



Level Up Your Sales, Support & Revenue with Nutshell's AI Chatbot

Learn how Nutshell's AI Chatbot answers questions, books meetings, and captures leads automatically, 24/7, right from your website.



Andy Fowler
CEO of Nutshell

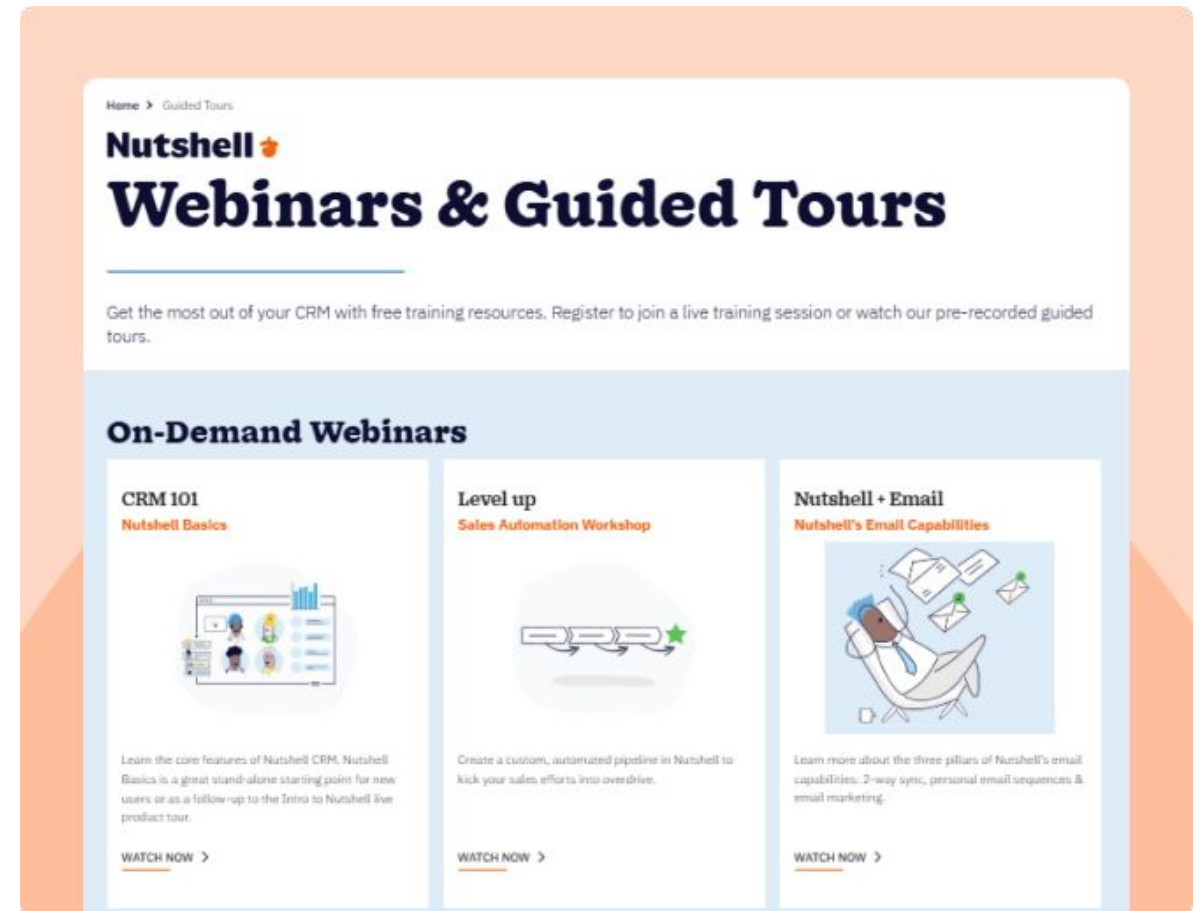
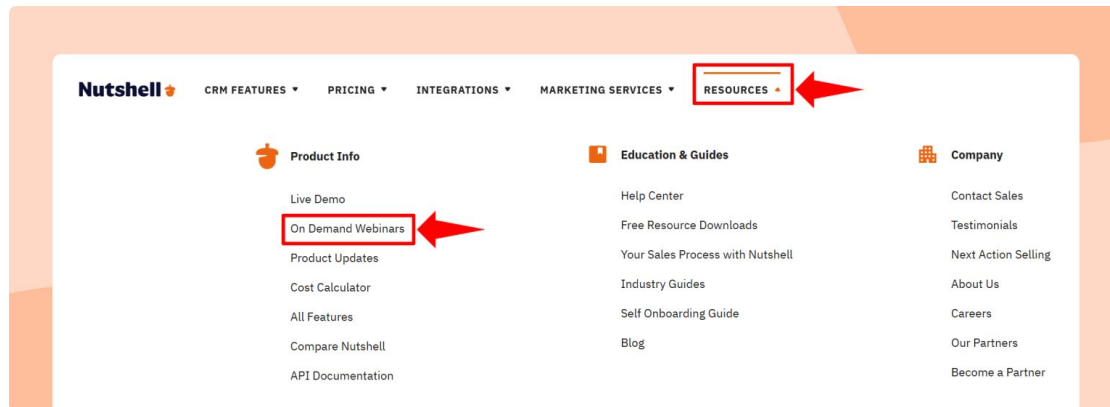


