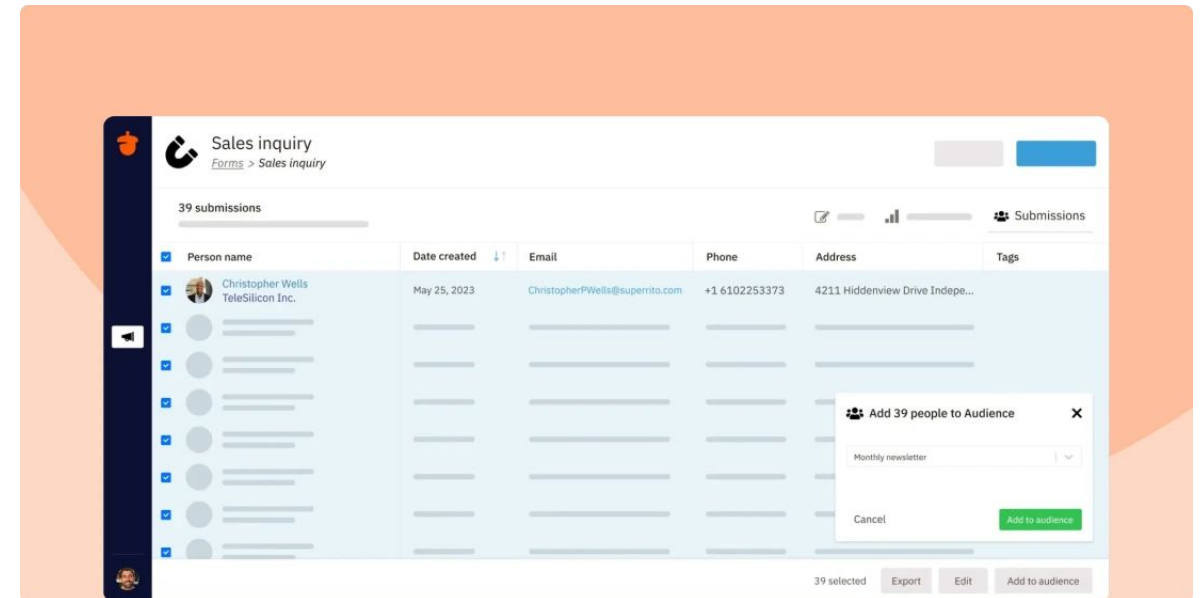
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Nutshell Forms Use Cases

- **Resource Downloads/Lead Magnets** – Guides, PDFs, etc. automatically delivered via:
  - Pipeline automation & personal email sequences
  - Tags & Email marketing drip campaigns

Nutshell

Nutshell Web Chat

WEB CHAT

Nutshell

What is Nutshell Web Chat?

- Build a custom web chat widget to **engage with website visitors** in real time.

- Instantly **answer questions, provide information, & guide prospects** through your sales process.

- Leverage faster prospect engagement to **increase conversion rates**

- You'll need to have **Nutshell Analytics** installed to start using Web chat

- Web chat is included for **ALL Nutshell customers**

Available on our Engagement Foundation plan, included with any Nutshell Sales plan

Nutshell
online

Hello there! Nice to meet you.

Hi! When can I start using Nutshell Chat!

Please fill out the details below to help us better assist you.

Thank you for your information, an agent will be with you shortly.

Amina joined the conversation
Amina left the conversation
Hamida S joined the conversation

