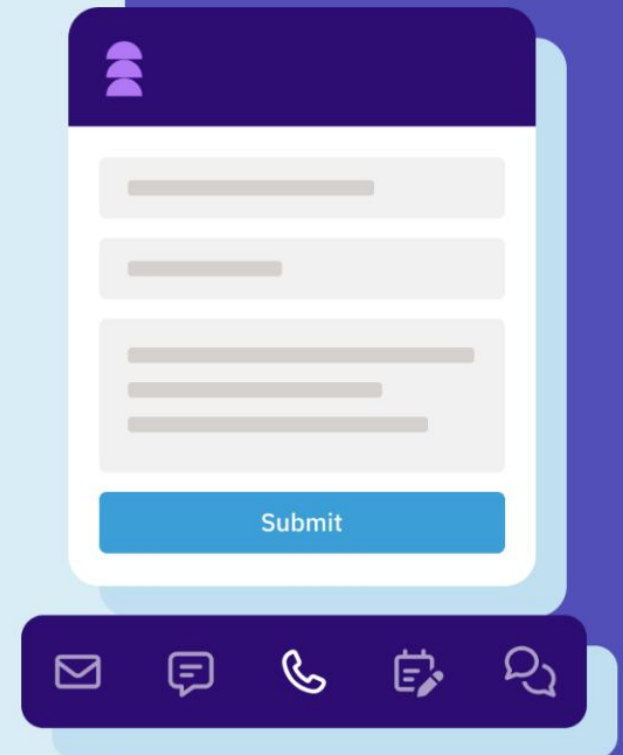# Nutshell

Drive More Conversions with Nutshell Chat's Engagement Bar

Make every website visit count and increase conversions with Smart Nudges & the Engagement Bar.

