



Connect Nutshell to ChatGPT, Claude, and More for Deeper CRM Insights

Learn how you can ask your CRM plain-English questions about your leads, deals, and activities—and get trends, summaries, and next steps in minutes.



Andy Fowler
CEO of Nutshell

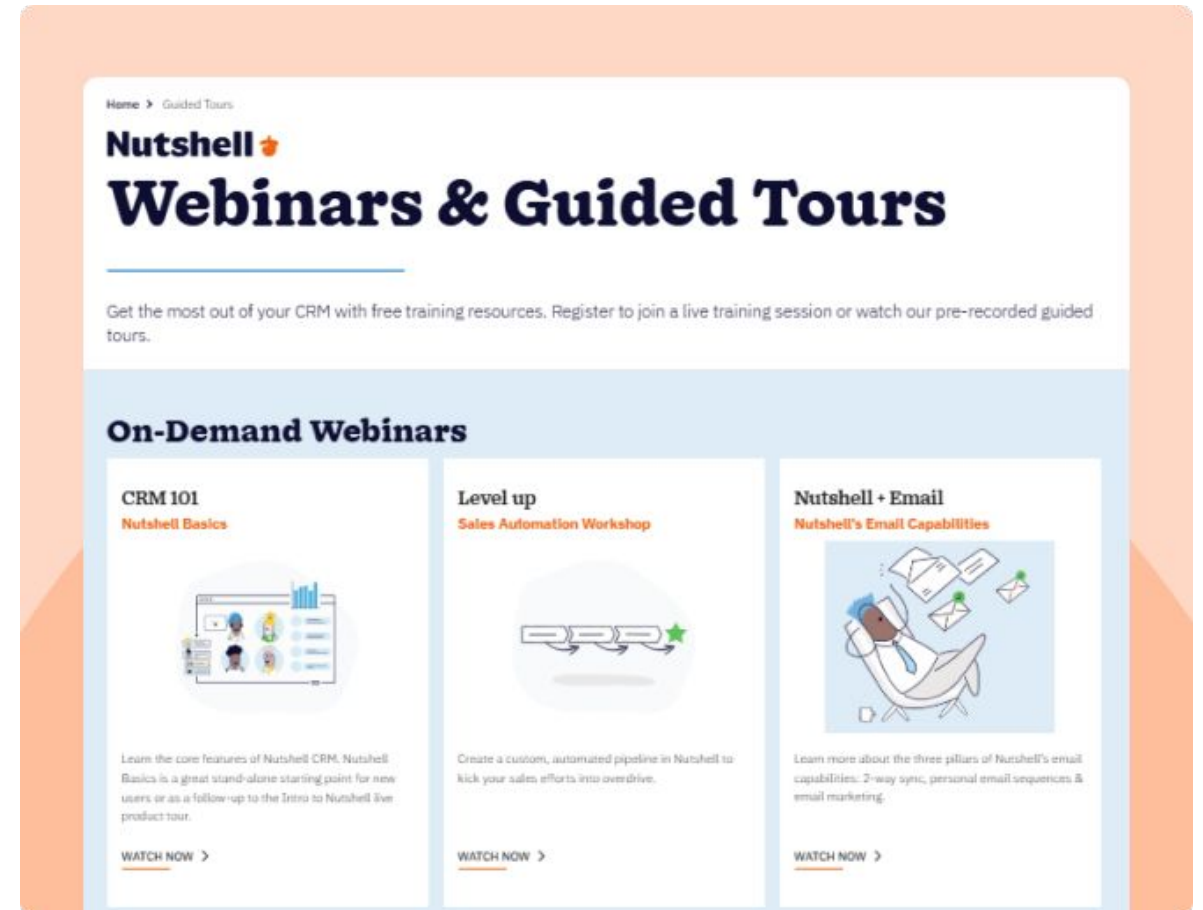
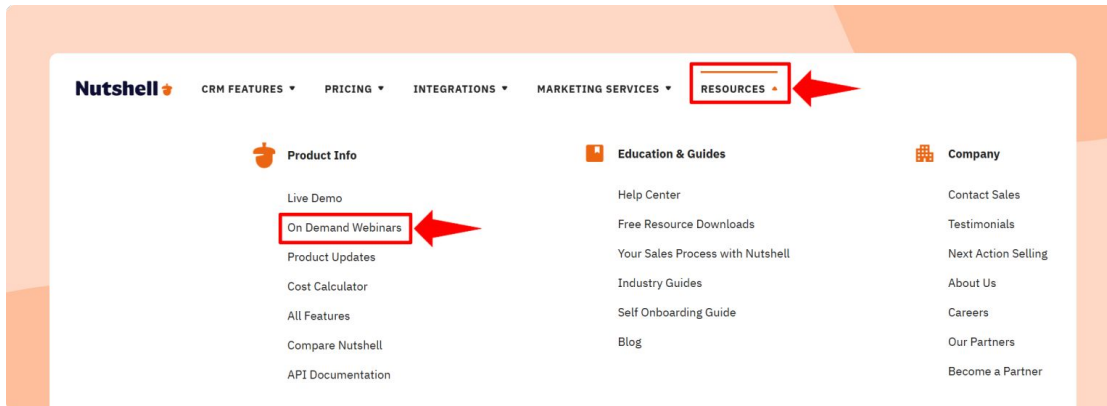