Type a message
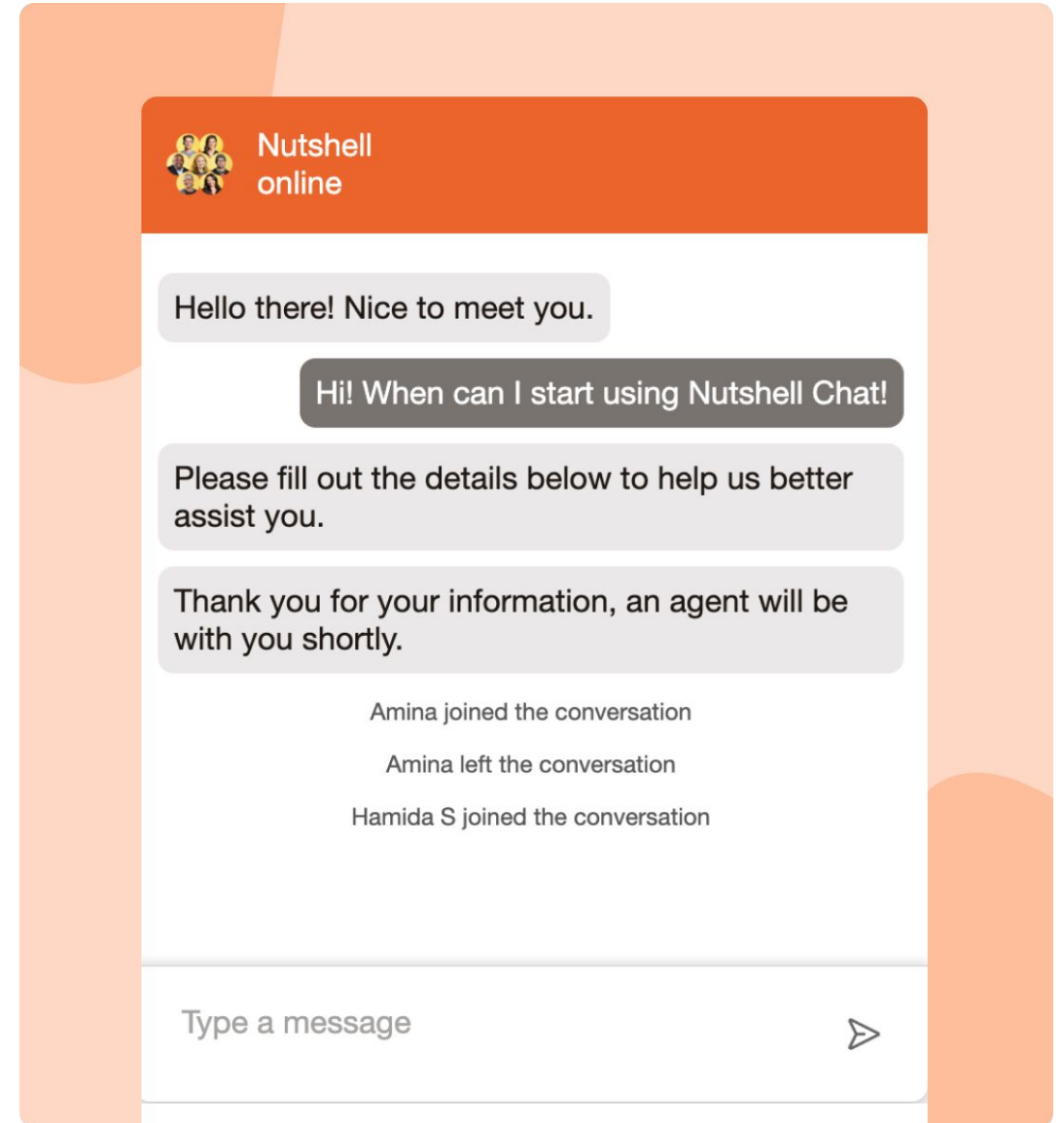
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Getting Started With Nutshell Web Chat

WEB CHAT

Nutshell

Nutshell Web Chat Use Cases

- ## Answer pre-sales questions:
  - **E.G.:** Ecommerce store answering product, shipping, return, and purchase process questions

- ## Provide customer support:
  - **E.G.:** Offer quick assistance online to encourage sales & identify upsell opportunities

- ## Schedule appointments:
  - **E.G.:** Add a Scheduler event to take visitors from lead to demo/meeting, etc. *(Coming this Spring)*

