

Nutshell 🍪

Nutshell IQ

Fill Your CRM With More Sales Opportunities

Generating high-quality leads for your business can feel like a juggling act. Nutshell IQ empowers your team to find and close on more qualified sales opportunities with a complete lead generation toolkit.



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Marketing Specialist
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Today's Agenda

- What is Nutshell IQ and what's included? 5 minutes
- When to use and how to set up ProspectorIQ, VisitorIQ and PeopleIQ 10 minutes
- How to set it up 10 minutes
- Q&A 5 minutes

Please ask your questions in the chat throughout the presentation

What is Nutshell IQ?

- Nutshell's complete prospecting toolkit
 - Find qualified leads
 - Uncover visitors to your website
 - Identify people working for the companies in your CRM
 - Reveal contact data
- Add new leads to Nutshell and leverage sales automation to start sending marketing emails, SMS messages, and reaching out
- Data at your fingertips & in your CRM!



What does Nutshell IQ include?

- **New ProspectorIQ:**
 - Search through our databases to find the companies and people who fit your ideal customer profile
 - Add them to Nutshell in just a few clicks and start your outreach
- **VisitorIQ:**
 - Uncover visitors to your website from companies you don't yet have in Nutshell
- **PeopleIQ:**
 - Discover the contact information of people working for the companies you already have in Nutshell to get your message in front of the right person



Your Nutshell IQ workflow

- Build your ideal customer profile in **ProspectorIQ** and identify new prospects
- Reveal qualified website visitors with **VisitorIQ** to add to Nutshell
- Find the right point of contact at those new businesses using **PeopleIQ**



Find the right person to make the sale!

What is ProspectorIQ?

- Sources data from over 200 million people and companies across the United States
- Add new contacts as leads to Nutshell
- Set people and company filters to create your ideal customer profile
- Save filter lists for later use

WHEN to use: You want to fill your pipelines with more leads that fit your requirements (Outbound Sales)



A screenshot of the ProspectorIQ web application interface. The interface is divided into several sections. On the left is a dark blue sidebar with navigation options: Nutshell, Add new, Search, Dashboard, Companies, People, Leads, Reports, and Marketing (highlighted). Below these are various tool categories like Emails, Calendar, Scheduler, Notifications, Help, and Settings, along with the user's name, Hana Coon. The main content area has a header with the ProspectorIQ logo and tagline. Below the header, there are filter options for "Person name" (Contains, Is exactly) and "Company". A list of people is displayed, including Harriot Humble (UX Researcher, Product Design, Ann Arbor, MI) and Acronis (UX Researcher, Product Design, Ann Arbor, MI). A modal dialog is open over the list, titled "Add Harriot Humble and 1 other to Nutshell". The dialog contains a checkbox for "Also create 2 new leads", a dropdown for "New customer pipeline", and a green "Add Harriot Humble and 1 other" button. At the bottom of the list, it says "2 Selected" and "Add 2 people".

What is VisitorIQ?

- Discover qualified leads who are visiting your website
 - You'll need to install Nutshell Analytics!
- Reveal company and person information like revenue, job title, email, and more
- Unlock and add website visitors to Nutshell as leads to start warming them up

WHEN to use: You want to target companies and people already interested in your offerings who are checking out your website (Outbound Sales meets Inbound Sales)



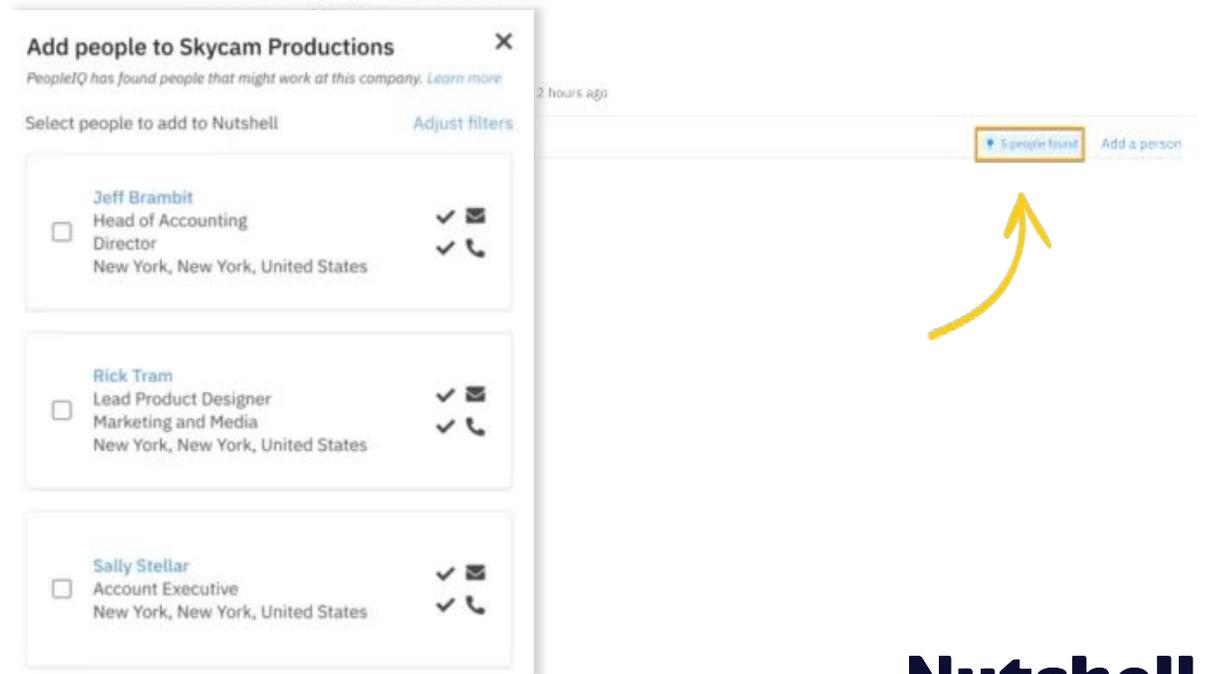
The screenshot shows the VisitorIQ dashboard interface. At the top, there's a navigation bar with the VisitorIQ logo, a tagline "Track companies that visit your website to identify new opportunities", and a status indicator "Analytics: Active". Below this, there's a section for "Unlocked this month: 11/50" and navigation links for "Visitors" and "Settings". A search bar shows "All companies" with a dropdown arrow and "2,583 companies". Below the search bar, there's a table with 10 columns: "Company name", "Phone", "URL", "Full address", "First visit", "Region", "Industry", and "# of Vis". The table contains 10 rows of data, each representing a company. Each row has a checkbox on the left and a lock icon. The data includes company names (all "Company [redacted]"), phone numbers (all "(555) 567-8901"), URLs (all "https://www.nutshell..."), full addresses, first visit dates (ranging from "Today" to "Yesterday"), regions, industries, and the number of visitors.

