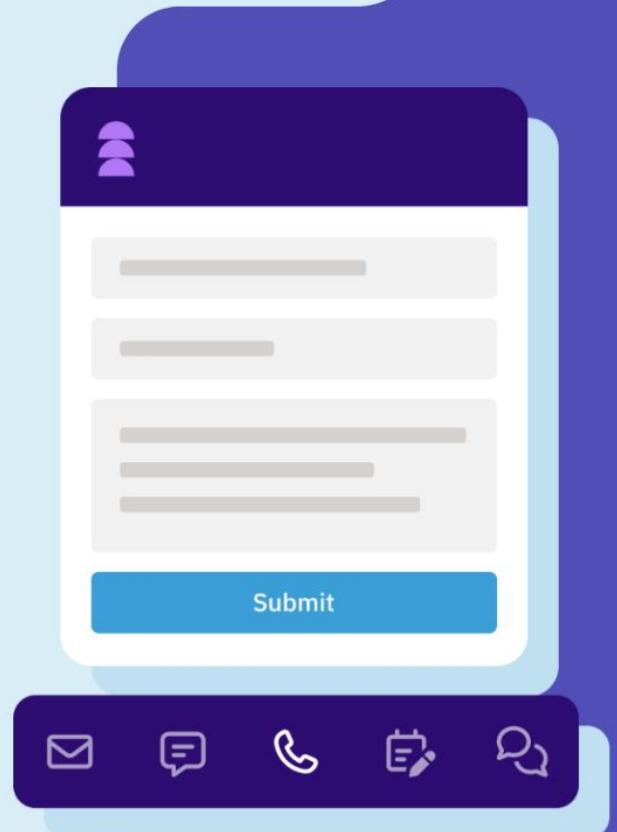




# Drive More Conversions with Nutshell Chat's Engagement Bar

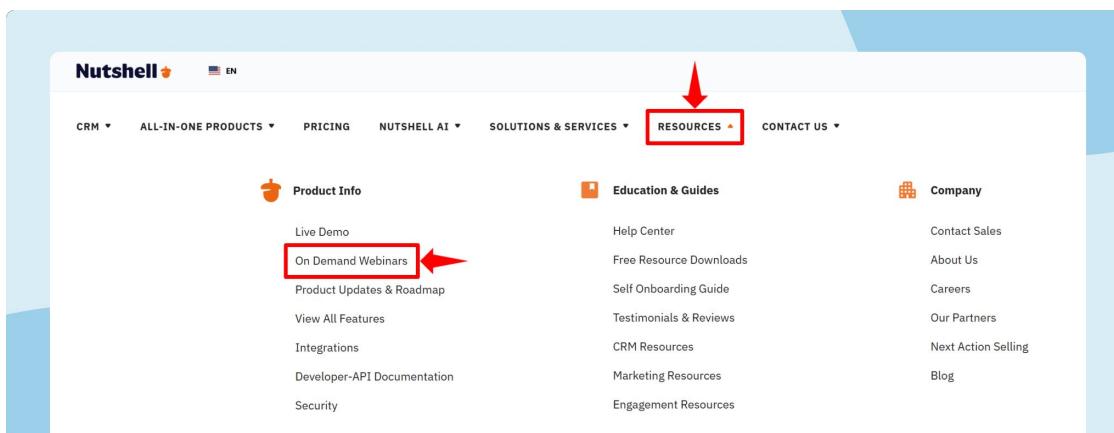
Make every website visit count and increase conversions with Smart Nudges & the Engagement Bar.



# 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 screenshot shows the 'Webinars & Guided Tours' page. The page title is 'Webinars & Guided Tours'. Below the title, a sub-section titled 'On-Demand Webinars' is displayed, featuring three video thumbnails: 'CRM 101', 'Level up', and 'Nutshell + Email'.

