



Nutshell's 2026 Roadmap

Discover some of Nutshell's top launches of 2025 and get a first look at new features coming in 2026



Andy Fowler
CEO of Nutshell



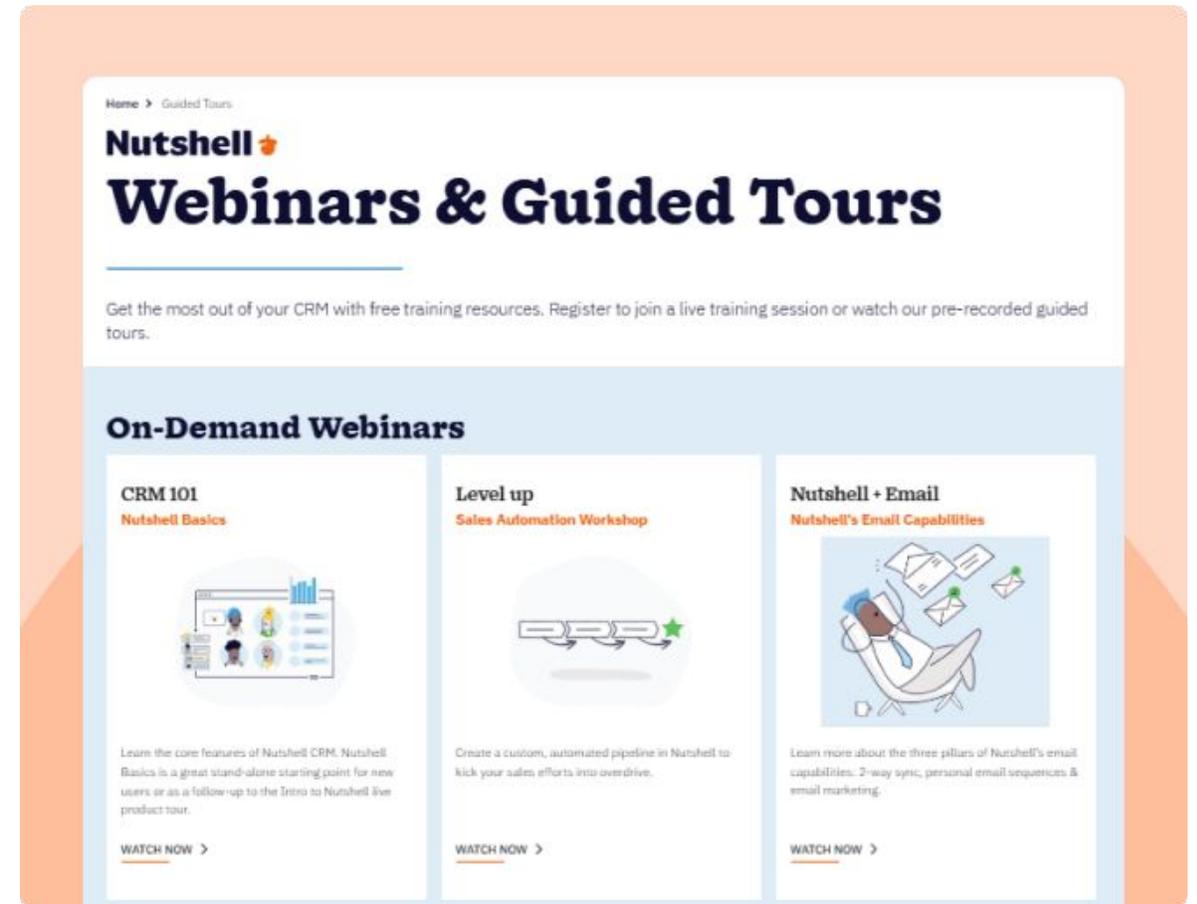
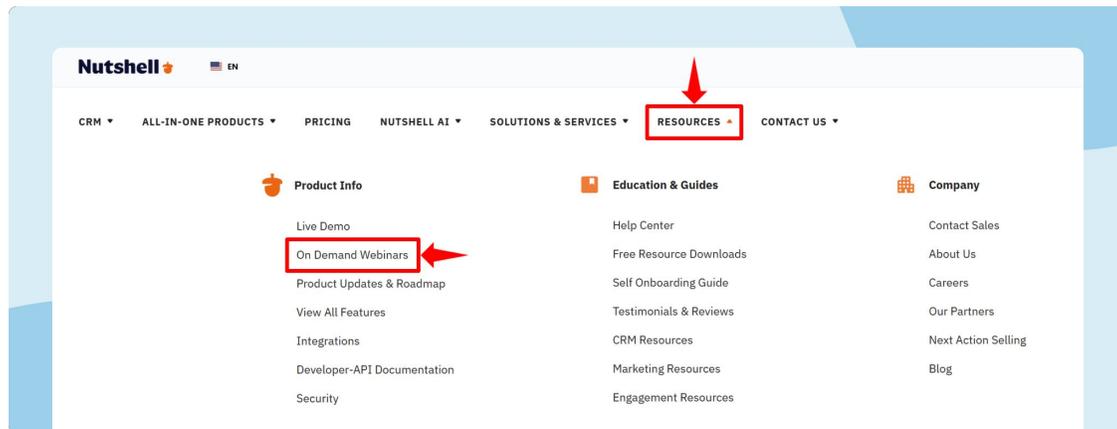
Will Gordon
Sr. Director of Marketing at Nutshell



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

- What Launched in 2025 ~15 minutes
- Where We Came From → Where We're Going ~5 minutes
- 2026 Roadmap ~10 minutes
- Q&A

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



Past Year Recap: 2025 Shipping News



2025 at-a-glance

- **Web chat** (February 2025)
- **Form submission tracking** (February 2025)
- **Nutshell Quotes** (March 2025)
- **Smart lists and audiences** (March 2025)
- **Email click link report** (March 2025)
- **Meta integrations** (April 2025)
- **AI Agents** (May 2025)
- **Scheduler managed meetings** (May 2025)
- **Product importer** (May 2025)
- **WhatsApp integration** (June 2025)
- **Email preference center** (June 2025)
- **Nutshell Invoices** (July 2025)
- **Google Meet AI integration** (July 2025)
- **Close lead follow-up automation** (August 2025)
- **AI Chatbot** (September 2025)
- **Microsoft Teams AI integration** (October 2025)
- **Task Report** (October 2025)
- **Product categories** (October 2025)
- **Lead page updates** (October 2025)
- **AI insights with MCP** (November 2025)
- **Calendar sync enhancements** (November 2025)
- **Draft pipelines** (December 2025)
- **One-click email campaign builder** (December 2025)
- **Engagement Report** (December 2025)



**Where we came from:
Nutshell is the
easy-to-use CRM.**



2026: Where Nutshell is going

Nutshell is the easy-to-use CRM *that saves you time.*



Devsgiving: A head-start into 2026

Our developers have been working hard to give back to our customers and start the new year strong!