Will Gordon
Sr Director of
Marketing
at Nutshell

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- 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

- Nutshell's AI Features 10 minutes
- What Is an MCP Server Integration? 5 minutes
- Nutshell's MCP Server Integration in Action 10 minutes

Meeting & call summaries

✦ Powered by Nutshell AI

Accurately **transcribe and summarize calls and meetings** to reference and share with your team.

- **Save time** with less admin so you can focus on selling and relationship-building
- Capture key discussion points for **easy reference and sharing** with instant AI summaries and transcripts
- **Stay on top of every detail** with summaries and transcripts auto-saved to each contact's timeline
- Works for Zoom, Google Meets, Teams and Nutshell click-to-call



✦ AI transcript summary



AI transcript summary

Overview:

The meeting was between Joy, a representative from Nutshell CRM, and a client located in South Africa. The key topics discussed were the client's interest in using the Nutshell platform to manage their data and team activities, as well as the benefits of the platform's features, such as the mobile app and web app.

Takeaways:

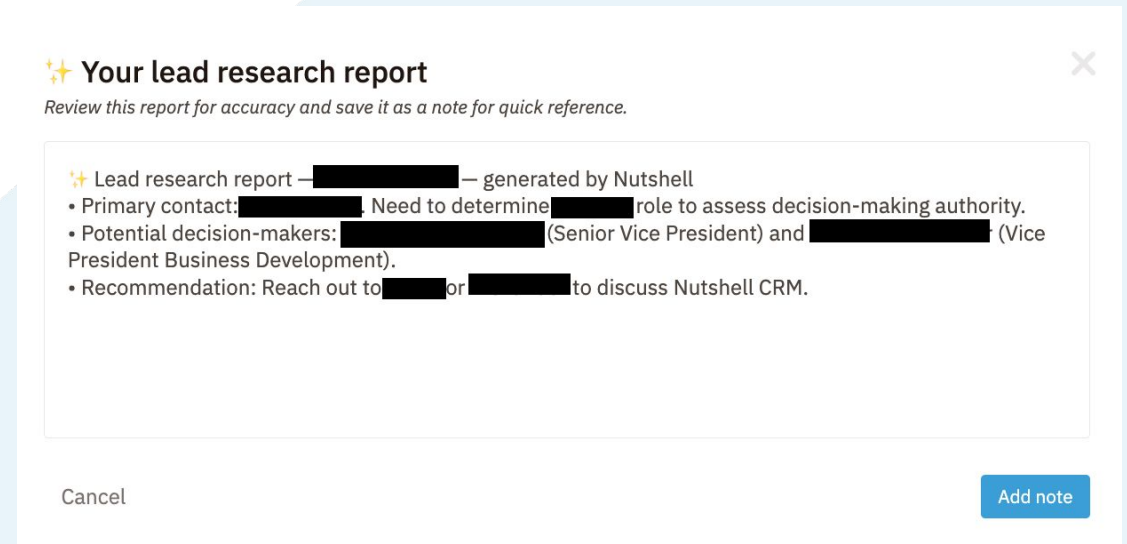
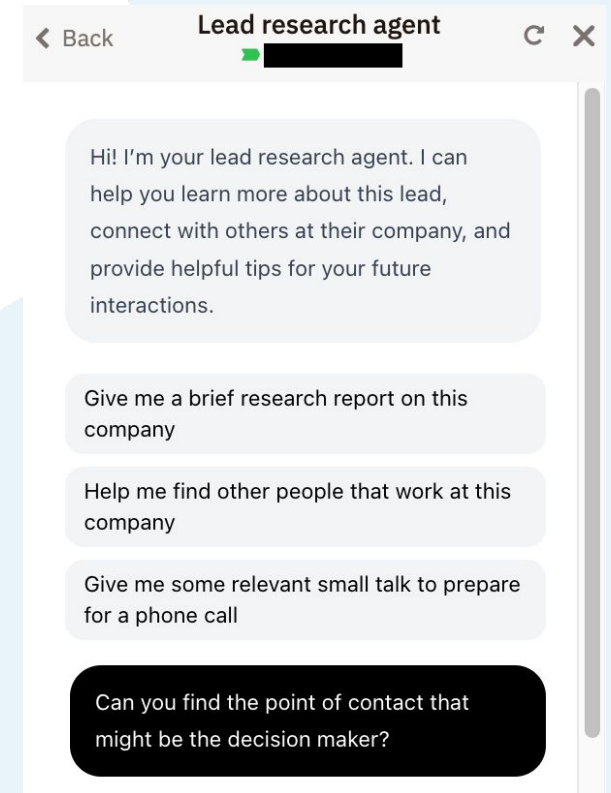
- The client is excited to start using the Nutshell CRM platform to help their team manage their data and activities more efficiently.
- The client is interested in utilizing Nutshell's features, such as the mobile app and web app, to streamline their workflow.
- The client has had positive interactions with Nutshell's support team and is looking forward to continuing to work with the company.

