



Nutshell's Summer 2025 Roadmap

Discover some of Nutshell's greatest 2025 feature launch hits and get a first look at what's in store this summer



Andy Fowler
CEO of Nutshell

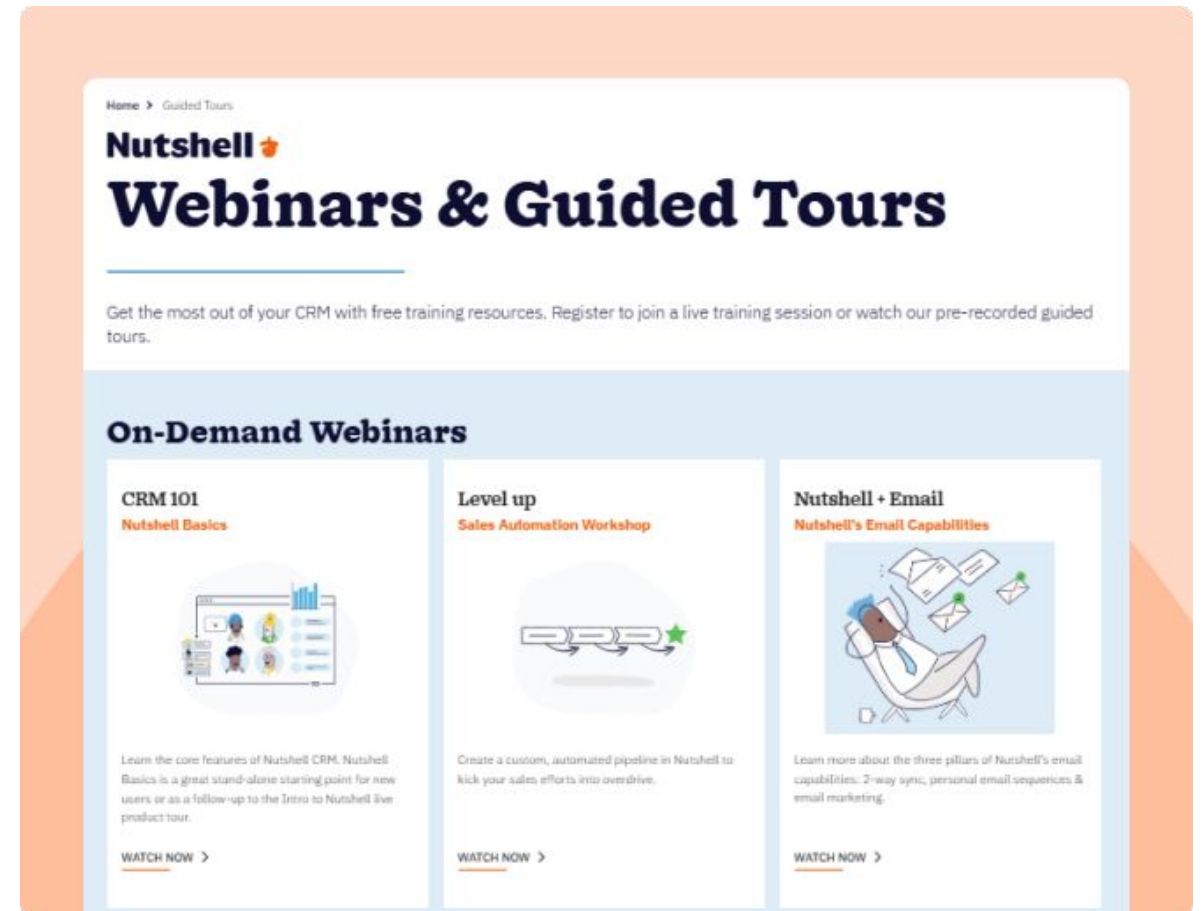
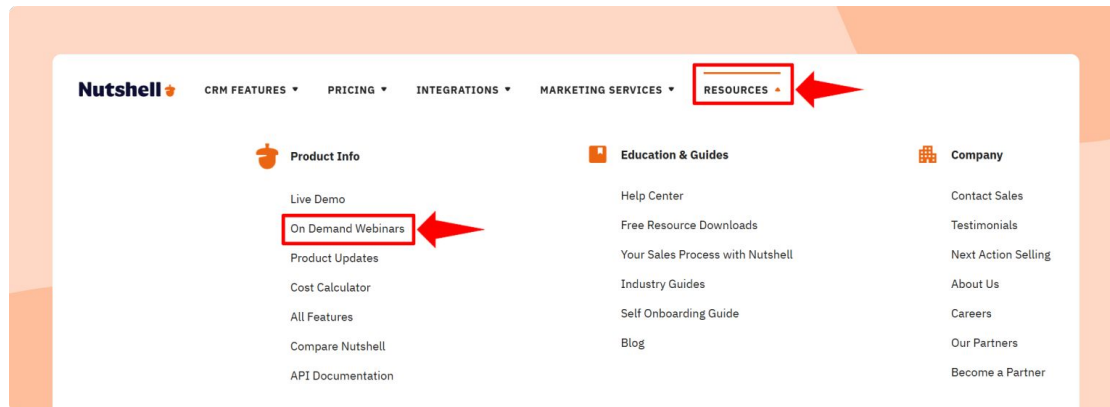


Will Gordon
Sr Director of
Marketing
at Nutshell

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.*



Meet Your Hosts



Andy Fowler: CEO and cofounder of Nutshell



Will Gordon: Sr. Director of Marketing at Nutshell

What We'll Cover Today

- Updates launched in 2025 so far ~10 minutes
- Our summer 2025 roadmap ~15 minutes
- Q&A ~10 minutes

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 CRM Grid® Report every quarter since 2020
- Currently serving **20,000+** users across **5,000+** companies



