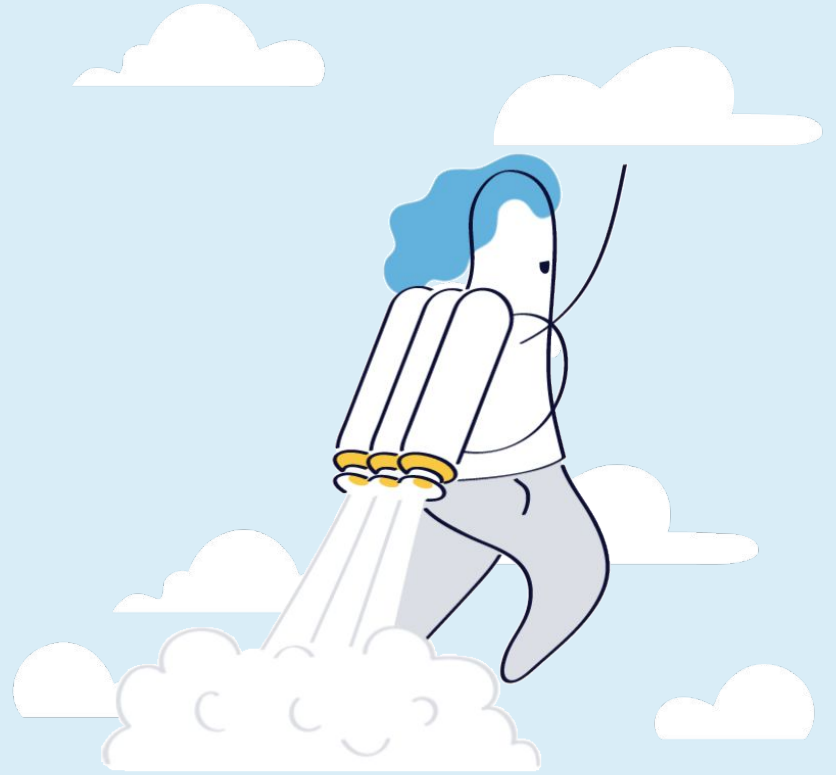


Nutshell 🍊

Making the case for Nutshell



What is Nutshell anyway?

Nutshell is a CRM that helps B2B, B2C, and D2C organizations work together to win more deals.

Nutshell uses automation, AI, sensible design & powerful add-ons to help organizations take the next action to close more deals and retain more customers.



Intro to Nutshell

with CEO Andy Fowler

Nutshell at a glance

- Launched in 2010
- Based in Ann Arbor, Michigan
- Named a “Leader” in G2’s Grid® Report for CRM every quarter since 2020
- Currently serving **20,000+** users across **5,000+** companies



The Best Next Action Selling CRM on the Market



HOW WE'RE DIFFERENT

5 things Nutshell offers
that other CRMs don't

1

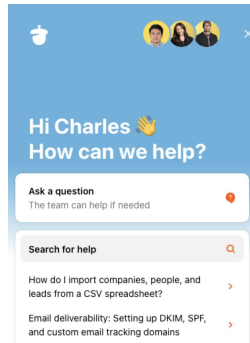
Fast, free implementation



- Simple enough to set up without an IT department and manage without a paid admin.
- No additional costs for onboarding and training.
- Free onboarding data importing assistance!
- Get up-and-running in days, not weeks.



World-class live support



- Our Global Support team provides technical assistance and strategic support via email or live chat, from the moment you start your trial.
- Support is available for customers on all plans.
- Live support is free, by the way. We want to *help* you.
- Scheduled phone support available for our Enterprise tier customers.

2



3

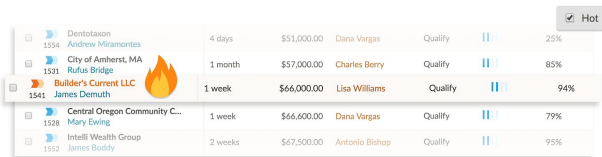
No contracts, no surprises



- Pay month to month, and leave at any time. Or, get a discounted price by paying for a year upfront.
- Either way, we won't lock you down with multi-year contracts or hold your data hostage. (Yes, some of our competitors actually do that.)
- Unlimited data storage. Unlimited CRM contacts.
- Pricing for add-ons is **per company** so it's easy to understand and **not** impacted by the number of users you need.



Nutshell helps you close the deal



							<input checked="" type="checkbox"/> Hot
<input type="checkbox"/>	Dentotaxon 1554 Andrew Miramontes	4 days	\$51,000.00	Dana Vargas	Qualify		25%
<input type="checkbox"/>	City of Amherst, MA 1531 Rufus Bridge	1 month	\$57,000.00	Charles Berry	Qualify		85%
<input type="checkbox"/>	Builder's Current LLC 1541 James Demuth	1 week	\$46,000.00	Lisa Williams	Qualify		94%
<input type="checkbox"/>	Central Oregon Community C... 1528 Mary Exling	1 week	\$46,600.00	Dana Vargas	Qualify		79%
<input type="checkbox"/>	Intelli Wealth Group 1552 James Boddy	2 weeks	\$47,500.00	Antonio Bishop	Qualify		95%

- Sales process automations and reminders keep every deal moving forward.
- Personal email sequences remember the follow-up for you.
- “Hot leads” keep major opportunities front-and-center.
- Enhance your CRM with powerful add-ons to gain insight into your website visitors, increase efficiency, and more.

4



5

Fill your CRM with high-quality leads

- Nutshell and WebFX have joined forces to offer best-in-class digital marketing services.
- Partner with WebFX to put their digital marketing experts, cutting edge technology, and proven track record to work for your company.

WebFX

REVENUE DRIVEN FOR OUR CLIENTS
\$3,021,182,299

550+
Experts on staff

5 billion
Data points powering MarketingCloudFX



Meta
Business Partner

Microsoft
MICROSOFT ADVERTISING
Partner



INSIDE NUTSHELL

Simple enough for any user,
sophisticated enough for any business

Sales automation

From automated lead assignments and task reminders to email sequences triggered by pipeline stage, Nutshell puts **time-wasting tasks on autopilot** so sales teams can focus on building relationships.

*For a deep dive on Nutshell's sales automation capabilities, **watch this!***

The screenshot displays a CRM pipeline interface for 'Demo Pipeline for New Customers'. The pipeline is divided into five stages: Qualify (25%), Schedule 1:1 Demo (50%), Complete 1:1 Demo (75%), and Close (90%). A '+ Add new stage' button is visible on the right. The interface includes several functional areas:

- User assignments:** A dropdown menu shows 'Theresa Nash' as the assignee.
- Due date:** A dropdown menu shows '1 business day after the stage is entered'.
- Description:** A text area with the placeholder 'Before closing, make sure to revisit any specific questions that came up in the demo.'
- Tasks:** A list of tasks for the 'Schedule 1:1 Demo' stage, including 'Welcome Call', 'Second Call Attempt', 'Final Call Attempt', 'Send Reminder Email', 'Prepares for Demo', 'Demo Recap', 'Email Check-in', and 'Close Call'. A 'Send Reminder Email' task is highlighted with a mouse cursor.
- Drip sequences:** A section for 'New customer welcome series' with 7 messages.
- Automated emails:** A section for 'Start sending: Let's Talk - Sales Welc...' with 11 no-reply emails.
- Stack:** A section for 'Post to Slack when a lead is created or enters a new stage'.
- Bottom right:** A social media widget for '#wins'.



