

# Partner program guide

Hello and welcome to Nutshell's partner program! We're thrilled to have you on board!

This guide is designed to provide you with all the essential information you need to maximize your success in our program. Inside, you'll find:

- A comprehensive overview of the program
- Information on how to navigate and use Impact, our partner program management software
- Marketing ideas and tips for promoting your tracking links
- A bit about us to help you get to know Nutshell
- Links to additional resources

We hope you find this guide helpful!

If you have questions at any time, feel free to reach out to me at [kevin@nutshell.com](mailto:kevin@nutshell.com).

Thanks again for choosing to partner with us. We look forward to growing together!

## Section 1: How the program works

In this section, we'll provide a brief overview of how our partner program works, from how to participate to how you get paid.

### How the partner program works

- Copy tracking links or other promotional assets from Impact and publish them to your website.
- When visitors to your website click through these links to nutshell.com, their activity will automatically be attributed to you.
- If a referral signs up for a Nutshell subscription, you'll receive credit for the transaction.
- Once the transaction is approved, you'll receive a commission through Impact.
- Commissions are paid out for up to 12 months per referral transaction (if your referral cancels their subscription prior to 12 months, you will be paid out your commission for the number of months their subscription was active).

### What do I need to do to participate?

To participate in the partner program, all you need to do is set up your Impact account and then publish referral links or promotional assets on your website, and/or share them via email, YouTube, or other channels. You'll then automatically receive credit for any new customers who sign up for a Nutshell subscription after clicking on your referral link.

The next section of this guide provides more details about using Impact, tracking links, and other promotional assets.

## How do I get paid?

If any of your referrals sign up for a Nutshell subscription after clicking one of your links or assets, you'll receive a commission on the total cost of that referral's Nutshell subscription for the first year they're a customer.

To find the commission percentage, refer to your contract in Impact. As you refer more customers, your commission percentage may increase. For full details on commission tiers, refer to your contract.

You will receive your commission through Impact approximately 50-80 days after a referral purchases a Nutshell subscription.

Actions, such as purchasing a Nutshell subscription, are locked 27 days after the end of the month in which they are tracked. 20 days after the end of the month they lock, approved transactions are paid. At this point, you will receive your commission through Impact.

**Example:** *If one of your referrals purchases a Nutshell subscription on June 28th, that action will "lock" on July 27th and your payment for that action will pay out on August 20th. All of your activity and payment details can be viewed in your Impact dashboard.*

