NEW TO NUTSHELL?

You’ve come to the right place!
What’s the big picture?

Nutshell helps you get organized, build stronger relationships, convert more leads, and ultimately increase your revenue. We believe that a great CRM should save you time, help you stay focused on the most important tasks, and close more deals, not get in your way with data entry or unnecessary friction.
What can Nutshell do for you?

✓ Get organized
✓ Better manage your outreach
✓ Improve your sales process to win more leads
✓ Increase visibility across reps and teams
✓ Hold your team accountable
Nutshell Terminology

Companies
The businesses that you work with.

People
The contacts that you have at those businesses.

Leads
Potential sales deals with your companies and people.

Activities
Scheduled events with your companies, people, and leads.

Tasks
Lightweight reminders for you and your teammates.

Reports
Generate lead reports to learn more about your sales

Dashboard
See your metrics and what’s scheduled for the day.

Dashboard Timeline
A real-time feed of everything going on in Nutshell.

Timeline
A complete log of all correspondence and notes with a company, person, or lead.
## Nutshell Terminology

<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pipeline</strong></td>
<td>A process you work leads through to bring them closer to buying</td>
</tr>
<tr>
<td><strong>Stage</strong></td>
<td>Defined milestones to track leads through a pipeline.</td>
</tr>
<tr>
<td><strong>Stage Guidance</strong></td>
<td>Advice for you to help you progress the lead.</td>
</tr>
<tr>
<td><strong>Stage Goals</strong></td>
<td>The main purpose of each stage that brings leads closer to a sale.</td>
</tr>
<tr>
<td><strong>Stage Tasks</strong></td>
<td>The to-do items for a lead while it is in a certain stage.</td>
</tr>
<tr>
<td><strong>Outcomes</strong></td>
<td>Learn why leads are lost or cancelled and report on them later.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Where your lead is at in its life cycle, from open to close.</td>
</tr>
<tr>
<td><strong>Sources</strong></td>
<td>Track where your leads are coming from to understand their journey.</td>
</tr>
<tr>
<td><strong>Custom Fields</strong></td>
<td>Store info about a company, person, or lead that's relevant to your sales process.</td>
</tr>
</tbody>
</table>
Where are things located?

Create new entries
Search
Dashboard
Companies
People
Leads
Reports
Activities and Tasks
Notifications
Help Center
Your settings
Psst... want a checklist?

Keep this checklist on hand while you’re working through your setup!

Do you prefer checking tasks off a list? So do we! Use this handy checklist to make sure that you don’t miss any steps while you’re setting up your Nutshell account.

[Click here to get your own setup checklist]
MY SETUP

✓ Set up your profile
✓ Connect your email
✓ Connect your phone
✓ Connect your calendar
✓ Choose your notifications
✓ Customize your dashboard
Set up your profile

Customize your profile to make Nutshell feel more like home!

Add up to 5 email addresses right on your profile for unique email outreach. You can also log in with any of those emails, so you’ll never forget your login!

Set your time zone, market, phone code, and weather units to make sure you’re operating with the right location settings.

This will make your life a little easier when it comes to calling, emailing, and adding dollar values to your leads.
Emailing with Nutshell

Should I sync my email?

Syncing your email will pull all of your new emails into Nutshell and attach them to the right people, companies, and open leads.

This is a great way to log your correspondence so that your team always knows exactly where you left off with someone. Never repeat unnecessary information or ask the same questions again!
Email privacy

**How can I sync my emails and keep internal communications private?**

If you would like to keep your synced emails private, please configure your settings to automatically share “none” of your emails.

You can manually share specific emails by clicking the “share with everyone” button at the bottom of the email.
Email privacy

How do I know which emails my colleagues can see?

Private emails are surrounded by a black dotted line and cannot be viewed by anyone but you. In your inbox, they have a “private” tag.

Public emails are in a light blue box and have a red and white stripe down the left side. These can be seen by everyone.
Email privacy

How do I keep private conversations out of Nutshell?

Add email addresses to your blacklist to prevent any correspondence with that person from being added to Nutshell.

Internal emails between Nutshell users will never be shared.
Connect your phone

Set up your phone so that you can click any phone number in Nutshell and call right away. Make phone outreach a breeze!

You’ll never have to dial a number again! Once you’re finished, log those calls so that your manager knows how hard you’re working each day. You can even record calls to share with the team.

Not a Nutshell Pro user? Connect RingCentral, Kixie, or Skype.
Connect your calendar

Sync Nutshell with your external calendar so that your activities appear in both places without doing double data entry!