- New Quotes & Invoices overview reports
- International analytics updates
- Smoother iOS experience when viewing saved lists on mobile
- Improvements to Android file uploads
- Public API access to Quotes & Invoices
- Visibility into task ownership and assignment
- More space for product descriptions
- Email duplication for quick content reuse
- Refreshed setting and form labels
- Longer product description limits
- Simultaneous scrolling while using *Log activity* or *Write note* tabs
- Warnings for admins sending broadcasts from restricted users
- Easier custom field organization
- New overview reports in Quotes & Invoices
- Add notifications on forms with broken Slack notifications
- Faster dashboard timeline loading

...and more!



**Coming this spring &
summer...**

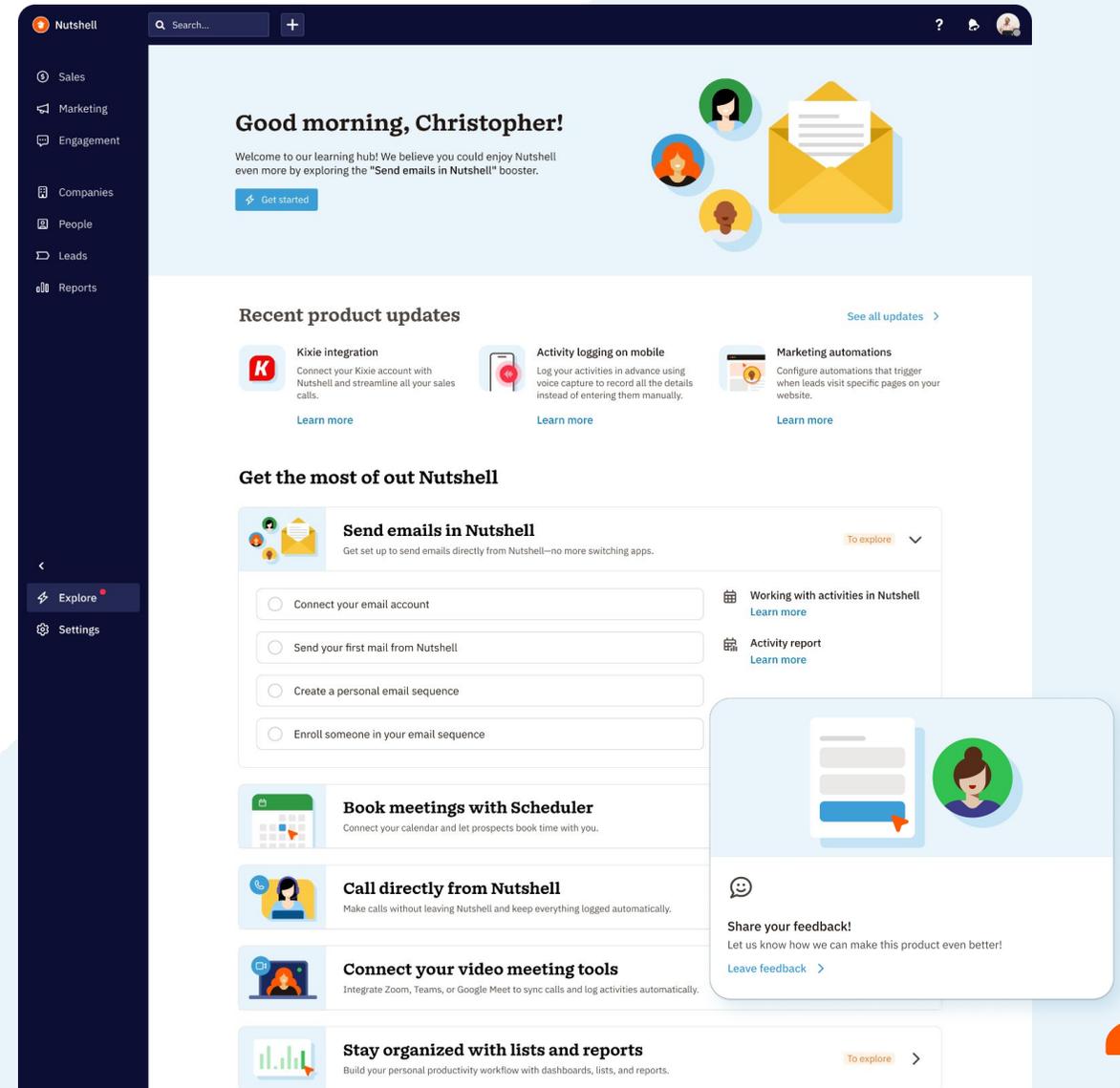


New Explore page



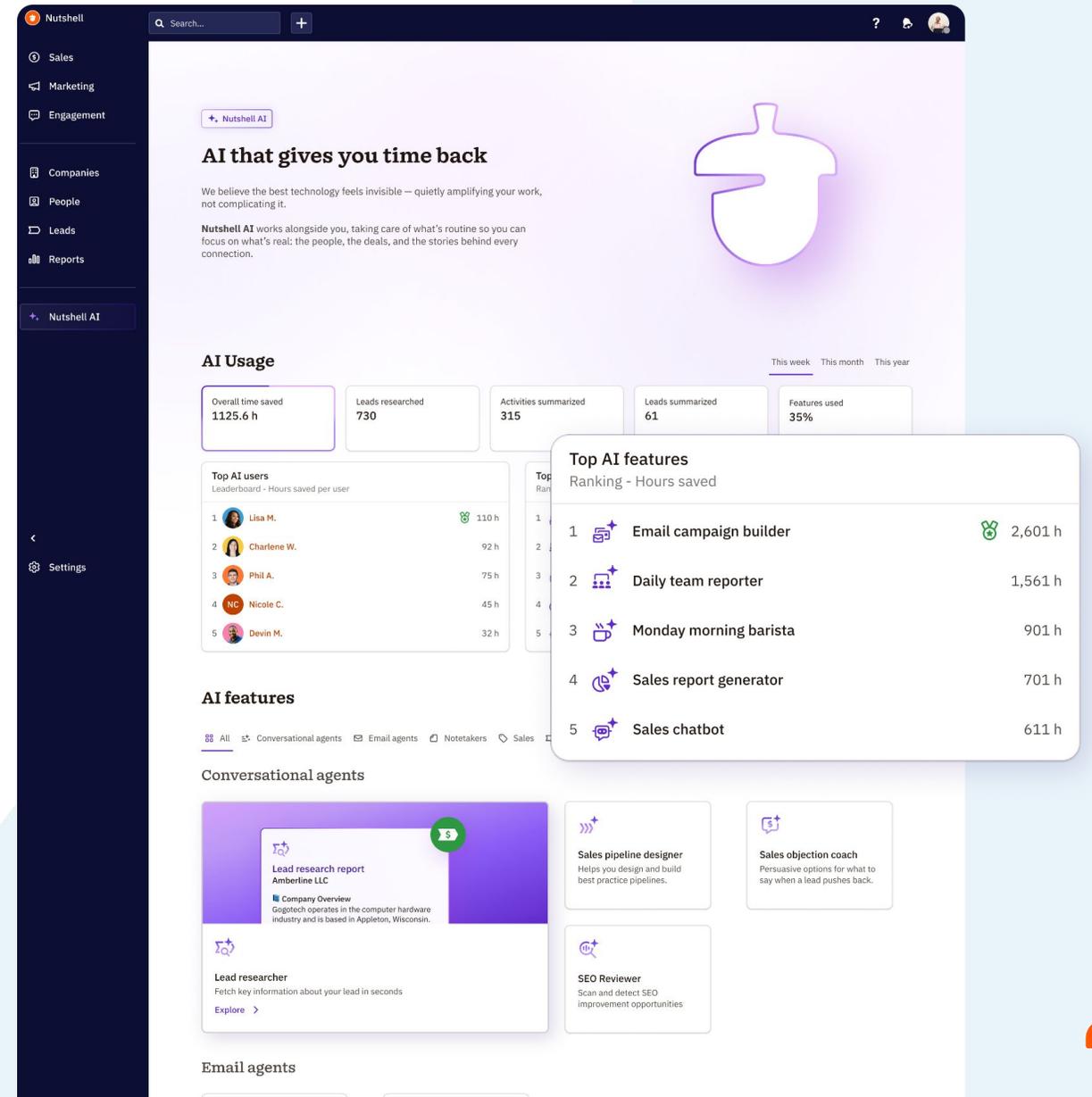
Your new home for getting the most out of Nutshell!

- See **recent product updates** as they roll out
- Discover **upcoming events** and **new parts of Nutshell** you didn't know existed
- **Leave reviews** and feedback for our team



Nutshell AI

- Time-saving AI
- Built into your Nutshell workflows
- **AI Assists**
- **AI Outcomes**



Nutshell AI

