



Otter.ai



SALES

Meeting Mastery for Sales Pros

with John Barrows



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and LinkedIn Top
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This guide is for sales pros who want to take their meetings to the next level. This means increasing your show rates and improving your meeting progression rates so you hit quota in no time.

I. Introduction: Why Good Prep Matters

Want to know the secret to awesome sales meetings? It's all about getting ready ahead of time. This guide will show you how to set yourself up for success. Let's make it happen.

The goal is to manage your buyer's expectations ahead of the meeting. Most reps go into meetings assuming their clients know what they want to discuss. You're already shooting yourself in the foot if you're doing this. The best sales reps have prep locked down to a science.

Here's a template to help you get started.

→ [Meeting Checklist and Notes Template](#)

With the template you'll be creating the following:

- Know whose attending the meeting and their titles
- Agenda and Priority Areas
- Goals for the Meeting
- Client Name and who they sell to - the more you know about their customer the easier it is to build rapport
- Industry Trends
 - Discovery question you want to focus on
- Company
 - Priorities + related discovery question to unpack this
- Challenges
- Recent News
- Persona
 - Priorities by role + Related Discovery Question
- Other Research
 - News
 - Competitors
 - LinkedIn / Social Posts

Look at how vital preparation is. Most reps just go with the flow.

By not focusing on the business and being relevant to the buyer you are more likely to get ghosted, have a slow sale process (because you haven't uncovered a real pain point) or lose the deal altogether.

II. The Shared Agenda: Your Meeting Roadmap

Once you've got the prep down - you need to set the agenda of the meeting. This helps manage your buyer's expectations right away.

Picture this: You're about to go on a road trip. You wouldn't just hop in the car without a map, right? Well, a sales meeting is like a business road trip. You need a map, and that's where the Shared Agenda comes in!

Here's how to make one:

1. Write an email to your client at least a day before the meeting.
2. Add a subject line that's direct and easy to understand
3. In the email, share your ideas for what to talk about.
4. Ask the client what they want to add. This makes them feel included and part of the conversation.

Here's a simple template you can use:

→ [Shared Agenda Email Template](#)

Pro tip: Check out the [Meeting Efficiency Survey](#) I put together. This has dramatically improved my meeting success rates. Granted, not everyone fills it out, but it doesn't hurt to ask. The more info you get the better.

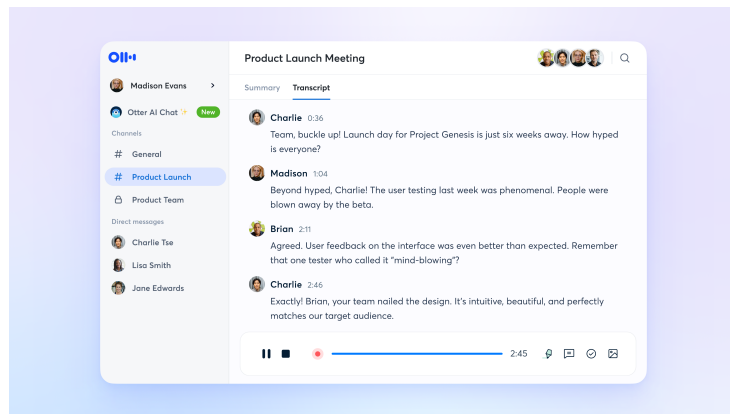
III. The Power of Otter.ai: Your Meeting Sidekick

I'll be real... I used to write all my notes by hand. Here's what happened when I did that. I started missing things.

Because when you're writing, you're not actually listening. And this is where you start missing out.

Every detail matters in a meeting, so you need to give your undivided attention.