Submit

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.*
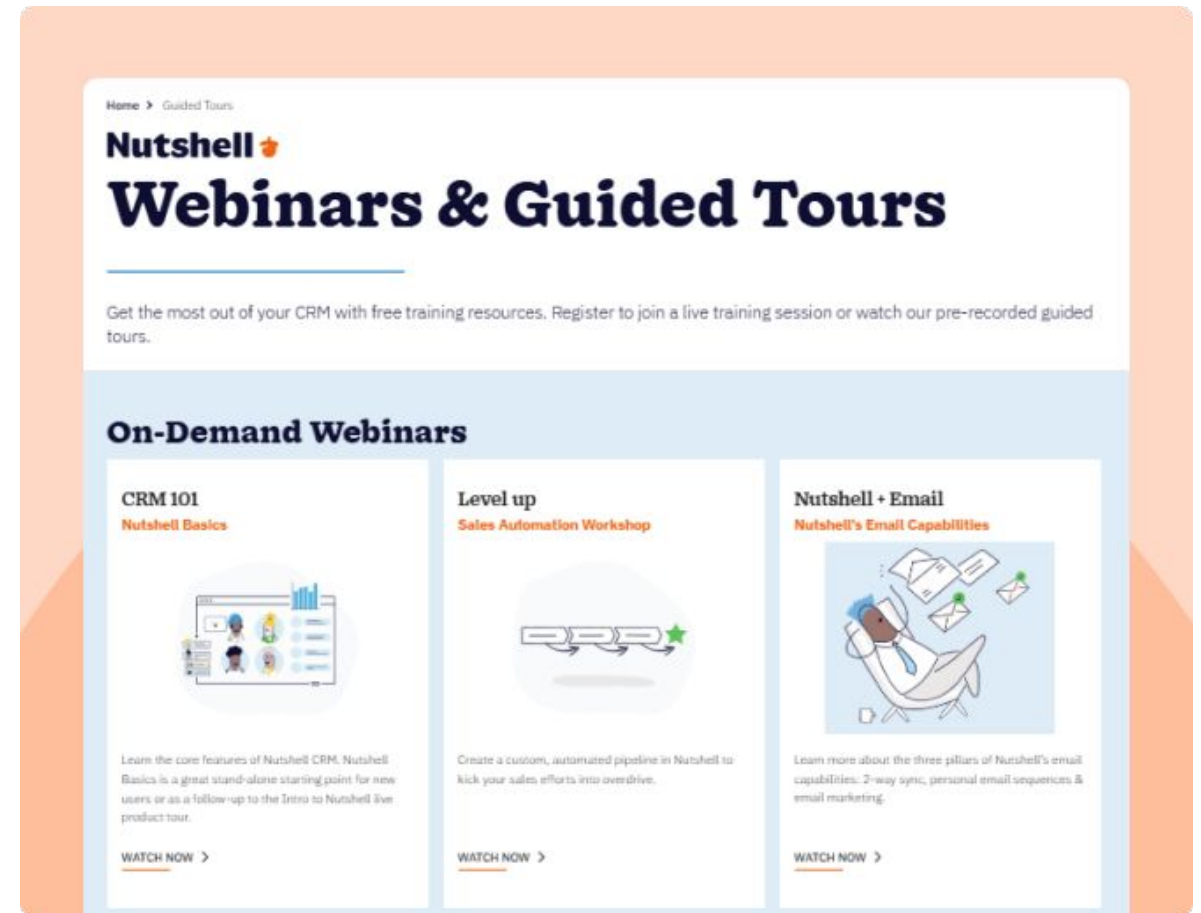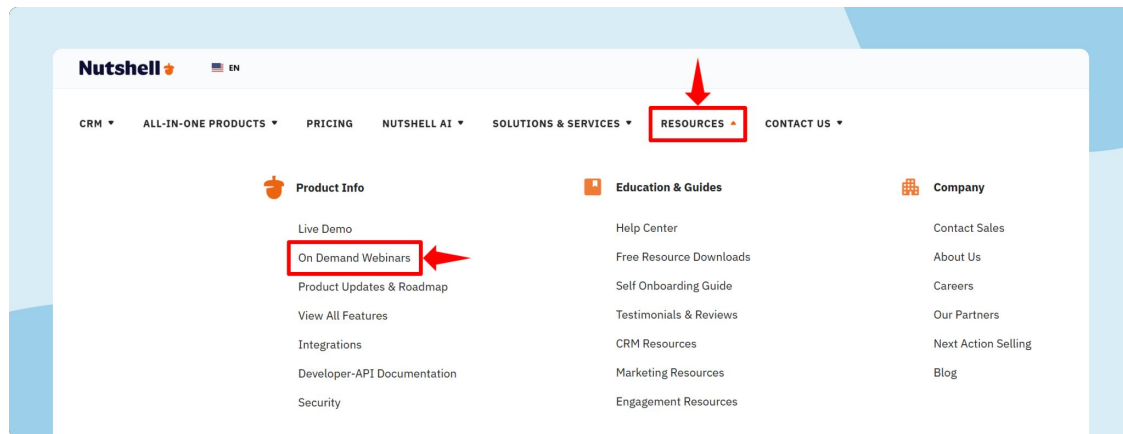