Forms

Whether you're collecting sales requests, providing downloadable content, or just gathering customer information, Nutshell Forms help you connect with your buyers.

Forms can be customized to create new people, companies, or leads, add tags, and drop contacts into an email marketing audience—without any manual effort from your team.



Forms

Add contacts to Nutshell directly from your website

A screenshot of the Nutshell Forms builder interface. The main area shows a form titled "Connect with our sales team!" with fields for "Name *", "Email address *", and a text area "Tell us what you're interested in". A "SUBMIT" button is at the bottom. On the left, an "Add a block" panel shows "CONTENT BLOCKS" (Hh Header, hh Subheader, Tt Text block) and "INPUT BLOCKS" (Person name, Email, Phone, Company name, Note). On the right, a "Form design > Field design" panel allows customization of text color, background color, font size, border radius, font weight, and button position. Below the form, a "NEXT STEPS" panel offers actions like "Create a person" and "Create a lead".

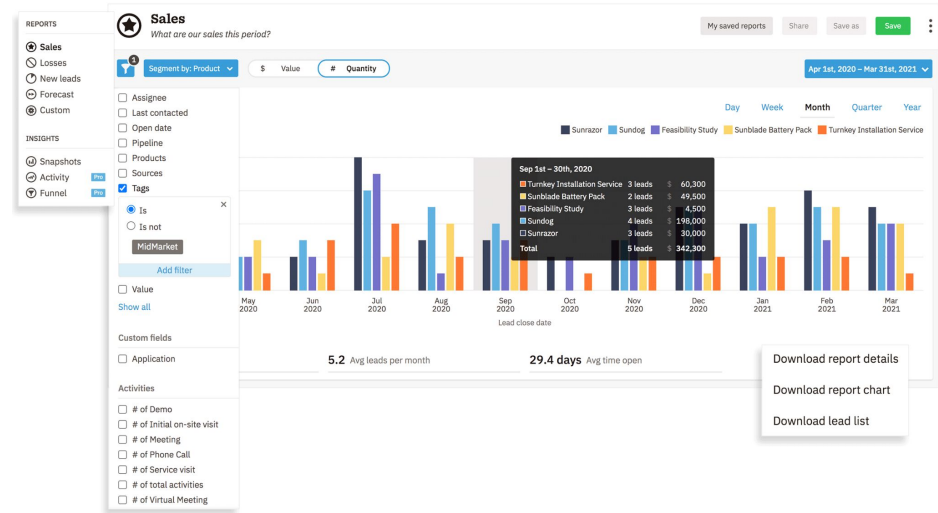


Reporting

Our simple, customizable reports show sales managers what's working and what needs to be improved—right out of the box.



- Sales report
- New leads report
- Losses report
- Attribution report
- Forecast report
- Snapshots report
- Activity report
- Funnel report
- Custom reports



Team collaboration

Keep important customer details from getting lost in your inbox!

@-mentioning and mobile alerts help teammates **stay in the loop** on everything that needs their attention.

The screenshot displays a CRM dashboard for a user named Charles Berry. The interface is divided into several sections:

- Dashboard Header:** Includes a search bar and navigation options for ArrowGrid, Add new, and Search.
- Sales metrics (Month-to-date):**
 - New leads:** 17 (Up 13% from 15 this time last month)
 - Open leads:** \$3.26 m (Down 13% from \$3.77m this time last month)
 - Sales:** \$2.9 m (Up 260% from \$806k this time last month)
- Sales and activity quotas:**
 - Sales this month:** Charles Berry, \$2.5m / \$416.7k
 - Phone Call:** Charles Berry, 0 / 2
- Activities:** A calendar view for December 2023 showing activities for Charles Berry. The calendar highlights the 15th of December with a blue square. Activities listed include:
 - 9:00am: On-site visit at DigiSilicon to show Sundog to Robert DigiSilicon
 - 9:00am: On-site visit at Trade Silicon to show Sunrazor to Carol Trade Silicon
 - 10:00am: Phone call with Patricia Betatechnology
- Book meetings with Scheduler:** A section for inviting people to book time based on availability.



Pipeline management

Nutshell is **the most flexible CRM** for sales reps, offering four ways to view and work your leads.

- **List view** for a spreadsheet layout
- **Map view** for those on the go
- **Board view** for an overview of your pipelines
- **Chart view** for your reporting overview



Map view: How we're different (and better!)

Leads
Business deals with your companies and people

My saved lists | Share | Save as | Save

Assignee | Open | Only hot | Demo Pipeline for New Customers | Search leads... | 36 leads found | Remove filters | Board | List | Map | Chart

\$3,015,000 Total value | **\$83.8k** Avg value | **214.6 days** Avg time open

View as list | Find me | See the world

Lead name	Age	Value	Assignee	Stage	Confiden...	Close date	Sources
<input checked="" type="checkbox"/> Circuit Design & Installation Racha Snider	7 months	\$27,600.00	Charles Berry	Schedule 1...	50%	May 20, 2021	
<input checked="" type="checkbox"/> Peterborough, New Hampshire Eileen Sweeney	7 months	\$31,500.00	Sandra Hendix	Schedule 1...	50%	May 19, 2021	
<input checked="" type="checkbox"/> Jay Jacobs Solar Cells Tabitha Williams	8 months	\$34,500.00	Dana Vargas	Schedule 1...	50%	April 15, 2021	
<input checked="" type="checkbox"/> Zupky Investments Jacqueline Danforth	6 months	\$34,500.00	Antonio Bishop	Complete 1...	75%	Yesterday	
<input checked="" type="checkbox"/> GS Beam Carpet Design & In... Sidney Evans	7 months	\$42,000.00	Dana Vargas	Complete 1...	75%	May 17, 2021	
<input checked="" type="checkbox"/> Buck Alley Silicon Frank Hawkins	7 months	\$42,000.00	Charles Berry	Qualify	25%	May 20, 2021	
<input checked="" type="checkbox"/> Southern Illinois Solar Pauline Perry	9 months	\$45,600.00	Charles Berry	Schedule 1...	50%	June 22, 2021	
<input checked="" type="checkbox"/> Schneider Microgrid Teresa Mealey	7 months	\$48,000.00	Antonio Bishop	Qualify	25%	May 3, 2021	Cold Call
<input checked="" type="checkbox"/> Rialto United School District L... Shayla Hochstetler	7 months	\$51,000.00	Dana Vargas	Complete 1...	75%	May 3, 2021	
<input checked="" type="checkbox"/> Dentolaxon Andrew Miramontes	6 months	\$51,000.00	Dana Vargas	Close	90%	May 27, 2021	
<input checked="" type="checkbox"/> City of Amherst, MA Rufus Bridge	7 months	\$57,000.00	Charles Berry	Schedule 1...	50%	April 26, 2021	Word of mouth
<input checked="" type="checkbox"/> Builder's Current LLC Tamara Pennington	6 months	\$66,000.00	Lisa Williams	Schedule 1...	50%	May 23, 2021	

Download ready | 36 selected | Export | Edit | Merge | Send to MailChimp | Send to Constant Contact | Add to Audience | Email | Delete

Many CRMs can display information on a map, but Nutshell lets sales teams take action. Filter contacts by location, and turn them into a lead list with one click.