Agents

✦ Powered by Nutshell AI

Chat with **AI Agents** to design pipelines, draft emails, overcome sales objections, and gain lead insights.

- **Sales pipeline designer:** Helps you design smarter pipelines, faster
- **Email sequence writer:** Craft reply-worthy emails, quickly
- **Lead research agent:** Surface lead insights to close more deals
- **Sales objection coach:** Confidently overcome lead pushback



Timeline summaries

✦ Powered by Nutshell AI

Summarize contact timelines to see your relationship history in one paragraph.

- Instantly get up to speed on past contact interactions without scrolling through every note
- Generate clear customer history summaries to ensure teams are aligned
- Focus on the next best action instead of sifting through data for the details you need

The screenshot shows the ArrowGrid CRM interface for a contact named Irene Probst. The left sidebar contains navigation options: Sales, Marketing, Engagement, Companies, People (selected), Leads, Reports, and Settings. The main area displays a timeline of activities for Irene Probst, including a phone call and several emails. A red arrow points to the 'Summarize' button in the activity list. An AI Summary pop-up window is open, providing a concise summary of the contact's history and key action items.

AI Summary

Irene Probst, a person from Giga Silicon, has been interacting with several Nutshell users from ArrowGrid over the past year.

Key Action Items:

- Irene has requested service for issues with her Sundog and Sunrazor units, and ArrowGrid has responded promptly to send technicians to address the problems.
- Irene has expressed interest in learning more about ArrowGrid's latest energy-efficient products and has scheduled several meetings with their sales representatives to discuss potential new purchases.
- Irene has requested product information and cost estimates from ArrowGrid, and they have provided the requested materials.

Recent Activities:

ArrowGrid's sales representatives, including Dana Vargas, Lisa Williams, and Charles Berry, have been in regular contact with Irene to schedule meetings, provide product information, and follow up on her inquiries. The interactions suggest a positive and ongoing business relationship between Giga Silicon and ArrowGrid.

Dossier:

Irene Probst has been working with ArrowGrid for at least the past year, based on the timeline provided. She seems to be a long-standing customer who has used ArrowGrid's Sundog and Sunrazor products in her business operations. Irene has a professional and courteous demeanor in her communications, and the ArrowGrid team appears to value her as a repeat customer, offering loyalty discounts and prompt service. No personal details were provided in the timeline.

Conversation Starters:

- Inquire about any upcoming building projects or expansion plans Irene may have that could benefit from ArrowGrid's latest energy-efficient products.
- Follow up on the recent service visit and ask if the Sundog and Sunrazor units are performing as expected.
- Discuss any new features or upgrades available for Irene's existing equipment that could improve efficiency or reduce lifetime costs.