What We'll Cover Today

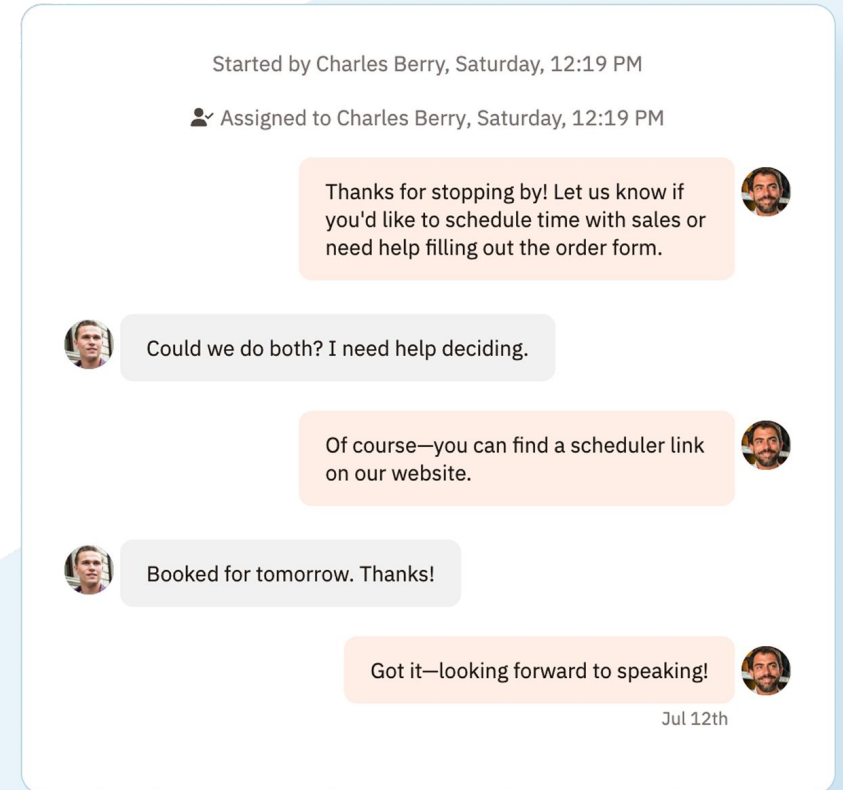- Customizing Nutshell Chat   ~10 minutes