Contact management

Nutshell is the **source of truth** for all customer data, making every contact and conversation accessible for the entire team.

When adding contacts, Nutshell helps prevent duplicate records and makes it easy to update current records.

Our AI capabilities allow you to summarize a Contact's timeline into a bite-sized summary for easy review.

Newing Industries Inc.

OPENED BY: Theresa Nash | OPENED ON: May 7th, 2020 | EXPECTED TO CLOSE: October 28th | CONFIDENCE: 50%

Qualify | Schedule 1:1 De... | Complete 1:1 De... | Close

All | Emails | Activities | Notes | Tickets | Email outreach | Filter by user...

- Charles Berry advanced Newing Industries Inc. to the Schedule 1:1 Demo stage a day ago
- Charles Berry moved Newing Industries Inc. from the Pitch stage to the Qualify stage a day ago
- anew@newingindustries.com was sent January Coupons 6 months ago

Dana Vargas emailed **Everett Goforth**
No problem, Everett...sounds like it's an easy fix.

Everett Goforth emailed **Dana Vargas**
Our Sundog has been beeping intermittently.

Newing Industries Inc. Chicago, Illinois

- Ann New** +1 925-848-1840
- Cynthia Lewis** +1 949-673-6327 Contacted Feb 16, 2021
- Everett Goforth** +1 256-220-5980 Contacted Mar 25, 2021

work +1 603-648-9762 Call

Twitter @egoforth

LinkedIn /everett-goforth/



Contact management (contd.)

63°F
Carlsbad, California

Los Angeles Palm Springs San Diego Yuma Phoenix Alamogordo

ARIZONA NEW MEXICO

San Diego Yuma Mexicali Tucson

Add email, phone, url, or address

Enter an email, phone number, address, etc.

Jacqueline Garland
Sales Director @Builder's Current LLC

One field for all your info.
Enter a phone number, address, or email, and we'll put it where it belongs.

Delete Created via CSV import: Feb 13 2:06 PM a day ago

Jacqueline Garland
Sales Director @Builder's Current LLC

Call

main

3269 Simpson Square
Carlsbad, CA US

email

JGarland@builderscurrent.com

mobile

+1 580-599-5689 Ext

work

+1 603-648-9762

Update your contact records in seconds. Just hover over the relevant field, click, and start typing. (How easy is that?)

Dial, log, and record your phone calls directly from Nutshell in a single click.

Twitter @jgarland

LinkedIn /jacqueline-garland/

Vimeo user784152

Flickr people/jgarland45380

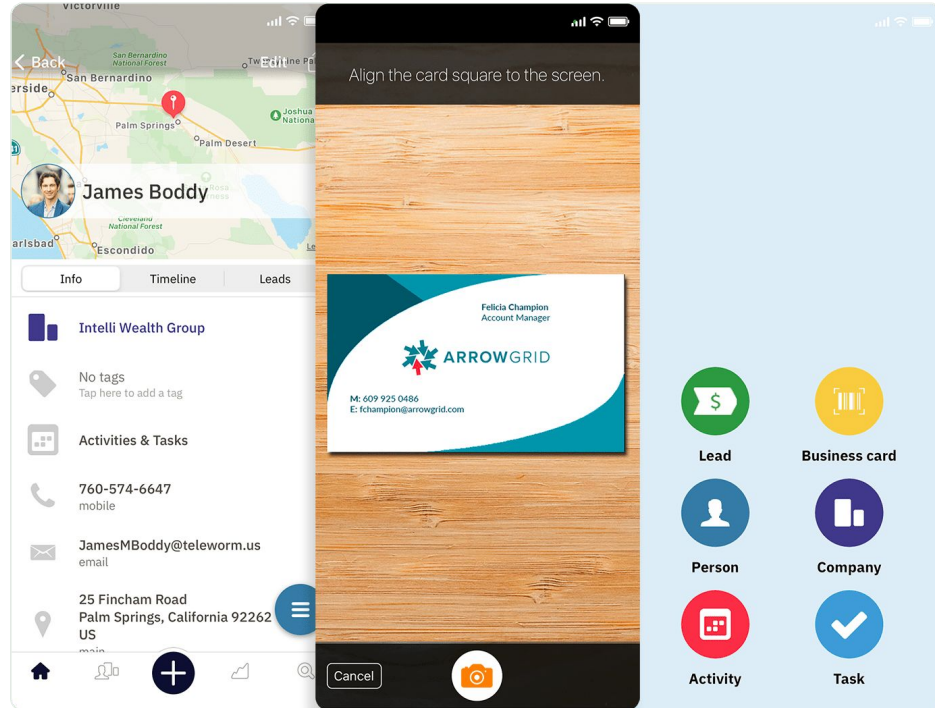
Facebook jackie.garland

Leave the Googling to us. Every time you add a contact, Nutshell scours the internet to fill in their job title, social media accounts, location, and more.



Business card scanner

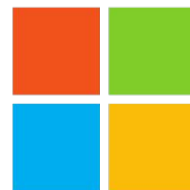
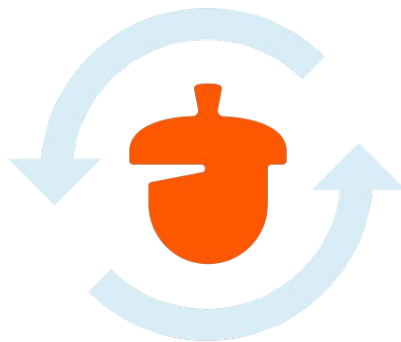
Add new contacts on the fly with our business card scanner.



Two-way email & calendar sync

Two-way email and calendar sync with Google Workspace and Office 365 keeps sales reps organized without changing how they work or requiring extra effort.

Syncing your Google Workspace or Office 365 account will also automatically import all your contacts.



Email communication

Generate more replies with Nutshell's personal email sequences—we'll remember the follow-up for you. Plus, our shareable email templates put hours back in your week, and you can track opens for any email sent out of Nutshell.

Demo Pipeline for New Customers

The screenshot displays a CRM pipeline for new customers with four stages: Qualify (25%), Schedule 1:1 Demo (50%), Complete 1:1 Demo (75%), and Close (90%). An automated email sequence is shown for a contact named Ann New. The sequence includes three steps: 1. 'Let's talk solar' (sent), 2. 'Yes, I can help' (scheduled), and 3. 'We're powered by solar every day' (scheduled). The email content includes a personalized greeting, a thank you for considering ArrowGrid, and a link to a calendar. A contact card for Charles Berry, Account Executive at ArrowGrid, is visible. A 'Send to 15,209 recipients' button is also present. Below the email sequence, tracking information shows that Ann New clicked a link and opened the email 10 days ago.