2025 H1 Feature Releases (in a nutshell)

2025 H1 At a Glance

- [Nutshell's Suites](#) (February 2025)
- [Tracking form submissions](#) (February 2025)
- [Web chat enhancements](#) (February 2025)
- [SMS Marketing](#) (Feb 2025)
- [Scheduler: Customized Meeting Pages](#) (Feb 2025)
- [Nutshell Quotes](#) (Feb 2025)
- [Smart lists](#) (March 2025)
- [Email link report](#) (March 2025)
- [Zoom AI enhancements](#) (April 2025)
- [Facebook Messenger and Instagram integration in Nutshell Engagement](#) (April 2025)
- [Outlook extension enhancements](#) (April 2025)
- [Enhanced login security \(SSO / Directory Sync\)](#) (April 2025)
- [Product Importer](#) (April 2025)
- [AI Email Replies](#) (April 2025)
- [Conflict Calendars for Nutshell Scheduler](#) (May 2025)
- [Scheduler Managed Meetings](#) (May 2025)
- [Nutshell AI Agents](#) (May 2025)
- [WhatsApp Integration for Nutshell Engagement](#) (May 2025)
- [Email Preference Center](#) (May 2025)
- [Form Answer Automations](#) (June 2025)
- [Conversational Forms](#) (June 2025)
- [Activity Dialog Redesign](#) (June 2025)

Nutshell's Suites

- We organized our powerful features into three Suites:
 - Sales
 - Marketing
 - Engagement
- Leverage **robust sales, marketing, and engagement toolkits** to simplify workflows, collaborate more effectively, and keep leads and customers engaged through your CRM.
- [Learn more about Nutshell's Suites here](#)

Launched: February 2025



SMS Marketing



- We added the ability to **send SMS broadcasts and drip sequences** in Marketing Pro.
- **Launch, track, and manage** text message campaigns from your CRM with ease, meeting customers and leads where they are.
- [Learn more about SMS Marketing here](#)

Launched: February 2025



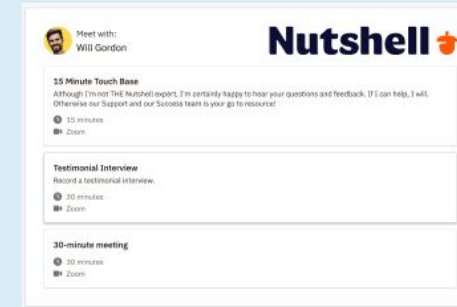
Scheduler: growing up



- **Meeting pages** - share a customized Scheduler meeting page that includes all of your bookable meeting types.
- **Support for multiple calendars** - sync additional calendars to prevent double booking.
- **Managed meetings** - letting admins create, assign, and update standardized meeting templates across the team — speeding up onboarding/setup and boosting selling time.

[Learn more about all Scheduler's features](#)

Scheduler Updates



Customize meetings pages, add company branding, and more

Nutshell Quotes



- We added a **powerful quoting tool** to help you create, send, and track custom quotes from Nutshell.
- **Respond to opportunities and close deals faster** with an efficient quoting tool that lets you generate, send, monitor, and manage quotes from your CRM in a flash—keeping all your sales activities in one place.
- [Learn more about Nutshell Quotes here](#)

Launched: February 2025

Nutshell Quotes

The screenshot displays the Nutshell Quotes interface. At the top, it shows the Nutshell logo, address (206 E Huron St Suite # 206, Ann Arbor MI, 48104), website (www.nutshell.com), phone number (123-456-7890), and the word "QUOTE". Below this, it lists the quote number (1238 - 01), prepared by (Hannah Mu), date prepared (January 1, 2025), and valid till (January 25, 2025). A green "ACCEPTED" stamp is visible. The main section is titled "PREPARED FOR" and lists the client details: Hanover Insurance Group, Orii Norris, 478 E Loula St, Olathe KS 66061, www.hanover.com, and 123-456-7890. Below this is a table with columns: Name, SKU, Quantity, Price, Term, Discount, and Total. The table contains three rows: "Nutshell Foundation Monthly" (5 users, \$19.00), "Campaigns" (100, \$5.00), and "Landing pages" (1, \$37.00). A "SMS Users" row is also visible with a quantity of 1 and price of \$16.00. To the right of the table, there is a "QUOTES" section with a "Learn more" link. It lists two quotes: "Quote 1046-02" (R650.00) with a "Ready" button, and "Quote 1046-01" (R650.00) with a "Sent" status and an "Accepted" button.

Create, send, & track custom quotes

Marketing email link report



- The marketing email link report for Marketing Pro users, helps you **uncover engagement insights** for your email marketing campaigns.
- See exactly who is clicking on your campaigns & drip sequences and exactly what links they are clicking.
- [Learn more about Marketing email link reports here](#)

Launched: March 2025

Marketing Email Link Report

Total clicks	Unique clicks	Notifications
		Add users
3	3	Add users
7	6	Add users
4	3	Add users
8	7	Add users
22	19	

January News
Newsletters > Customer Newsletter > January News

Sent to 44 recipients
Delivered Thursday, January 23, 2025 2:06 PM

Clicked | https://twitter.com/

1-5 of 5

Person name	Email
Mary Martin Quotetouch	MaryDMartin@teleworm.us
Paula Brady	Paula51brady@rhyta.com