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Nutshell Landing Pages
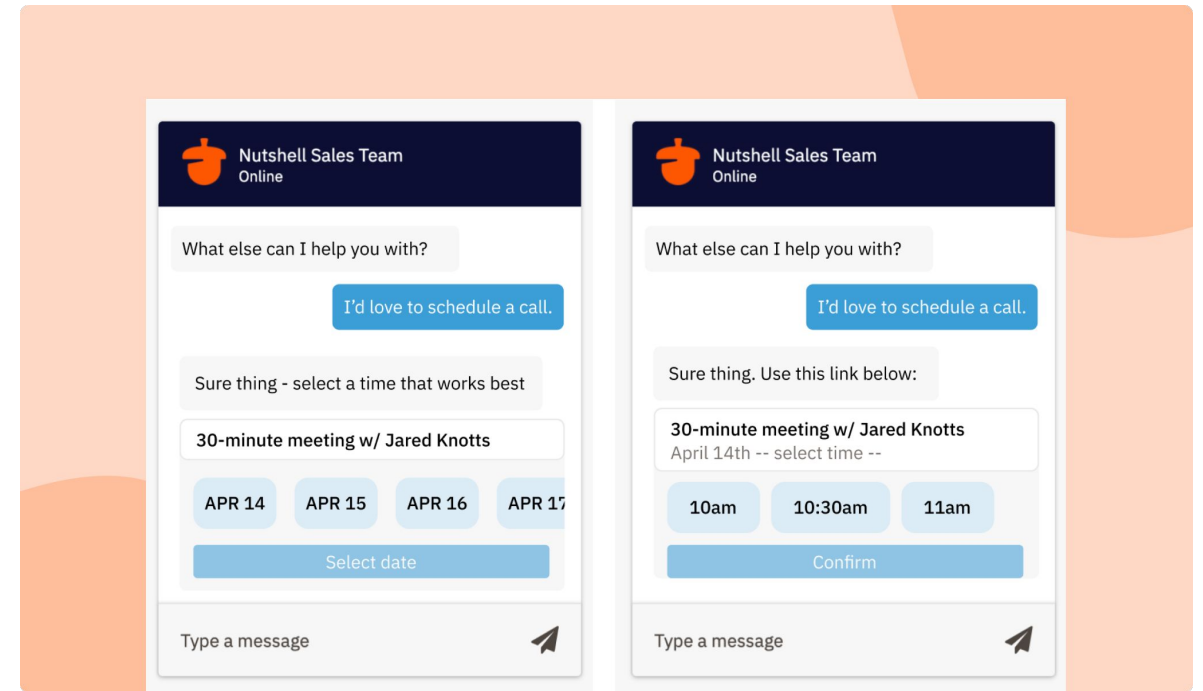
LANDING PAGES

Nutshell

What is Nutshell Landing Pages?

- Create **focused web pages** to meet specific marketing campaign goals

- Ensure a **targeted, streamlined experience** to encourage a desired action:
  - **EG:** Signing up for a newsletter, downloading a resource, requesting a demo, etc.

- Nutshell Landing pages is available to **ALL Nutshell customers**

Available on our Marketing Foundation plan (with Nutshell logo), included with any Nutshell Sales plan
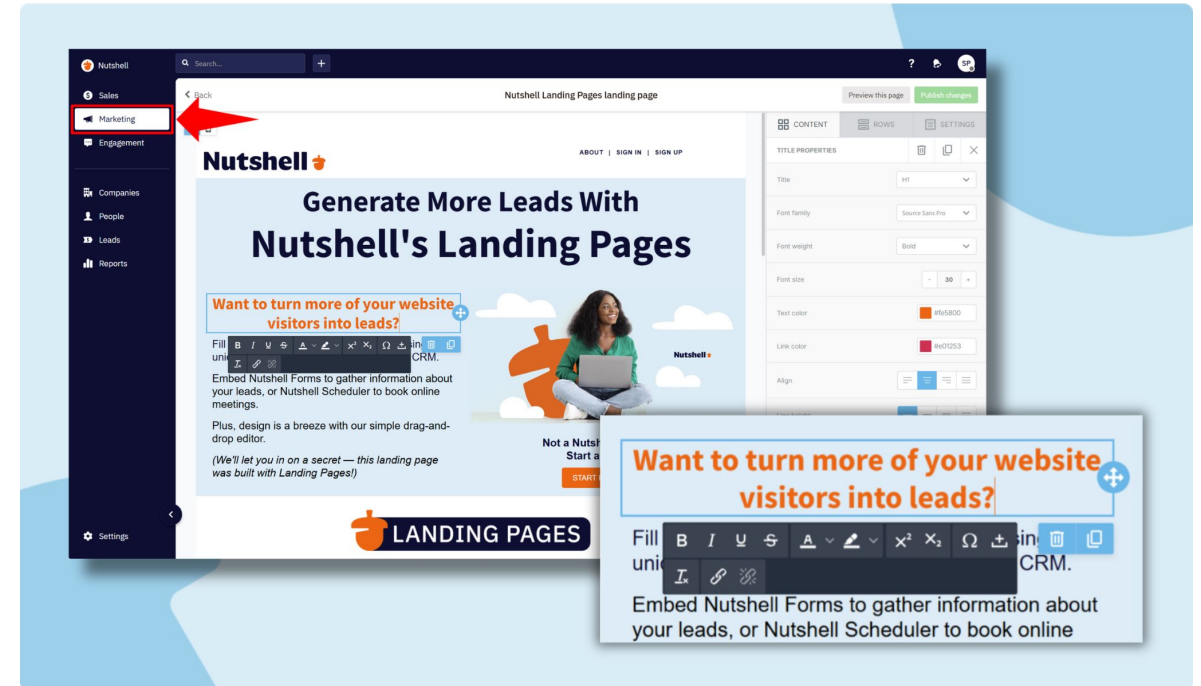
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Getting Started With Nutshell Landing Pages