## Section 2: Getting started with Impact

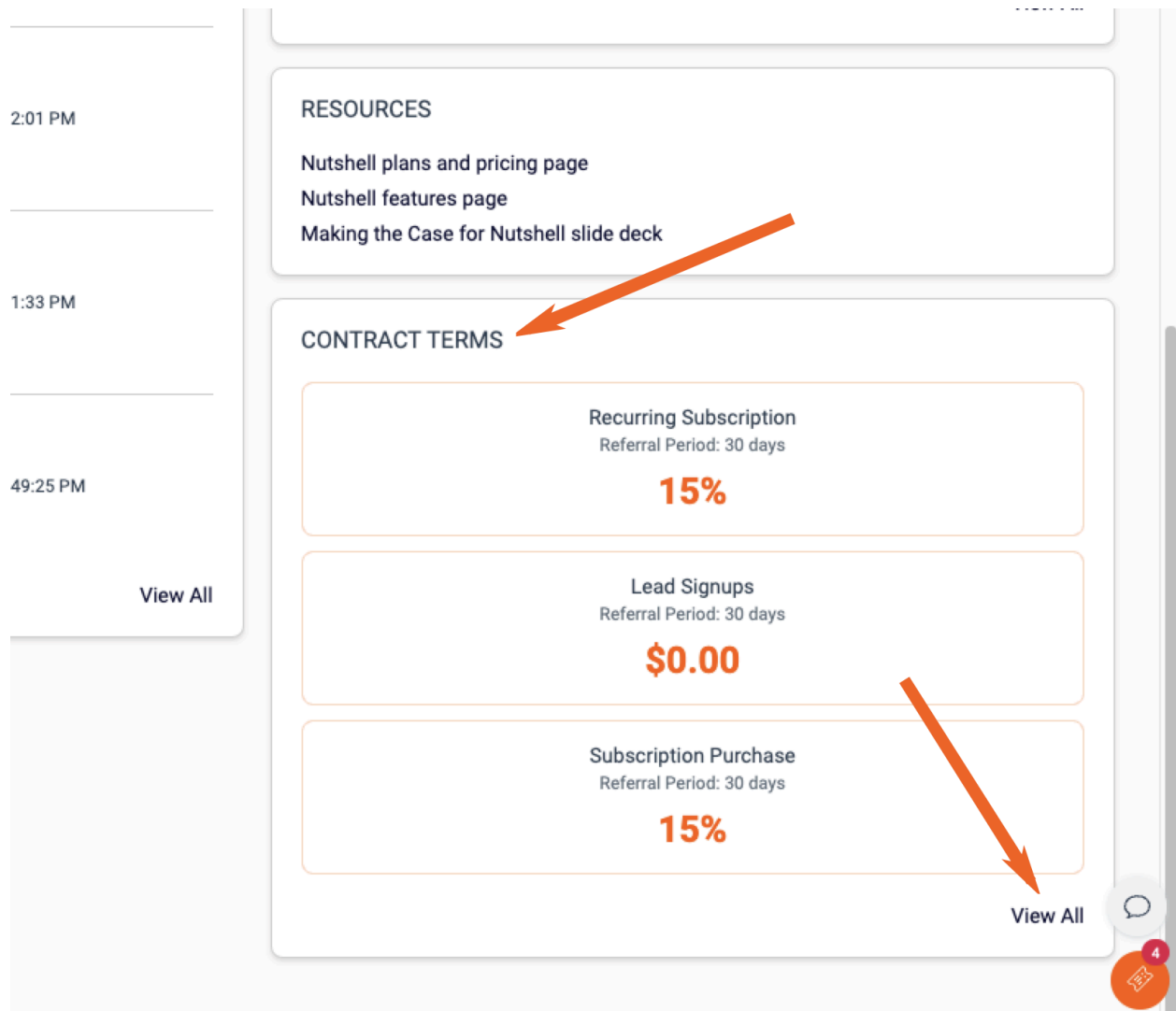
Impact is the software we use to manage our partner program, and it's your portal for everything you need to get started as a partner. If you didn't have an Impact account already, you were prompted to create one when you applied for our partner program.

Within Impact, you'll find your tracking links and assets, reports on your referrals, resources from the Nutshell team, and more.

In this section of our partner program guide, we'll walk you through how to set up your Impact account and how to use it to make the most of our partnership.

## Review your terms

As a partner, it's important to understand the terms of your contract. Your contract provides details about how actions are tracked, how payments are made, and additional guidelines. You can find your contract terms on the right side of your Impact dashboard. Click 'View All' in the bottom-right corner of the contract terms widget to view your full contract.

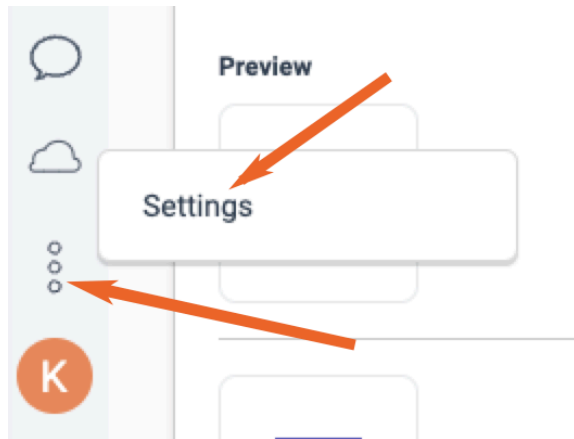


If you see 'Brands' in your top navigation menu, you can also access your contract terms there.

Click 'Brands' and then 'My Brands.' Then, select Nutshell. Next, select, 'More' and choose 'View and Manage Contract' from the drop-down menu.

## How to configure your finance settings

Another important early step is selecting your finance settings to ensure you get paid. To go to your finance settings, click on the three dots in the bottom left corner of your screen and then click 'Settings.'



On the settings page, scroll down to the 'Finance' section.

Click 'Bank Account' under 'Finance.' On the 'Bank Account Settings' page, you can enter your bank account or PayPal details and set up autopay.