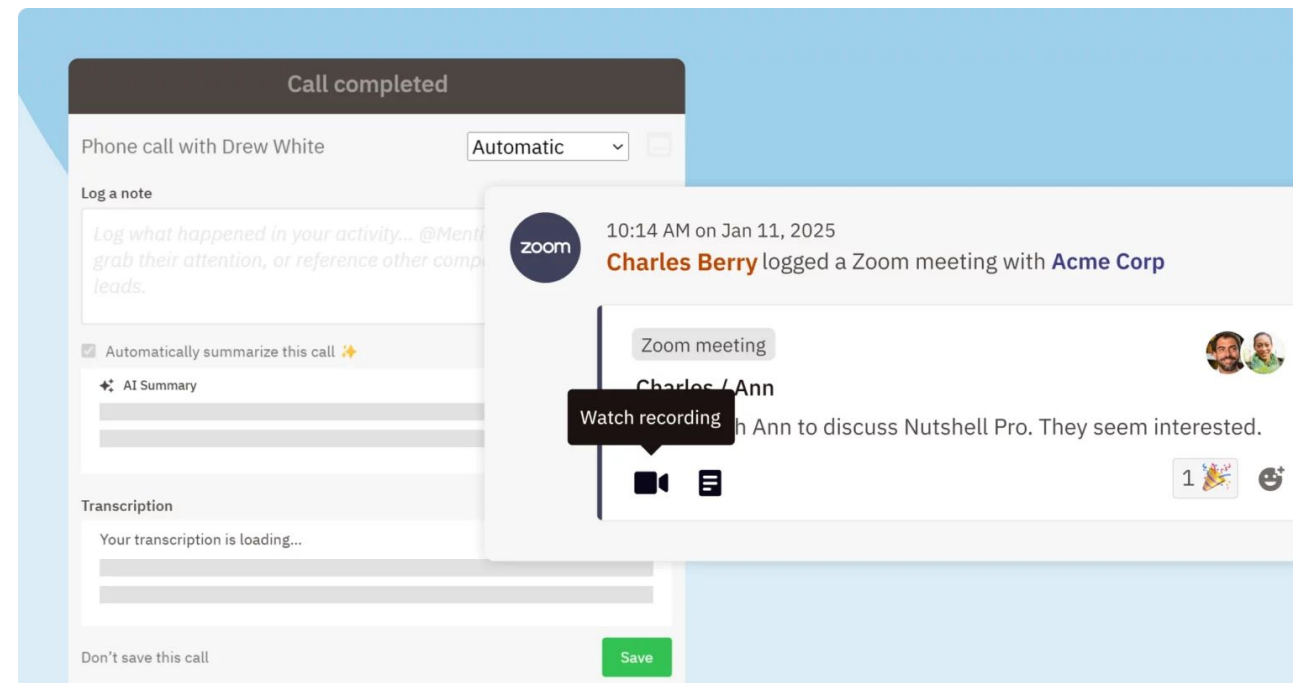
Uncover insights about email engagement

Zoom, Google Meets & Click-to-Call AI Summarizations



✦ Powered by Nutshell AI

- We enhanced our Zoom & Google Meet integrations with **AI transcriptions and summarizations**
- **Streamline workflows and save time by automatically:**
 - Logging calls as an activity
 - Saving a call recording
 - Adding a transcription to your activity
 - Summarizing your call transcription for actionable takeaways
- [Learn more about our Zoom AI enhancements here](#)



Launched: April 2025

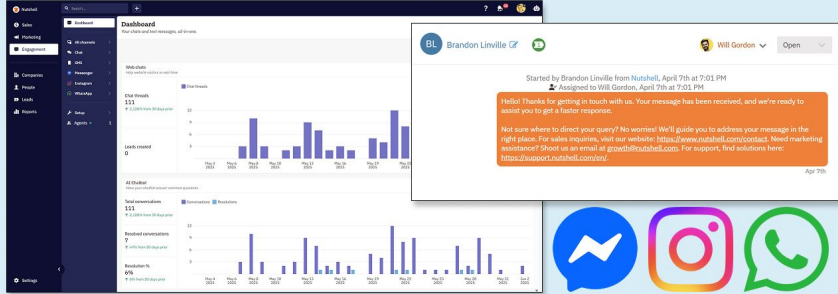
Meta Integration in Nutshell Engagement



- We added the ability to send and receive messages in Nutshell via:
 - WhatsApp
 - Facebook Messenger
 - Instagram DMs
- Keep prospects and customers engaged through their preferred channels
- Automatically create and assign leads
- Improve conversation management without leaving your CRM.

[Learn more about our Omni-channel Inbox](#)

Meta Integration in Nutshell Engagement



The screenshot shows the Nutshell Engagement dashboard. On the left is a sidebar with navigation options like Sales, Marketing, and Support. The main area displays a 'Dashboard' with a bar chart showing lead volume over time. An orange chat window is overlaid on the dashboard, showing a conversation with 'Brandon Linville'. The chat history includes a message from Brandon Linville and a response from 'Will Gordon'. Below the chat window are icons for Facebook Messenger, Instagram, and WhatsApp.

Manage Facebook, Instagram, & WhatsApp Conversations in Nutshell

Outlook Extension Enhancements



- We added **robust CRM actions** to our Outlook extension, letting you view contact timelines, create tasks, inspect open/closed leads, add notes, and insert Nutshell email templates—all without leaving Outlook.
- **Access, log, and send** on-brand messages directly from your inbox to save time, stay in context, and keep every customer interaction perfectly synced with Nutshell.
- [Learn more about our Outlook Extension enhancements here](#)

Launched: April 2025

Unite Your CRM With Your Microsoft Email

The graphic features a central image of the Outlook interface with the Nutshell extension overlay. The extension shows a sidebar with 'Tasks', 'Activities', 'Leads', and 'Timeline' sections. The main pane displays an email from 'Adam Gupta' with a 'Request to schedule call' subject. The email body contains a friendly message about a Friday meeting and a request to schedule a call. The extension's sidebar shows a list of tasks, activities, leads, and a timeline of events.

Download Nutshell's Outlook Extension

Enhanced login security (SSO/Directory Sync)



- We added secure **Single Sign-On (SSO)** with SAML and directory sync to streamline user authentication and management.
- Boost **data protection** and trim IT overhead with centralized credential control, one-click logins, and instant onboarding or offboarding for every teammate.
- [Learn more about our SSO/directory sync updates here](#)

Launched: April 2025

SSO and DS in Nutshell



Enable Fast, Secure and Convenient Logins

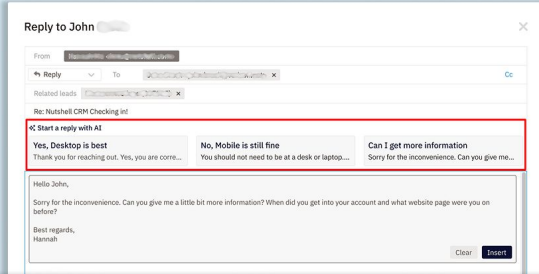
AI email reply starters



- We added AI-powered reply starters that surface up to three **context-aware email responses** right inside Nutshell.
- **Reply in seconds** and keep conversations personal by selecting, tweaking, and sending on-brand messages without writing from scratch.
- [Learn more about AI email reply starters here](#)

Launched: April 2025

AI Email Reply Starters



The screenshot shows an email reply window titled "Reply to John". It includes fields for "From", "To", and "Subject". Below these, there's a section titled "Start a reply with AI" which contains three suggested responses: "Yes, Desktop is best", "No, Mobile is still fine", and "Can I get more information". Each suggestion has a brief description of the response. Below the suggestions, there's a "Send" button.