LANDING PAGES

Nutshell

Nutshell Landing Pages Use Cases

- ## Dedicated campaign pages:
  - **E.G.:** Clothing retailer creates Summer Collection landing page offering a discount for new subscribers

- ## Ebook/resource download pages:
  - **E.G.:** Financial services firm creates Free Retirement Planning Guide landing page to capture leads

- ## Webinar/event registration pages
  - **E.G.:** Marketing agency creates Upcoming Webinar promotion landing page to build its email list

- ## Internal company information sharing
  - **E.G.:** Share crucial info internally with branded, clear, and engaging landing pages

Nutshell

Nutshell Scheduler
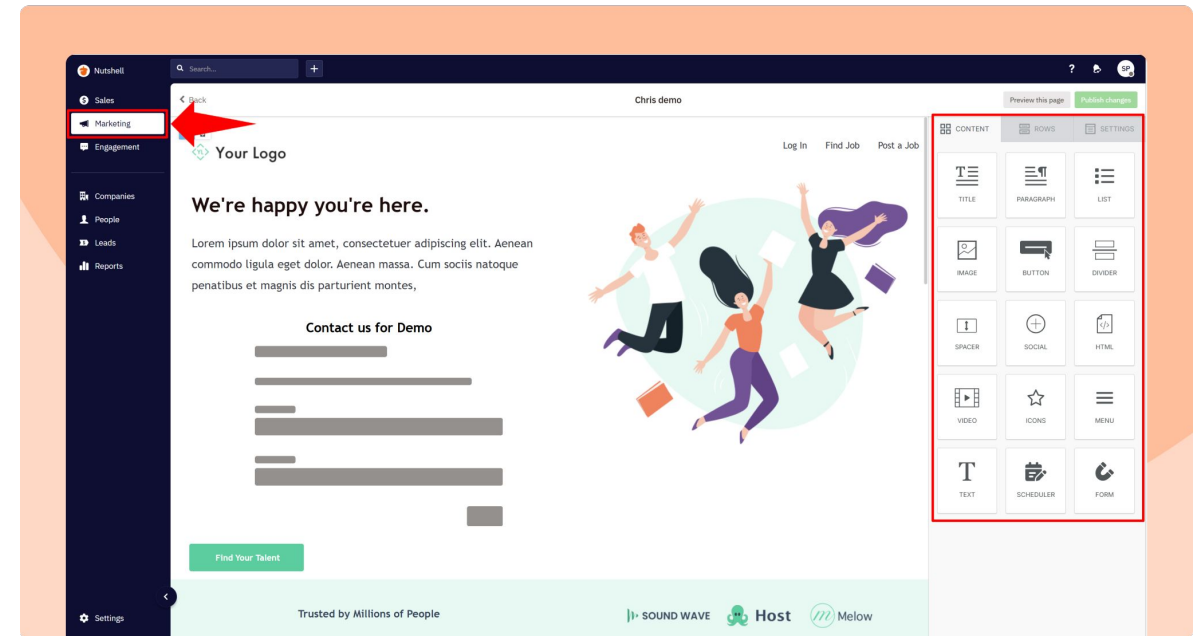
SCHEDULER

Nutshell

What is Nutshell Scheduler?