AI that gives you time back

We believe the best technology feels invisible – quietly amplifying your work, not complicating it.

Nutshell AI works alongside you, taking care of what's routine so you can focus on what's real: the people, the deals, and the stories behind every connection.

AI Usage

Overall time saved	Leads researched	Activities summarized	Leads summarized	Features used
1125.6 h	730	315	61	35%

Top AI users

Rank	User	Hours saved
1	Lisa M.	110 h
2	Charlene W.	92 h
3	Phil A.	75 h
4	Nicole C.	45 h
5	Devin M.	32 h

Top AI features

Rank	Feature	Hours saved
1	Email campaign builder	2,601 h
2	Daily team reporter	1,561 h
3	Monday morning barista	901 h
4	Sales report generator	701 h
5	Sales chatbot	611 h

AI features

- Conversational agents
- Email agents
- Notetakers
- Sales

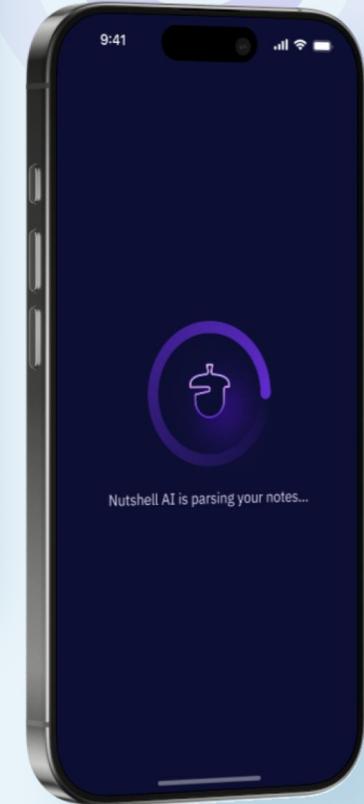
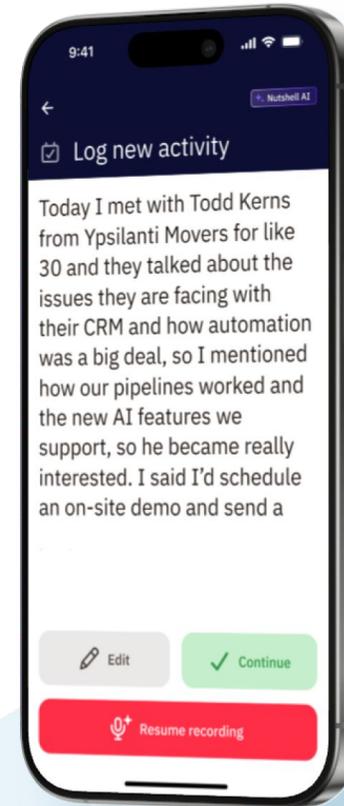
Conversational agents

- Lead research report** (Amberline LLC)
- Lead researcher**: Fetch key information about your lead in seconds.
- Sales pipeline designer**: Helps you design and build best practice pipelines.
- Sales objection coach**: Persuasive options for what to say when a lead pushes back.
- SEO Reviewer**: Scan and detect SEO improvement opportunities.