**On-Demand Webinars**

- CRM 101**  
Nutshell Basics
- Level up**  
Sales Automation Workshop
- Nutshell + Email**  
Nutshell's Email Capabilities

# What We'll Cover Today

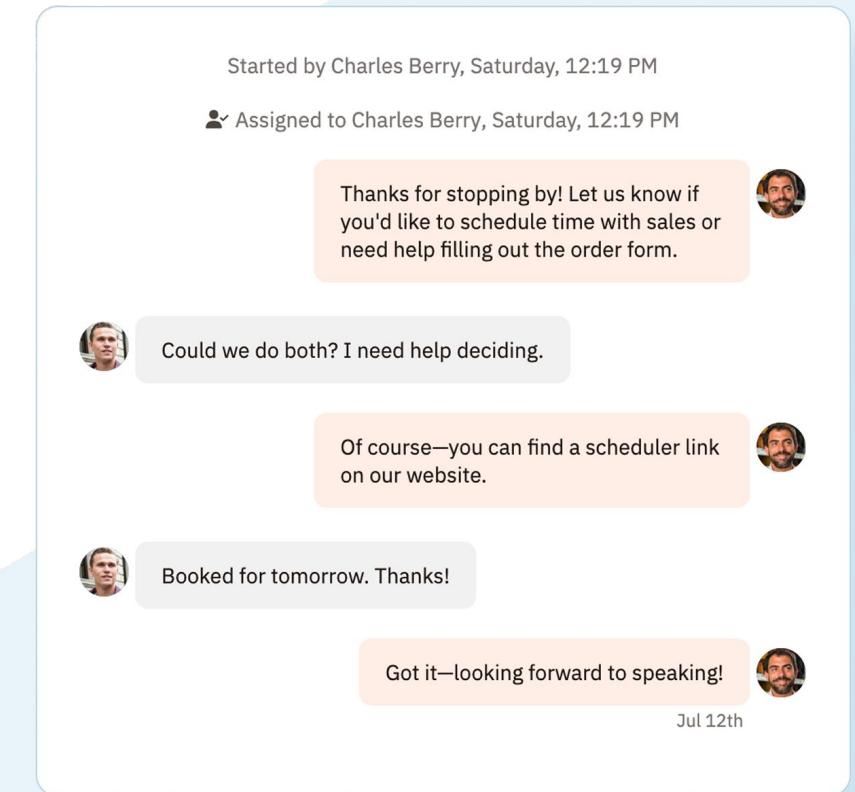
- Customizing Nutshell Chat ~10 minutes
- Customizing Your AI Chatbot ~5 minutes
- Smart Nudges Overview ~5 minutes
- Engagement Bar Overview ~10 minutes
- Customizing Your Engagement Bar ~10 minutes
- Q&A

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

# Why website engagement matters

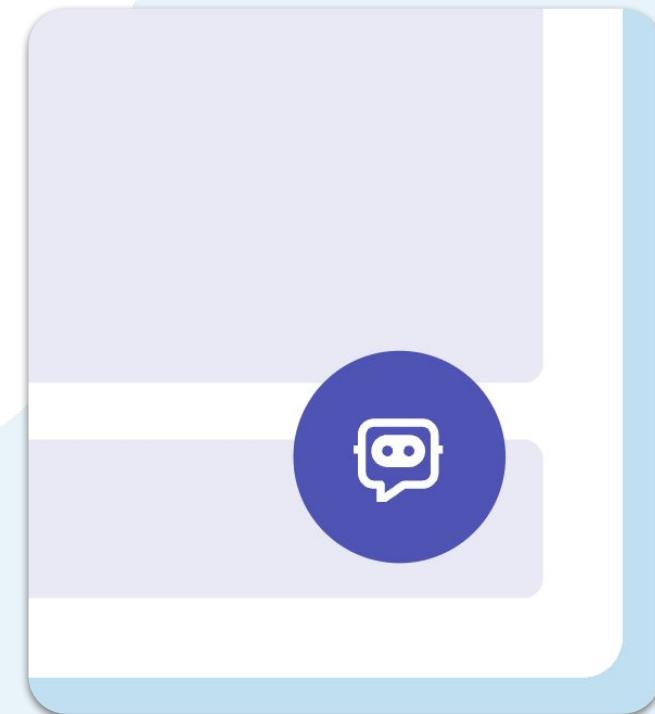
**Did you know?** - Customers are **2.4 times more likely** to stick with a brand when their problems are solved quickly. ([Forrester](#))