Will Gordon
Sr Director of
Marketing
at Nutshell

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.*



What We'll Cover Today

- Why we built Nutshell Chat ~5 minutes
- What is Nutshell Chat? ~5 minutes
- Setting up Nutshell Chat ~2-3 minutes
- Your website visitors' experience ~5 minutes
- Deeper configuration & customization ~5 minutes
- Measuring Chatbot effectiveness ~5 minutes
- Pricing & what's next ~5 minutes
- Q&A

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

Why We Built Nutshell Chat

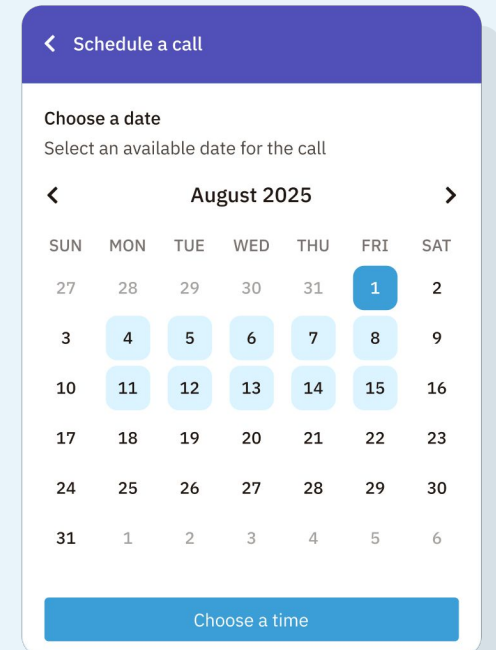
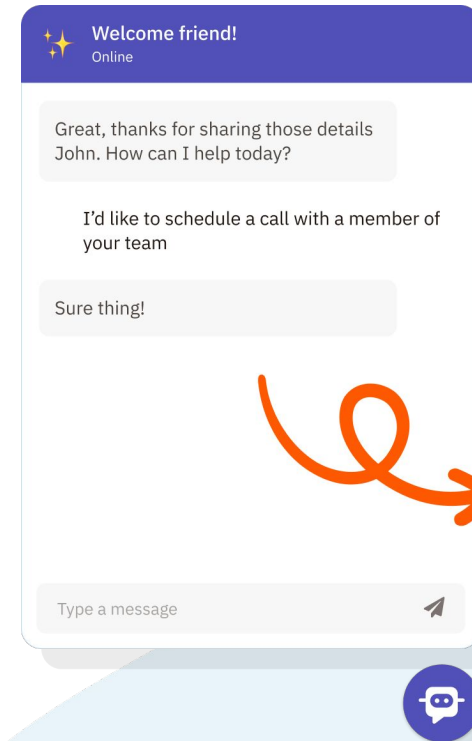
CRM helps you manage leads—but, ideally, you also want it to **generate leads**:

- Chatbots are the best way to **convert existing website visitors** into leads
- A chatbot **converts better** than traditional contact forms—it's the next generation approach
- It offers **better integration** under one roof vs. using 3-4 different tools (i.e. Calendly, Jotform, Podium and a separate CRM)

*Did you know? - Customers are **2.4 times more likely** to stick with a brand when their problems are solved quickly. ([Forrester](#))*

What is Nutshell Chat?