Email agents

Mobile AI activity logging

- **Log or schedule** activities on the go using your phone's microphone
- Voice capture, powered by Nutshell AI, turns your **voice notes into activity details**
- Available for iPhone and Android
- Later this year: automatically create tasks from detected items



 **Launched!**



Design refresh for Company and People

- The lead page redesign is coming to company and people pages
- Introduces **customization**
- **Drag-and-drop** ordering
- Quick logging
- Your **custom fields** front and center

The screenshot displays the Nutshell CRM interface for a company profile. The top navigation bar includes 'Sales', 'Marketing', 'Engagement', 'Companies', 'People', 'Leads', and 'Reports'. The main content area shows the profile for 'Nouveau Advertising LLC', created 4 years ago by Jared Knotts. The profile includes an 'About' section, a 'Last contacted' date of 'Last week', and various fields for 'Territory', 'Company type', and 'Industry'. A 'BUSINESS CARD' section is visible on the right, containing contact information such as '210 Matheson Blvd East, Mississauga, ON L4W 4V9, CA' and '+1 416-555-0198'. Below the business card, there are sections for 'RELATED PEOPLE' (listing Liam Carter, Sophie Turner, Ethan Brooks, Olivia Smith, and Noah Johnson) and 'YOUR TASKS' (listing tasks like 'Update spreadsheet' and 'Update Will about error seen on pricing table').

5 new phone integrations

- Connect your phone with a few clicks
- Automatically:
 - log calls
 - transcribe calls
 - summarize calls
 - get next step insights
 - add all info to timeline

 Phone call with Ash Oakwood  AI summary: Megan sent pricing proposal last week. Lead opened email 3x, clicked...	Ash Oakwood	Today 12:00 PM	 Log call
 Email exchange with Jamie Rivers  AI summary: Followed up on the project scope. Jamie expressed concerns about time...	Jamie Rivers	Yesterday 3:30 PM	 Log call
 Meeting with Taylor Brooks  AI summary: Discussed the design feedback on the latest prototype. Taylor appr...	Taylor Brooks	This week 2:00 PM	 Logged



AI follow-up tasks

- Works with every Nutshell Notetaker (phone, Zoom, etc)
- **Detects action items** from your phone calls and meetings
- Automatically adds them as reminders

The screenshot displays a meeting record for "Serra Heck & Jared Knotts - 30 min Demo" on February 18, 2025. The meeting overview notes that the discussion involved cleaning up duplicate contacts and configuring the team. A callout box highlights an AI-generated task: "Prepare demo slideshow for Thursday", due on February 20, 2025, assigned to Jared Knotts. Below this, a "Follow-up tasks (2)" section lists two items: "Schedule a follow-up meeting with Serra" and "Prepare demo slideshow for Thursday", both due on February 20, 2025. The interface also shows a "Logged" status at the bottom right, indicating the task was recorded on July 2, 2025, via calendar sync.



Lead researcher

- Lead outreach just got faster and smoother. Research and qualify leads instantly with **AI-powered insights**
- Nutshell AI gathers company context and talking points, then presents a **clear summary** and **measures the lead's fit** for your business

LEAD RESEARCH

Lead fit
Ideal

- B2B software consultancy (core ICP)
- Product SaaS buyer
- Mid-sized, services-led revenue model

Company Profile
Employee-owned custom software consultancy specializing in design-led digital products for startups and enterprise teams. Long-standing, Midwest-based, B2B-focused.

Industry Software Development Agency	Team Size Mid (25-50 employees)
Location Lansing, MI	

    Nutshell AI

Set up your lead researcher

To start researching your leads, share a few details to get company insights

Tell us about your business *

We provide expert software development services, helping businesses innovate and streamline their operations for maximum efficiency.

Briefly describe your company and the markets you serve

Who is your ideal buyer *

Sales Manager at a tech firm, seeking innovative software solutions to enhance lead qualification and streamline operations for maximum efficiency in client engagement.

The type of customer our AI should match with the right leads

Which company data is important for your workflow?

