

CASE STUDY

MRI Software + Otter.ai Automatizes Sales Procedures and Enablement

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Business Benefits

- ROI realized after 2.5 weeks of use
- \$150,000 annual savings for a 26-person team
- 20-minute savings per meeting using Otter

Use Cases

- Cross-functional Collaboration
- Onboarding
- Knowledge Retention

The Client

- Real Estate Solutions and Services
- 4000+ employees
- Operating on 7 continents
- 170+ countries
- 45,000+ clients

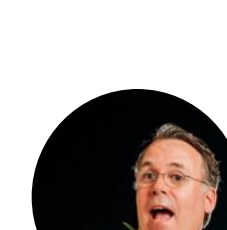
Overview

MRI Software is a leading provider of real estate software solutions that meet the unique needs of real estate businesses—from property-level management and accounting to investment modeling and analytics for the global commercial and residential markets. The company's products are complex, with a sales cycle that typically spans 1-2 years and includes dozens of individuals on both the buyer and seller sides.



Otter has been a game-changer for our sales engineering team. The time savings, insights, and productivity gains have been incredible, and we're just scratching the surface of what's possible with this technology."

Dana Cutter
Solutions Architect



A Sales Engineering Team Aims for Stronger Collaboration

Due to its complex and lengthy sales cycle, the MRI sales engineering team faced an information-sharing and collaboration challenge. "Our Sales Engineering team is not only tasked with demoing the product but also showing value for a range of unique business cases. There are many internal calls to prep for clients and prospect demonstrations with the sales team and internal champions. It has definitely been a challenge to make sure that data was moving cohesively amongst the groups and everyone has the information they need," explained Katie Klein, Solution Architect Manager.

The team used a debrief document that outlined key information about each demo, such as what was covered, things other internal teams needed to know, follow-up items and numerous technical details. It's not uncommon for MRI sales engineers to conduct four-hour or full-day onsite demos that include multiple products. After these intensive on-sites, filling out the debrief form required extensive note taking during the demo and a steel trap memory. It left too much opportunity for key items to be missed.

Collaboration during long sales cycles had become taxing for the team as well as all the teams that interact with prospective customers, particularly during the evaluation stage of a deal. Any individual interacting with a prospective customer was expected to be up to date on months of meetings, requirements and decisions, but many conversations were siloed. Quick answers were needed to assuage customer questions and concerns. Dozens of data points were a factor in each deal.

Additionally, newly hired sales engineers required hours of onboarding from existing team members, taking precious time away from selling. The sales engineering team needed a system or process for collaboration.



The coaching capabilities are amazing. For my newer folks, I can't be on all their demos to make sure they're catching on. Now, I can go into Otter.ai and ask if there were any parts where maybe they struggled. It takes me right to that section of the transcript, so I can listen to what occurred and then I can go back and more effectively coach them for next time."

Katie Klein
Solution Architect Manager



Otter.ai Offers an "Interconnected Knowledge Hub"

Enter Dana Cutter, a Solutions Architect at MRI Software, who began a search for an AI tool that could streamline the information management burden during the entire sales cycle. As a member of a 26-person team responsible for promoting 165 products, Cutter was convinced that AI would be helpful in consolidating and summarizing lots of disparate meetings and conversations. After evaluating a few AI solutions, affordable and expensive alike, Cutter landed on Otter.ai. "I didn't want an app just for note taking. I wanted that transcript in an interconnected hub of knowledge," said Cutter.

According to Klein, "Many of the tools were focused on the sales side of things, and we really needed the learning piece and the knowledge sharing abilities that Otter.ai brought to the table. We wanted a way to dump a ton of knowledge into a database and be able to easily pull it back out."

Once Cutter tried Otter.ai through a free business trial, he was thrilled with the product and quickly became MRI's evangelist for Otter.ai adoption. Although Otter.ai had a short learning curve and was intuitive to use, Cutter wanted to ensure that his team had sufficient AI literacy to ensure they took full advantage of the tool's knowledge center capabilities so he and Klein developed and launched a pilot program. After just two and a half weeks, the pilot team began to realize a ROI, without fully adopting all of Otter.ai's capabilities. Today, the entire 25-person North America sales engineering team uses Otter.ai.



I love Otter because it's agnostic. It can work with any industry, any segment, any role, where conversations are driving a sale, which is just about every software and solutions vendor out there. As an enterprise tool, Otter is just phenomenal."

Dana Cutter
Solutions Architect



Real-time Collaboration and Faster Onboarding

The MRI team is benefitting from Otter's interconnected, centralized hub of knowledge that Cutter envisioned. The sales team, engineering team and the late sales cycle internal stakeholders are no longer scrambling to catch up on 1-2 years of prospect data, such as technical requirements and limitations, specific implementation timelines, and key milestones. With only a few questions in Otter's AI Chat feature, new team members can quickly review summaries, takeaways and action items, getting up to speed in minutes rather than weeks. Siloed conversations are a thing of the past and internal collaboration is now relatively friction-free.

During meetings with prospective customers, the real time collaboration capabilities of Otter prove incredibly useful. Sales reps or Solution Engineers are able to reach out to internal subject matter experts, who often are not present in the meeting, and get answers to prospect questions before the meeting has ended, saving the need for another meeting. And the answers are then stored in Otter for future information gathering.

"One of the things that is incredibly helpful with Otter.ai is the ability to understand the context around any question I receive during a meeting where I am not in attendance. When I receive a question that a client or prospect asks during the demo, I can go into Otter.ai and review that section of the transcript to get all the context around that question. I can even listen to the person actually asking the question", shared Klein. "Previously, it would have taken a lot of back and forth, so that is amazing." This functionality has become very helpful in keeping deals on track and delivering a positive customer experience.

Klein also praised the level of detail Otter captures and how it has made their working relationship with the going to be a smooth handoff, because they have the transcript, really thorough debriefs, meeting summaries, and Otter's MEDDPICCC custom insights.

Otter allows each team member to have a wealth of knowledge at their fingertips.

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