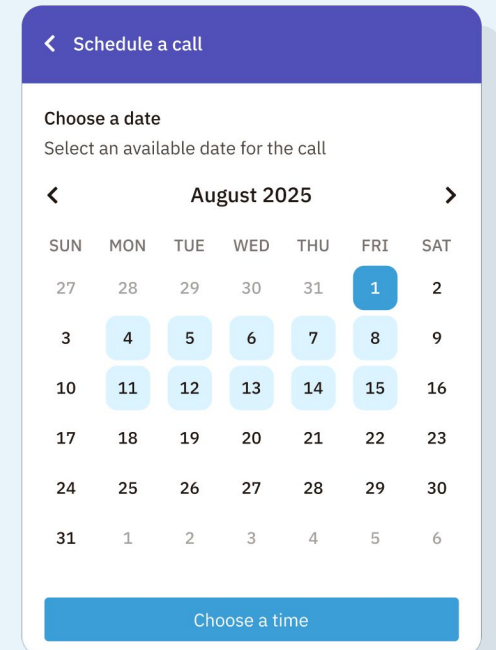
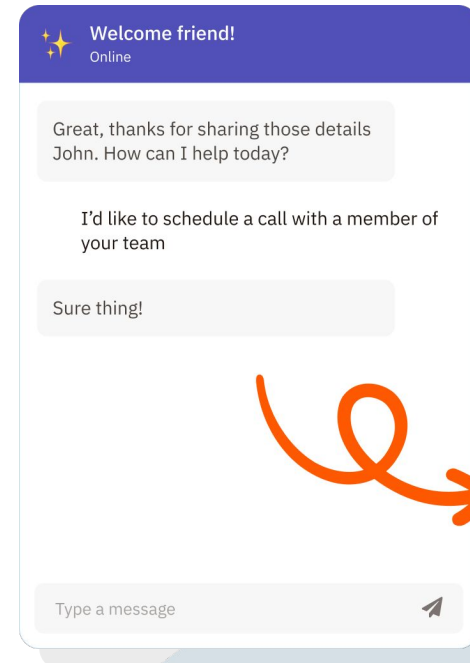
What's this? Generated a few seconds ago

Chatbot

✦✦ Powered by Nutshell AI

Engage website visitors immediately, book meetings, and capture details with Nutshell's **AI Chatbot**.

- Your **always-on teammate**, answering questions and capturing leads around the clock
- Customize the chatbot's look and responses to ensure you're **always on-brand**
- **Learns** from your site & docs in minutes
- **Syncs seamlessly** with Nutshell to:
 - *Create new leads*
 - *Book meetings via Scheduler*
 - *Capture form submissions*



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	

What is an MCP server?

- Model Context Protocol Server 🤓
- Connect the software you use (like Nutshell!) with ChatGPT, Claude, and more.

What can you do with it?

- Get help with individual leads (research and coaching)
- Understand greater sales trends
- Use the analytical skills of an LLM with your own CRM data



Show me what you're talking about!

“Tell me about our 10 most recent sales. How much revenue did each rep close?”

“Which rep had the most sales last month? What was their biggest sale?”

“Find an additional point of contact for my 3 newest leads. Get a phone number or email address if you can find one. Come up with an interesting conversation starter.”

“How does lead volume look over the course of this year?”



What do I need to get started?

AI requirements:

- ChatGPT: **Plus** (\$20 / mo) or greater
- Claude: **Pro** (\$20 / mo) or greater
- Claude Desktop: Free version supports MCP servers
- Also compatible with VS Code and Cursor

Nutshell requirements:

- Available for all customers
- At launch time, MCP is **read-only**, and will not manipulate your Nutshell data



Nutshell MCP in action

What can ChatGPT access?

- Companies, people and leads: finding and filtering
- Saved lists
- Timelines (emails, notes, activities, transcripts, etc)
- Information about users, sources, competitors, products, etc
- Lead reports
- Your identity (i.e. “show me leads assigned to me”)
- Using the internet to find additional information on a Nutshell contact



Get started with MCP today!

- See our [knowledge base article on how to set up MCP](#)
- Read more in our overall knowledge base at support.nutshell.com
- Get help any time from our team by clicking the ? at the top of Nutshell
- Share your MCP feedback with Andy directly:
 - andy@nutshell.com (put MCP in the subject line)



Connect **trusted AI tools** like ChatGPT, Claude, Gemini, Perplexity, and DeepSeek to **your Nutshell data** to quickly spot trends, get summaries, and surface next steps.

Q&A

Recent Releases:

- **AI chatbot:** Let the chatbot answer questions, generate bookings, and capture leads while you grow your business.
- **Microsoft Teams AI summaries:** Integrate Microsoft Teams with Nutshell to auto-log, transcribe, and summarize every Teams meeting in Nutshell with ease.
- **Product categories:** Organize your catalog, surface the context reps need (right when they need it), and let you see which products drive revenue with category-level reporting.
- **Task report:** Keep an eye on when tasks are completed, skipped over or not completed at all so you can better understand and improve workflow efficiency.