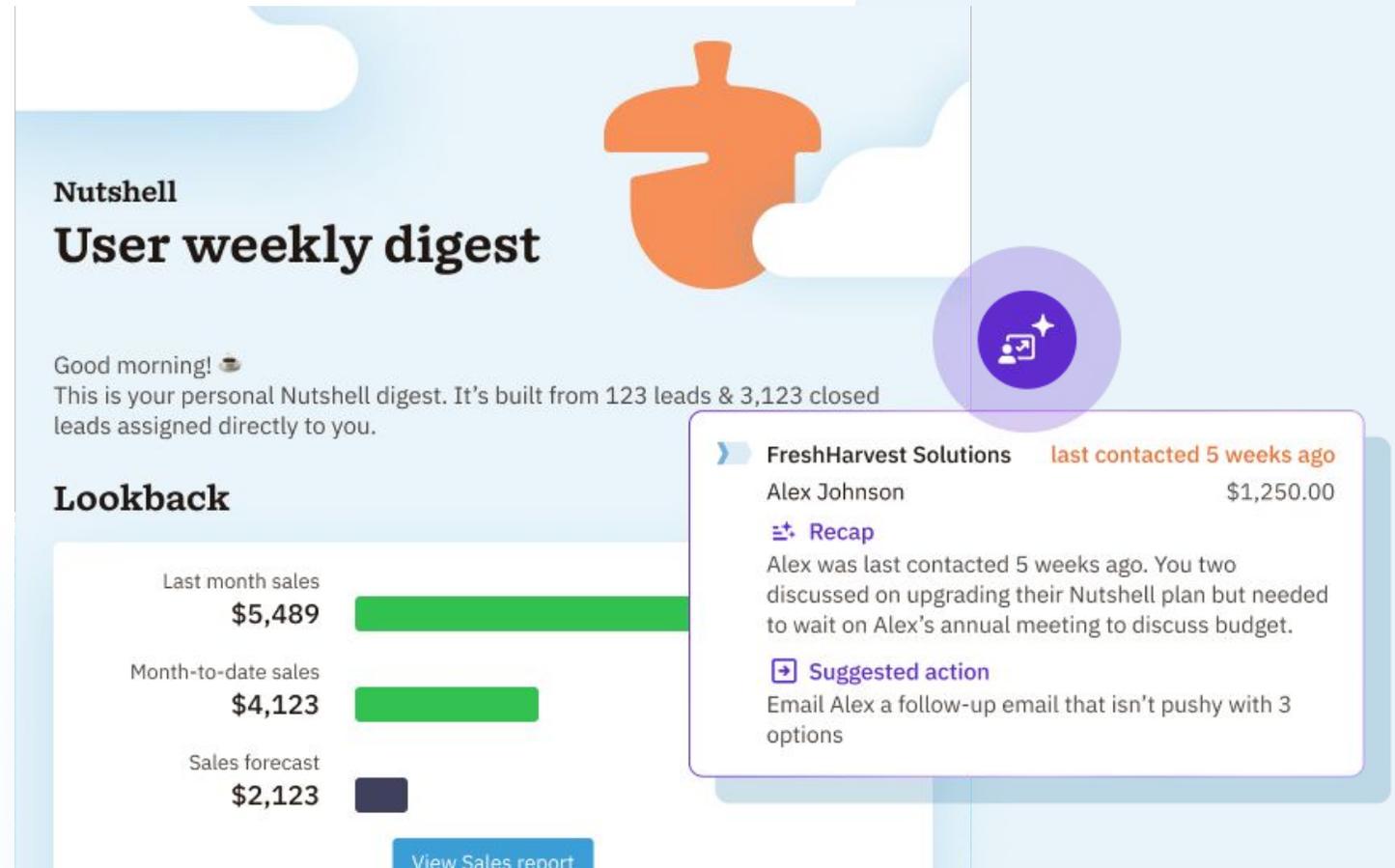
<input checked="" type="checkbox"/> Revenue	<input checked="" type="checkbox"/> Employee count
<input checked="" type="checkbox"/> Location	<input type="checkbox"/> Industry
<input type="checkbox"/> Business model	<input type="checkbox"/> Years in Business
<input type="checkbox"/> Company stage	<input type="checkbox"/> Average deal size

Close Save and research



Email digests

- Stay in sync with your pipeline through **insights delivered to your inbox**
- Sign up for daily or weekly email digests tailored to your role
 - **Admin digest:** Highest sales won, hottest new leads, sales and activity leaderboard, pipeline snapshot
 - **User digest:** Upcoming activities and tasks, hot leads, leads closing soon and going cold



Nutshell
User weekly digest

Good morning! ☺
This is your personal Nutshell digest. It's built from 123 leads & 3,123 closed leads assigned directly to you.

Lookback

Last month sales	\$5,489	<div style="width: 100%; height: 10px; background-color: #28a745;"></div>
Month-to-date sales	\$4,123	<div style="width: 75%; height: 10px; background-color: #28a745;"></div>
Sales forecast	\$2,123	<div style="width: 38%; height: 10px; background-color: #343a40;"></div>

[View Sales report](#)

FreshHarvest Solutions last contacted 5 weeks ago
Alex Johnson \$1,250.00

[Recap](#)
Alex was last contacted 5 weeks ago. You two discussed on upgrading their Nutshell plan but needed to wait on Alex's annual meeting to discuss budget.

[Suggested action](#)
Email Alex a follow-up email that isn't pushy with 3 options



Page visit marketing automations



- Automatically turn website interest into **timely follow-up**
- **Trigger automations** when contacts visit specific pages
- Page-based automations let you:
 - Send drip sequences
 - Get notifications
 - Add tags
 - Add/remove contacts to an audience
 - Create a new lead

The image shows a browser window displaying the URL <https://www.ironclad.com/savings>. The website content includes the 'IRONCLAD' logo, a 'SMALL EXCAVATORS' section with a 'BIG SAVINGS' headline, and a 'VIEW ELIGIBLE MODELS' button. Three automation overlays are shown:

- Notification:** A bell icon with the text 'Someone just visited your site! Just now'.
- 30 minutes after the start trigger:** An email preview with the subject 'Ready to break ground?' and a table of metrics.
- 5 days after the previous message:** An email preview with the subject 'Build with us' and a table of metrics.

Deliveries	Open rate	Click rate	Bounce rate
3	33%	0%	0%

Deliveries	Open rate	Click rate	Bounce rate
3	33%	0%	0%



AI email campaign generator enhancements

- Use AI to quickly create Broadcasts, Newsletter editions **(new)**, and Drip campaigns **(new)**
- Option to choose your pre-existing templates
- Significant design improvements