<input type="checkbox"/>	Company name	Phone	URL	Full address	First visit	Region	Industry	# of Vis
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	1980 University Avenue, San...	Today	East Palo Alto, California	Professional Scient...	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	101 A23002	Today	US	Information	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	3945 Logans Drive, Suite 300...	Today	Plano, Texas	Professional Scient...	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	135 Summer Street Bridgew...	Yesterday	Bridgewater, Massachusetts	Educational Services	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	1113 Adams Street Riverside...	Yesterday	Riverside, California	Retail Trade	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	130 Main Street Leakesville, ...	Yesterday	Leakesville, Mississippi	Educational Services	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	100 Denon Street Azusa, CA...	Yesterday	Azusa, California	Retail Trade	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	1980 Wedgwood Road North...	Yesterday	Osseo, Minnesota	Construction	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	200 South Capitol Street Cl...	Yesterday	Clinton, Mississippi	Educational Services	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	400 Spruce Street Reno, Ne...	Yesterday	Reno, Nevada	Professional Scient...	
<input type="checkbox"/>	Company [redacted]	(555) 567-8901	https://www.nutshell...	700 52th Street, Suite 100 L...	Yesterday	Lynchburg, Virginia	Manufacturing	

What is PeopleIQ?

- Identify more people working at the companies you already have in Nutshell
- Reveal contact information and add new people to Nutshell
- Start reaching out to the exact person who needs to hear your message

WHEN to use: You need to identify the Head of Sales, Director of Marketing, or any other specific person at a Nutshell company (Closing the sale, Upselling & Retention)

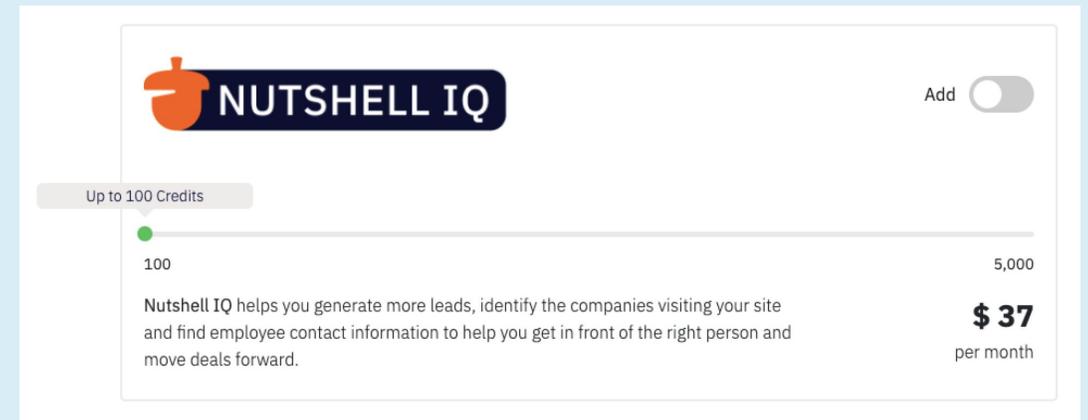


Let's Walk Through



How to get Nutshell IQ

- Every CRM plan comes with 10 free credits per month
 - These credits can be used for ProspectorIQ, PeopleIQ and VisitorIQ
 - 1 credit = 1 prospect unlocked and added to Nutshell
- Admins can purchase Nutshell IQ from our billing page
- Starting at \$37/mo for 100 credits
 - Per **company**, not per user



Q&A

Join our monthly support-led podcast

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 Basics webcast will be on October 23rd, 2024 at 12:00 PM EST.

Thanks for joining us today!

Recent releases:

- **Multiple attendees for Scheduler:** meeting attendees can now invite more people to their bookings
- **Custom fields descriptions:** help your team remember the purpose of custom fields
- **Log an activity in Nutshell with Zapier:** when something happens in another app, Nutshell will create/log an activity
- **Custom domains:** use your custom domain to host Forms, Scheduler links, and marketing email editions
- **REST API documentation:** integrating your tech stack with Nutshell is easier than ever
- **Marketing email templates:** ensure consistent branding across your company emails

Upcoming releases:

- **Nutshell SMS:** text message/SMS capabilities inside Nutshell
- **Nutshell Webchat:** enable conversations directly from your company website

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