



CASE STUDY

How Stax Saves Time
on Client Projects with
Otter's Real-Time
Automated Notes
and Enhanced
Collaboration Tools

Stax



Overview



As a strategic management consulting firm, Stax works with a diverse range of clients. Most of Stax's clients have consulting needs that require a lot of research and analysis in a short amount of time.

"To us, a project is four to six weeks—and a few weeks are already used up with just creating the discussion guide, setting the table, and lining up people," explains Miguel Patino, Information Technology Leader at Stax.



Miguel Patino
Information Technology Leader, Stax



We have a very short window of time to get all of the information gathering done and turn it around to the analysis team to get the analysis out of the raw data that we've acquired.

To help Stax achieve client project success, Stax turns to Otter. Not only does Otter empower Stax to save critical time, but Otter's automated meeting notes and insights also make cross-team collaboration more seamless and empowers the company to continue its hybrid work model.

Staying on Schedule with Real-Time Notes and Actionable Insights



Otter's real-time meeting notes improve both turnaround times and information accuracy during the entire project.

"A lot of what we do is interview prospective companies, customers, experts in the marketplace, competitors of the prospective target company, and other people that might have a view of what the company's future potential might be," says Patino.

Because Otter's automated notes and insights can be used immediately, Stax can quickly get started on its corresponding action items and analysis. Compared to manual transcription services, Otter provides instant results.



*Otter can gain us a day or two in a very compressed timeline.
That's very worthwhile.*

Streamlining Collaboration Through Easy-to-Use Features



Adoption of Otter is increasing across Stax's two U.S. offices in Boston and Chicago, as Otter has become many Stax consultants' 'go-to' place for information—thanks to Otter's ability to enrich live meeting transcripts with images, comments, and other key insights.

Currently, Stax uses Otter for in-person and virtual meetings on Microsoft Teams and Zoom. "We do use Microsoft Teams, and we do have a few Zoom accounts," Patino notes. "But Team's transcription isn't the best, nor is it as insightful—and it's not as interactive. The big drive for people who use Otter is that they can take screenshots, they can make notations, and they can go back over them later."

These features are especially well-suited to the firm's free-flowing approach to creating its discussion guides. Patino explains, "The reason Otter is so good is that it allows us to let the conversation happen, and then go back later and use the tool to highlight key words, phrases, and insights after the fact, without having to do a lot of typing or spend a lot of focus on the scribing of the meeting."

Maintaining Client Confidentiality



"A lot of the companies we work for have various disclaimers on what can be disclosed," Patino says. "Confidentiality is a huge component of what we do. Some of our discussions can be confidential, and in those cases, we have to make sure that data is tightly controlled and managed by us in a centralized way."

Patino's research into Otter's data security and compliance standards gave him the confidence to purchase Otter Enterprise for Stax. According to Patino, "One of the challenges I was having is that people were creating individual accounts on the fly. Over time, many of the people that created these accounts may not work for Stax anymore, and those that had data that was private to them are now lost to us."

I can take a lot of the 'Rogue IT' out of the workplace, and I can centralize it so that we have much more control over the repository where this data lives."



Having a relationship with Otter on an enterprise level is great for me because now I can control who is using what subscriptions.

Empowering Remote Productivity in a Hybrid Workplace



Finally, Patino appreciates the role Otter has played in facilitating remote productivity amongst Stax's hybrid workforce. While the company has some roles that are fully in-office, it had elements of hybrid work in place even before COVID—with different roles traveling between offices or meeting with clients in different locations.

Otter's ability to support in-person meetings, easy access via web and mobile apps, and video conferencing platform integrations with Microsoft Teams, Google Meet, and Zoom have helped prove to Stax's management that hybrid work is a viable operating model for the company.

"We have a lot of people who have gotten used to working this way, and we've been able to convince the various managing directors that the people are still engaged and that the work doesn't suffer. Having a dispersed team, and using a tool like

Otter—even for internal meetings—is very handy," explains Patino.

"I use it for all my internal meetings," he continues. "I use it when I talk to vendors, and I use it when I'm talking to my developers, just to make sure that I can go back later and be certain of any points that were brought up. I can create better, more accurate follow-up emails, and understand a little better what the timelines are for any particular piece of work, which is helpful to me."



It doesn't matter where I am. It's easy for me to engage with Otter, wherever I happen to be.