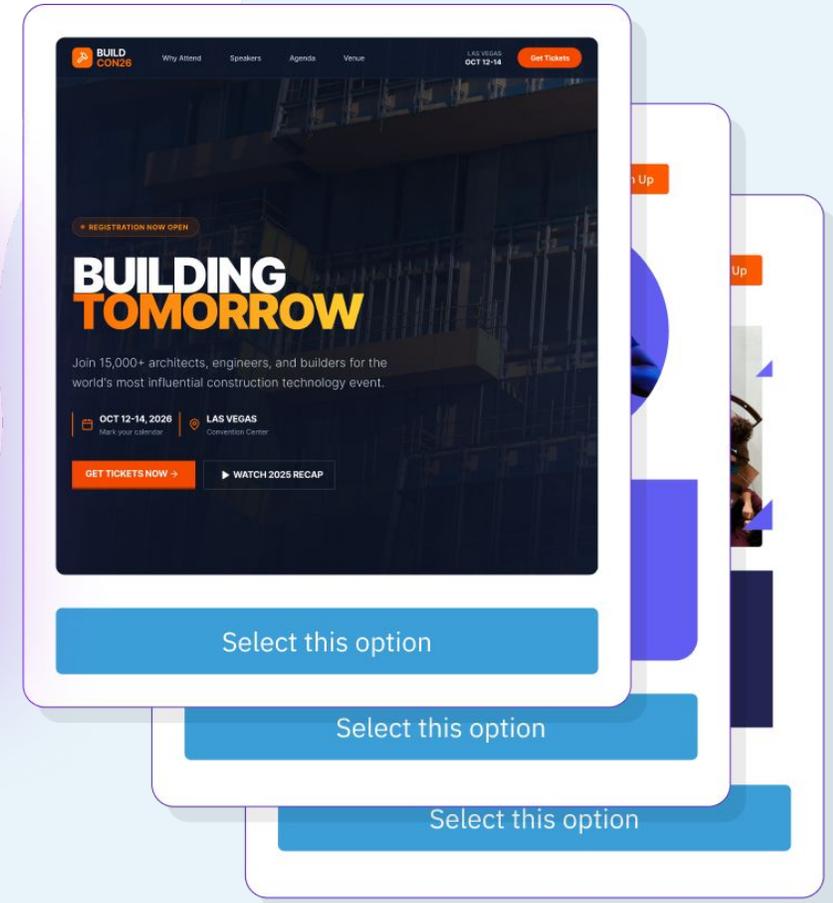
The image displays a user interface for an AI email campaign generator. At the top, it says "Email broadcast" and "Broadcasts > New broadcast". Below this are navigation options: "Editor", "Details", "A/B test", "Engagement", and "Drip Sequence". The main content area shows a real estate listing for a "1500ft, 3 bed House" in South Beach, Miami. A callout box with a purple border and a star icon contains the prompt: "Write an energetic email promoting BuildCon25. Highlight that it's the premier event for industry innovators and that readers can get 25% off with a coupon. End with a clear CTA." Below the prompt is a purple button labeled "Generate campaign". To the right of the main listing, three smaller preview cards are shown, each representing a different email design template for the same listing. The first template is white with a blue header, the second is blue with a white header, and the third is dark blue with a white header. Each template includes a "Book House Tour" button.

AI landing page generator

- Build landing pages that convert—with just a prompt
- Generate content, images and CTAs for a branded landing page using Nutshell AI

Create an energetic landing page promoting BuildCon25. Highlight that it's the premier event for industry innovators and explain the key value attendees will gain from participating. Include a strong headline, a brief section explaining why the event matters, and a clear call to action to register

Create landing page



Multi-page and progressive forms

- Make form submissions easier than ever for visitors interested in your offerings
- Collect customer & lead info through dynamic, multi-step forms instead of one long form.

Book and appointment

1 — 2 — 3 — 4
General Services Guest Guest

Full name *

Email address *

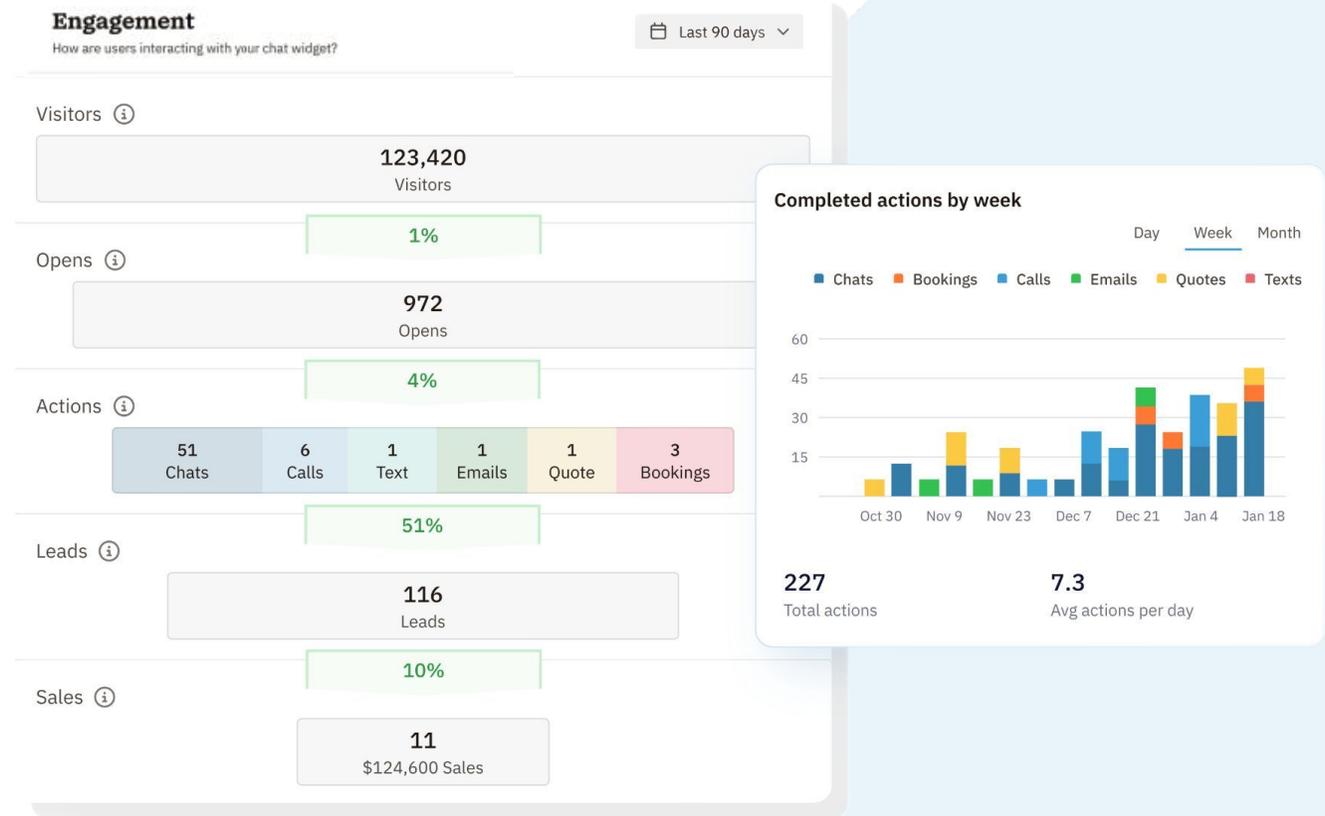
Phone number *

Previous Next



Engagement report

- Understand how your website visitors are engaging with your web chat.