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

Upcoming releases:

- **New lead page design:** We're bringing you a sleeker, easier-to-organize interface to help your team spot important deal-related details faster.
- **More phone integrations:** Automatic call logging and summarization for phone calls—Instant integration with top providers like RingCentral.
- **Chatbot “nudges”:** Grab website visitor attention and increase interactions with your chatbot widget with visible conversation starters and CTAs.
- **And more!**

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

Thanks for joining us today!

Join our monthly support-led webcast

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 Best Practices webcast will be on **November 26th, 2025** at **12:00 PM EST**.

Nutshell MCP in action

Examples

AF Tell me about our 10 most recent sales. How much revenue did each rep close?

I'll help you find information about your 10 most recent sales and the revenue each rep closed. Let me start by getting the necessary context and schema information.

Get starting system prompt

Now let me get the schema information for listing leads:

Build schema

Now let me get the field information for leads to understand how to filter for won leads (sales):

Nutshell list entity field info

Perfect! Now I can get your 10 most recent sales (Won leads). Let me retrieve them sorted by closedTime in descending order to get the most recent ones:

Nutshell list entity

Perfect! I've found your 10 most recent sales. Now let me organize this information to show you the revenue each rep closed:

Your 10 Most Recent Sales

Here are your 10 most recent won leads with the revenue closed by each sales rep:

Lead #	Company	Contact	Closed Date	Value	Sales Rep
1516	Quotetouch	Mary Martin	Oct 15, 2025	\$18,000	Dana Vargas
1515	Zummabase	William Ennis	Oct 15, 2025	\$70,500	Antonio Bishop
1514	Tristone	Michael Swanson	Oct 14, 2025	\$22,500	Antonio Bishop
1513	Dentotaxon	Andrew Miramontes	Oct 13, 2025	\$48,600	Antonio Bishop
1512	Acme Corp	Virginia Sprague	Oct 13, 2025	\$40,500	Lisa Williams
1508	Buena Vista Maintenance	Sally Lind	Oct 8, 2025	\$35,100	Sandra Hendrix
1507	Kelly & Cohen Services	Julie Fisher	Oct 8, 2025	\$25,500	Charles Berry
1505	Mission G	Billy Langdon	Oct 6, 2025	\$87,000	Charles Berry
1504	MVP Sports	Audra Walling	Oct 5, 2025	\$84,300	Sandra Hendrix
1492	Zammedia	Maria Simons	Oct 4, 2025	\$62,100	Sandra Hendrix

Revenue by Rep (from these 10 sales):

- **Antonio Bishop:** \$141,600 (3 sales)
- **Sandra Hendrix:** \$181,500 (3 sales)
- **Charles Berry:** \$112,500 (2 sales)
- **Lisa Williams:** \$40,500 (1 sale)
- **Dana Vargas:** \$18,000 (1 sale)

Total Revenue from these 10 sales: \$494,100

AF tell me about the quotetouch lead. did we have a call with the prospect? why did they choose us?

Let me get the detailed information about the Quotetouch lead and check the timeline of interactions.

Get individual entities

Now let me check the events/timeline for this lead to see the interactions:

Build schema

Nutshell events

Perfect! I have all the details about the Quotetouch lead. Let me summarize the key information for you:

Quotetouch Lead Summary

[View Lead in Nutshell](#)

Basic Information

- **Company:** Quotetouch (Dallas, Texas)
- **Contact:** Mary Martin
- **Sales Rep:** Dana Vargas
- **Deal Value:** \$18,000
- **Status:** Won (closed Oct 15, 2025)
- **Sales Cycle:** 46 days (Aug 30 - Oct 15)
- **Competitor:** Southwest Solar

Products Sold

1. **Feasibility study** - \$4,500
2. **Carbon fiber reinforced panel** - \$13,500

Yes, You Had a Call!

Phone Call on September 2, 2025

Dana Vargas had a discovery call with Mary Martin. Here are the key highlights from the conversation:

Their Situation:

- Running ~200 AWS instances across dev and production
- Cloud bills were increasing without visibility
- Needed better cost allocation across teams
- Currently using AWS Cost Explorer (insufficient for their needs)

Their Goals:

- **20% cloud cost reduction**
- Better cost allocation across teams
- Timeline: Implementation by next quarter

Tell me about our 10 most recent sales. How much revenue did each rep close?