Qualify 25% Schedule 1:1 Demo 50% Complete 1:1 Demo 75% Close 90%

Automated emails **Pro**

Start sending: Let's Talk | Sales Welcome Sequence
If no reply, stop when the lead exits Schedule 1:1 Demo
○ 4 business hours after the lead enters Qualify
📧 Send from the lead assignee

1 Let's talk solar
Hi [firstName], First things...

2 Yes, I can help
(firstName), Have you read...

3 We're powered by solar every day
Me again! (companyName)...

Add follow-up email

Ann New
★★★★☆

Ann New clicked <https://calendly.com/cberry> from ArrowGrid - Let's Talk! 10 days ago

Ann New opened ArrowGrid - Let's Talk! 3 times 10 days ago

Add to list: Newsletter

ARROWGRID

Save money. Save energy.

Send to 15,209 recipients



Nutshell Campaigns

Build targeted marketing audiences from your CRM contacts, send marketing emails to thousands of contacts at a time, see who's engaging with your messages, and **turn your subscribers into buyers.**

Available for additional monthly charge. Starting at \$5/month for 100 contacts up to \$460/month for 60,000 contacts, with many options in between and custom pricing for over 60,000 contacts.

The screenshot displays the Nutshell Campaigns interface. At the top, there's a logo with an orange teardrop shape and the word "CAMPAIGNS" in white on a dark blue background. Below this, a navigation bar includes "CONTENT", "HOWS", and "SETTINGS". The main content area is divided into two columns. The left column contains a grid of icons for "TEXT", "IMAGE", "BUTTON", "DIVIDER", "SOCIAL", "HTML", "VIDEO", and "MENU". The right column shows a campaign preview for "logolpsuun" titled "The 7 Secrets of Sales and Marketing Collaboration". Below the preview, there's a "Send to 12,805 recipients" button. A table of analytics shows: Open rate: 20%, Click rate: 2.16%, Unsubscribe rate: 0.45%, Bounce rate: 1.8%. A line graph shows engagement over time. Below the analytics, there's a section for "Email templates" with a table:

Shared with you	Last sent ↓	Reply %
2 month check-in		61%
Proposal confirmation		96%
SOLARCON follow-up		78%

At the bottom right, there's a "Track and measure" section with a green checkmark indicating "You're under the recommended daily limit". It shows "Today's outgoing emails" with a progress bar from 0 to 300, and "124 sent today" and "32 scheduled for today". Below that, a preview of an email says "Great seeing you at SOLARCON" with "Opened 15 times" and "21" and "15" icons.



Powerful integrations

Make Nutshell the command center of your entire business. Nutshell integrates natively with some of the most popular business tools and connects via Zapier to hundreds more, saving you time and putting all of your valuable customer data in one place.



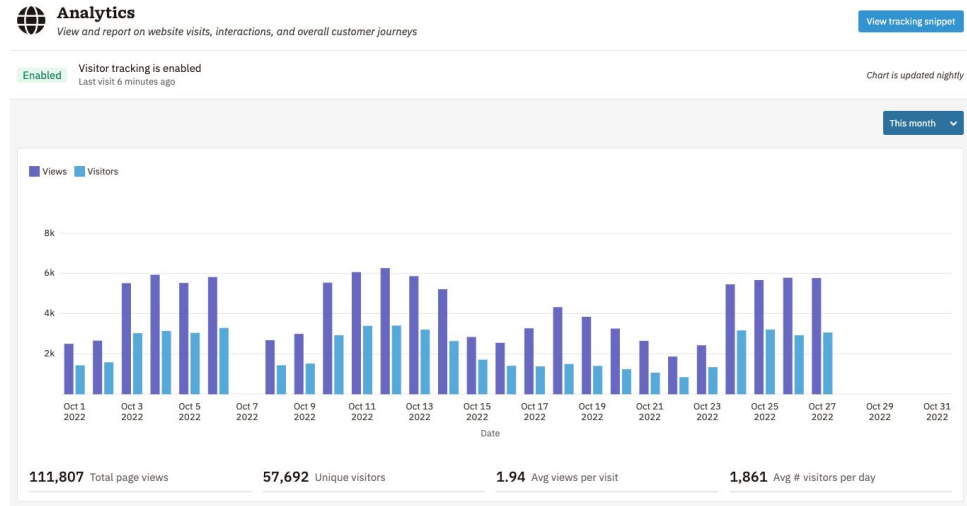
INTERCOM



Nutshell Analytics

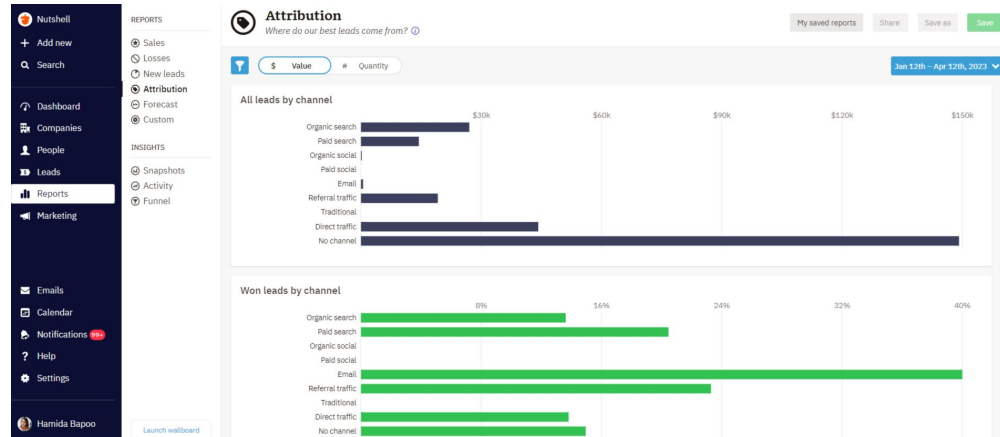
Imbed our Nutshell Analytics code on every page of your website to instantly start tracking page visitors and views and strengthen your relationships with your leads.

Unlike third-party analytics data, Nutshell Analytics data is stored in your CRM and belongs only to *you*.



Lead attribution

Level up your marketing strategy and invest in what works with Nutshell's lead attribution report. **See where your best leads come from**, whether paid or organic search, social media, or email connections.



Company & People Enrichment

Optimize your sales and marketing approach with Company and People Enrichment, powered by Nutshell Intelligence. These tools provide up-to-date data and actionable insights about your customers and their needs, so you have the most accurate data without lifting a finger.