- 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**

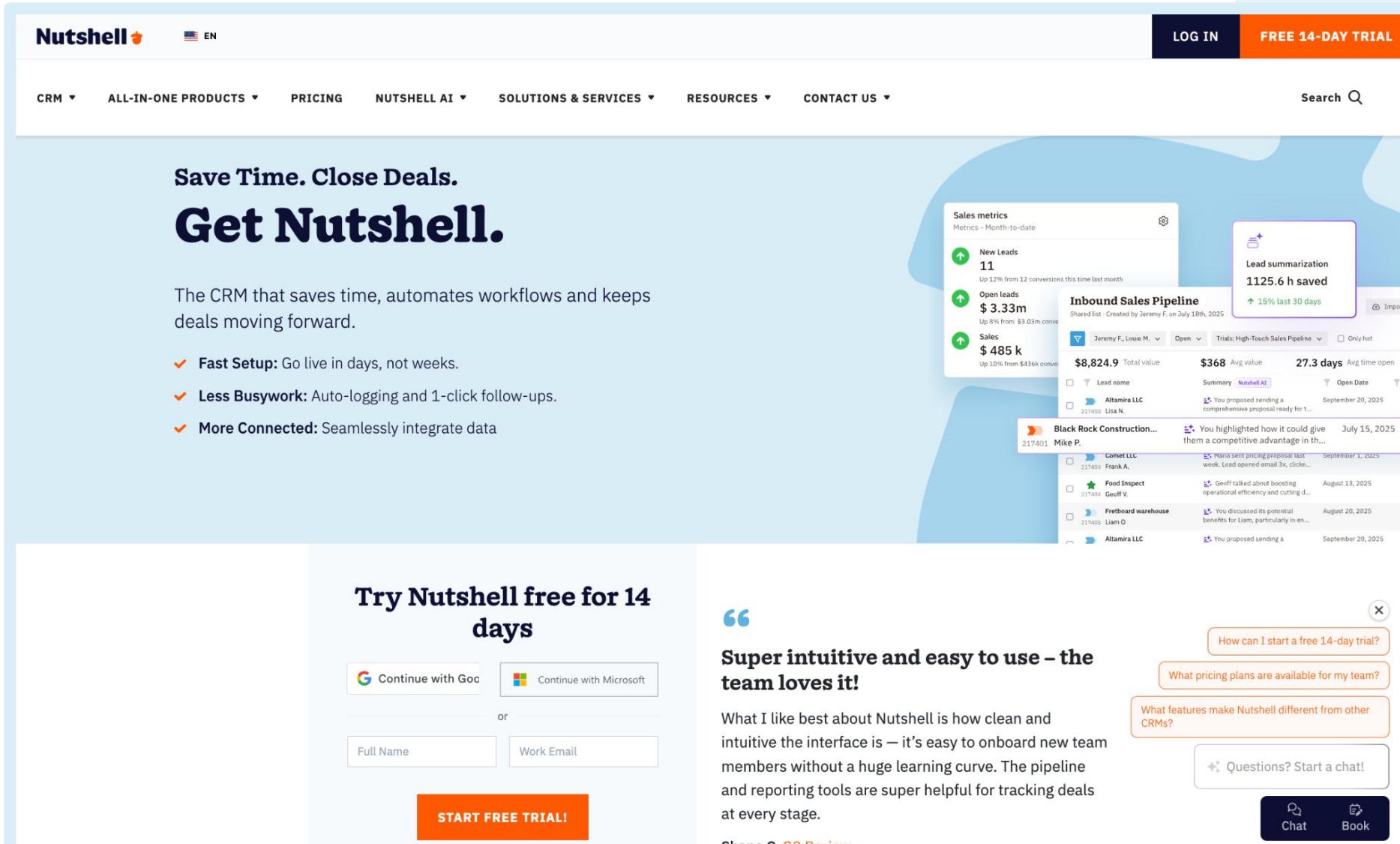


# How Nutshell Chat helps

- **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



The screenshot shows the Nutshell website homepage. At the top, there's a navigation bar with links for CRM, All-in-one Products, Pricing, Nutshell AI, Solutions & Services, Resources, and Contact Us. There are also 'LOG IN' and 'FREE 14-DAY TRIAL' buttons. A search bar is on the right. The main headline reads 'Save Time. Close Deals. Get Nutshell.' Below this, a sub-headline says 'The CRM that saves time, automates workflows and keeps deals moving forward.' A list of three benefits follows: 'Fast Setup', 'Less Buswork', and 'More Connected'. To the right, there's a large screenshot of the Nutshell CRM interface showing sales metrics, an inbound sales pipeline, and a deal for 'Black Rock Construction'. At the bottom, there's a 'Try Nutshell free for 14 days' call-to-action with social login buttons for Google and Microsoft, and input fields for 'Full Name' and 'Work Email'. A large orange 'START FREE TRIAL!' button is at the bottom right. A chatbot is overlaid on the right side, with a message bubble asking 'How can I start a free 14-day trial?' and another asking 'What pricing plans are available for my team?'. The Nutshell logo is at the bottom right.

**Nutshell**  EN

CRM ▾ ALL-IN-ONE PRODUCTS ▾ PRICING NUTSHELL AI ▾ SOLUTIONS & SERVICES ▾ RESOURCES ▾ CONTACT US ▾

LOG IN FREE 14-DAY TRIAL

Search 

Save Time. Close Deals.

## Get Nutshell.

The CRM that saves time, automates workflows and keeps deals moving forward.