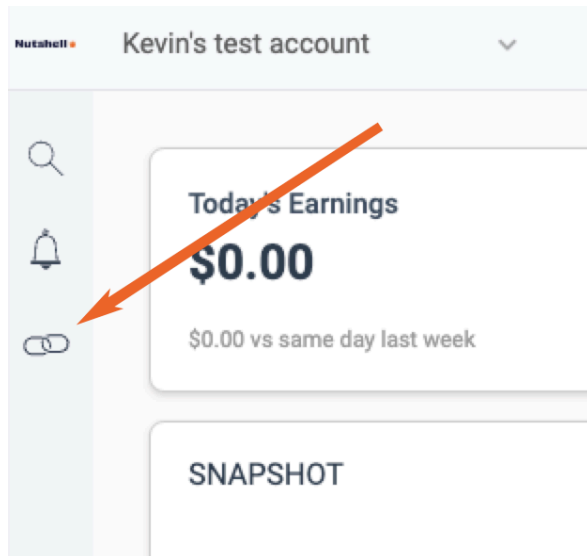
You'll also need to submit tax documents to get paid. From the settings page, select 'Tax Documents' under 'Finance.' On the 'Electronic Tax Documents' page, you can submit your documents. Those based in the US will need to submit a W9. Others need to submit a W8.

## How to create and share tracking links

Tracking links are the links you share with referrals. These links enable us to track the actions your referrals take back to you so you can get credit for them. You may also hear these links called affiliate links or referral links.

You have several options when it comes to creating and accessing tracking links.

The first is selecting the chain link icon from the left sidebar near the top of the page. The icon looks like this:



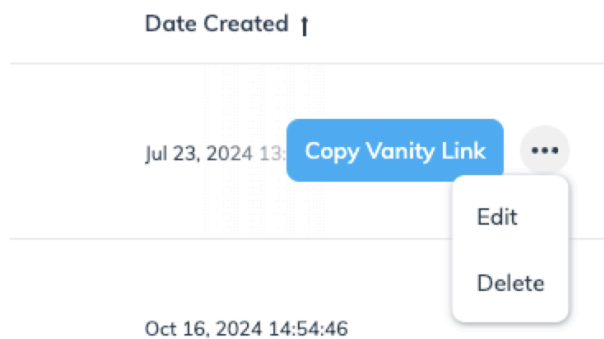
Clicking that icon will expand the sidebar to show the 'Create and share link' window. Clicking the 'Create' button without entering anything in the 'Landing Page' will generate a tracking link to our trial signup page. You can generate a tracking link to any other page on nutshell.com by pasting the desired URL in the 'Landing Page' field.

To share a tracking link, simply click on it to copy it. Then paste it in the desired location on your website, email, social media post, or elsewhere. Find more information on where to share your link in section 3 below.

A screenshot of the 'Create and share link' window. The title is 'Create and share link' with the subtitle 'Promote any brand with a simple link'. There is a dropdown menu set to 'Nutshell' and a text input field for 'Landing Page'. A blue back arrow is on the left. An orange 'Create' button is below the input fields, and a link to 'Advanced' settings is to its right. Below these is a message: 'Use this link to promote Nutshell. Link updates may take up to 5 minutes to propagate.' Underneath is a URL field with 'https://' selected and a copy icon. At the bottom are 'Share' buttons for Facebook, Twitter, and a QR code. A 'View All' link is at the bottom right.

Another place you can create and access tracking links is from the widget on your dashboard. On the right hand side of your dashboard, you'll see a widget titled 'Create and share link.' You can follow the same steps as above to create and copy links from here.