AI Chatbot enhancements

- Chatbot report: get insights on the questions your bot is handling
- Support for more training content

The image displays a dashboard for a chatbot, with a 'Chatbot report' window and a 'Chatbot feedback' window overlaid on top.

Chatbot report
How are users interacting with your chatbot?

Search... +

LEADS

- Sales
- Losses
- New leads
- Attribution
- Forecast
- Custom

EFFORT

- Activity
- Email
- Tasks

OTHER

- Chatbot**
- Engagement
- Snapshots
- Funnel

Launch wallboard

Chatbot summary for August 15 - September 15

Performance
Nutshell AI successfully handled pricing overviews, trial signups, and basic feature questions, but struggled with plan-specific features, integration compatibility, and multi-turn follow-ups

Activity
Chatbot activity peaked on Tuesdays through Thursdays between 10:00 AM and 2:00 PM

Impact
The chatbot created 312 new leads during the selected period
Proactive nudges drove 41% of conversation starts.

Total visitors 12,305

Chatbot conversations 942

% asking for a human 53%

% chats filled out a form 78%

Top nudges
Most selected nudge and their source page

Rank	Nudge	Source	Threads
1	Can I see a demo or try it free before buying?	/homepage, +2	58 threads
2	What features are in the Nutshell Pro?	/homepage, +1	24 threads
3	What's the pricing for CRM in Nutshell?	/homepage, +1	20 threads
4	What is Engagement?	/pricing	17 threads
5	Connect with a sales representative	/pricing	13 threads

Chatbot feedback
Ratio of conversations Nutshell AI rated as good, bad or neutral

60% Good threads, 10% Bad threads, 30% Neutral threads

Most common topics
Top 5 topics by conversation volume in the selected time period

Rank	Topic	Threads
1	Pricing & plan	158 threads
2	Feature discovery & comparison	65 threads

Top frustration topics
Top 5 topics where users expressed frustration and requested human help

Rank	Topic	Threads
1	"Connect with a human" not visible	54 threads
2	Login / Password reset failures	52 threads

Chatbot feedback
View recent threads rated positive by AI

Sarah Smith asked if Nutshell CRM offers a free trial. Last seen 3 hours ago.

Sarah Smith: Sarah asked if Nutshell CRM offers a free trial

Emily Rivera: Discussed integration options with existing software. 7 threads

James Patel: Explored pricing tiers and discounts available. 6 threads

Samantha Lee: Requested additional features for next quarter's roadmap. 5 threads

Feedback messages:
Sarah Smith: Is there a free trial available for CRM?
Nutshell AI: Yes, we offer a free 14-day trial of Nutshell so you can explore all the features and see how it fits your needs. You can start your trial here: [Try Nutshell For Free.](#)
Sarah Smith: Thank you

Shared email inbox

- For teams that collect leads via an email inbox
- Sync your shared inbox to Nutshell
- Triage and create leads, so it's clear who owns each thread

`sales@yourcompany.com`



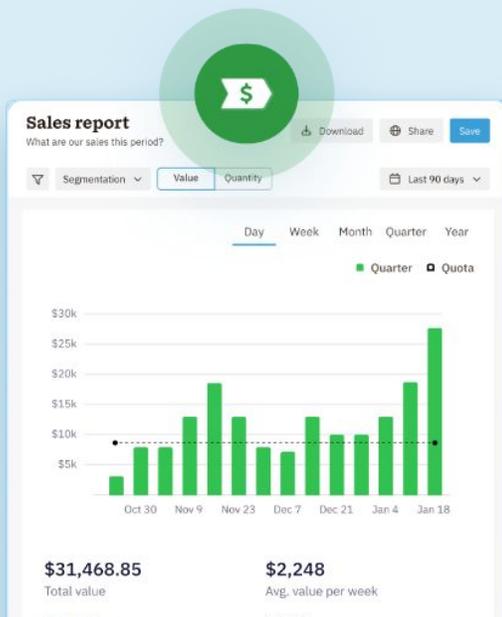
The screenshot displays the Nutshell CRM interface. On the left is a dark sidebar with navigation options: Sales, Marketing, Engagement, Companies, People, Leads, Reports, and Nutshell AI. The main area is titled 'Email' and shows a list of email threads. The first thread is from Chad, dated Jan 16th, 2:49 pm, with the subject 'No problem - I'll connect you with an agent shortly.' The second thread is from Parker Blake, dated Jan 16th, 9:39 am, with the same subject. The third thread is from Ann Brown, dated Dec 18th, 9:56 am, with the subject 'Microsoft 365 does not include a built-in program specifically for converting PDFs to JPGs; you can use free online converters or dedicated software like Adobe Acrobat or...'. The fourth thread is from Pedro Pazmino, dated Dec 17th, 2:00 pm, with the subject 'Prefer not to share that right now'. The fifth thread is from Brandon Linville, dated Nov 14th, 11:09 am, with the subject 'Hi'. The sixth thread is from Jared Knotts, dated Nov 12th, 12:03 pm, with the subject 'Hi'. On the right side of the interface, a chat thread is visible, showing a message from Chad: 'What does Nutshell cost?'. A response from the system states: 'We offer a range of plans starting from \$13 per user per month for our basic options, with more advanced features available on higher-tier plans. You can see all the pricing details and compare plans here: [Compare All Plans](#).' Another message from the system says: 'You can use the "Connect with a human" button below to speak with a live agent.' A third message from the system says: 'No problem - I'll connect you with an agent shortly.' At the bottom of the chat thread, it says 'Assigned to Blake Brdak, Friday, 2:49 PM'. A final message at the bottom of the chat thread says: 'Oops! It seems you're not assigned to this message thread, which means you're unable to send messages here.'