When you sync your calendar with Nutshell, you’re able to schedule activities in one place and still see them everywhere you need them.

Events you create in your Google or Office 365 calendar will come into Nutshell and your Nutshell activities will appear on your personal calendar.
Choose your notifications

Choose how and when you’d like to receive alerts for specific things that happen in Nutshell.

Set up notifications so that you’re always up to speed on things, like when a lead is assigned to you or you have 30 minutes until your next scheduled activity.

You can receive notifications inside of Nutshell, by email, and on your phone.

<table>
<thead>
<tr>
<th>Notifications</th>
<th>IN-APP</th>
<th>EMAIL</th>
<th>MOBILE PUSH</th>
</tr>
</thead>
<tbody>
<tr>
<td>All leads</td>
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<td></td>
<td></td>
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<tr>
<td>New leads</td>
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<tr>
<td>Leads closed</td>
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<tr>
<td>Leads updated</td>
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<td></td>
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<tr>
<td>Leads due</td>
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<td>Lead is hot</td>
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<td></td>
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<td>Lead is won</td>
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<tr>
<td>Your leads</td>
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<tr>
<td>Lead assigned</td>
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<tr>
<td>Lead updated</td>
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<tr>
<td>Your leads</td>
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<tr>
<td>Lead is closed</td>
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<tr>
<td>Watched leads</td>
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<td></td>
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<tr>
<td>Watched lead updated</td>
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<td>Watched lead closed</td>
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<tr>
<td>Watched lead due</td>
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<tr>
<td>Activities</td>
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<td>Added as a participant</td>
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<td></td>
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<tr>
<td>30-minute notification</td>
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<tr>
<td>Tasks</td>
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<tr>
<td>30 minutes before a task is due</td>
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<td>30 minutes before an automated task is due</td>
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<tr>
<td>A task is assigned to you</td>
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</tr>
<tr>
<td>An automated task is assigned to you</td>
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<tr>
<td>Mentions</td>
<td></td>
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<tr>
<td>You or your team are mentioned in a note</td>
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</tbody>
</table>
Customize your dashboard

Create dashboard cards to easily track the information that matters most to you!

We like to add things like list of your hot leads, your sales for the month, and lists of overdue leads.
ADMIN SETUP

✓ Configure your general setup
✓ Add your team
✓ Choose a plan
✓ Set up account-wide integrations
✓ Set sales quotas
✓ Set activity quotas [Pro]
Configure your general setup

Customize your team’s account so that it feels like home! Add your company name, slogan, and logos.

Set the start of your work week, fiscal year, and business hours to make sure your team is operating on the same clock.

Set a default market, phone code, and address to keep everyone working in the same location.

Set permissions for exporting, bulk editing, and email viewing so that everyone does and sees what they’re supposed to.
Add your team

Add your colleagues so that you can collaborate inside of Nutshell and share the data.

If your company has multiple teams, create those so that you can set each team’s quota and round-robin assign leads to the right people.

You can also set viewing permissions inside of those teams. This is the place to come if you need to restrict someone’s access to companies, people, and leads.
Choose a plan

Choose your desired Nutshell plan to set your team up with all the features they need.

Double-check the number of team members on your plan to make sure that everybody who needs it has access to Nutshell.

Bill monthly or annually, depending on which plan fits your budget best.

**PRO TIP** Bill annually for a 10% discount!

Add your billing information and the email address that you’d like us to send invoices to so that you never miss a payment.
Set up account-wide integrations

Connect your company’s other software tools to Nutshell so that your team can seamlessly send data back and forth.

These account-wide integrations apply to your entire account, so setting a connection up once will activate it for everyone!

Connect things like your Wufoo forms, Quickbooks Online contacts, and PandaDoc proposals.
Set sales quotas

Set a sales quota for each team so that your reps know exactly what number to reach for each month.

Report on performance against these quotas and add them to your dashboard so that those goals are always top of mind.
Set activity quotas

Determine how many activities you want your team to complete each week (for all activity types) and **set activity quotas** so they know exactly how busy they should be each week.

Make sure your reps are focusing on the right activities and spending their valuable time wisely!
CUSTOMIZE

✓ Import your data  ✓ Markets
✓ Activity types     ✓ Products
✓ Company types     ✓ Sources
✓ Competitors       ✓ Tags
✓ Custom fields     ✓ Territories
✓ Industries
Import your data

You can import your data into Nutshell from a ton of other places! To begin, nail down where are you importing from.

Once you know where you’re importing from, you can find detailed instructions for your unique importing process here.