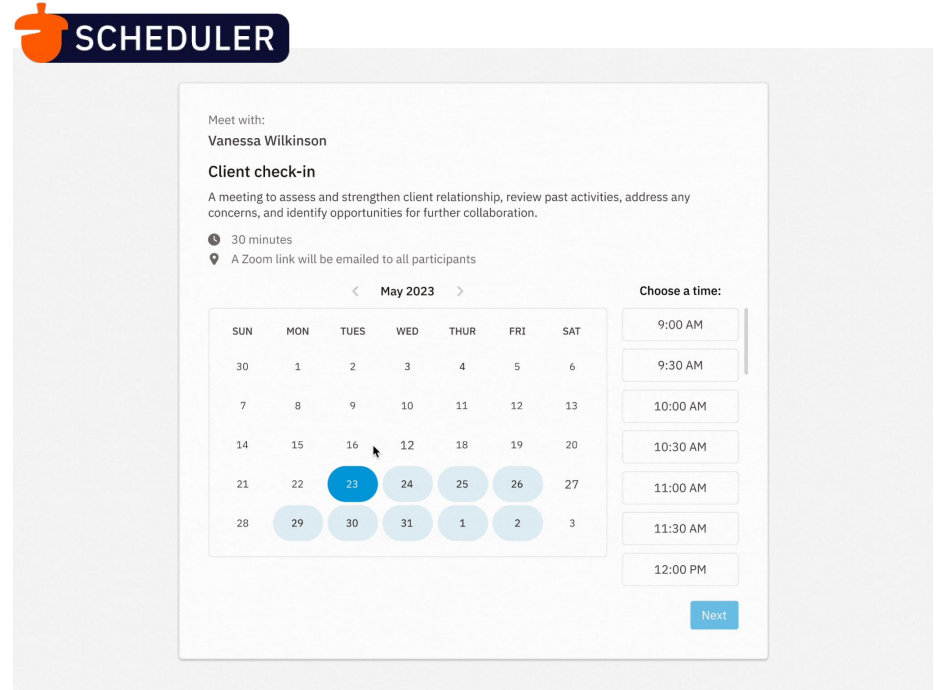
The screenshot displays the Nutshell CRM interface. A central modal window titled "Review new data for Russel Group" is open, comparing current data with new data. The current data shows the company name as "Russel Group". The new data includes the company name "Russel Group", industry "Electronics", revenue "\$17,000,000", number of employees "500", phone "1-607-728-9919", email "joe@sanfordconnelly.com", and address "77158 Sienna Flats". A green "Accept & update" button is visible at the bottom right of the modal. The background shows a lead record for "Russel Group" with various fields: LEADS (\$658, 1 open, \$196, 1 lost), KEEP IN TOUCH (Remind me to follow up), COMPANY TYPE (Select...), INDUSTRY (Select...), ASSIGNEE (Select...), TERRITORY (Select...), REVENUE (00.00), NUMBER OF EMPLOYEES (0), ATTACHED FILES (Upload file), and CUSTOM FIELDS (Legacy ID: 346131, MRR: Add MRR, USD).



Nutshell Scheduler

Keeping track of your meetings is easier than ever! Scheduler is **our online meeting scheduler** that lets you schedule Zoom, Microsoft Teams, or Google Meet meetings, add Nutshell Forms to your meeting invites, and **collect data about your invitees** before the meeting gets started.

Available as part of our Revenue Booster add-on, charged at \$37/month for your entire company - not per seat.



SCHEDULER

Meet with:
Vanessa Wilkinson

Client check-in
A meeting to assess and strengthen client relationship, review past activities, address any concerns, and identify opportunities for further collaboration.

30 minutes
A Zoom link will be emailed to all participants

Choose a time:

SUN	MON	TUES	WED	THUR	FRI	SAT
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

9:00 AM
9:30 AM
10:00 AM
10:30 AM
11:00 AM
11:30 AM
12:00 PM

Next



PeopleIQ

Easily find contact information for the people that work for your customers. Need to speak with someone in accounting but only have contacts for people in Sales? PeopleIQ can help.

*Nutshell customers get 5 **free** PeopleIQ credits per month. Pricing starts at \$37 for 100 credits per month.*



Add people to Skycam Productions ✕

PeopleIQ has found people that might work at this company. [Learn more](#)

Select people to add to Nutshell [Adjust filters](#)

Jeff Brambit
Head of Accounting
Director
New York, New York, United States

✓ ✉
✓ ☎

Rick Tram
Lead Product Designer
Marketing and Media
New York, New York, United States

✓ ✉
✓ ☎

Sally Stellar
Account Executive
New York, New York, United States

✓ ✉
✓ ☎

Harriott Humble
Product Designer
Marketing and Media
New York, New York, United States

✓ ✉
✓ ☎

Roger Rambleton
Videographer
Marketing and Media
New York, New York, United States

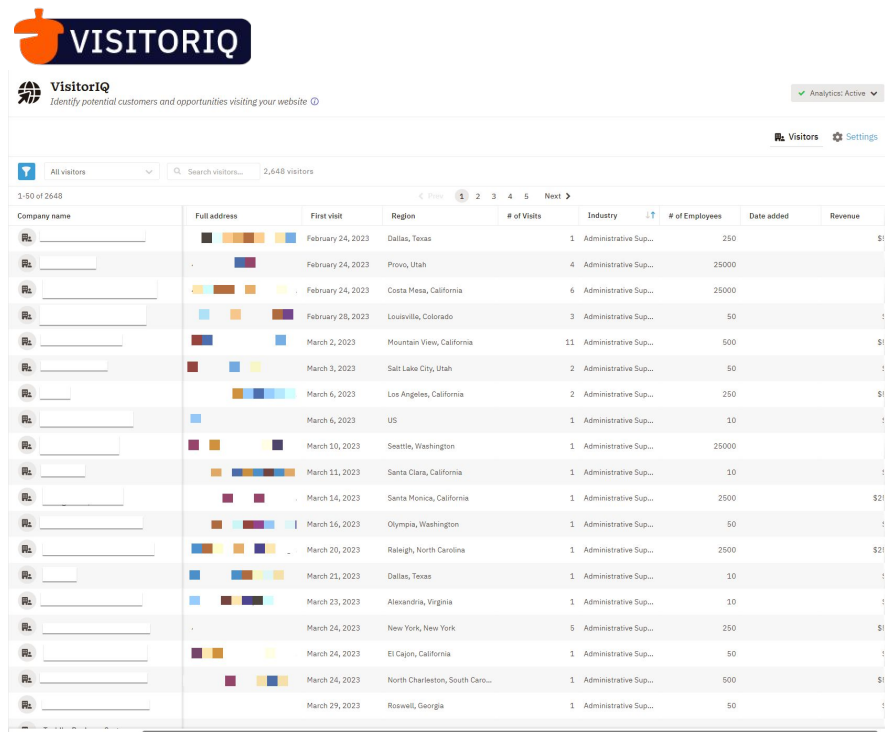
✓ ✉
✓ ☎



VisitorIQ

Find out who's visiting your website with VisitorIQ so you can target the people and companies that are already interested in your products and services, even if they don't fill out a form, download a white paper or call your sales line.