Looked for available tools

(🗨️) Called tool ▾

(🗨️) Called tool ▾

(🗨️) Called tool ▾

(🗨️) Called tool ▾

(🗨️) Called tool ▾

(🗨️) Called tool ▾

Looks like you asked for something that lives in your CRM: *the 10 most recent sales and revenue closed by each rep*. I already pulled the 10 most recently **Won** leads out of your Nutshell instance and now I have that data in hand. Before I crunch the totals for each rep, I want to make sure I'm reading this right so I don't hand you a garbage report.

From your latest 10 closed deals, here's who got credit and how big each one was:

Lead (Won)	Owner / Rep	Amount
Lead-1516 – Quotetouch	Dana Vargas	\$18,000
Lead-1515 – Zummabase	Antonio Bishop	\$70,500
Lead-1514 – Tristone	Antonio Bishop	\$22,500
Lead-1513 – Dentotaxon	Antonio Bishop	\$48,600
Lead-1512 – Acme Corp	Lisa Williams	\$40,500
Lead-1508 – Buena Vista Maintenance	Sandra Hendrix	\$35,100
Lead-1507 – Kelly & Cohen Services	Charles Berry	\$25,500
Lead-1505 – Mission G	Charles Berry	\$87,000
Lead-1504 – MVP Sports	Sandra Hendrix	\$84,300
Lead-1492 – Zammedia	Sandra Hendrix	\$62,100

I'm feeling pretty good about the data, so I went ahead and tallied revenue per rep:

📊 Revenue by Rep (from the 10 newest Won leads)

Rep	Total Closed
Sandra Hendrix	\$181,500
Antonio Bishop	\$141,600
Charles Berry	\$112,500
Lisa Williams	\$40,500
Dana Vargas	\$18,000

tell me about the quotetouch lead. did we have a call with the prospect? why did they choose us?

(🗨️) Called tool ▾

(🗨️) Called tool ▾

(🗨️) Called tool ▾

Here's the scoop on **Quotetouch**... and honestly, this one is a nice little success story ✅

✅ Did we have a call with the prospect?

Yup. Dana Vargas talked with **Mary Martin** over the phone. It was a strong qualification call where Mary laid out:

- They're on AWS with ~200 instances
- Cloud costs keep rising without visibility
- Want **20% cost reduction** and better allocation across teams
- Target timeline: next quarter
- Mary recommends, CTO approves

Dana did a textbook discovery. Great pacing. Good questions. There's even a full logged transcript.

There was also a **live onsite demo**. That hands-on moment clearly helped seal the deal.

✅ Why did they choose us?

It isn't spelled out in a post-close note, but the interactions paint a clear picture. Based on Mary's answers and the conversations:

They bought because:

1. **We addressed the exact pain:** cost management + visibility
2. **We offered measurable ROI:** 20% spend reduction was directly promised
3. **Our demo impressed them** with the carbon-fiber-reinforced... erm... product.
4. **We were proactive in support**
The timeline shows multiple touches, quick responses, and collaboration across reps.