- ✓ **Fast Setup:** Go live in days, not weeks.
- ✓ **Less Buswork:** Auto-logging and 1-click follow-ups.
- ✓ **More Connected:** Seamlessly integrate data

Try Nutshell free for 14 days

Continue with Google Continue with Microsoft

Full Name Work Email

START FREE TRIAL!

**Sales metrics**  
Metrics - Month-to-date

Category	Value	Change
New Leads	11	Up 12% from 12 conversions this time last month
Open leads	\$ 3.33m	Up 8% from \$3.03m
Sales	\$ 485 k	Up 10% from \$436k

**Inbound Sales Pipeline**  
Shared list - Created by Jeremy F. on July 18th, 2025

Lead	Total value	Avg value	Avg time open
Black Rock Construction...	\$8,824.9	\$368	27.3 days

Mike P. (217401) highlighted how it could give them a competitive advantage in th... on July 15, 2025

Comet LLC (217403) sent pricing proposal last week. Lead opened email 3x, clicked... on September 1, 2025

Food Inspect (217404) Geoff V. talked about boosting operational efficiency and cutting d... on August 13, 2025

Fretboard warehouse (217405) Liam O. You discussed its potential benefits for Liam, particularly in en... on August 20, 2025

Altamira LLC (217400) Lisa N. You proposed sending a comprehensive proposal ready for ... on September 20, 2025

Altamira LLC (217400) Lisa N. You proposed sending a comprehensive proposal ready for ... on September 20, 2025

How can I start a free 14-day trial?

What pricing plans are available for my team?

What features make Nutshell different from other CRMs?

Questions? Start a chat!

Chat Book

How can I start a free 14-day trial?

What pricing plans are available for my team?

What features make Nutshell different from other CRMs?