- Customizing Your AI Chatbot   ~5 minutes

- Smart Nudges Overview   ~5 minutes

- Engagement Bar Overview   ~10 minutes

- Customizing Your Engagement Bar   ~10 minutes

- Q&A

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

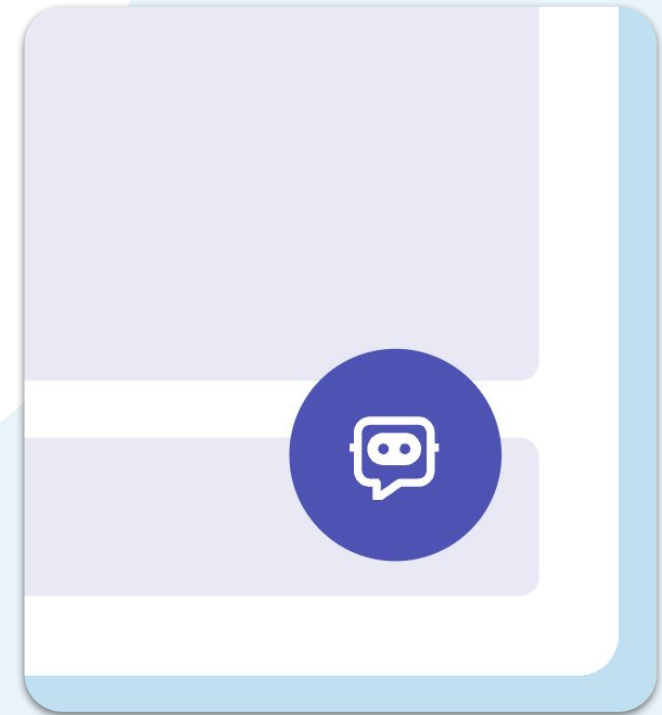**Nutshell**

Why website engagement matters

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

- Your website has **just seconds** to capture a visitor's attention

- People **expect** fast answers, clear next steps, and simple ways to reach your team

- If that experience feels slow or confusing, they **leave**

Started by Charles Berry, Saturday, 12:19 PM

Assigned to Charles Berry, Saturday, 12:19 PM

Thanks for stopping by! Let us know if you'd like to schedule time with sales or need help filling out the order form.

Could we do both? I need help deciding.

Of course—you can find a scheduler link on our website.

Booked for tomorrow. Thanks!

Got it—looking forward to speaking!