- **Customize** your chatbot interface and responses to your brand
- **Train** the chatbot on your website content with AI
- Works as an **always-online employee** answering questions and generating leads 24/7
- **Syncs easily** with the rest of Nutshell (CRM contact records, Scheduler bookings, Nutshell Forms)

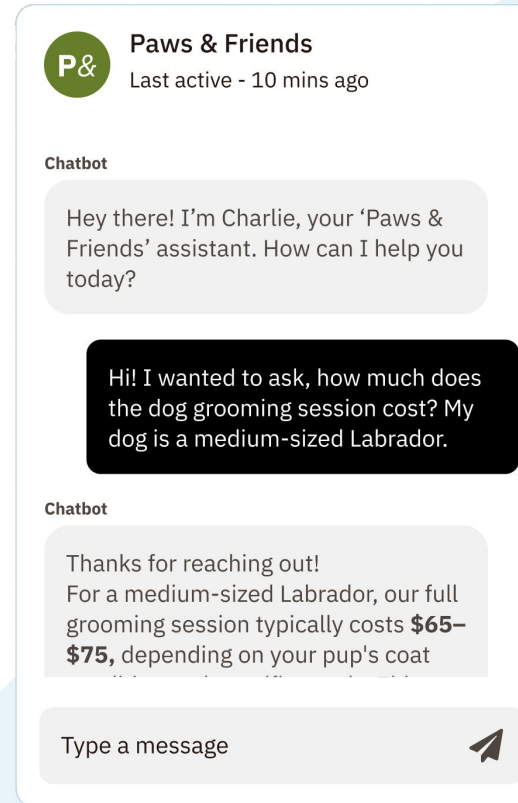


Leads generated
254
↑ 35% last 30 days
Bookings made
89
↓ 15% last 30 days
Information Collected
135
↑ 5% last 30 days
AI-to-human handoff

Getting Started with Nutshell Chat

Get Nutshell Chat **set up in minutes** (seriously):

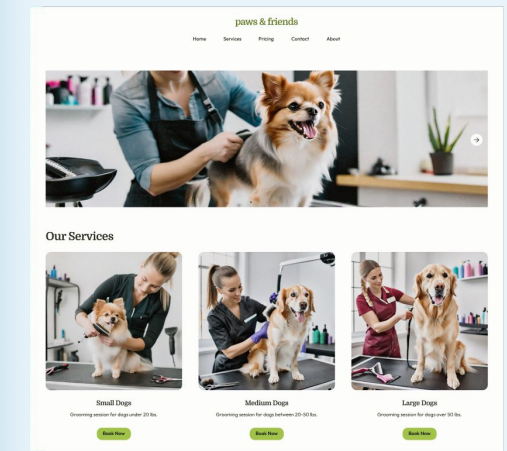
- Enter your **website URL** (or upload PDFs)
- Nutshell crawls your website and **trains the chatbot**
- **Preview and test** your chatbot and its functionality in Nutshell
- Add the Nutshell snippet to your site and **launch your chatbot**