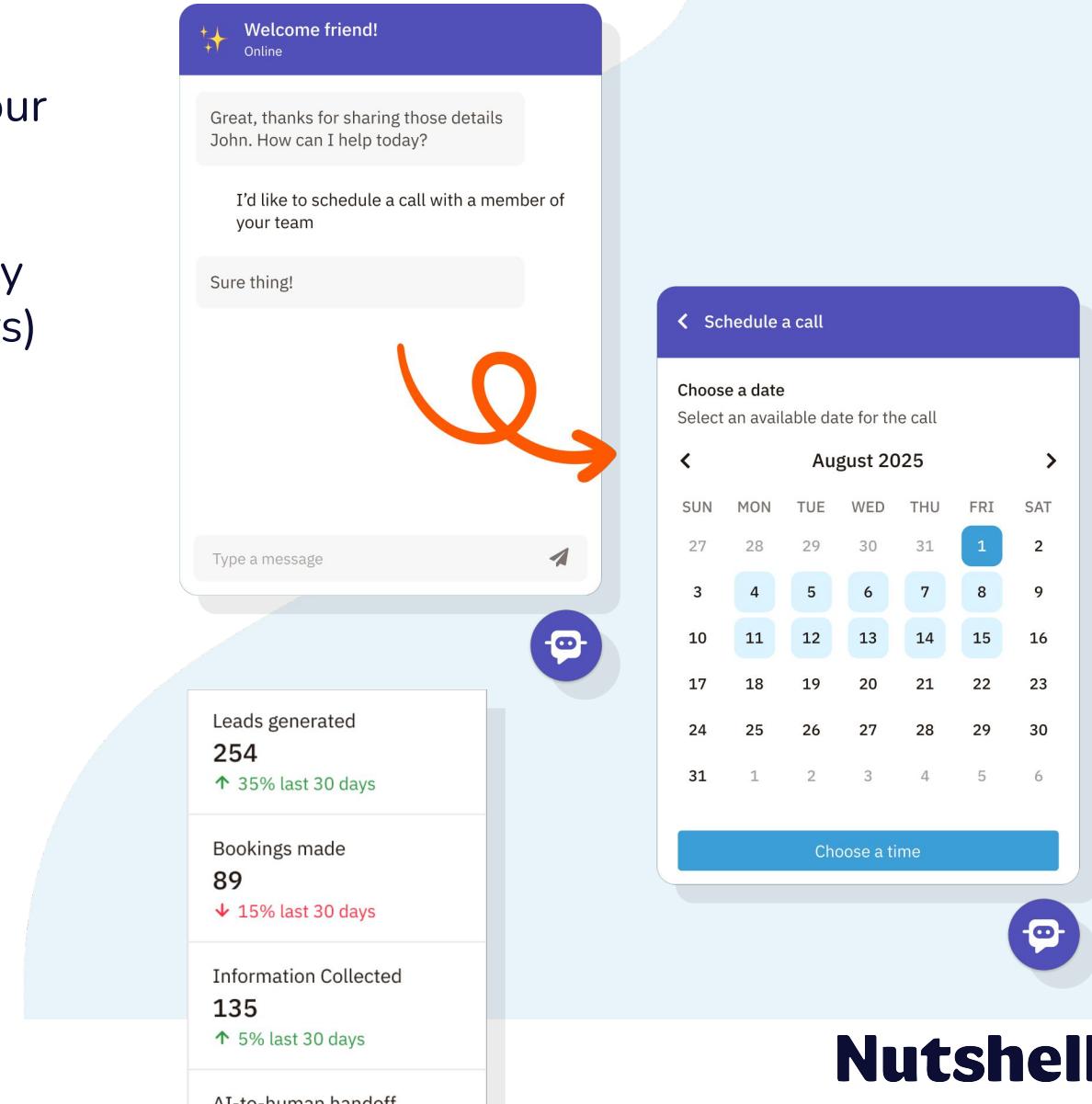
Questions? Start a chat!

Chat Book

# Customizing your Web Chat widget

Make your chat widget feel like an extension of your brand

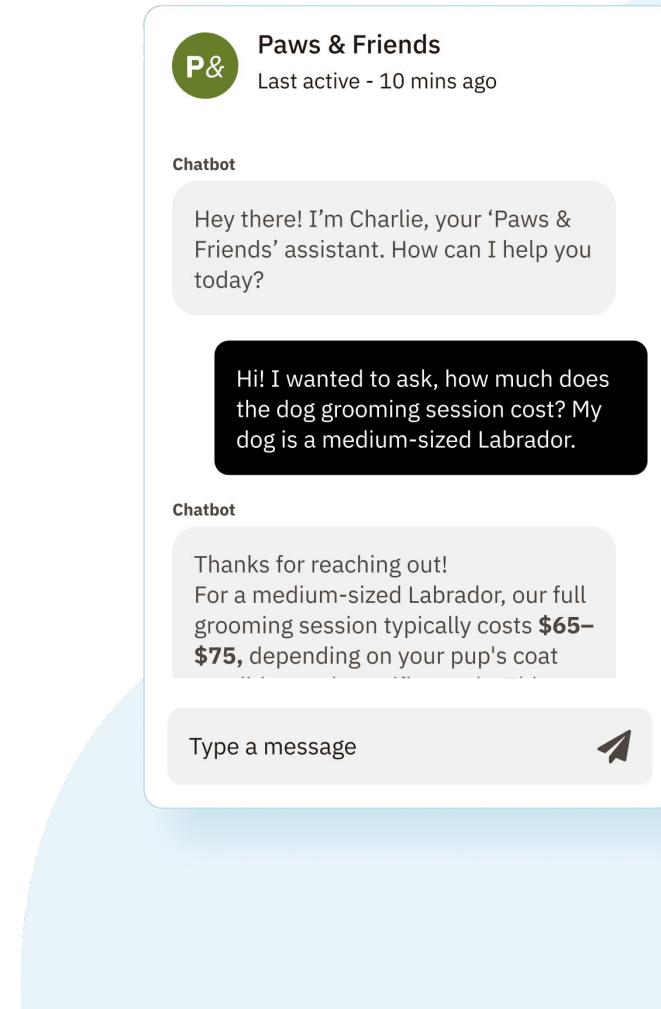
- **Choose** your brand colors, chat layout, friendly greeting, & behavior (when & where it appears)
- Add your **website URL** & preview the chat experience in real time
- Install the **Nutshell snippet** on your website and select when to make it live
- **Syncs perfectly** with Nutshell to
  - Create leads
  - Schedule bookings
  - Submit Forms