Jul 12th

How Nutshell Chat helps

- **Boost engagement** by starting real conversations with your website visitors

- **Increase conversions** by guiding visitors toward the right actions

- **Improve response times** by answering questions instantly

- **Strengthen your pipeline** by capturing leads, scheduling meetings, and keeping communication flowing
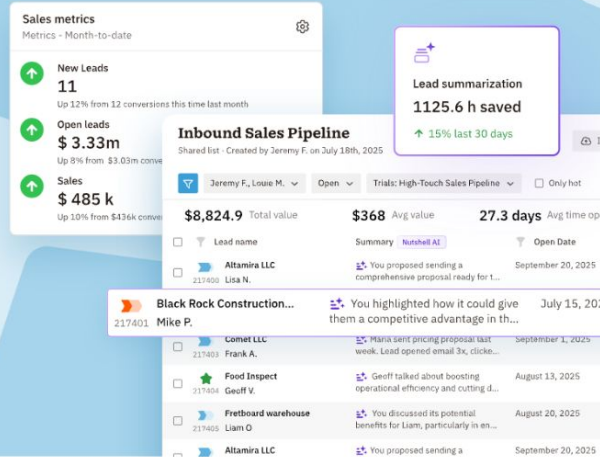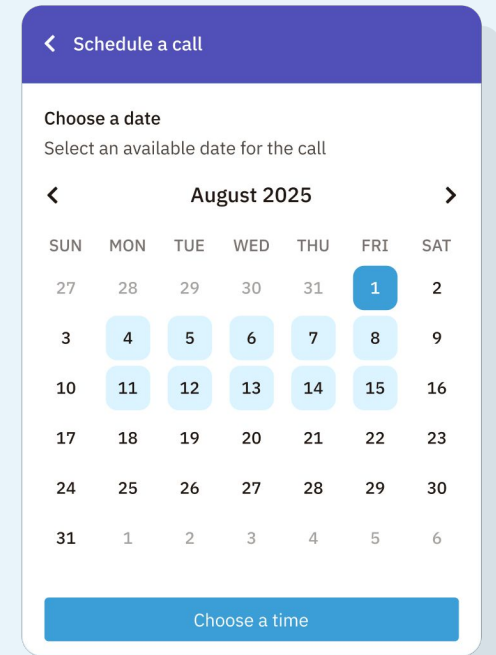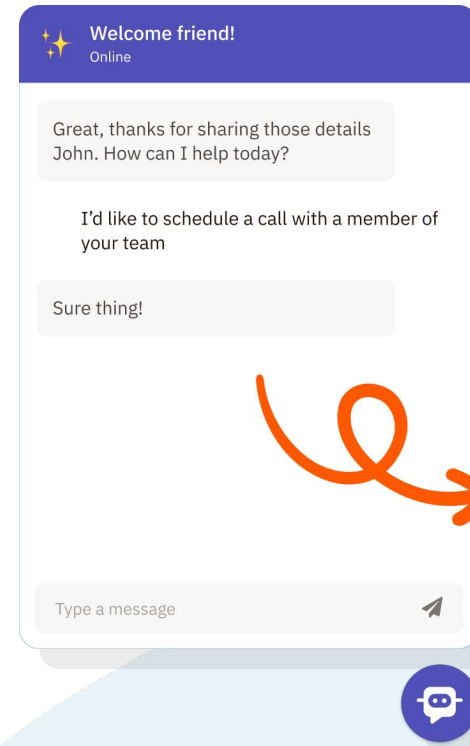
Chat In Action

Customizing your Web Chat widget

Make your chat widget feel like an extension of your brand

- **Choose** your brand colors, chat layout, friendly greeting, & behavior (when & where it appears)

- Add your **website URL & preview** the chat experience in real time

- Install the **Nutshell snippet** on your website and select when to make it live

- **Syncs perfectly** with Nutshell to
  - *Create leads*
  - *Schedule bookings*
  - *Submit Forms*

Welcome friend!
Online

Great, thanks for sharing those details John. How can I help today?

I'd like to schedule a call with a member of your team

Sure thing!

Type a message

Schedule a call

Choose a date
Select an available date for the call

August 2025

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	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

Choose a time

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

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Customizing your AI Chatbot

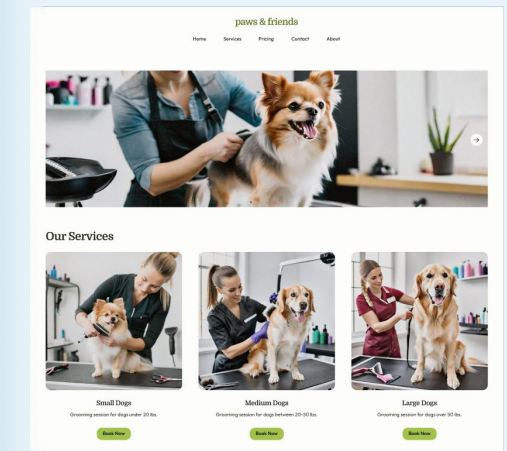Training & customizing your AI chatbot only takes **a few minutes**:

- Enter your website URL and/or upload PDFs to **train your bot** on your business

- Choose your chatbot **tone, response length, & topics to avoid**

- Set your **chatbot behavior rules** for handing off to a human when your team is online—round-robin or to a specific user.