❖ Start a reply with AI

Yes, Desktop is best Thank you for reaching out. Yes, you are corre...	No, Mobile is still fine You should not need to be at a desk or laptop....	Can I get more information Sorry for the inconvenience. Can you give me...
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Increase efficiency with intelligent response suggestions

AI Agents

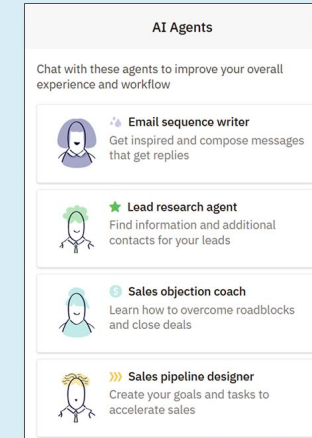
✦ Powered by Nutshell AI



- We added **built-in AI Agents** that draft emails, gather lead insights, recommend pipeline optimizations, and help sales reps overcome objections right inside Nutshell.
- Try out the **lead research agent** and the **sales pipeline designer** to get started
- [Learn more about Nutshell's AI Agents here](#)

Launched: May 2025

Nutshell's AI Agents



Increase Workflow Productivity in Nutshell

Email preference center



- We added a customizable email preference center that lets contacts **fine-tune up to 10 audience subscriptions** from a branded page linked in every marketing email.
- **Retain subscribers and lift engagement** by empowering them to choose relevant content while Nutshell auto-syncs their preferences to keep lists accurate.
- [Learn more about the email preference center here](#)

Launched: May 2025

Nutshell's Email Preference Center

The screenshot displays two overlapping panels from the Nutshell Email Preference Center. The background panel, titled 'Update my email preferences', shows a form where users can select the type of communication they want to receive. It includes a 'Monthly Product Updates' section with a checkbox for 'Receive 1 monthly email from ArrowGrid to stay up to date with new product offerings.' and a 'Webinar announcements' section with a checkbox for 'Get an email to notify you of upcoming webinars.' Below these are 'Save' and 'Unsubscribe from all emails' buttons. A blue 'Unsubscribe' button is also visible to the left. The foreground panel, titled 'Add audience to preference center', prompts users to 'Select an audience and add public-facing information for your recipients.' It features a dropdown menu for 'Audience' (currently showing 'Webinar attendees' with a count of 10), a text field for 'Public name' (containing 'Webinar announcements'), and another text field for 'Public description' (containing 'Get an email to notify you of upcoming webinars.'). 'Cancel' and 'Save' buttons are at the bottom of this panel.

Improve marketing email engagement & reduce subscription churn

Refreshed activity dialog



- We updated our activity dialog, bringing scheduling, notes, transcripts, recordings, and more into one streamlined workspace.
- **Log and manage sales activities** in seconds with fewer clicks, richer AI context, and a single place to capture every next step.
- [Learn more about Nutshell's activity dialog redesign here](#)

Launched: June 2025

Nutshell's New Activity Dialog

The screenshot displays the 'Phone Call' activity dialog in Nutshell. It features a sidebar with navigation options: Schedule, Internal notes, Calendar, Recordings, and Comments. The main area shows a 'Phone Call' activity for June 14, 2025, from 2:06 PM to 2:21 PM. Below the activity details, there are buttons for 'Create activity' (green) and 'Log this activity' (blue). A 'Welcome and onboarding meeting' dialog is also visible, showing a 'Meeting' activity type and a 'Note' section with AI-generated context. A floating menu on the right lists 'Internal notes', 'Calendar', 'Transcript', 'Recordings', and 'Comments'.

Experience Improved Sales Activity Workflow Efficiency in Nutshell

1-click website & domain setup



- We added a **unified tracking snippet & domain hub** that displays real-time status for your script and DNS records in one view.
- Configure analytics, forms, web chat, landing pages, and attribution in minutes—**reducing setup errors and accelerating lead capture** from your website.
- [Learn more about Nutshell's activity dialog redesign here](#)

Launched: June 2025

Tracking Snippet & DNS Setup Hub in Nutshell Marketing

Streamline Nutshell Integration Connections Via a Centralized Interface

Why We Build What We Build at Nutshell

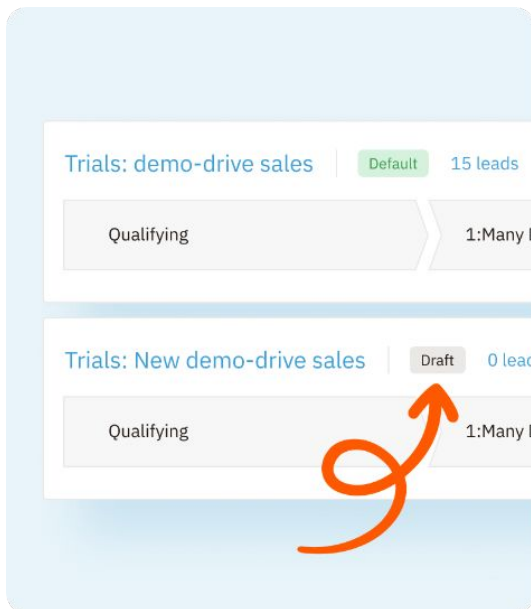
Our Product Philosophy

- **Empowering sales, marketing, and customer teams:** Shortening lead generation and lead-to-sale cycles so you can focus on building lasting relationships.
- **Unifying mission-critical data:** Bringing interdepartmental customer and lead data into one centralized hub for easy access and management.
- **Automating busywork:** Improving workflow efficiency with automations, AI, and intuitive tools, so teams can spend more time nurturing relationships and closing deals.



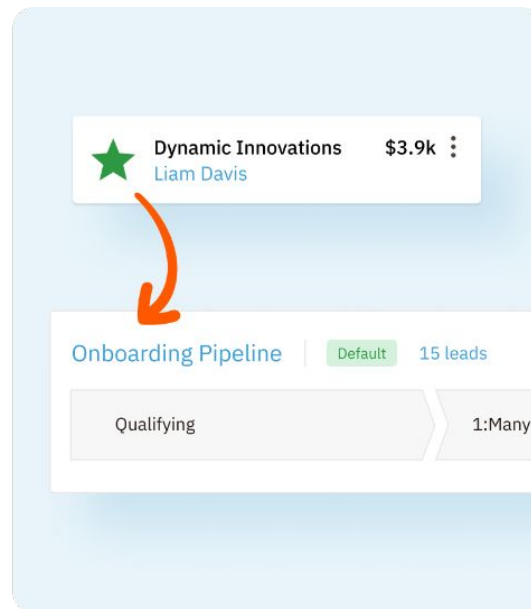
Our Summer 2025 Roadmap

BIG “Smalls”