# Customizing your AI Chatbot

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

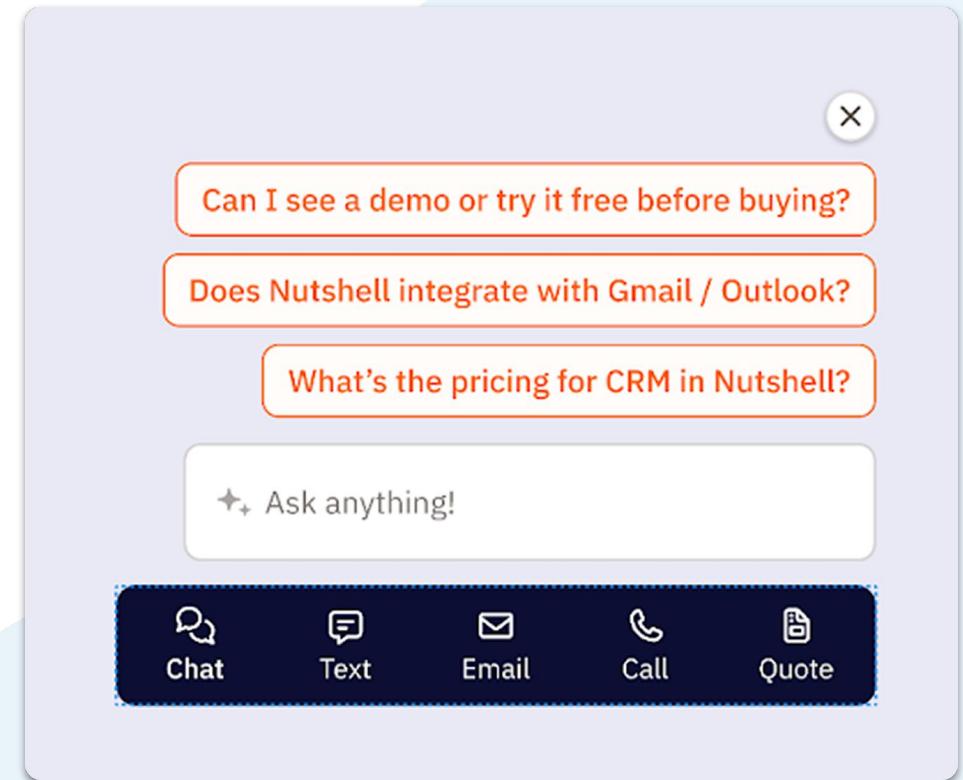
- Enter your website URL and/or upload PDFs to **train your bot** on your business
- Choose your chatbot **tone, response length, & topics to avoid**
- Set your **chatbot behavior rules** for handing off to a human when your team is online—round-robin or to a specific user.
- Customize your **form intake** (traditional form or conversational intake)
- **Preview and test** your chatbot and its functionality in Nutshell



The screenshot shows the Paws & Friends website. It features a header with the logo and navigation links (Home, Services, Pricing, Contact, About). Below the header is a hero image of a dog being groomed. The 'Our Services' section is visible, showing three categories: Small Dogs (for dogs under 20 lbs), Medium Dogs (for dogs between 20-50 lbs), and Large Dogs (for dogs over 50 lbs). Each category has a 'Book Now' button. At the bottom, there is a section for 'Other documents' with links to 'Paws&Friends Welcome', 'Dog Grooming Policies', 'Employee Handbook', and 'Terms and Conditions'.