- Customize your **form intake** (traditional form or conversational intake)

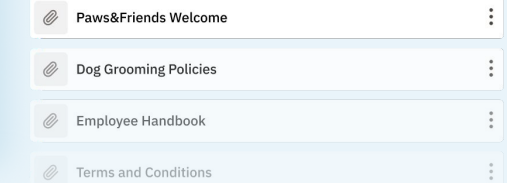- **Preview and test** your chatbot and its functionality in Nutshell

---

P& **Paws & Friends**
Last active - 10 mins ago

Chatbot

Hey there! I'm Charlie, your 'Paws & Friends' assistant. How can I help you today?

Hi! I wanted to ask, how much does the dog grooming session cost? My dog is a medium-sized Labrador.

Chatbot

Thanks for reaching out!
For a medium-sized Labrador, our full grooming session typically costs **$65–$75,** depending on your pup's coat

Type a message
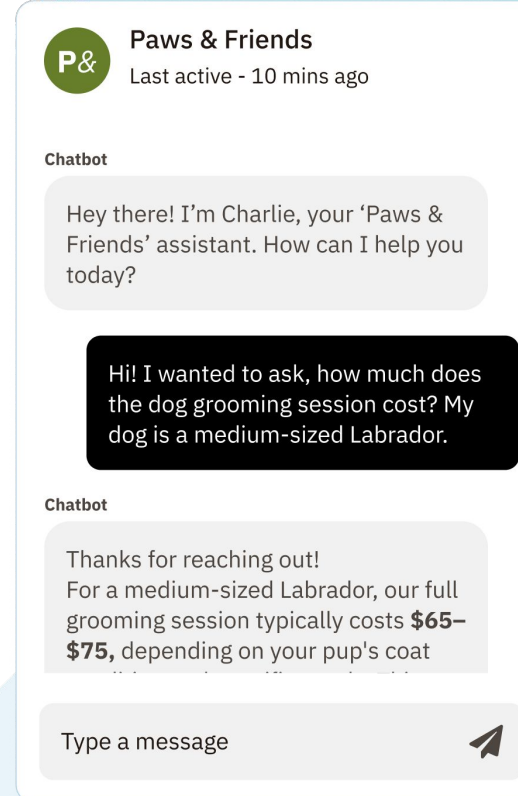
Train AI chatbot with

My Website

paws&friends.com

Our Services

Small Dogs | Medium Dogs | Large Dogs

Other documents

- Paws&Friends Welcome
- Dog Grooming Policies
- Employee Handbook
- Terms and Conditions

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What are Smart Nudges?

- **Conversation starters** that encourage website visitors to engage

- **AI-generated prompts** that automatically appear in the chat widget based on the context of the page—EG:

  - "What features are included?"
  - "How does pricing work?"
  - "Can I book a demo?"

- **Reduce friction**, increase engagement, & help visitors get answers fast

- **Zero additional setup** required

Nutshell
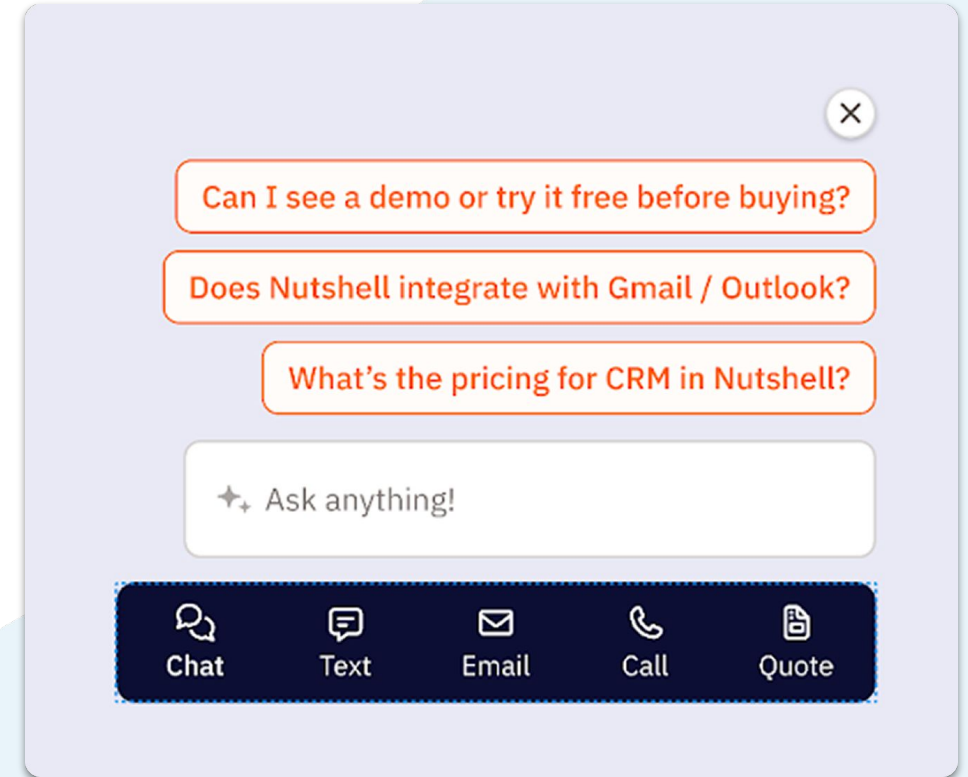
What is the Engagement Bar?