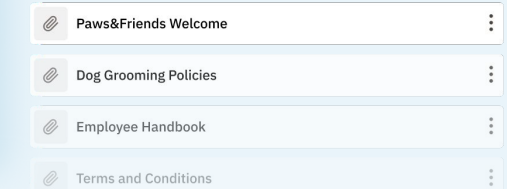
Train AI chatbot with

My Website

paws&friends.com

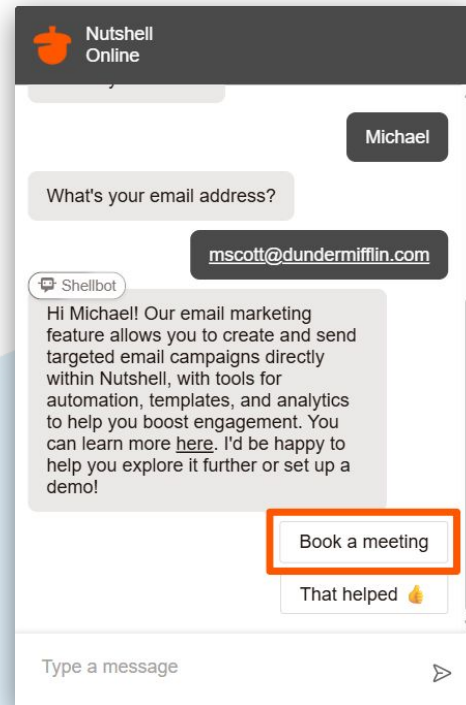
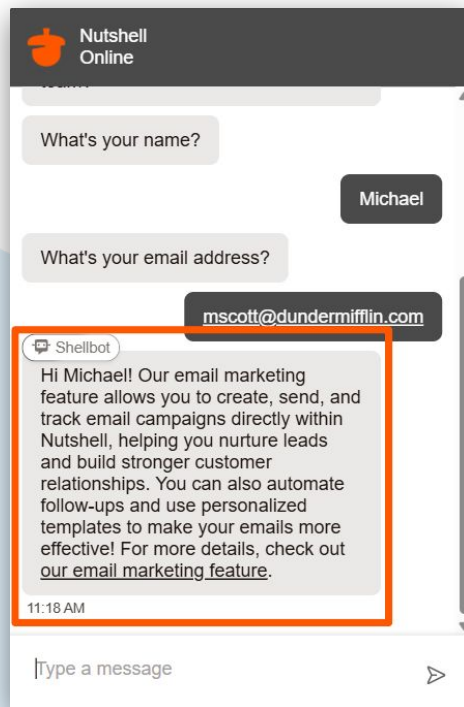


Other documents



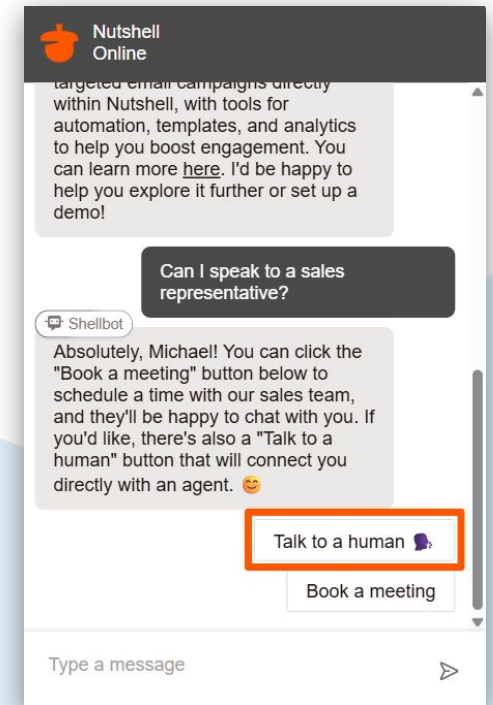
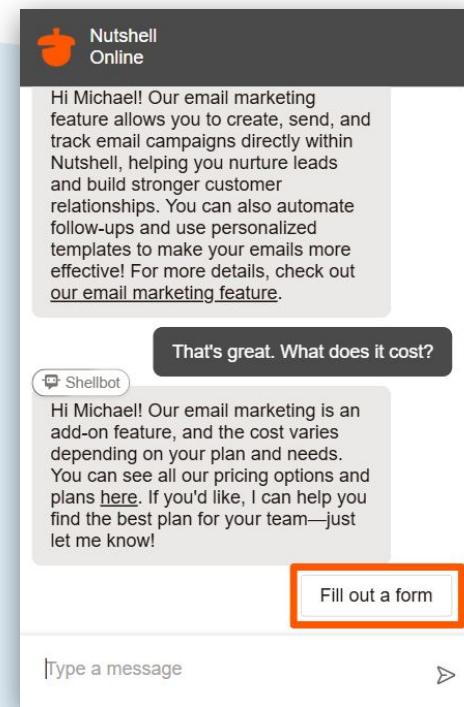
Nutshell Chat User Experience