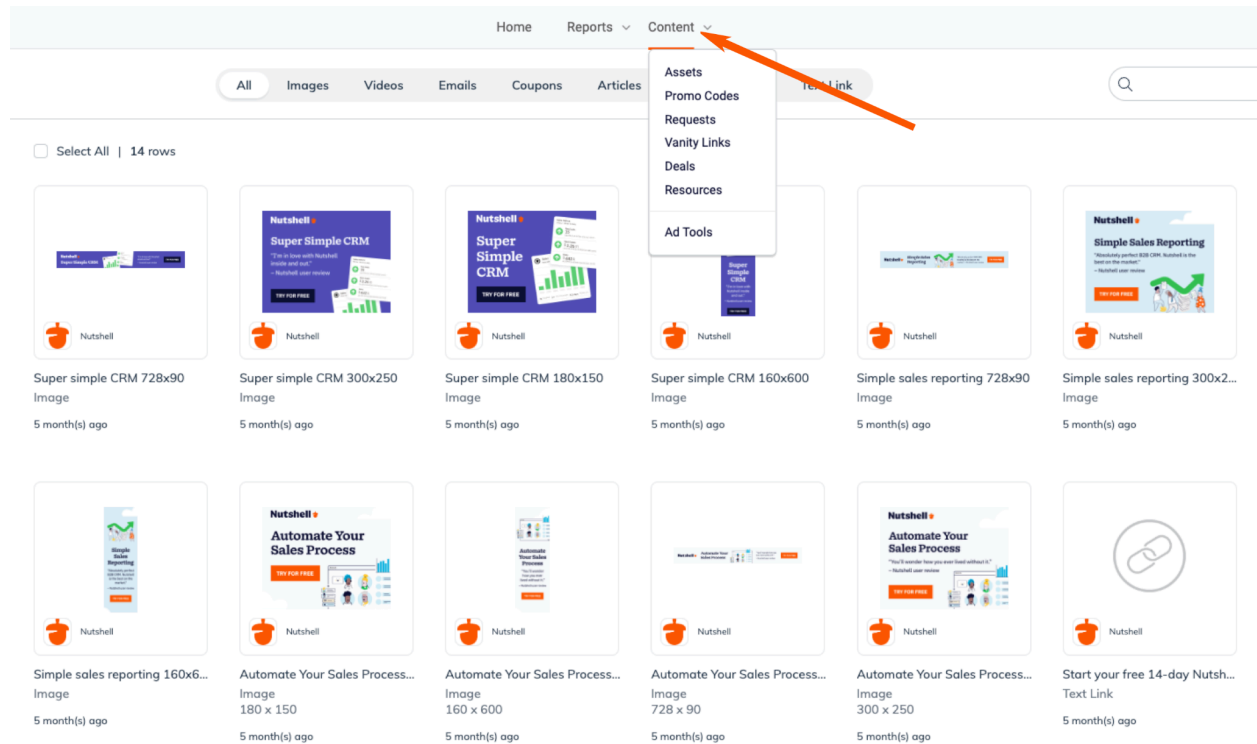
The third option for accessing your tracking links is clicking 'Content' in the top navigation bar and then selecting 'Vanity Links.' On the 'Manage Vanity Links' page, you'll see all of the links you've created. Hover over the desired link and click the 'Copy Vanity Link' to copy it. To edit a link, hover over it, click the three dots that appear on the right side of the screen, and click 'Edit.'



## How to access and share other assets in Impact

In addition to standard tracking links, you can access other promotional assets in Impact to share with referrals. These assets work the same way as standard tracking links but come in the form of various types of media such as images. These images contain a link. When clicked, they take referrals to nutshell.com and you get credit for the link.

To access these assets, click on 'Content' in the top navigation menu and then select 'Assets.' You will then see a collection of assets you can use to promote Nutshell.

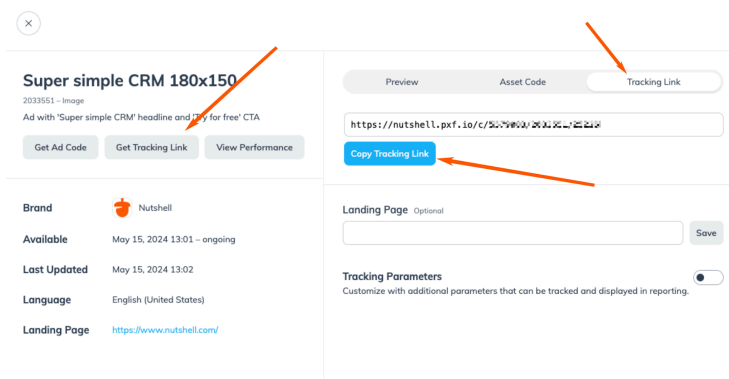
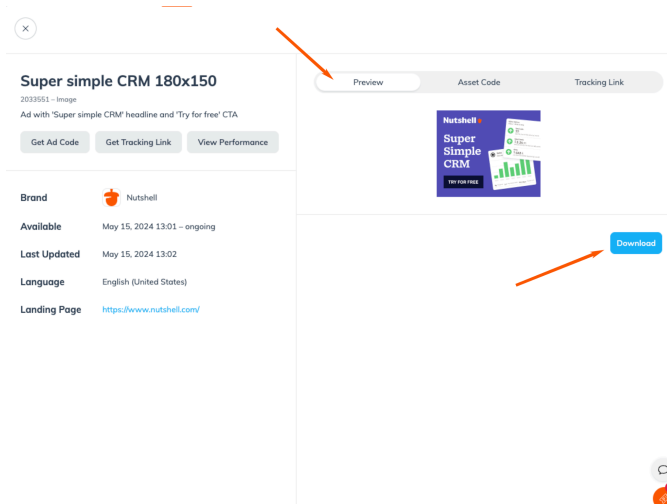