- Add an attractive **CTA bar** to the bottom of your chat widget

- Make it easier for visitors to **take the next step** when they need help

- Provide easy **1-click CTAs** for visitors to interact with directly from your chat widget

- Capture every action **in your CRM** so nothing is lost

- More visibility = More action = **More conversions**
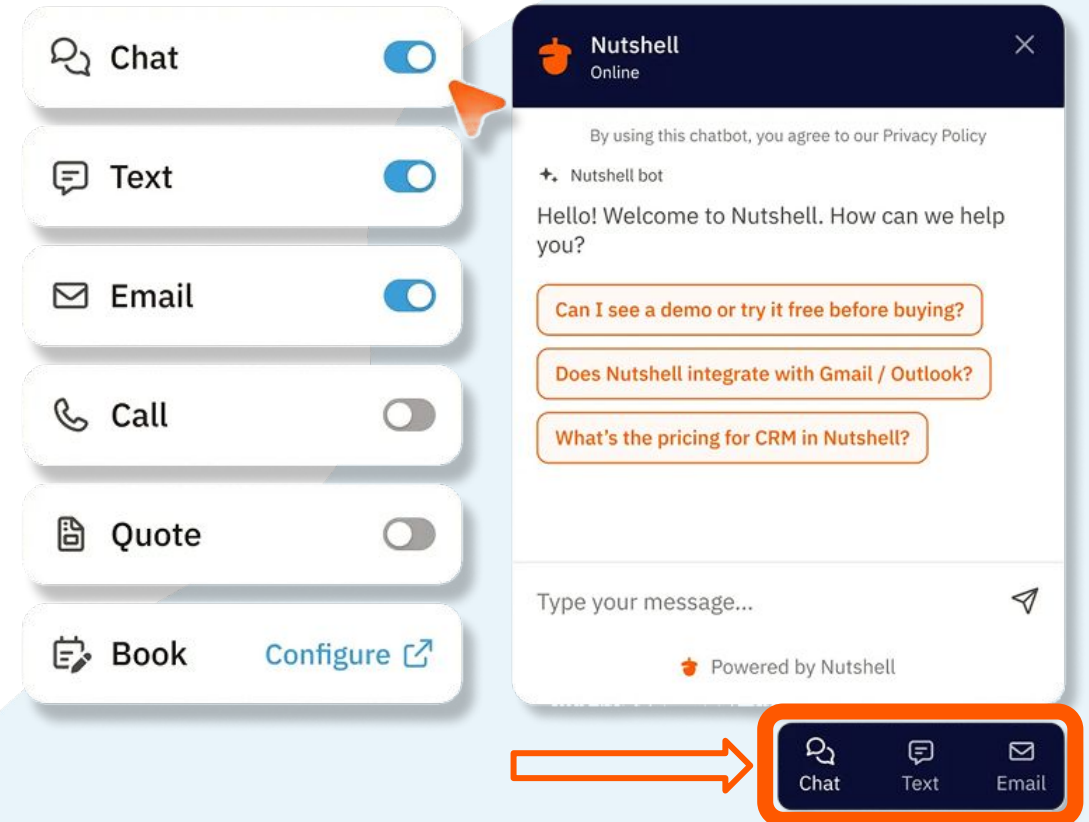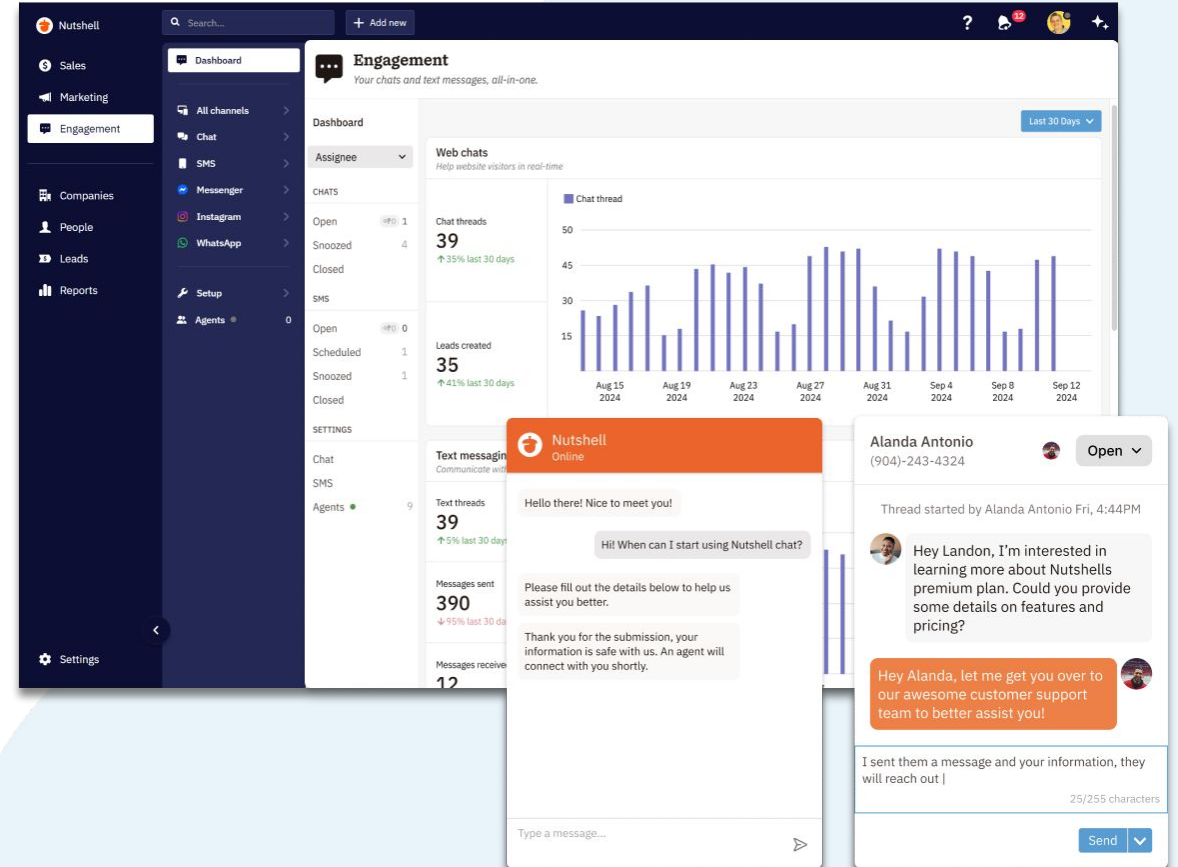
Customizing your Engagement Bar

- **Select CTAs** that matter most for your business:
  - Chat
  - Text
  - Email
  - Call
  - Quote
  - Book

- Choose **up to 5 CTAs** and arrange them as you'd like them to appear

- Configure **CTA text and related messaging** for the different actions you choose