 VisitorIQ is a feature of PeopleIQ



The screenshot displays the VisitorIQ dashboard. At the top, the VisitorIQ logo is visible, along with the tagline "Identify potential customers and opportunities visiting your website". A navigation bar includes "Visitors" and "Settings" links. Below the navigation, there is a search bar and a filter dropdown set to "All visitors", showing a total of 2,648 visitors. The main content area is a table with the following columns: Company name, Full address, First visit, Region, # of Visits, Industry, # of Employees, Date added, and Revenue. The table contains 18 rows of visitor data, each with a small bar chart icon next to the full address column.

Company name	Full address	First visit	Region	# of Visits	Industry	# of Employees	Date added	Revenue
		February 24, 2023	Dallas, Texas	1	Administrative Sup...	250		\$1
		February 24, 2023	Provo, Utah	4	Administrative Sup...	25000		
		February 24, 2023	Costa Mesa, California	6	Administrative Sup...	25000		
		February 28, 2023	Louisville, Colorado	3	Administrative Sup...	50		
		March 2, 2023	Mountain View, California	11	Administrative Sup...	500		\$1
		March 3, 2023	Salt Lake City, Utah	2	Administrative Sup...	50		
		March 6, 2023	Los Angeles, California	2	Administrative Sup...	250		\$1
		March 6, 2023	US	1	Administrative Sup...	10		
		March 10, 2023	Seattle, Washington	1	Administrative Sup...	25000		
		March 11, 2023	Santa Clara, California	1	Administrative Sup...	10		
		March 14, 2023	Santa Monica, California	1	Administrative Sup...	2500		\$21
		March 16, 2023	Olympia, Washington	1	Administrative Sup...	50		
		March 20, 2023	Raleigh, North Carolina	1	Administrative Sup...	2500		\$21
		March 21, 2023	Dallas, Texas	1	Administrative Sup...	10		
		March 23, 2023	Alexandria, Virginia	1	Administrative Sup...	10		
		March 24, 2023	New York, New York	5	Administrative Sup...	250		\$1
		March 24, 2023	El Cajon, California	1	Administrative Sup...	50		
		March 24, 2023	North Charleston, South Caro...	1	Administrative Sup...	500		\$1
		March 29, 2023	Roswell, Georgia	1	Administrative Sup...	50		



CompetitorIQ

Compare your website traffic with your competitors so you can uncover which marketing channels are driving their success, fine-tune your strategy, and spot opportunities for growth.

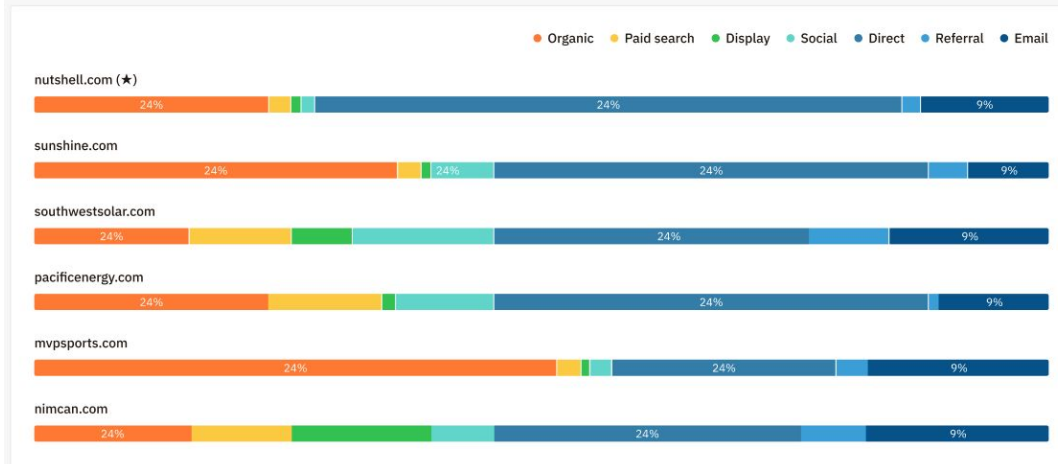
CompetitorIQ is included free for all Nutshell customers.



Traffic strategies

Identify competitor tactics for achieving web traffic success

September



Landing Pages

Design and host custom landing pages on your website to website visitors — no coding necessary. Easily collect visitor information and schedule bookings by embedding Nutshell Forms and Nutshell Scheduler on your pages.

All Nutshell customers can create Landing Pages and can upgrade to remove branding.

The screenshot displays the Nutshell landing page editor. On the left is a dark sidebar with navigation options: Dashboard, Companies, People, Leads, Reports, Marketing (highlighted), Emails, Calendar, Scheduler, Notifications (99+), Help, and Settings. The main workspace shows a landing page titled "Nutshell Email and Socials landing page" with a "Discard changes" button and a "Publish changes" button. The page content includes the Nutshell logo, navigation links (ABOUT | BLOG | CONTACT), a large heading "Let's Get Social", a sub-heading "Want to stay up-to-date on the latest Nutshell enhancements and get expert tips for getting the most out of your CRM?", a call-to-action "Get connected with the CRM experts behind Nutshell!!", and a "CONNECT" button. A woman is shown sitting on a large orange Nutshell logo, using a laptop. On the right, a "CONTENT PROPERTIES" panel allows editing of text elements, with fields for Title (H1), Font family (Source Sans Pro), Font weight (Bold), Font size (100), Text color (#555555), and Link color (#E01253).



Artificial Intelligence

Leverage AI in your CRM with Nutshell's PowerAI! Quickly summarize People, Company, and Lead timelines to see the history of your relationships in one paragraph, and get accurate Zoom transcription summarizations to share with your team.

The PowerAI plan also comes with everything in Nutshell Pro. Pricing starts at \$52/month per user.



Nutshell's Artificial Intelligence CRM

Power AI

With Power AI, you can...

- ✓ Summarize People, Company and Lead timelines
- ✓ Zoom transcription summarizations

Ask yourself – If you saved each one of your sales reps 3 hours a month, how much is that worth to your business?

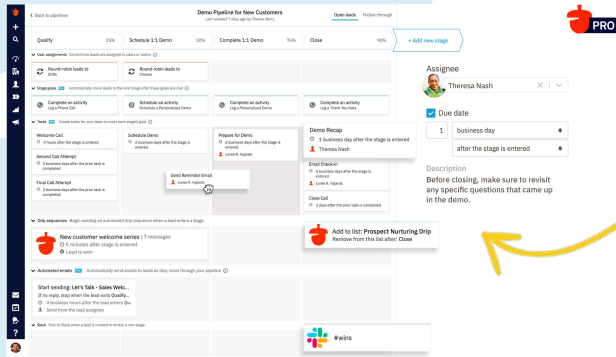
Power AI can do just that!