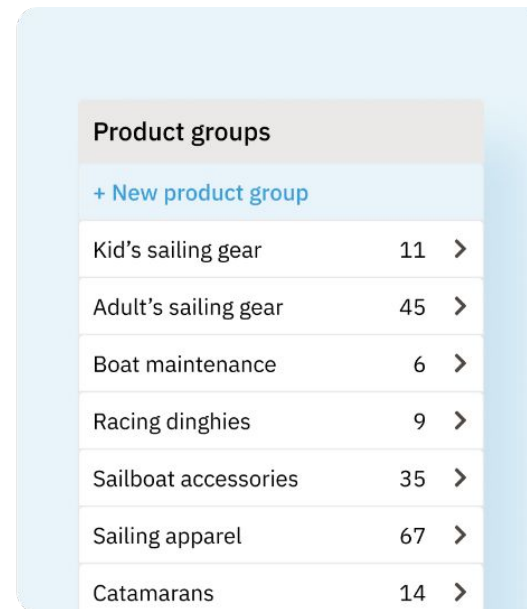
Organize your draft pipelines

- Ability to create Draft pipelines
- Additional statuses: Active, Locked & Archived



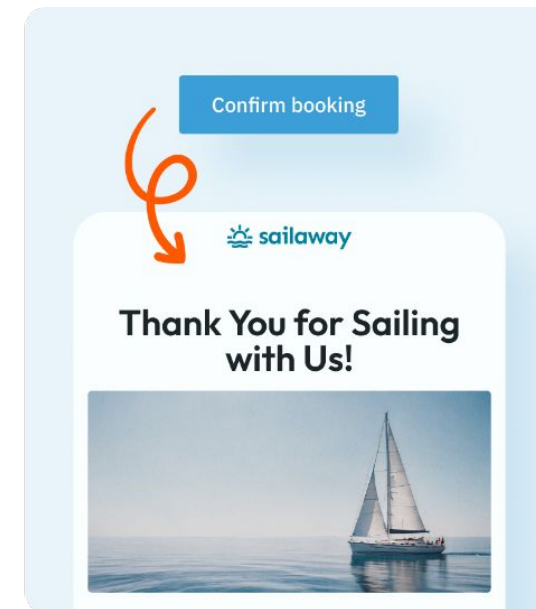
Automate new leads when a lead is closed

- Automatically create a follow-up lead when a lead is won or lost
- Example: Create an “Onboarding” Lead in your “Onboarding Pipeline” after a lead is marked Closed Won



Organize products by category

- Group products into categories for easier filtering, quoting, invoicing, and reporting



Redirect Scheduler bookings to a thank-you

- Redirect to a thank you page or another URL after someone books on Scheduler.
- Great for tracking & sharing additional information

Revenue attribution report

- **Track more lead attribution data** than just where your best leads come from and your lead activation rate
- Gain a deeper understanding of **revenue attribution** by channel and campaign
- Adjust your marketing budgets based on what is actually **growing your business.**

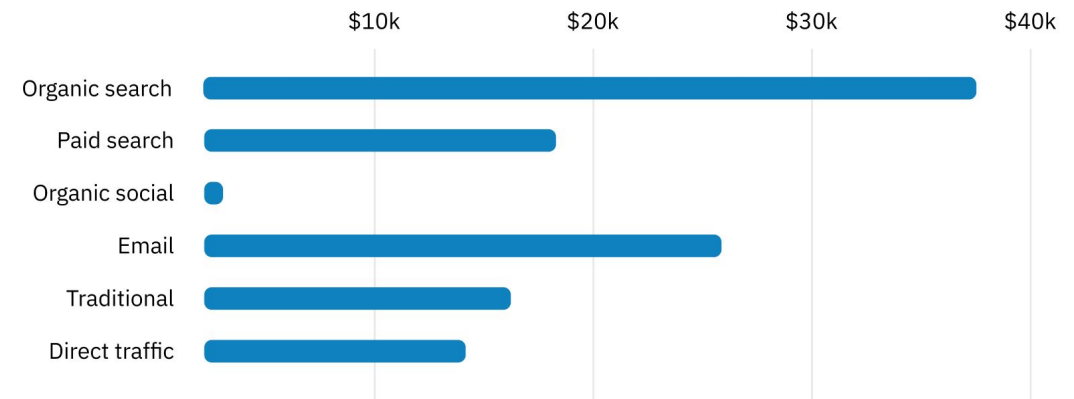


Revenue attribution

What sources does your revenue come from?



Total revenue by channel



Pipeline starter packs



- Quickly create pipelines that **match your sales process** and start selling in minutes
- Choose from **5 pipeline templates** that are fully-functional and sales process-specific
- Each **preconfigured template** includes stages, goals, tasks, personal email sequences, and drip sequences
- **Track essential data** sooner with auto-created custom fields, activity types, tags, and lead outcomes



Create a new pipeline

Blank pipeline

Copy from existing pipeline

Templates

Outbound prospecting

Fast-touch inbound

Quote and invoice selling

Enterprise sales

Renewals

Enterprise sales

A template for teams that qualify with a discovery call, and pitch with a demo

Qualify with discovery call

Determine decision maker

Complete a demo call

Send a quote

Final negotiation

Drip sequence

Personal email sequences

Cancel

Copy this pipeline

Microsoft Teams AI Summarizations*

✦ Powered by Nutshell AI



- Integrate Microsoft Teams with Nutshell to generate **AI meeting summarizations** with ease
- Auto-log, transcribe, and summarize **every Teams meeting** in Nutshell
- **Automatically capture** key discussion points, meeting information, notes, and more



✦ AI transcript summary

Jim Davis has frequently interacted with your team over the past 3 months. He recently asked about a discount on a proposal for a new concrete warehouse pad.

Conversation starters: Follow up on Jim's recent purchase of a SunDog solar panel to see how it's working out. Ask him about his interests in energy-efficient inverter technology. Mention last July's service visit to repair the Sunrazor

Dossier: Jim is the VP of Operations at ArrowGrid, he has a professional demeanor but occasionally mentions his family and their cabin in rural New York.

**In review*

More phone integrations

✦✦ Powered by Nutshell AI



- **Automatic call logging and summarization** for phone calls
- **Instant integration** with top providers:
 - RingCentral
 - ~4-5 more
 - *You tell us, what phone applications are important to you?*



Transcript

Summary

Phone call with Jane A.