To use these images, first click on the one you want to share. Then, you have several options for adding the image to your site or other media property.

To copy the image's html, click on the 'Get Ad Code' button. Then, click the blue 'Copy Code' under the HTML section on the right side of your screen. This code contains the code for the image as well as the tracking link that goes with it. Then, paste this html onto a page on your website.







You also have the option of customizing the landing page for the ad with either method. To do so, paste the URL for your desired landing page in the 'Landing Page' section on either the 'Asset Code' or 'Tracking Link' tab before copying the code or link.

If there's a specific that not's available but would be helpful for you, you can request new assets by clicking on 'Content' in the top navigation bar and then hitting 'Requests.'

## How to access resources in Impact

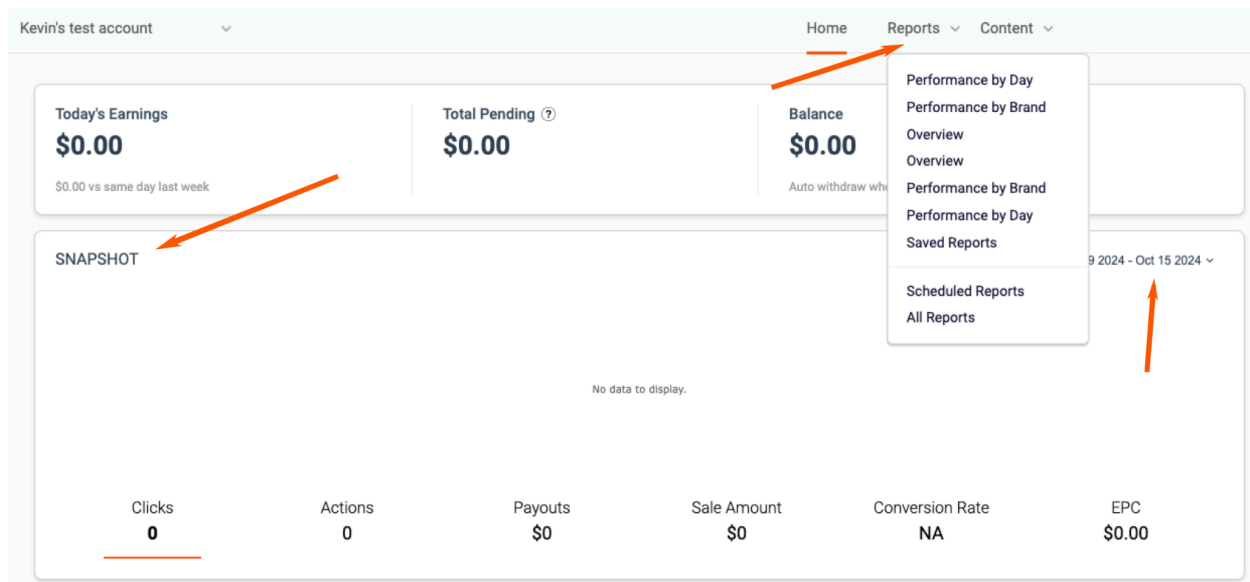
We've added various resources to Impact to help you make the most of our partner program. These resources can help you learn more about Nutshell and create content to promote Nutshell and share your affiliate links.

To access these resources, go to 'Content' in the top navigation menu and click 'Resources.'