- Automatically **create a lead** for each chat and add them to a pipeline
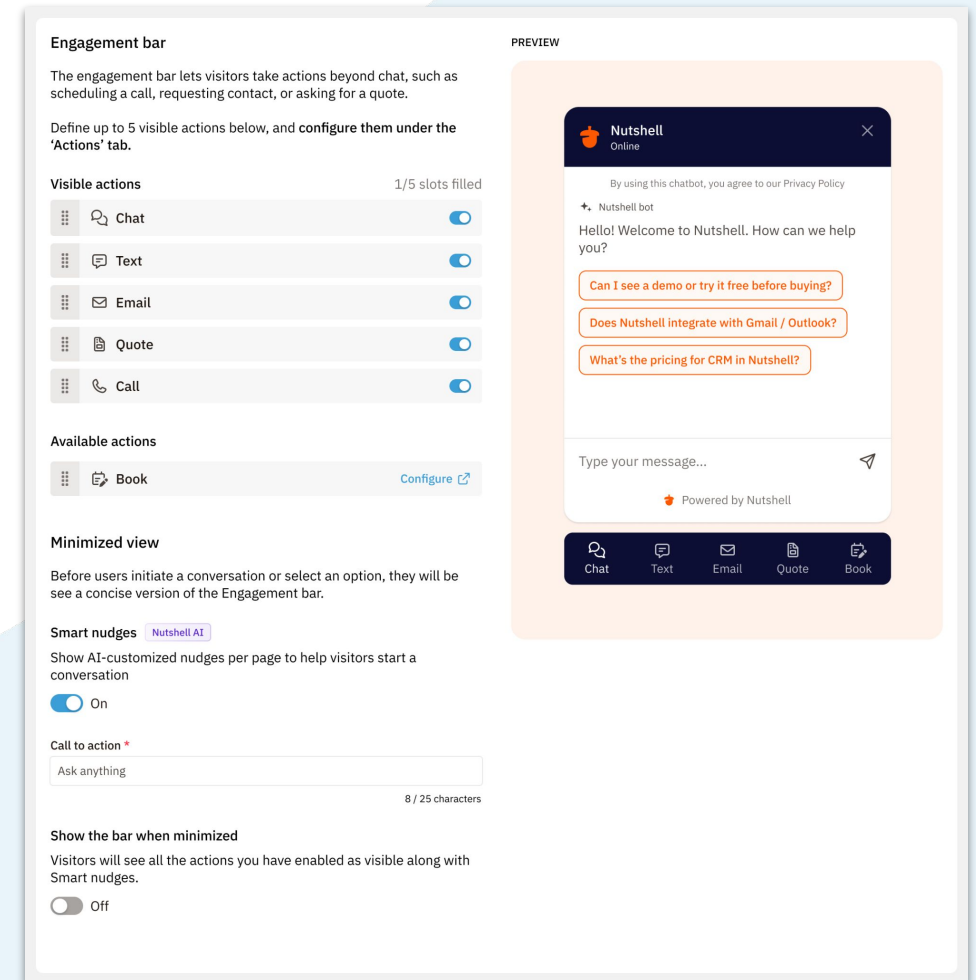
Nutshell

Pricing & What's Next

How can you access Nutshell Chat?

- Included with all CRM plans

- Early access offers you **unlimited use**

- **Launched today:** Engagement report

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Resources

Access Nutshell Chat in our Engagement Suite to configure your Smart Nudges & Engagement Bar!

Explore Nutshell's Engagement 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.

Nutshell

*Turn every website visit into a **real opportunity** with Smart Nudges and the Engagement Bar—guiding your visitors toward the actions that **drive conversions**.*

Q&A

Nutshell

Recent Releases:

- **Nutshell MCP Server Integration:** Integrate Chat GPT and other AI tools with your Nutshell account, so you can ask it questions and get answers specific to your account data.

- **Task Report:** Keep an eye on when team tasks are completed, skipped over, or not completed at all to better understand and improve workflow efficiency.

- **Product Categories:** Keep you catalog clean and navigable by grouping products into categories, complete with descriptions that guide your team to the right choice.

- **Microsoft Teams AI Integration:** Integrate Microsoft Teams with Nutshell to auto-log, transcribe, and summarize every Teams meeting in Nutshell with ease.

- **Organize Your Draft Pipelines:** Design new pipelines to optimize your sales motion without disrupting your live process.

- **New Phone Integrations:** Save time with automatic call logging through RingCentral, Aircall, CallRail, and Dialpad

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

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Upcoming releases:

- **Nutshell AI library:** Access all AI tools in one place, freeing up time for selling and serving customers.

- **Advanced Marketing Automation:** Convert buying signals into immediate engagement by triggering high-intent actions—alerting reps, launching email sequences, or creating leads—when visitors open specific URLs.

- **AI Email campaign creator:** Use AI to create the content and design for Email Brodcasts in less than a minute.

- **Engagement Report:** Analyze Nutshell Engagement data to identify which pages, prompts, and playbooks drive revenue, then double down on what works. 🚀 *Launched today* 🚀

- **And more!**

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

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Thanks for joining us today!

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