- Allow prospects & customers to **easily book appointments** based on your availability

- Improve prospect & customer experiences with this **effortless, time-saving tool**

- Your **self-service scheduling tool** that integrates seamlessly with Nutshell

- Nutshell Scheduler is available on our **Sales Pro, Sales Business, and Sales Enterprise** plans
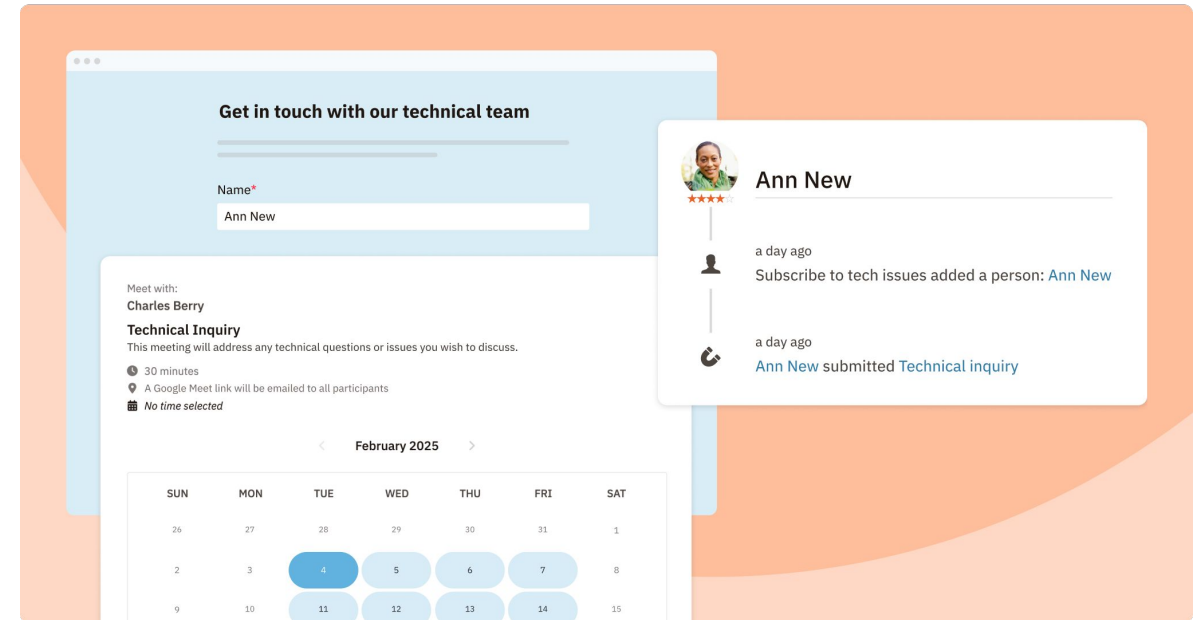
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Getting Started With Nutshell Scheduler

SCHEDULER

Nutshell

Nutshell Scheduler Use Cases

- ## Schedule demo calls:
  - **E.G.:** Software company adds a Scheduler link to sales emails, letting prospects quickly book a demo
  - Use round-robin assignment to maximize bookable hours

- ## Book support/maintenance appointments:
  - **E.G.:** Hardware manufacturer allows customers to book support calls with Scheduler
  - **E.G.:** HVAC technician shares Scheduler link so customer can pick a convenient maintenance appointment time

- ## Set up consultation calls:
  - **E.G.:** Business consultant lets prospects book an initial consultation to discuss needs

Nutshell IQ

What is Nutshell IQ?

- Nutshell IQ is our suite of **AI-powered features** designed to help you work smarter, not harder

- Identify & prioritize **your best leads**

- Uncover **opportunities & insights** within your CRM data

- **Improve sales effectiveness** by focusing on leads most likely to convert

- **Nutshell IQ is an add-on**: Starting at $37/month

- Get lead data into Nutshell **with 1 click** - no integration required

NUTSHELL IQ

ProspectorIQ ⟶ New prospects

VisitorIQ ⟶ Qualified website visitors

PeopleIQ ⟶ Decision makers

Find the right person to make the sale!