LEVEL UP

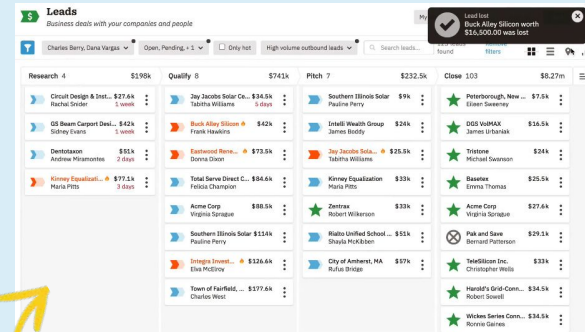
Who gets value from Nutshell?
(Hint: It's everybody)

Nutshell powers sales managers



Design and automate your perfect sales process.

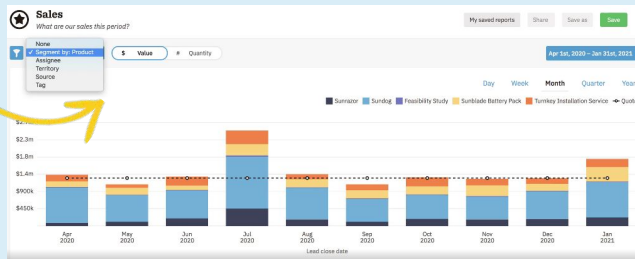
Automatic lead assignment, task creation, stage goals, reminders, and guidance keep your team on the same page and speed the onboarding of new hires.



Get a broad view or examine the finest detail.

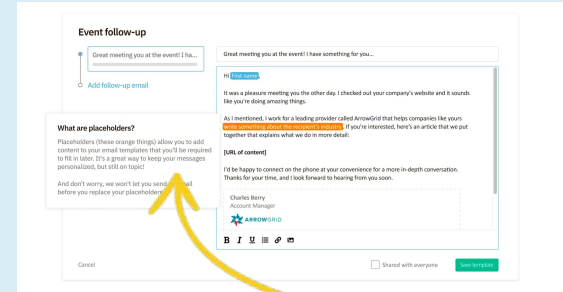
Immediately find the status and value of any lead, and the historic record of every contact's phone calls, emails, notes, and activities.

Nutshell makes it easy to identify and improve what's working. Track and measure everything from wins and losses, to lead sources, to sales rep activity and funnel efficiency.

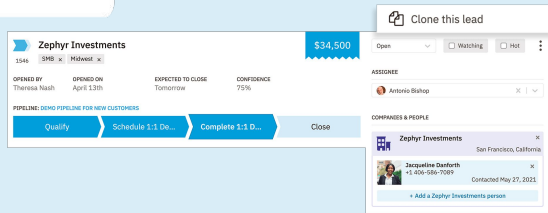


Nutshell is the CRM sales reps actually use

Reps can see all of their deals, create and save dynamic lists, visualize their pipeline, find prospects on a map, and customize their dashboard with the information that matters to them most, so they can **focus on the right deal at the right time.**

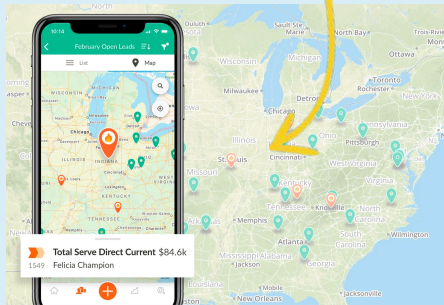


Sell more, work less. Nutshell makes adding and updating contacts, communicating, and reporting with your CRM a cinch. Simple UI, automated tasks, email templates, and a clear “to-do” list make everything you need just a click or two away.

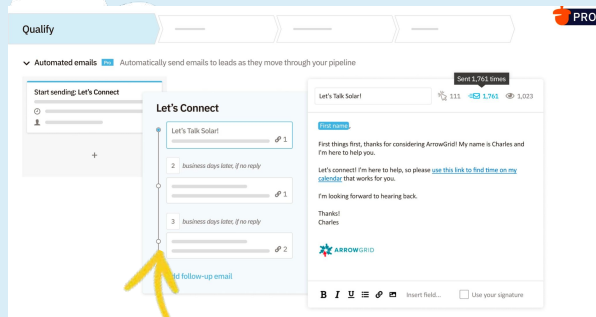


Work leads effortlessly.

Countless integrations, two-way email and calendar sync, one-click phone dialing and recording, a free mobile app, and more let every rep work how they want to work.

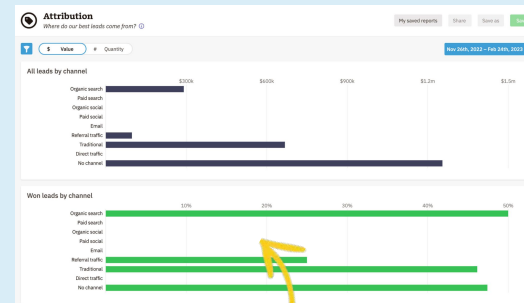
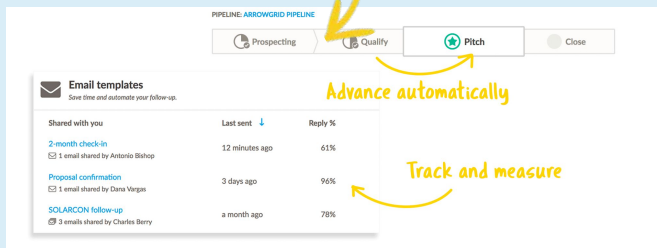


Nutshell is built for marketers who care about sales outcomes



Collect leads directly from your website, place them in the most relevant email marketing audiences, and **measure engagement.**

Automatically trigger drip sequences based on where a lead is in your pipeline.



Understand how prospects are finding you so you can focus your budget on the channels with the highest ROI.



Support, operation, etc., etc.

Demo Pipeline for New Customers

Quality 25% | Schedule 1:1 Demo 50% | Complete 1:1 Demo 75% | Close 90%

Automated emails

- 1. Start sending: Let's Talk! Sales Welcome Sequence (If no reply, stop after the lead exits Schedule 1:1 Demo)
- 2. Let's talk later (1st attempt) (1st reply)
- 3. No, thanks! (2nd attempt) (2nd reply)
- 4. Business days later (3rd attempt)
- 5. We're powered to order every day (3rd attempt)

Ann New

- Ann New clicked <https://calendly.com/cberry> from ArrowGrid - Let's Talk! 10 days ago
- Ann New opened ArrowGrid - Let's Talk! 3 times 10 days ago

Send to 55,209 recipients

Solve customer issues faster by **understanding the full context** of every relationship.

Get a **big-picture view** of your company's revenue, growth trends, and efficiency.

Funnel

What are our conversion rates?

Default Pipeline: \$ Value # Quantity

Assignee Products Sources Competitors Tags Date range: Current month 41 leads valued at \$3.61m

Stage	Leads	Conversion Rate
Prospecting	5 added	
14 already	19 leads	5% Closed, 5% Lost
1 remain		
Average time in stage: 13.7 days		
Quality	95% 18 advanced	
19 already	37 leads	3% 1 Won, 3% 1 Lost
35 remain		
Average time in stage: 33.3 days		
Pitch	0% 0 advanced	

Import your data

Update your existing book of business to Nutshell.