## How to access reports in Impact

Impact provides reporting that tells you how your links and assets are performing. Using reports, you can see metrics such as how many clicks your links have received, how many of your referrals have signed up for Nutshell, how much you've earned, and more.

You can see key metrics in the 'Snapshot' widget on your dashboard and adjust the date range for those metrics in the top right corner of the 'Snapshot' window. To see all of the reports available in Impact, click on 'Reports' in the top navigation bar and choose one of the options in the dropdown.



## Learn more about using Impact

For more information about how to use Impact, explore [Impact's help center](#) or reach out to Impact's support team. To access help docs, support chat, and other assistance options, click the question mark icon in the bottom right of your screen.



## Section 3: Marketing playbook

In this section of our guide, we'll provide some ideas on how to promote Nutshell effectively. Of course, you know your audience best but feel free to use this section for inspiration and guidance as you share Nutshell with them.

### Create a landing page for word-of-mouth referrals

Word-of-mouth referrals are a powerful way to promote Nutshell. One effective strategy is to create a dedicated landing page that highlights the benefits of Nutshell. Begin by setting up a simple and clean layout that focuses on the key features and USPs (unique selling propositions) of the platform. Ensure that you include a compelling call-to-action (CTA) with your tracking link to make it easy for referrals to take the next step.

Once your landing page is live, share the link with your clients, associates, and potential referrals through various channels, including email, messaging apps, and social media platforms. This approach allows you to reach a broader audience and increases the likelihood of generating leads.

When thinking about who makes a good referral, consider small business owners, sales professionals, and marketing teams who may benefit from a robust CRM solution like Nutshell. Engage in conversations about CRM needs, sales processes, or marketing challenges, and suggest Nutshell as a potential solution during these discussions.

To create an effective landing page, keep it simple and focused. Highlight the unique benefits of Nutshell and trust signals such as reviews.

For more information about effectively pitching Nutshell, see the 'How to Talk about Nutshell' section below.

### Feature Nutshell in blog posts or pages on your website

Blogging is a powerful way to reach your audience while establishing your authority in your niche. By featuring Nutshell in your blog posts, you can share your personal experiences and insights, which can help attract potential customers. When writing your blog, aim for a decent length—ideally, at least 800 words—to provide comprehensive information. Ensure your writing is original and free from spelling or grammatical errors, as this enhances credibility.

To maximize the effectiveness of your blogs, follow essential SEO best practices. Incorporate relevant keywords naturally throughout your content, optimize your headings and subheadings to enhance readability, and include both internal and external links to improve search engine visibility.

As you write about Nutshell, look for opportunities to include your tracking link. Make sure to mention Nutshell prominently when you first introduce it in your post and consider adding clear CTAs at the end of the article to encourage readers to click through and learn more.

## Blog post topic ideas

1. **Review of Nutshell:** Share your experience with Nutshell, detailing how it has benefited your business. Be honest and cover essential features, pricing, and customer service. This transparency can build trust with your audience.
2. **Comparison blog post:** Create a post comparing Nutshell to its competitors. Focus on key differentiators such as pricing, features, and user experience. Provide your audience with insights that can help them make informed decisions.
3. **Listicle:** Consider writing list-style articles like “Top CRMs for Small Businesses” or “Essential Tools for Marketing Success.” Listicles are easy to read and can be shared widely, making them an effective format for driving traffic.
4. **Nutshell tutorials:** Write tutorials on how to use Nutshell effectively. Including screenshots or video snippets can greatly enhance clarity and engagement, making it easier for users to follow along. Possible tutorial ideas could include "How to Set Up Your First Sales Pipeline" or "Using Nutshell for Email Marketing Campaigns."
5. **General business topics:** Discuss broader topics in the sales, marketing, or business space and naturally integrate mentions of Nutshell as a solution. Topic ideas could range from sales strategies to CRM best practices. You can also browse our blog for inspiration, but remember to create original content and avoid plagiarism.

## Create videos

Repurposing your blog content into videos can extend your reach even further. Consider creating engaging videos for platforms like YouTube, where you can talk about your blog topics, share tutorials, or discuss industry trends. Be sure to include your tracking link in the video description to drive traffic back to your landing page.

Optimize your videos with compelling titles, descriptions, and thumbnails to attract viewers. This multi-channel approach not only helps you reach a wider audience but also reinforces your message across different formats.