Nutshell

Getting Started With Nutshell IQ

Nutshell IQ - ProspectorIQ

ProspectorIQ lets you discover new leads the fit your ICP

- Search a database of **over 200 million contacts** for people who match your ideal customer profile

- Add prospects to Nutshell in just a few clicks & **start reaching out immediately**

- Save filtered lists to save time on your next search

ProspectorIQ Use Cases

- **E.G.:** Commercial water treatment company can use ProspectorIQ's filters to find prospects at manufacturing companies with "maintenance" in their titles

- Cold outreach immediately or Add to a marketing audience to warm them up.
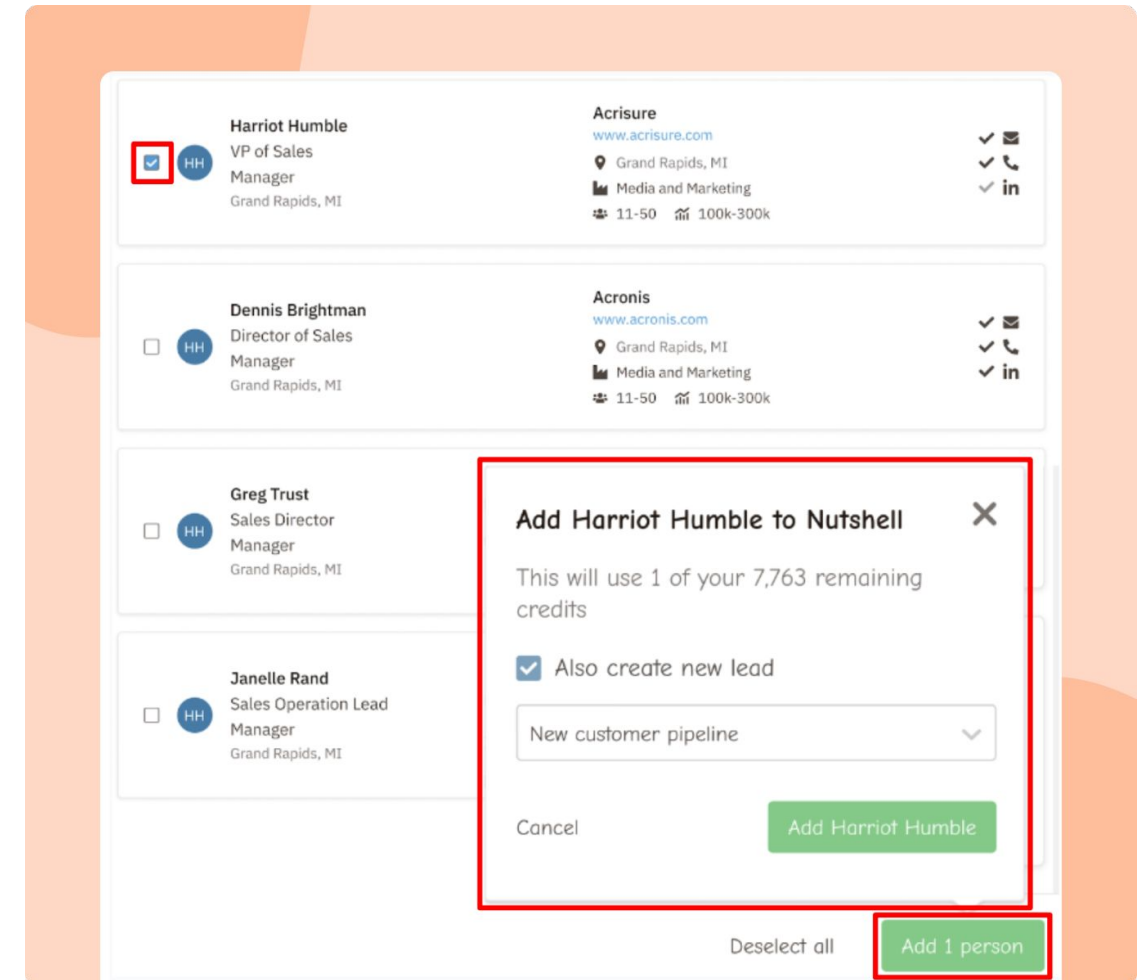
Nutshell

Nutshell IQ - VisitorIQ

VisitorIQ helps you find people who visited your website but didn't contact you

- Pinpoint people who show interest in your products/services

- Add their data to Nutshell as a contact, pipeline lead, or marketing audience in just a few clicks