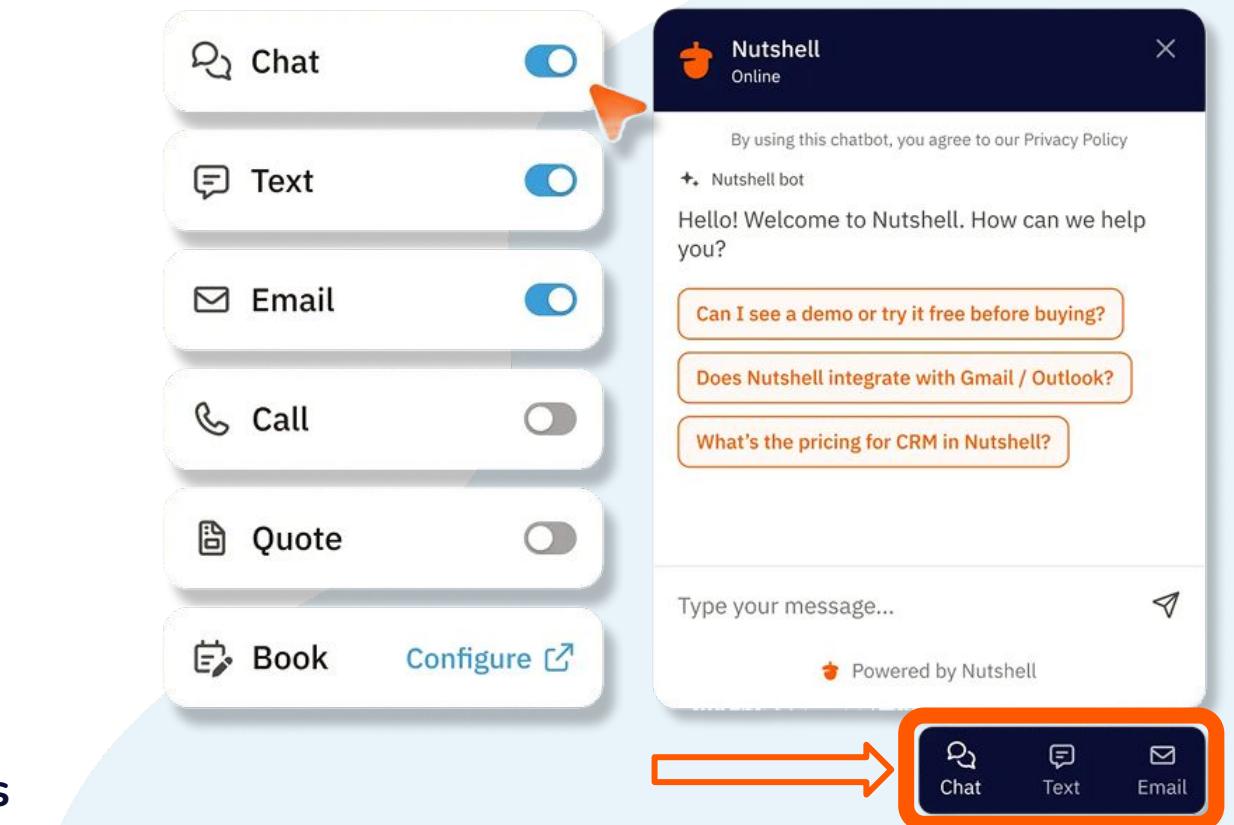
# What are Smart Nudges?

- **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



# 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

The screenshot shows the 'Engagement bar' configuration interface on the left and a 'PREVIEW' of the chatbot interface on the right.