## Create a “Recommended resources” or “Partners” page

Adding a dedicated page for recommended resources or partners on your website can effectively showcase Nutshell while providing value to your visitors. Ensure your page is visually appealing, using engaging images and concise descriptions of what Nutshell offers. Highlight its key features and benefits to capture the attention of potential users.

Don't forget to include your tracking link prominently on this page to ensure that any traffic generated from it can be tracked. Using image assets from Impact can enhance the visual appeal of your recommendations, making the page more inviting and informative.

## Place image assets on your website

Utilizing ad image assets from Impact can visually promote Nutshell on your website. These assets typically come in the form of banners or ads that you can position strategically on your site. Consider placing these banners in high-visibility areas, such as the header, sidebar, or within blog content where they are likely to capture the attention of your visitors.

For more details on how to effectively use these assets, refer to the "How to Share Other Assets from Impact" section of this guide, which provides comprehensive instructions on maximizing visibility and engagement.

## Mention Nutshell in your email newsletter

Incorporating Nutshell into your email marketing strategy can significantly boost your promotional efforts. If you have an email newsletter, consider dedicating a section to share updates about Nutshell, success stories, or link to relevant blog posts that feature Nutshell prominently.

You can also include Nutshell ad images in your newsletter to visually capture attention. When crafting your email newsletter, keep your content concise and engaging, ensuring that your subject lines are clear and compelling to encourage higher open rates.

## Send a drip campaign

Deploying a drip campaign is an effective way to nurture leads and educate your audience about Nutshell over time. This approach involves sending a series of automated emails spaced out over several days or weeks to keep your audience engaged. Define the purpose of your campaign, whether it's to introduce Nutshell, highlight features, or share success stories.

When planning your drip campaign, aim to send 3-5 messages spaced a few days apart to maintain interest without overwhelming your audience. Tailor the content of each email to address specific pain points your audience may face, providing valuable insights and solutions.

## Highlight Nutshell tools you use

If you're using Nutshell products, leverage their capabilities in your marketing efforts. For example, if you use [Nutshell Campaigns](#), consider adding a note at the bottom of your email that states "Powered by Nutshell Campaigns," along with a tracking link to the corresponding feature page. This not only promotes Nutshell but also reinforces its value as a tool you trust.

Similarly, if you're using [Nutshell Forms](#), include a note beneath the forms on your website, along with a tracking link.

## Post on social media

Social media platforms are powerful channels for engaging with your audience and sharing your experiences with Nutshell. Create posts that discuss your positive experiences with the platform and why you recommend it. Be sure to include your tracking link in these posts.

In addition to sharing your personal experiences, you can use social media to promote your blog posts or videos that feature Nutshell.

## Host a webinar

Hosting a webinar is another effective way to showcase Nutshell and connect with your audience. Choose a relevant topic that addresses a specific problem your audience faces, and discuss how Nutshell can help provide solutions. While Nutshell doesn't need to be the sole focus of your webinar, mentioning it naturally throughout your presentation can lead to increased interest and inquiries.

Be sure to include your affiliate tracking link in the webinar notes or descriptions, and send a follow-up email to participants with additional resources and your link for easy referral.

## Mention Nutshell in podcast episodes

If you have a podcast, consider incorporating mentions of Nutshell into your episodes. This can be done in a few ways—either by weaving it into the main topic of your discussion or by treating it like an ad read. Discussing how Nutshell has impacted your workflow or helped your clients can provide real-life context that resonates with listeners.

Ensure you include your tracking link in the episode description, making it easy for listeners to learn more about Nutshell. Consider creating a few potential topics or ad reads that effectively highlight the benefits of using Nutshell.

## Run paid ads

Running paid ads can be an effective strategy to promote Nutshell, especially if you have the budget to support it. Consider leveraging search engines, display networks, or social media platforms to reach your target audience. You can use ads to promote your blog content or webinars or direct traffic to your landing page.

However, it's crucial to adhere to your contract stipulations, which prohibit bidding on Nutshell-branded keywords. Additionally, be aware of the financial risks associated with paid

advertising. While it can be a powerful tool for driving traffic and generating leads, it also comes with upfront costs that must be carefully managed.