- Monitor existing customers visiting pages that may indicate in switching to a competitor, & take action to prevent customer churn

VisitorIQ Use Cases

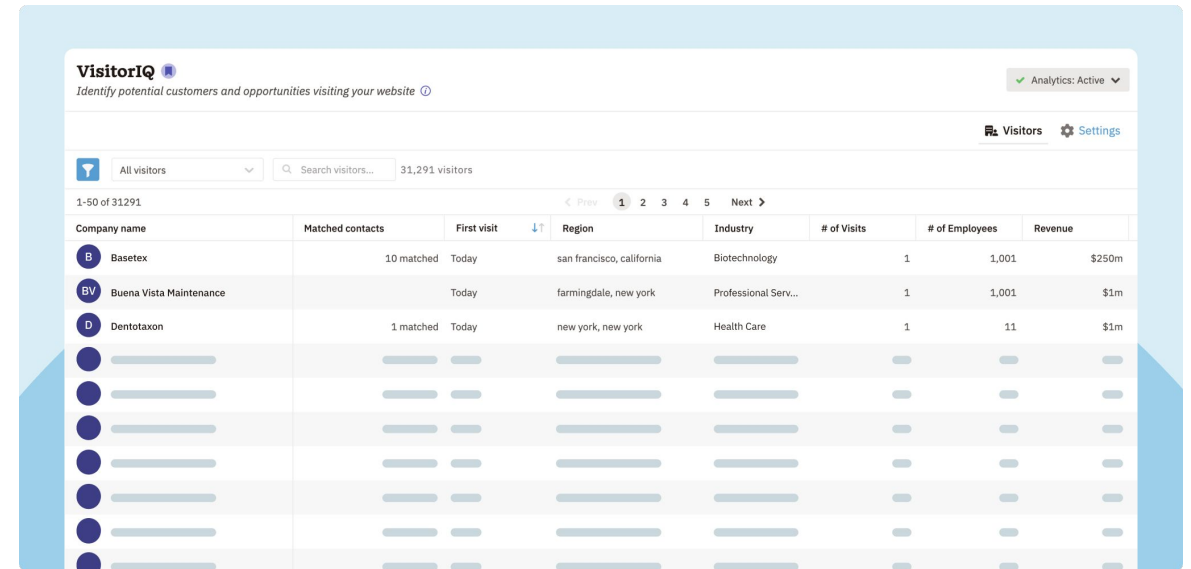- **E.G.:** Realtor notices a homebuilding company visited their site, possibly to find an agent for their new builds, and adds them as a lead for nurturing

- **E.G.:** Customer success manager notices valued customer viewed their pricing page for a possible competitor price comparison & contacted them to save a potential churn

VisitorIQ
Identify potential customers and opportunities visiting your website ⓘ

✓ Analytics: Active ⌄

🖥 Visitors   ⚙ Settings

| All visitors ⌄ | 🔍 Search visitors... | 31,291 visitors |

1-50 of 31291   < Prev **1** 2 3 4 5 Next >

Company name	Matched contacts	First visit ↓↑	Region	Industry	# of Visits	# of Employees	Revenue
B Basetex	10 matched	Today	san francisco, california	Biotechnology	1	1,001	$250m
BV Buena Vista Maintenance		Today	farmingdale, new york	Professional Serv...	1	1,001	$1m
D Dentotaxon	1 matched	Today	new york, new york	Health Care	1	11	$1m

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Nutshell IQ - PeopleIQ

PeopleIQ reveals new contacts at companies already in your CRM

- Find & add contact info for other employees at companies you're working with to maximize your prospects

PeopleIQ Use Cases

- **E.G.:** Find the next best person for management approval to keep the sale moving forward

- **E.G.:** Pinpoint an alternative contact to try and meet your quota deadline when your point of contact is out on leave

- **E.G.:** Determine who has replaced your point of contact if they leave the company to keep the relationship going