Jul 21, 2025 - 02:32:05 PM

Sales Rep (Alex):

Hi Jordan! Thanks for taking the time today. How are things going on your end?

Prospect (Jordan):

Hey Alex, all good—just busy trying to keep up with our growing pipeline.

Alex:

That's a good problem to have! Before we dive in, mind if I quickly set the agenda? I'd love to learn more about how your team handles lead...

[See more](#)

Activity reporting 2.0



- Our new activity report includes more **metrics, filters, and a cleaner UI**
- Break down performance by logged vs. unlogged, emails, notes, duration, and AI-summarized entries to spot coaching gaps fast.
- New average time, and quota progress at a glance to **connect rep activity to real sales outcomes.**

Log Status: Logged ▾

All Activities
✓ Logged activities
Unlogged activities

Include: None ▾

☐ None
☐ Include emails
☐ Include notes

✦ AI-Summarized Activities

728


Logged with a note

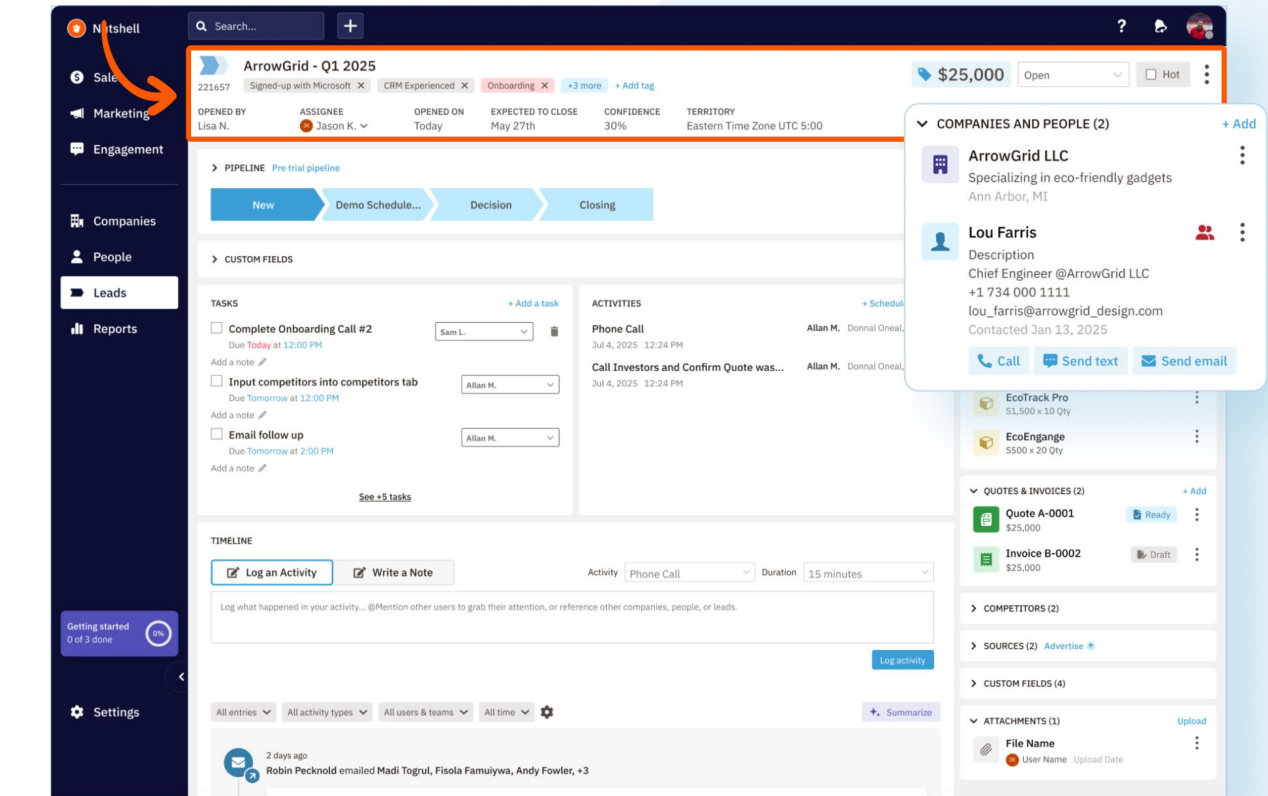
340

User	Phone calls	Demio Intro...	Meetings out...
Totals	3200 27 mins	160 / 200 27 mins	5,100 27 mins
CB Christian B.	1,200 32 min	30 / 40 32 min	1,200 32 min
JK Jessica K.	800 1 h 45 min	50 / 40 1 h 45 min	800 1 h 45 min
MT Mary T.	200 19 min	20 / 40 19 min	200 19 min
LM Liam M.	0 -	30 / 40 -	0 -
HR Hailey R.	1,000 22 min	30 / 40 22 min	1,000 22 min

New lead page



- **Surface deal-critical details faster** with a streamlined layout and enhanced organizational tools
- **Cut clutter** with collapsible sections, clear action buttons, smart grouping, and customizable field visibility
- Log notes, tasks, emails, and activities from **one unified bar** for faster action
- Coming soon: **What's Next?** for every lead, based on the timeline, goals, and custom fields.  Powered by Nutshell AI