1. Q&A responses about your products, services, and company



2. Nudge someone to schedule a meeting or book an appointment

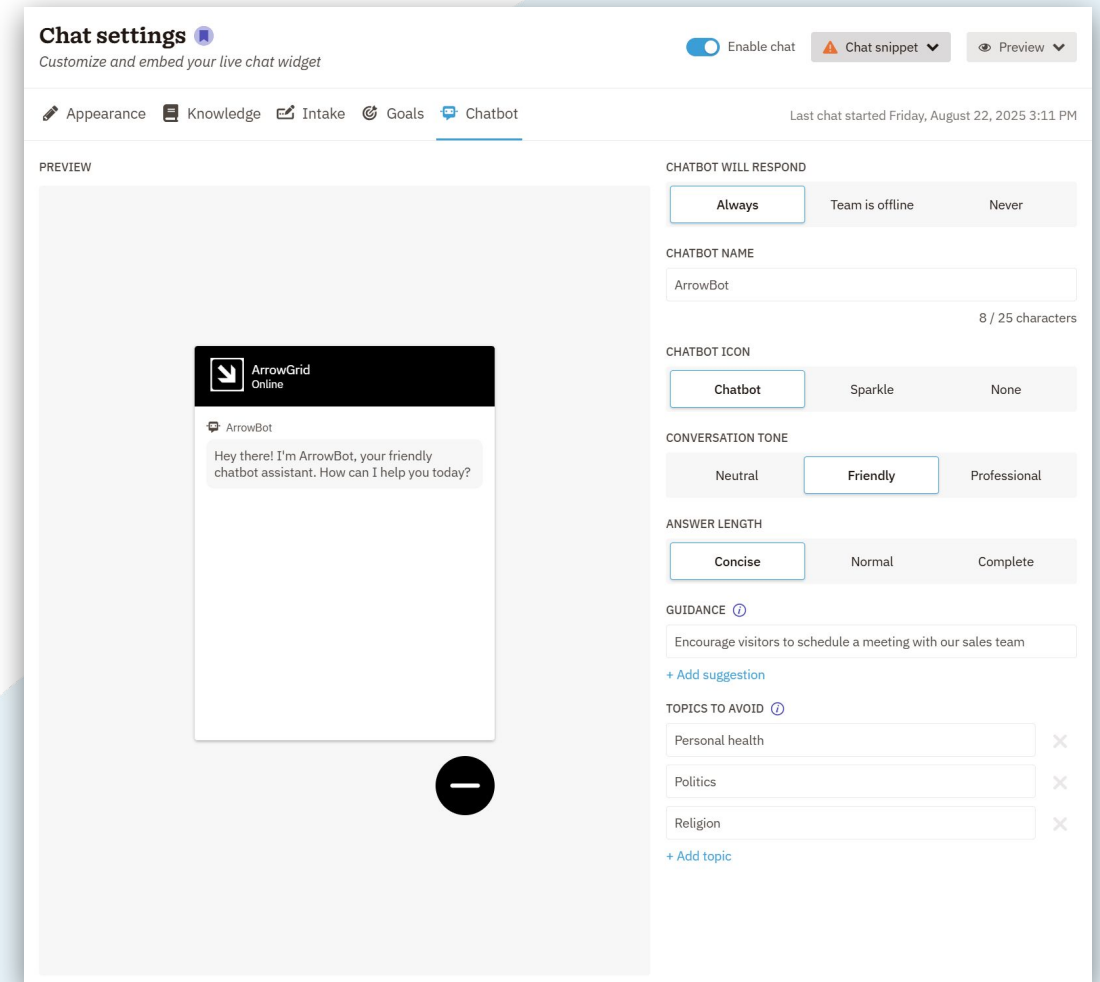
3. Nudge someone to fill out a form for lead capture



4. Handoff to a live person when needed

Deeper Configuration & Customization

- **Customize your chatbot** appearance and branding
- **Train your chatbot** on your business specifics
- **Customize your form intake** (traditional form or conversational intake)
- Set up your **chatbot goals** (schedule a meeting, collect info, or hand off to an agent)
- **Leverage advanced controls** like: tone, response length, additional guidance, and topics to avoid