Nutshell
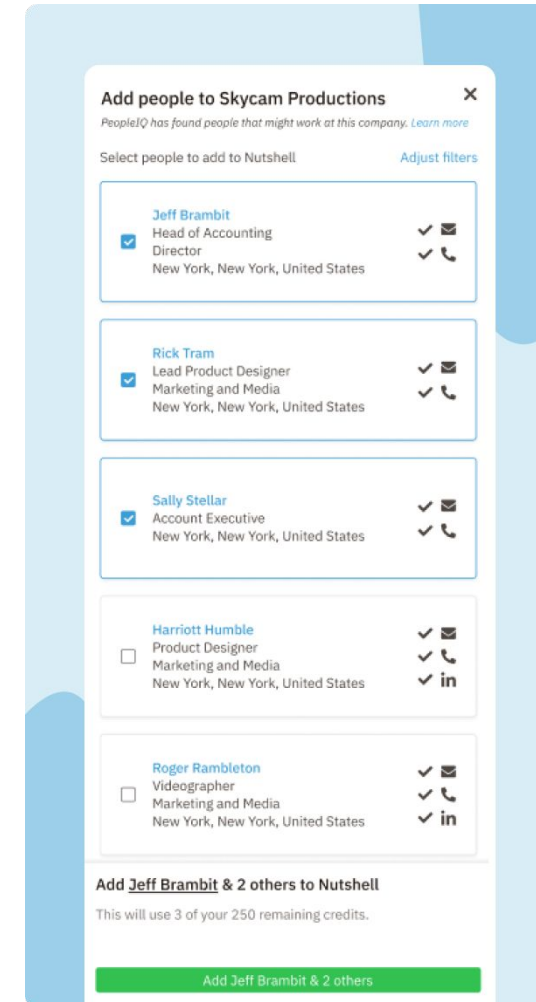
Bonus Lead Generation Tools

Once you have the lead...

EMAIL MARKETING

To nurture, engage, guide, and inform throughout the sales cycle and beyond.

Examples
- Welcome drip sequences
- Monthly newsletters
- Promo broadcasts

SMS MARKETING

To nurture, engage, guide, and inform.

Examples
- Welcome drip sequences
- Promo broadcasts
- Event announcements

SMS

To engage and communicate with your leads and customers.

Examples
- 1:1 SMS message conversations
- Automated SMS follow-ups

Nutshell

Discover the Power of Nutshell's Lead Gen Tool Kit

FORMS

Nutshell Forms · Capture leads directly from your website.
Learn more about Nutshell Forms

WEB CHAT

Nutshell Web chat · Engage with website visitors in real-time.
Learn more about Nutshell Web chat

LANDING PAGES

Nutshell Landing pages · Create targeted pages for your campaigns.
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SCHEDULER

Nutshell Scheduler · Simplify the process of booking meetings.
Learn more about Nutshell Scheduler

NUTSHELL IQ

Nutshell IQ · Use AI to identify and prioritize your best leads.
Learn more about Nutshell IQ

Visit our **comprehensive help center** to find more resources or **contact our support team** directly for further assistance.

Nutshell

With Nutshell's integrated lead gen tool kit, your team has everything they need to <u>attract</u>, <u>engage</u>, and <u>convert</u> more prospects.

Q&A

Nutshell 🌰

Recent Releases:

- **Enterprise SSO / Directory Sync:** Streamline user credential management with Single Sign-On capabilities

- **AI email reply starters:** Use smart email reply starters to streamline email creation and staying in touch with your contacts. *Available in early access.*

- **Scheduler Conflict Calendars:** Add additional calendars (personal/work) for Scheduler to check for availability.

- **Outlook extension updates:** Send emails using your Nutshell templates right from Outlook, track opens and clicks, create new contacts and tasks, and much more.

- **Product Importer:** Import or update all of your products and services at once with the product importer

- **Meta integration in Nutshell Engagement:** Chat with customers/leads on Facebook Messenger/Instagram DMs directly from Nutshell

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

Nutshell

Upcoming releases:

- **AI Agents:** Use Nutshell's Agents to help you complete tasks like building a sales process or researching a lead.

- **Scheduler Managed Events:** Admin users can create Scheduler events and push them live for all Nutshell users.

- **Google Meets + AI:** Automatically transcribe, summarize and log Google Meet calls.

- **WhatsApp Integration:** Receive and reply to WhatsApp messages right from Nutshell.

- **And more!**

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

Nutshell

Thanks for joining us today!

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 **May 28th, 2025** at **12:00 PM EST**.

Nutshell