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.



High-touch sales pipeline
Shared list · Created by Jeremy F. on July 18th, 2025

Import Email Share

Assignee Open Trials: High-Touch Sales Pipeline Only hot

Prospecting 3	Qualify 20	Pitch 6	Close 8	Won 8
Basetext \$27.6k Emma Thomas Basetext	Newing Industries \$34.5k Ann New Newing Industries 6 days	Welch & Co. \$51k Megan Wells Welch & Co. AI summary: Megan sent pricing proposal last week. Lead opened email 3x, clicked pricing link. Demo scheduled...	Norris Consulting \$27.6k Allison Norris Norris Consulting	
VentureSilicon \$31.5k Jerry McMillan VentureSilicon	Accent Corp \$42k Virginia Sprague Accent Corp	Riverton Media \$75k Jonathan Rivers Riverton Media	Maxwell Corp \$31.5k Phil Maxwell Maxwell Corp	
Tristone \$34.5k Michael Swanson Tristone	Telemath Inc. \$51k Christopher Wells Telemath Inc.	Green Valley Farms \$30k Sara Greenfield Green Valley Farms	Greene Enterprises \$85.9k Laura Greene Greene Enterprises	
	Aylwin & Co. \$27k Irene Phelps Aylwin & Co.	Tech Innovations Inc. \$90k Michael Chang Tech Innovations Inc.	Benson Solutions \$92.4k Mark Benson Benson Solutions	
		Hudson Tech \$115.2k		

Email broadcast
Broadcasts > New broadcast

Send test Send

Editor Details A/B test Engagement Drip Sequence

The Drip Society

Barista Training

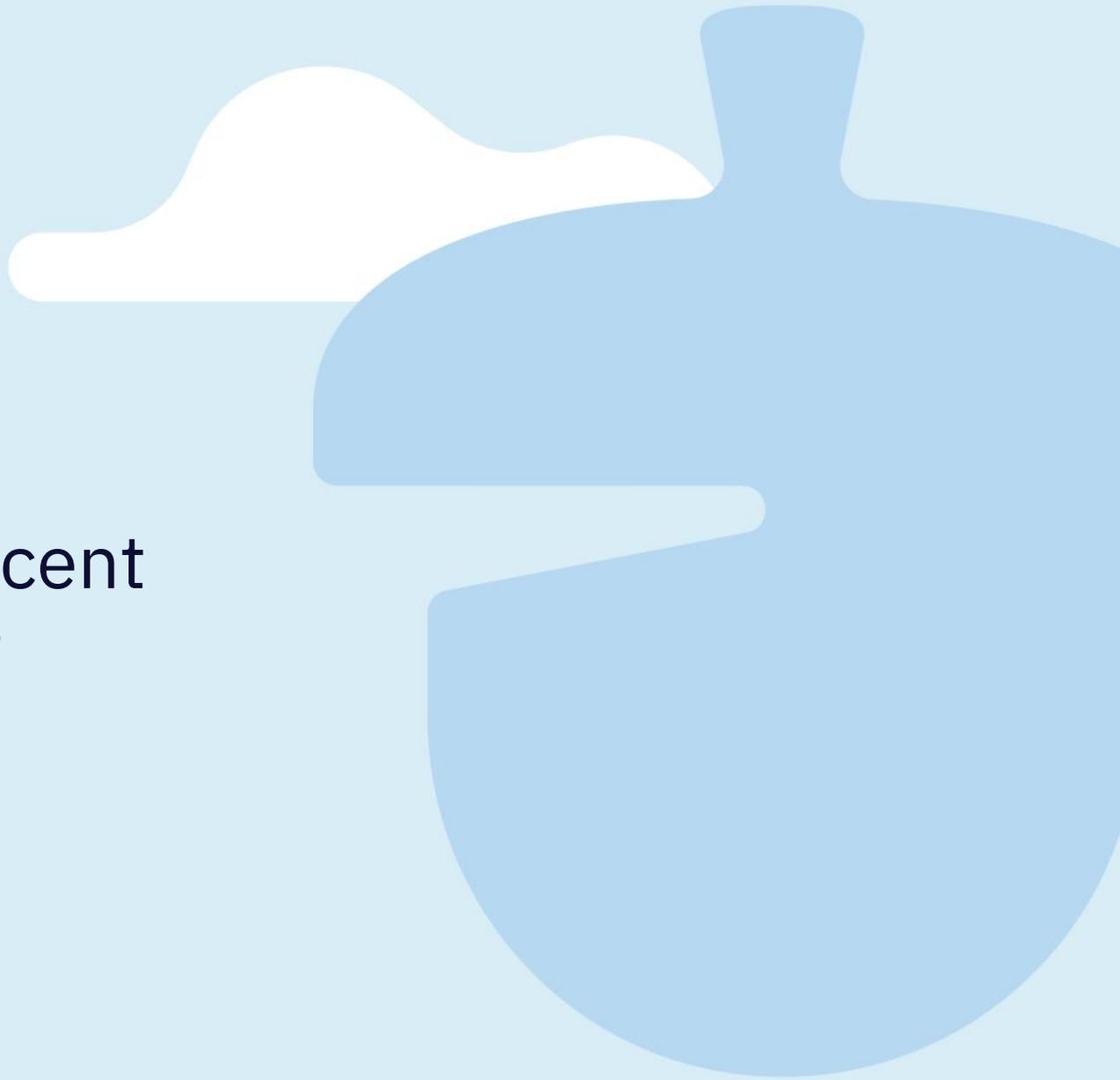
Join us for an exciting barista training designed for beginners! This hands-on workshop will introduce you to the art of coffee making.

CONTENT ROWS SETTINGS

TITLE PARAGRAPH LIST IMAGE BUTTON DIVIDER SPACERS SOCIAL HTML VIDEO ICONS MENU

Q&A

Got any questions about our recent or upcoming feature launches?



Nutshell 🌰

Thanks for joining us today!

nutshell.com