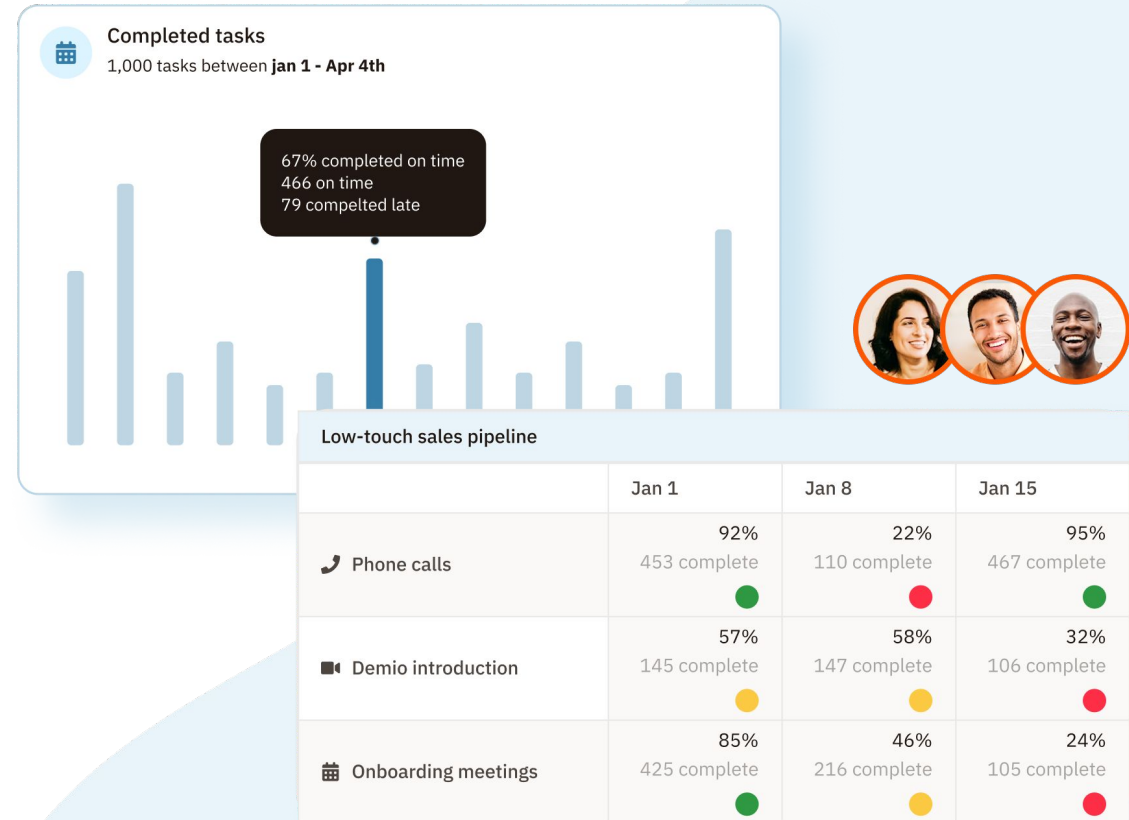
Want to have early access to our Lead page changes? Email us at beta@nutshell.com to get early access!



Task report

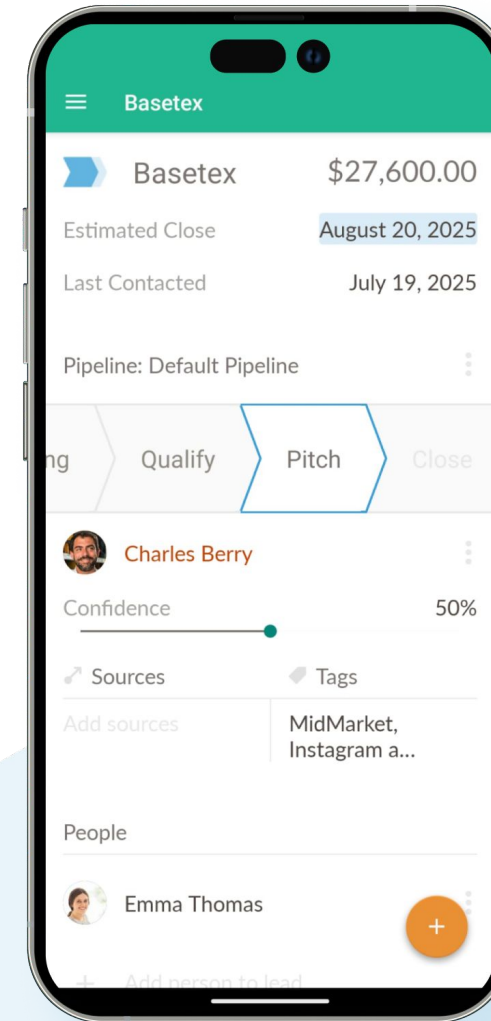


- Gain insight into automated task efficiency and completion rates — how fast is your team acting on each task
- Improve sales team task management through **flexible task sorting and filtering** via their dashboards



Faster mobile activity logging

- Log activities faster while on-the-go
- Keep activity tracking up-to-date with a **streamlined logging experience** on your mobile device
- Available for **iPhone and Android** users



Log an activity

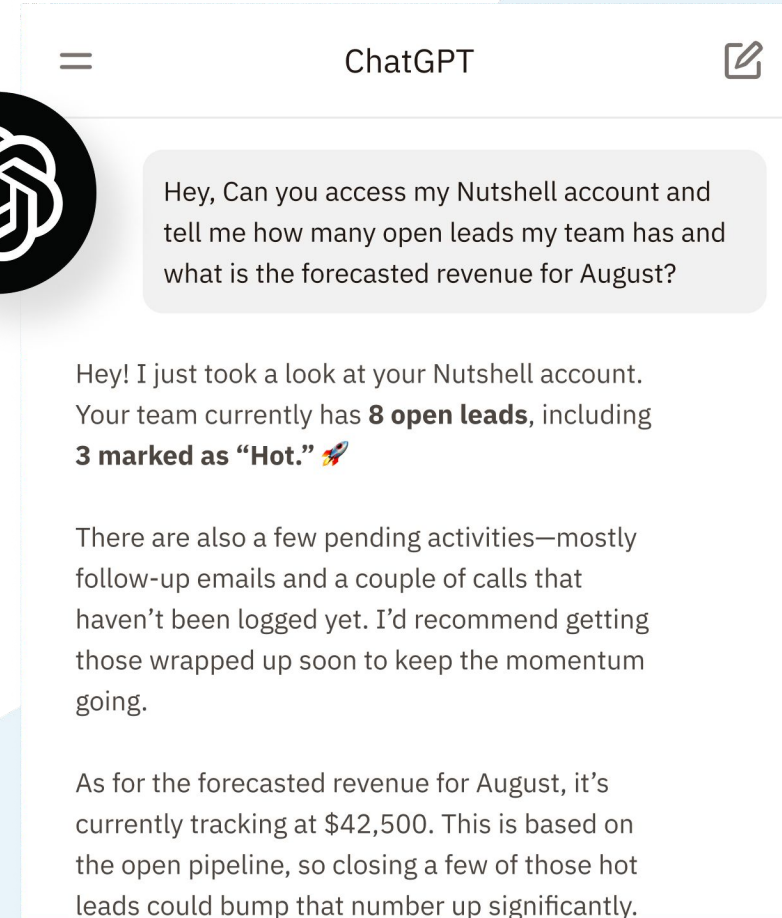


Nutshell MCP Server

✦ Powered by Nutshell AI



- Integrate your Nutshell account directly with ChatGPT (and other AI tools)
- Ask ChatGPT questions and get answers, recommendations based on the data in your own Nutshell account.