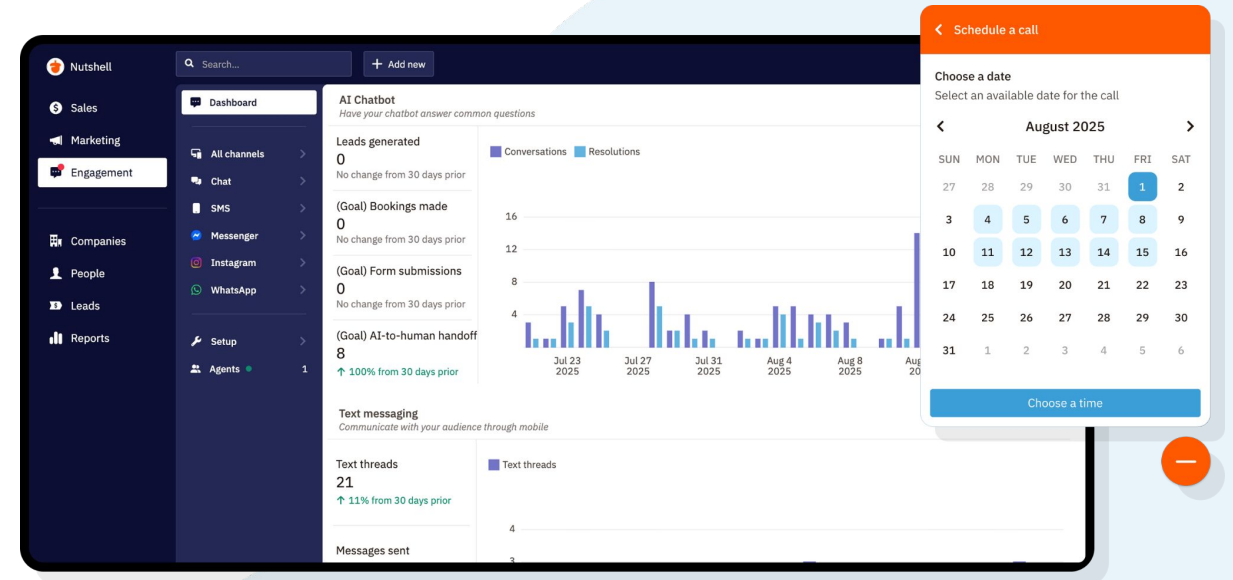


The screenshot displays the 'Chat settings' interface for a chatbot. The top navigation bar includes 'Appearance', 'Knowledge', 'Intake', 'Goals', and 'Chatbot' (which is selected). The 'Chatbot' tab shows a 'PREVIEW' of the chatbot's interface, which includes a header with the 'ArrowGrid Online' logo and a message from 'ArrowBot' saying 'Hey there! I'm ArrowBot, your friendly chatbot assistant. How can I help you today?'. Below the preview is a black circular button with a white minus sign. To the right of the preview are several configuration sections: 'CHATBOT WILL RESPOND' with options 'Always' (selected), 'Team is offline', and 'Never'; 'CHATBOT NAME' with a text input field containing 'ArrowBot' and a character count '8 / 25 characters'; 'CHATBOT ICON' with options 'Chatbot' (selected), 'Sparkle', and 'None'; 'CONVERSATION TONE' with options 'Neutral', 'Friendly' (selected), and 'Professional'; 'ANSWER LENGTH' with options 'Concise' (selected), 'Normal', and 'Complete'; 'GUIDANCE' with a text input field containing 'Encourage visitors to schedule a meeting with our sales team' and a '+ Add suggestion' link; and 'TOPICS TO AVOID' with a list of topics: 'Personal health', 'Politics', and 'Religion', each with a remove button (X), and a '+ Add topic' link at the bottom.

Measuring Chatbot Effectiveness

Determine chatbot efficacy by tracking the following metrics:

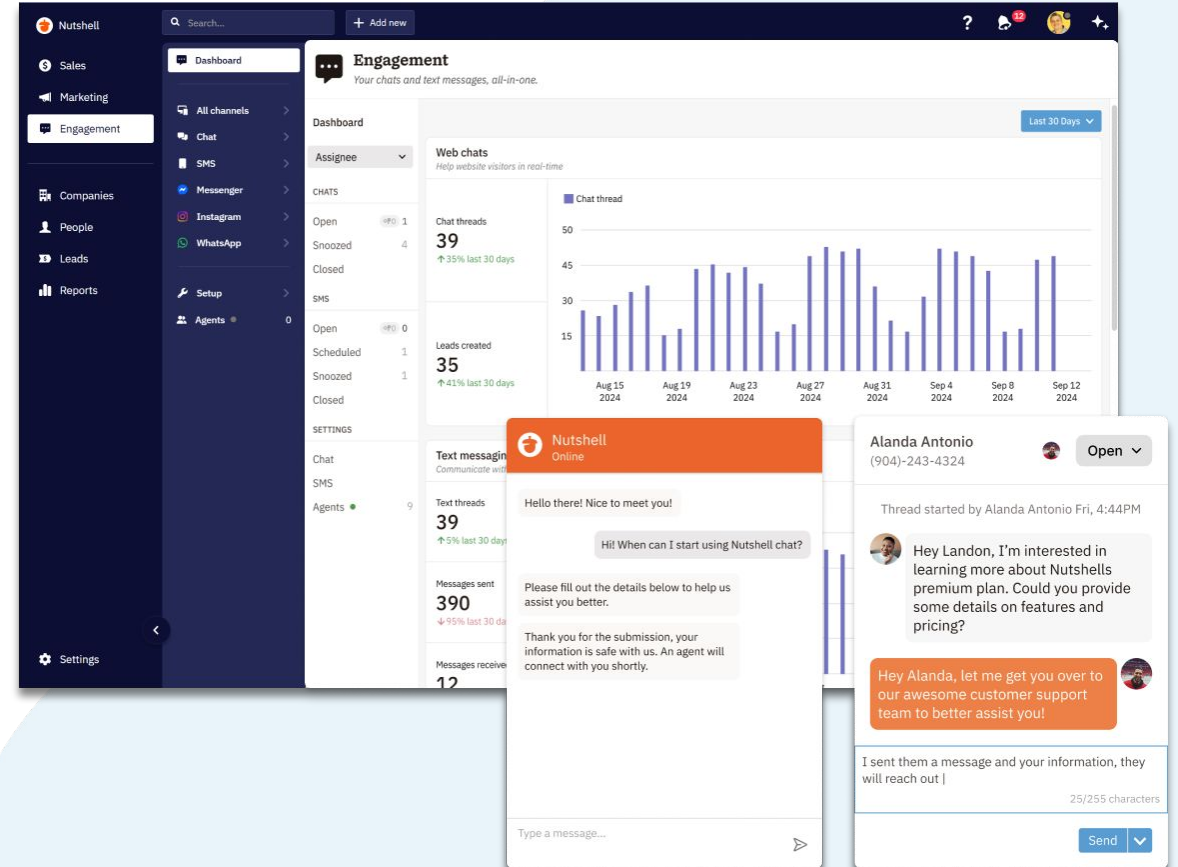
- Bookings made through Scheduler
- Leads generated
- Forms collected
- Human handoffs completed



Pricing & What's Next

How can you access Nutshell Chat?

- Included in **Engagement Foundation**
- Early access offers you **unlimited use**



Resources

Access Nutshell Chat in our Engagement Suite to [configure your AI Chatbot!](#)

Explore [Nutshell's Engagement Suite features](#) & discover the tools available to simplify customer and lead engagement from inside your CRM.

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

*Train Nutshell on your business with **one click** and launch a chatbot that **automatically** answers questions, generates bookings, and captures leads—24/7.*

Q&A

Recent Releases:

- **Nutshell Invoices:** Create, send, and track invoices in your CRM! *(part of our Nutshell Quotes & Invoices add-on)*
- **Pipeline Starter Packs:** Launch a full-featured sales pipeline to match your sales process with Nutshell's range of pipeline starter templates.
- **Activity Report Expansion:** Get the full picture of your team's activity effort, volume, and quality in one streamlined view with Nutshell's enhanced Activity report.
- **Closed Lead Follow-Up Pipeline:** Automatically route closed deals—*Won, Lost, or Cancelled*—to a new pipeline with all the vital lead information attached.

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

Upcoming releases:

- **Nutshell MCP Server Integration:** Integrate ChatGPT and other AI tools with your Nutshell account, so you can ask it questions and get answers specific to your account data.
- **Microsoft Teams AI Summarizations:** Integrate Microsoft Teams with Nutshell to auto-log, transcribe, and summarize every Teams meeting in Nutshell with ease.
- **New Lead Page Design:** We're bringing you a sleeker, easier-to-organize interface to help your team spot important deal-related details faster.
- **And more!**

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

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 **September 24th, 2025 at 12:00 PM EST.**