

CASE STUDY

How Asset Panda Leveraged OtterPilot for Sales to Improve Sales Efficiency

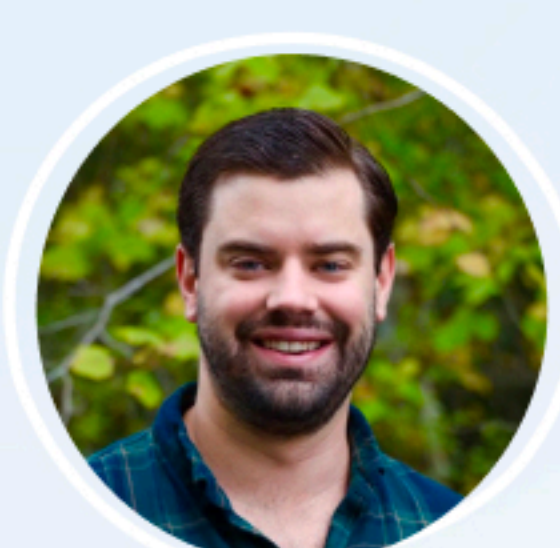
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Overview



Asset Panda, a SaaS company that provides software that makes it easy to track and manage assets, was experiencing rapid sales growth. With a sales cycle ranging from same-day to 18 months, sales reps were spending too much time documenting calls and sales leadership lacked transparency into the sales pipeline. The team needed a tool to make them more productive while handling a high volume of opportunities.

Justin Lackey, Chief Financial and Revenue Officer at Asset Panda, saw first hand what his team was dealing with: "...if I'm a salesperson, and I have 10 demos today, I'm having to spend too much time at the end of the day, trying to put together everything from an action item standpoint, from a key takeaway standpoint, follow ups to client standpoint," says Lackey.



Justin Lackey
Chief Financial and Revenue Officer

"We wanted to find if we could better equip our current folks that were here today....we wanted to find if we could make our folks today more productive, more efficient, more effective."

When Asset Panda found OtterPilot for Sales, Otter.ai's AI meeting assistant designed for sales reps and leaders, the team was excited about its time saving features: it could automatically write notes, summarize sales calls, generate customizable Sales Insights, provide leaders visibility into the sales pipeline, while also improving cross-team collaboration by creating a database of the customer journey for sales to share with customer onboarding.

After implementing OtterPilot for Sales, the impact was almost instant. Within weeks, Lackey says Asset Panda reps gained time back in their day by automating note-taking and started closing more deals faster by leveraging Otter AI Chat to draft emails and proposals.

"Tools like Otter have helped us make our folks more productive, more efficient, more effective, whereas they can handle maybe the work of one and a half people that were doing that"

Although Asset Panda hadn't integrated OtterPilot for Sales with their CRM to automatically sync Sales Insights directly into Salesforce and Hubspot, they plan to do so soon - further streamlining workflows.

Justin and his team at Asset Panda took advantage of Otter AI Chat's question-answering capabilities by creating templated prompts. In the early days of experimenting with Otter AI Chat, they asked it a variety of questions to understand its full abilities. Over time, they refined these questions into consistent templates focused on specific use cases. For example, they developed a template for generating implementation notes summaries that the onboarding team could use. By copying and pasting this template, Otter AI Chat would automatically populate the notes based on information in the call transcripts. Templated prompts like this one helped standardize processes and expectations while saving time versus manually compiling notes. They provided an efficient way for Asset Panda teams to leverage insights from sales call recordings.

For Justin, the biggest benefit is likely the ability to query across his and Asset Panda's entire database of sales and meeting notes in an instant. Asset Panda has already captured over 1,000 calls with Otter so now Justin and his team can ask Otter AI Chat questions, generate content, and instantly inform product development and other business decisions based on their sales call knowledge graph.

"That's enough benefit for me right there."

Contact Otter today to see for yourself the difference OtterPilot for Sales can make in your company.

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