**Engagement bar (Configuration):**

- Visible actions:** Chat, Text, Email, Quote, Call (all are turned on).
- Available actions:** Book (Configure button).
- Minimized view:** Describes a concise version of the Engagement bar before users initiate a conversation.
- Smart nudges:** Nutshell AI (On).
- Call to action:** Ask anything (8 / 25 characters).
- Show the bar when minimized:** Off.

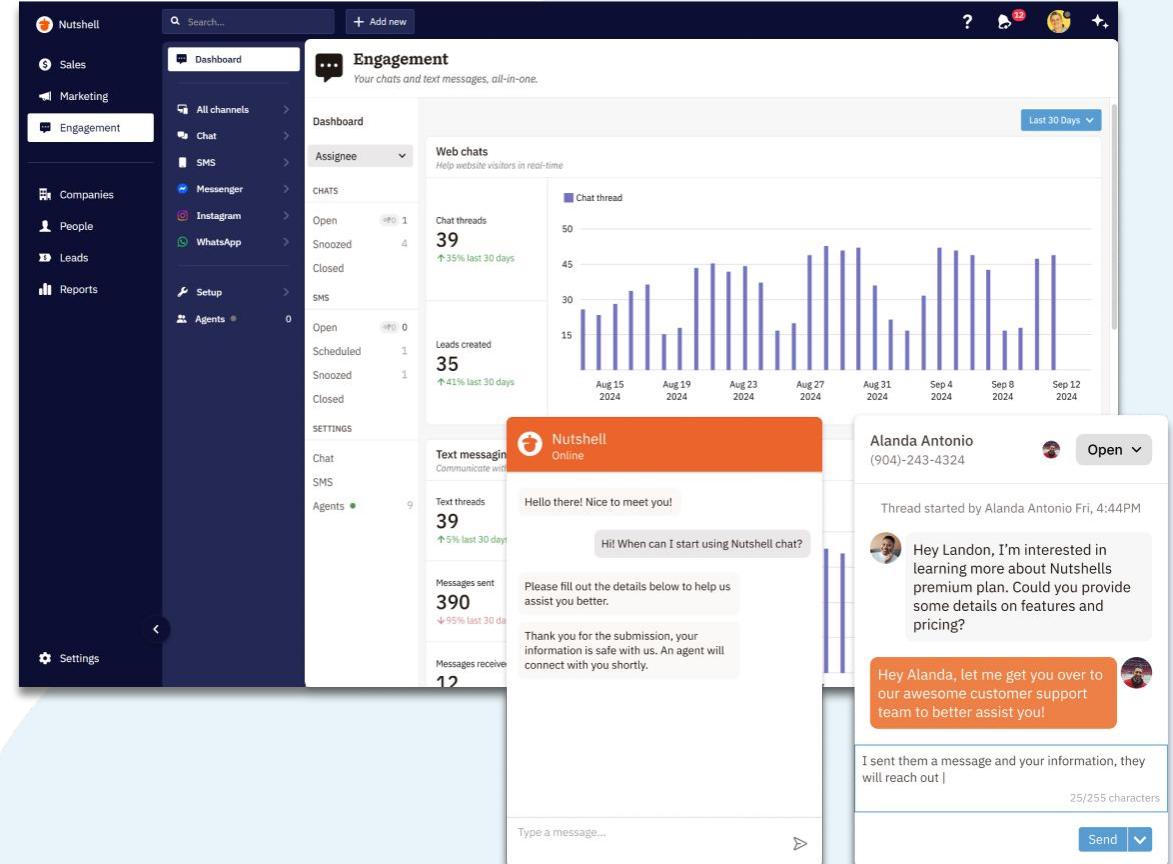
**PREVIEW (Chatbot Interface):**

- Header:** Nutshell Online, By using this chatbot, you agree to our Privacy Policy.
- Message:** Hello! Welcome to Nutshell. How can we help you?
- Buttons:** Can I see a demo or try it free before buying?, Does Nutshell integrate with Gmail / Outlook?, What's the pricing for CRM in Nutshell?.
- Input:** Type your message...
- Footer:** Powered by Nutshell, Chat, Text, Email, Quote, Book.

# 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



## 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.

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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

## 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 your 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](#).

# 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 Broadcasts 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!