Nutshell Invoices



- **Get paid faster** and reduce integration complexity
- Create **unlimited custom invoices** directly from Nutshell
- Go from lead to quote to invoice in **one click**
- **Track** *Drafted*, *Sent*, and *Paid* invoices associated with leads
- **Coming soon!** e-Sign and contract support

Our **Invoices & Quotes add-on** is available to all **Nutshell Sales** subscribers for just **\$67/month** for your entire company

 Draft


 Ready

 Sent

 Paid

 Overdue

Invoice 1541-01
\$59,400.00

 ArrowGrid Ltd
206 E. Huron Street
Ann Arbor MI 48104
Phone: 555-555-5555
Email: info@arrowgrid.com
Website: <https://arrowgrid.com>

INVOICE

PREPARED FOR
Pak and Save
Bernard Patterson
4524 Leisure Lane
San Luis Obispo California 93401
(512) 944-4122

Invoice number 1541-01
Purchase order # PO82711
Job # AG200-01
Customer # PAK003
Reference # PAK003-1541-01
Prepared by Charles Berry
Date issued July 15, 2025
Due date July 15, 2025

Name	SKU	Quantity	Price	Term	Discount	Total
Sundog	P-SD-01	1	\$33,000.00			\$33,000.00
Sunblade Battery Pack	P-SBP-01	2	\$16,500.00			\$33,000.00
Subtotal						\$66,000.00
Discount (10%)						-\$6,600.00
TOTAL						\$59,400.00

PAYMENT METHOD AND TERMS
WIRE TRANSFER
ABC Bank
Account #: 0123456789
Branch #: 54321

TERMS:

- Payment due on invoice
- Overdue accounts will incur interest

For our full terms and conditions, or if you require further assistance, please visit www.arrowgrid.com. Or contact us at info@arrowgrid.com.
Thank you for considering our services!

Marked as ready Today, 7:41 AM

Marked as ready Today, 7:41 AM

Marked as ready Today, 7:41 AM

Collect Scheduler bookings via chat

- Let your website visitors **book a meeting directly via chat** with Nutshell Scheduler
- **Instantly add events** to your calendar and update leads for swift meeting confirmation
- Choose whether chats that result in scheduled meetings **automatically generate leads**



C

Central hospital
Last active - 10 mins ago

Hi! I'm Charlie, your web assistant.
How can I help you today?

Schedule a call with a representative

Type a message

← 30-min meeting
Jared Knotts

Choose a date
Select an available date for the meeting

< July 2025 >

SUN	MON	TUE	WED	THU	FRI	SAT
29	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	4	5	6	7	8	9

✨ AI chatbot

✨ Powered by Nutshell AI

- **Answer questions** and generate leads from your web visitors with an AI-powered chatbot
- Ensure **every chat feels on-brand** with a tailored name, tone, and hand-off rules
- Create a **custom knowledge base** trained by your website: no coding or training necessary
- **Coming soon!** Enhanced Engagement reports so you can report on Chatbot-related conversion rates, AI vs rep close rates, and more

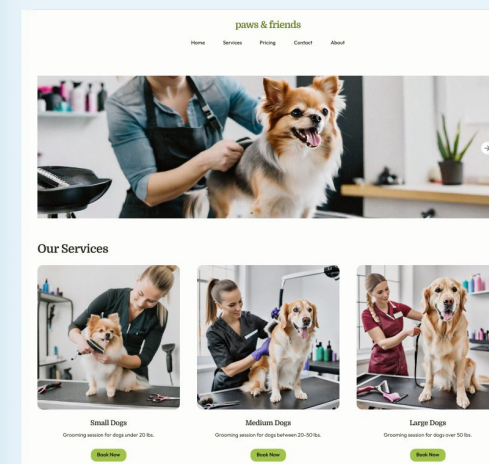
The AI chatbot is part of our [Nutshell Engagement](#) suite



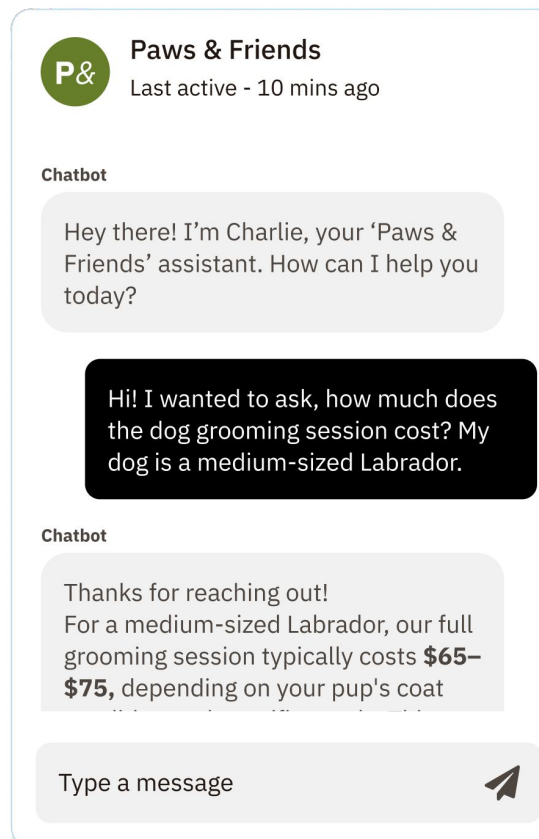
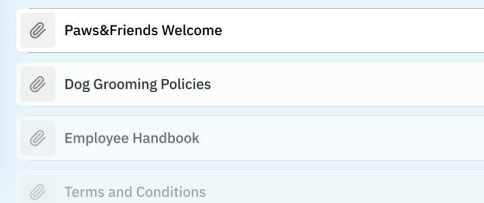
Train AI chatbot with

My Website

paws&friends.com



Other documents



Additional Resources

Stay up to date with our feature releases by keeping an eye on our [Product Updates & Enhancements](#) page or signing up for our [Shipping News](#) newsletter.

Need help getting started? Check out our [comprehensive support articles](#) or [reach out to our support team](#) for more information.

Want to get early access or be part of a future beta release? Email us at beta@nutshell.com to be on our shortlist for feature early releases.

Got any questions about our recent or upcoming feature launches?

Q&A

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 August 27th, 2025 at 12:00 PM EST.