- White-glove import
- Google contacts
- Your phone
- Another CRM
- Spreadsheet
- Salesforce
- Constant Contact
- Office 365
- QuickBooks
- QuickBooks Online

Company/Person CSV Upload

This widget allows you to import companies, emails, and leads from a CSV file. Please make sure the CSV file is correct and complete. Also, double-check the include/exclude checkboxes and uncheck the 'Use all phone numbers to ensure it is imported correctly, unless you want to export from Salesforce.

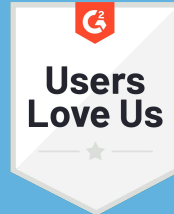
What will Nutshell do with this data? Anything you upload is covered by your privacy policy. To share your data belongs to you, and we won't use for anything.


Get started quickly with **all your contacts imported and synced** (even the custom fields).



#MADPROPS

Our customers “love, love, love” us!



 **Cassidee L.**
Mid-Market (51-1000 emp.)


Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Dec 07, 2023

"Nutshell makes it easy to track leads progress."

What do you like best about Nutshell?

I love that I can see set up a sequence of emails that go out without me having to do anything.

 **Daniel M.**
Small-Business (50 or fewer emp.)


Validated Reviewer ✓ Review source: Seller invite Incentivized Review

★★★★★ Mar 02, 2023

"The ease of use is great!"

What do you like best about Nutshell?

I like that it's incredibly easy to use, compared to other CRMs I've used before. Tools are easy to find, navigation is seamless and there's basically nothing there that adds clutter to the experience.

 **Lauren B.**
Marketing & Communications Leader
Small-Business (50 or fewer emp.)


Validated Reviewer ✓ Review source: Seller invite Incentivized Review

★★★★★ Sep 07, 2023

"Intuitive CRM - 5 stars"

What do you like best about Nutshell?

We have been using Nutshell for nearly 5 years and we absolutely love it. We especially like that we are able to track our leads that have very long sales cycles.

 **Verified User in Construction** ⓘ
Mid-Market (51-1000 emp.)

Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Aug 17, 2021

"Nutshell is a great tool without the huge cost"

What do you like best about Nutshell?


After using Nutshell for over a year we love it. It makes tracking our pipeline so much easier. The flexibility is amazing and the cost is well worth it.

What do you dislike about Nutshell?

We haven't run into any issues yet that cannot be overcome.

What problems is Nutshell solving and how is that benefiting you?

Taking disconnected sales pipelines and aggregating them into usable data and management reports.

 **David H.**
Small-Business (50 or fewer emp.)

Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★


"As a Solo-preneur, Nutshell is my partner"

What do you like best about Nutshell?

I like how it's customizable and I like how it displays information to keep me organized. I'm a creative and a little all over the place, but Nutshell keeps my whole pipeline/sales system together for me—whether I need to check for an overview, or spend time reviewing and working on all my leads.

What problems is Nutshell solving and how is that benefiting you?


Lets me track my leads and keep notes on them. Also allows me to build a detailed rolodex of all my clients.

 **Donald B.**
Mid-Market (51-1000 emp.)

Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Jul 17, 2023

"A CRM you can get people to use"

 **Bailey T.**
Channel Sales and Marketing Director
Small-Business (50 or fewer emp.)


Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★

"A great product for any size business"

What do you like best about Nutshell?

As a small business, pricing is crucial to us. Nutshell's pricing for what the product gives us is absolutely amazing. We have access to so many more CRM features that we never thought we'd be able to utilize without breaking the bank.

 **Zyler B.**
Mid-Market (51-1000 emp.)

Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Oct 05, 2023 (Original Apr 17, 2023) ⓘ


"Nutshell For Franchising"

What do you like best about Nutshell?

The organization and automated portion of Nutshell is worth every penny. With a smaller company, having a way to automate task

What do you dislike about Nutshell?

I do not think this is necessarily a downside, but you need to ensure you understand each section and data section before you beg down the line.

 **Lina M.**
Marketing Specialist
Mid-Market (51-1000 emp.)

Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Oct 13, 2023 (Original Aug 18, 2021) ⓘ


"Nutty for Nutshell!"

What do you like best about Nutshell?

As a marketer, data is everything! Our team has absolutely loved how easy it is to segment, filter, and analyze our sales data in a user-friendly way. I appreciate up-to-date by adding in a client email campaign feature, too.

What do you dislike about Nutshell?

Hm. There are a few hard-coded areas that we would like to see more flexibility in. An example could be around the "Leads" area.

 **Verified User in Oil & Energy** ⓘ
Mid-Market (51-1000 emp.)


Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Aug 02, 2023

"Everything you need with no useless baggage or unnecessary"

What do you like best about Nutshell?

Easy to use! Easy to set up your account, set up your team, and to manage leads. Everything is simple. And the easy. Pricing is very reasonable too.

 **Maddie D.**
Enterprise (> 1000 emp.)


Validated Reviewer ✓ Verified Current User ✓ Review source: Seller invite Incentivized Review

★★★★★ Dec 08, 2020

"Nutshell is a game changer for us"

What do you like best about Nutshell?

Nutshell is a very transparent, easy to navigate and flat view CRM platform. It's flexible, nimble and the Nutshell team is often making updates to assist

 **Jack B.**
Marketing Analyst
Enterprise (> 1000 emp.)

Validated Reviewer ✓ Review source: G2 invite Incentivized Review

★★★★★ Nov 13, 2019

"Feel the power productivity in your hands with Nutshell!"

The best value in CRM, period.

FOUNDATION

Simple, flexible CRM that helps teams organize their contacts, leads, and conversations.

\$16 per user per month

[VIEW PLAN DETAILS](#)

MOST POPULAR

PRO

CRM, sales automation, and advanced reporting to help your team maximize every opportunity.

\$42 per user per month

[VIEW PLAN DETAILS](#)

POWER AI

Harness the power of Artificial Intelligence to improve efficiency, effectiveness and revenue in your CRM.

\$52 per user per month

[VIEW PLAN DETAILS](#)

ENTERPRISE

No limits. No caps. No nonsense. Our tier that gives your team the most firepower.

\$67 per user per month

[VIEW PLAN DETAILS](#)








Priced for growing businesses

Calculate your cost

Plug in your team size and the plan you're interested in, and we'll do the math for you.

Annually Monthly **Users** **\$ 192**
per year

 FOUNDATION \$16 per user per month	 PRO \$42 per user per month
 POWER AI  \$52 per user per month	 ENTERPRISE \$67 per user per month



Get in touch

See how easy it is to reach our team, even if you're not officially a Nutshell customer yet.

SUPPORT

support@nutshell.com

SALES

nutshell.com/contact



Learn more

Nutshell Basics How-to videos to help you start selling with Nutshell.

Support Find quick answers and tutorials about anything in our product.

How do you sell? Pick your sales model and find out how Nutshell works for teams like yours.

Company Meet our brilliant team.

Secret Stash All our best sales resources in one place.

YouTube See our people and our product in action!