Here is the full list of the data you can import into Nutshell. Importing enables you to add contacts in bulk with just a few steps.
Activity types

Create any custom activity types that your team performs so that they can record exactly how they’re connecting with prospects.

Nutshell Pro customers can set activity quotas and report on these activities later to understand how their team is spending their time.

Pro folks can also create stage goals in their pipelines to automatically move leads forward when certain activities are scheduled or logged.
Company types

Categorize the types of relationships that your team has with other companies.

Keep track of your partners, customers, and vendors so that **prospecting your own contacts** is a breeze.

Nutshell Pro customers can **automatically change these company types** once a lead is closed! Win the lead and make that company a customer so that everybody knows they’ve already bought.
Competitors

Add any competitors to your business so that your team can track them in their leads. If prospects are considering another option, you should know about it!

Report on these competitors later on and compare your win and loss rates to see which ones are causing you the most trouble.
Custom fields

Create fields on your pages to store any custom data that doesn’t already have a home in Nutshell.

Filter your reports by custom fields to create specific lists of your contacts based on your unique business information.

Nutshell Pro customers can also set up stage goals based on lead custom fields. Automatically advance a lead when your team collects a key piece of information about that sale.
Industries

Create industries that you can use to organize and filter your companies.

Nutshell Pro customers with multiple pipelines can automatically add leads to certain pipelines based on their industries.
Markets

Add any markets that your team does business in to report on leads in different currencies.

Use territories (coming up soon) to keep track of different regions and only use markets to work in different currencies for your global sales.
Products

Add goods and/or services that your team sells to add value to leads and keep track of what you’re selling to your customers.

Products allow you to report on the dollar values of your sales. Assign leads to specific reps based on the product being sold.

Do your products have unique sales processes? Automatically drop leads into the right pipeline based on their products! [Pro]
Sources

Add all of the different sources where your team gets leads from.

Report on these to find out which sources are giving you the hottest leads and the most wins!

Nutshell Pro folks can also route leads into specific pipelines based on which source they’re coming from.
Create tags to add lightweight labels to your companies, people, and leads so that you can organize them into any special groups that you need.

Filter your contacts and report on your leads based on these tags to create unique collections of data.
Territories

**Specify the regions** where your contacts are located and create territories based on cities, states, zip codes, area codes, and countries.

Use these territories to **assign leads to specific reps** based on the locations of their primary contacts.

Pro folks can also **distribute leads into the right pipelines** based on their territories.
✓ Build your sales automation pipelines
  ○ Give your team guidance
  ○ Automate user assignments
  ○ Set stage goals
  ○ Create tasks
  ○ Add leads to automated MailChimp campaigns
✓ Determine outcomes
Build your sales automation pipelines

Build pipelines for leads so that your team knows exactly how to work their deals towards a close. Lay out each milestone of your sales process so that everyone knows how leads progress.

Report on this pipeline later to pinpoint where sales might be lagging and make incremental improvements to your process.
Give your team guidance

Add guidance to every stage in your pipeline to help your team through each step of the sales process. The guidance will appear beneath each stage of the pipeline.

Make it your own! This is a place to coach, encourage, and teach, right within Nutshell.
Automate user assignments

Automatically assign leads to certain team members based on the pipeline and/or stage of a lead. This takes the guesswork and the work out of lead assignments.

PRO TIP Create round-robin assignments for your teams to keep lead distributions fair.
Set stage goals

**Set goals for each stage** in the pipeline so that your team knows what’s most important for them to accomplish in order to move a lead forward.

The moment a stage goal is met, the lead will move to the next stage to keep **your team focused on the things that matter**. Remove the questions and the minutia!
Create tasks

Set automated tasks that must be completed during each stage of the pipeline

These stage tasks will appear automatically on each lead and on the assignee’s dashboard so that your team knows what to do next in order to achieve the stage goal and move the lead forward.
Add leads to MailChimp Campaigns

Automatically add leads to your automated campaigns in MailChimp based on their stage in the pipeline and remove them once those campaigns are no longer relevant.

Automate your email marketing and tie your outreach directly to your sales pipeline!
Determine outcomes

Create a list of outcomes that your team can use to record why a lead was lost or cancelled. This will allow you to report on those outcomes in the future to learn more about why your team is losing and cancelling leads.
GET SELLING!

1. Add a company and a person
2. Create a lead
3. Create activities and tasks
4. How to use the dashboard
5. Report on your sales
STILL HAVE QUESTIONS?

Contact us!
support@nutshell.com
(888) 336-8808