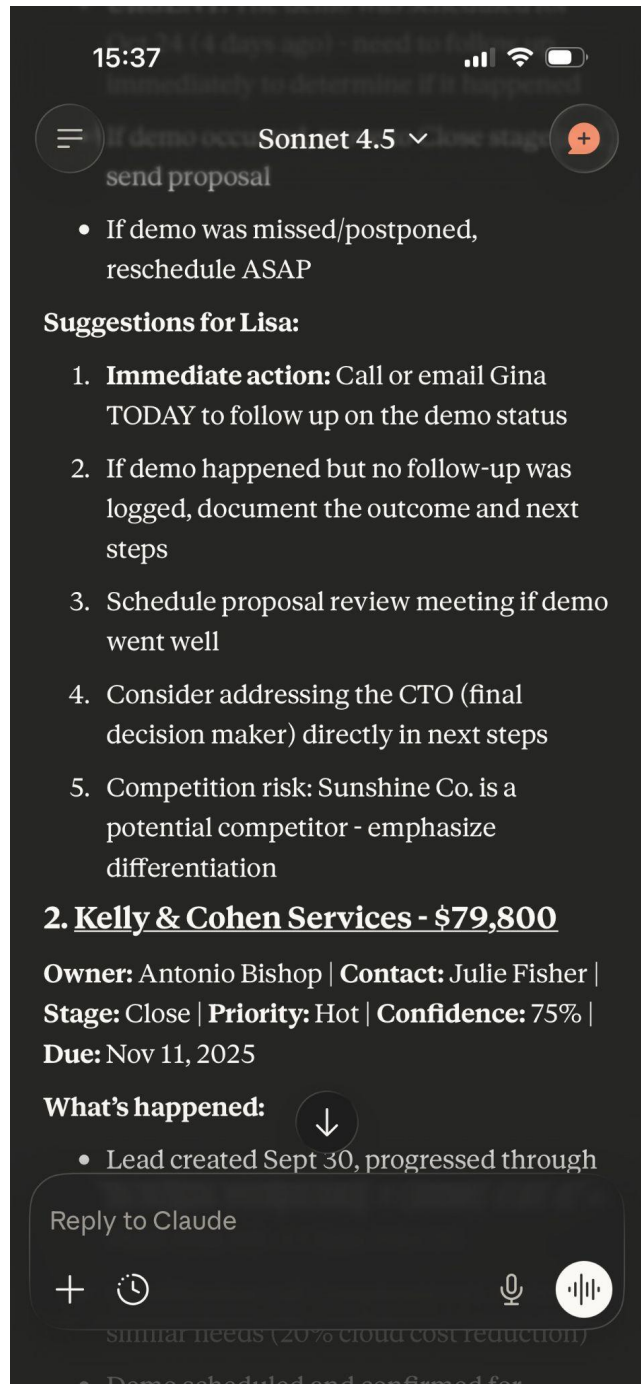
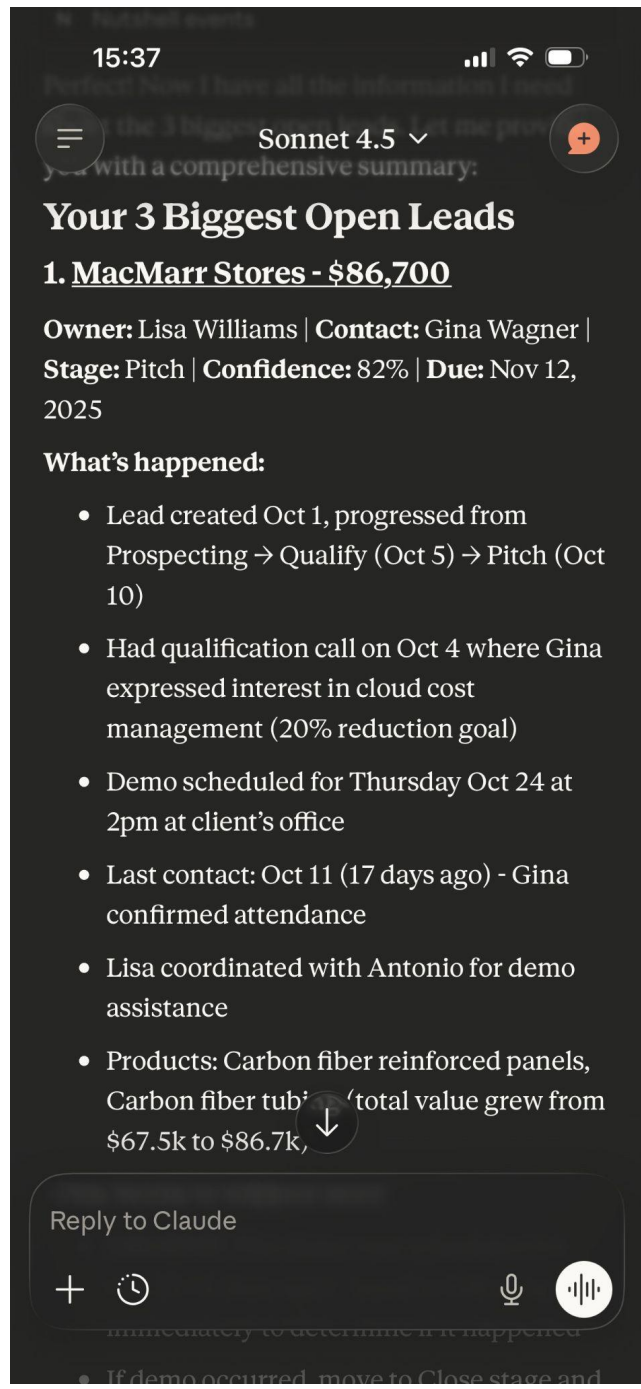
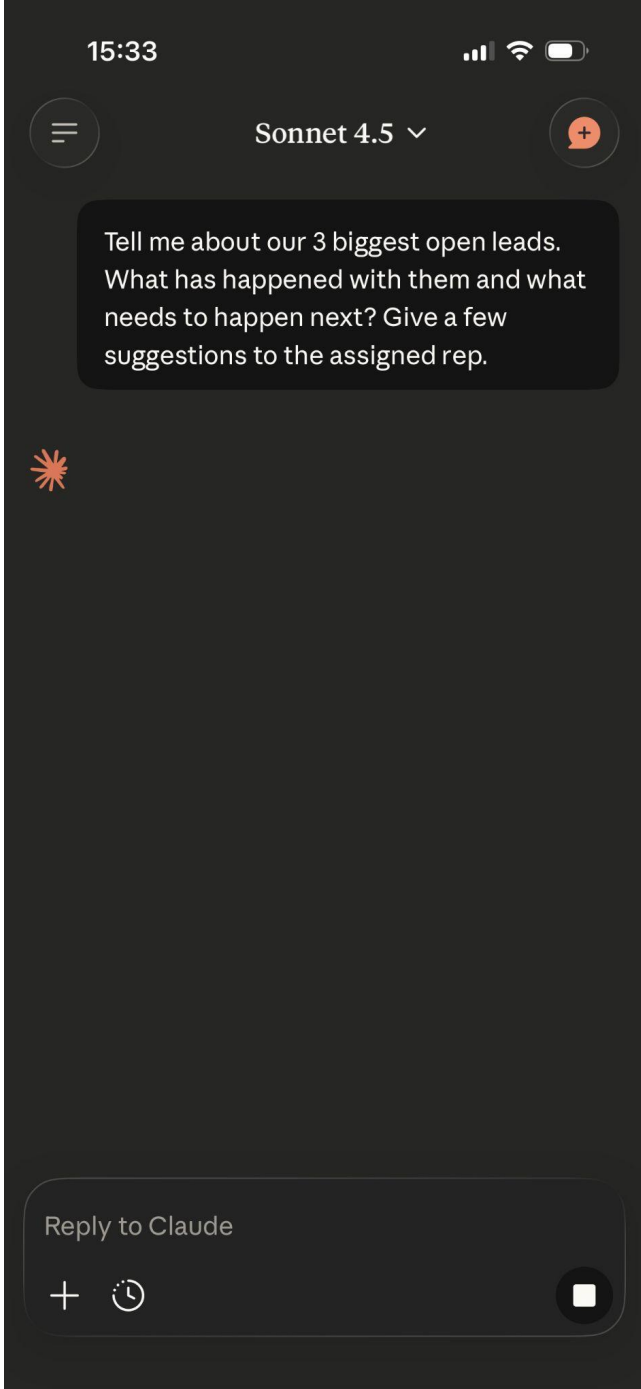
Plus this snippet from Mary:

“Sounds perfect, looking forward to it.”

That's a happy prospect energy.

Tiny timeline recap

Date	Interaction
Aug 30	Lead created
Early Sep	Qualification call
Sep	Multiple follow-ups + scheduling
Sep 16	On-site demo logged
Oct 15	Closed-Won 🏆 value increased to \$18k



AF

How does lead volume look over the course of this year?

Based on the data from your Nutshell account, here's how your lead volume looks for 2025:

Lead Volume Summary

Year-to-date Total: 438 leads (worth \$18.7m)

Monthly Breakdown:

- **January:** 132 leads (\$4.66m) - Strongest month by far
- **February:** 34 leads (\$1.32m)
- **March:** 31 leads (\$1.19m)
- **April:** 37 leads (\$1.73m)
- **May:** 32 leads (\$1.37m)
- **June:** 37 leads (\$1.71m)
- **July:** 33 leads (\$1.72m)
- **August:** 44 leads (\$2.12m)
- **September:** 36 leads (\$1.81m)
- **October:** 22 leads (\$1.02m) - Current month (partial)
- **November & December:** No data yet (future months)

Key Insights:

1. **Strong start:** January saw exceptionally high lead volume (132 leads), which was 3-4x higher than any other month
2. **Stabilization:** After January, lead volume has been relatively consistent, averaging around 30-37 leads per month
3. **Recent uptick:** August showed an increase to 44 leads before settling back down
4. **Current trend:** October is showing lower numbers so far (22 leads), but the month isn't complete yet

The significant spike in January might indicate a seasonal pattern, promotional campaign, or other business initiative. The subsequent months show steady, predictable lead generation.