To enhance your paid ad efforts, focus on targeting the right audience, setting a clear budget, and monitoring ad performance to ensure you get the best return on your investment.

## Section 4: How to talk about Nutshell

In this section, we will cover what makes Nutshell stand out and how to effectively pitch it to potential customers. By highlighting Nutshell's key features, unique selling points, and success stories, you can confidently convey the value of Nutshell to your audience.

### What is Nutshell?

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.

Launched in 2010, Nutshell is based in Ann Arbor, Michigan and currently serves 20,000+ users across 5,000+ companies. Nutshell has been named a “Leader” in G2’s Grid® Report for CRM every quarter since 2020.

### Nutshell descriptions

Below are two descriptions of Nutshell you can use when sharing Nutshell on your website or with your contacts.

#### Short description:

"Nutshell is the best Next Action Sales B2B CRM that helps organizations work together to win more deals and grow their business. Simple enough for any user and sophisticated enough for any business, Nutshell serves thousands of businesses worldwide."

#### Long description:

"Nutshell is an all-in-one CRM and email marketing platform that helps B2B organizations work together to win more deals. Simple enough for any user and sophisticated enough for any business, Nutshell is built for teams who are tired of juggling separate sales and marketing tools and don't want to pay a full-time admin to manage their software.

Every Nutshell subscription includes unlimited CRM contacts and data storage, fully customizable reporting tools, free data migration assistance, and world-class live support, all at an extremely affordable price.

Nutshell integrates with the software small businesses already use, including Google Workspace/Gmail, Microsoft Office/Outlook, QuickBooks Online, Intercom, and Slack. Nutshell also offers native iPhone and Android apps, allowing sales reps to create, search, and edit contact information while in the field.

Launched in 2010, Nutshell serves thousands of businesses around the world and has been named a top CRM for both user-friendliness and affordability. Nutshell has been honored as a "Leader" in G2's Grid® Report for CRM every quarter since Fall 2020.

In 2021, Nutshell released Nutshell Campaigns, which allows Nutshell customers to design and send beautiful marketing emails and automated drip sequences, and instantly measure their engagement, directly out of Nutshell. Nutshell Campaigns seamlessly connects to your CRM data, so you can target custom audiences in a snap and manage all your outreach out of a single tool."

## How is Nutshell different?

Here are five things that help Nutshell stand out in the CRM market:

- **Fast, free implementation:** Nutshell is simple enough to set up without an IT department or paid admin. Customers also get free data importing assistance. You can get up and running in days, not weeks.
- **World-class live support:** Our global support team provides free live assistance via chat and email from the moment you start your trial.
- **No contracts, no surprises:** At Nutshell, we don't lock you down into tricky multi-year contracts. Our plans also include unlimited data storage and CRM contacts.
- **Nutshell helps you close the deal:** Sales automation, personal email sequences, hot leads, SMS, and our powerful add-ons help you keep every day moving forward.
- **Fill your CRM with high-quality leads:** Through our partnership with WebFX, our customers can access best-in-class digital marketing services and cutting-edge marketing technology.

For a more in-depth look at how to pitch Nutshell, check out our [‘Making the Case for Nutshell’ slide deck](#).

## Section 6: Additional resources

If you're looking for additional resources, feel free to explore the resources we've added to Impact by click on 'Content' in the top navigation and then 'Resources.' In this resources section, we've added information about how to pitch Nutshell, Nutshell plan and pricing information, additional image and copy assets, and more.



Here are links to a few highlights:

- Our [Making the Case for Nutshell slide deck](#): This slide deck serves as an introduction to Nutshell and what makes us unique and as a guide for how to pitch Nutshell to potential customers.
- A [resource library in Google Drive](#) that contains our logo, product screenshots, and descriptions of Nutshell you can use to inform your copy
- [Impact's help center](#), which has all the information you need to become an Impact expert

We also invite you to check out [our website](#), [YouTube channel](#), and social media profiles to learn more about us and explore our content.

If you have additional questions about using Impact, please reach out to Impact's support team by clicking on the question mark icon in the bottom right corner of your screen in Impact.

If you have questions about Nutshell or our partner program or want to talk about ideas for making the most of our partnership, feel free to send me an email at [kevin@nutshell.com](mailto:kevin@nutshell.com).

Thanks again for being part of our partner program!