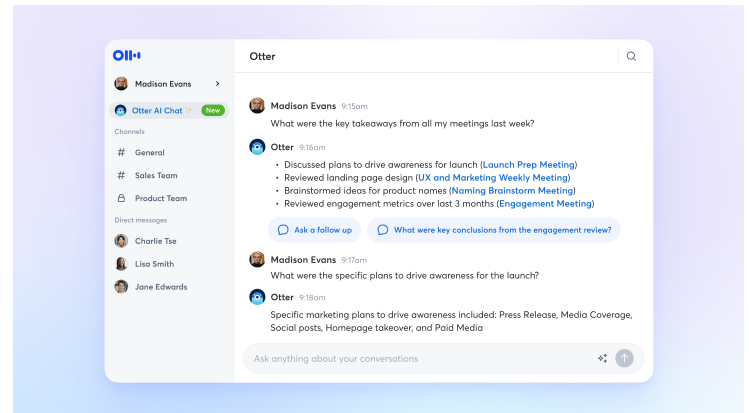
This is why I love using OtterPilot for Sales. OtterPilot, your AI assistant from Otter.ai! It's like having a super-organized colleague in your meetings.



OtterPilot can:

1. Take notes for you
2. Catch important details you might miss
3. Help you remember action items
4. Make it easy to share meeting info with your team
5. Sync straight into your CRM so you don't have to update notes

With OtterPilot, you can focus on talking to your client instead of worrying about writing everything down. It's like having a personal meeting secretary!



Here's the best part. OtterPilot just released their AI chatbot feature that allows you to:

"Ask Otter" about previous calls.

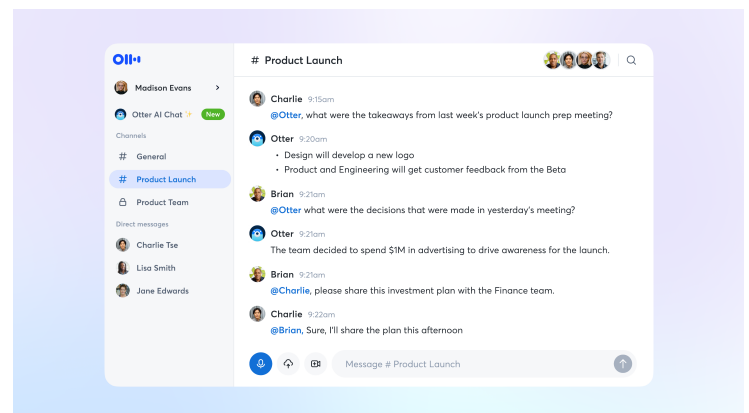
So now you can ask it questions like:

"What were the client's main pain points?"

"Summarize their key priorities."

"When did they do X?"

I'm used to having 6-7 calls daily, and no matter how good my notes are, I can't remember everything. This is why having a notetaker like Otter.ai goes a long way.



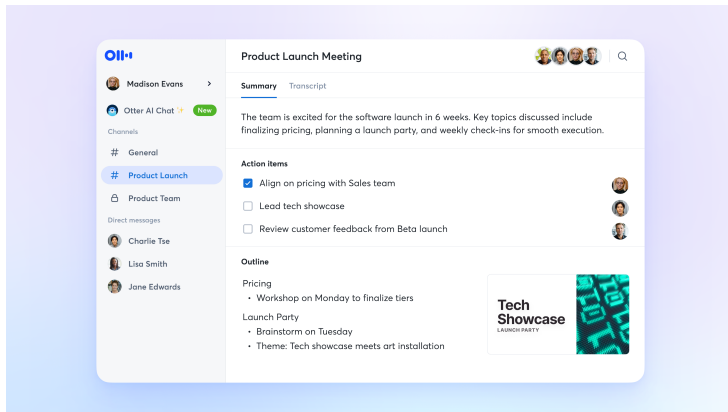
IV. Putting It All Together: Summary Email

So you've prepped like a pro, shared your agenda and brought Otter to your meeting.

What's next?

You need to confirm your understanding of the client's needs.

This is where you take all those fantastic notes (thank you, Otter!), answers to discovery questions and key priorities, and summarize them to show the buyer you were listening.



Here's a template you can use to send a summary:

→ [Summary E-Mail Template](#)

Notice how you've outlined the key challenges, the business impact of said challenges, and the decision criteria they've agreed to for change.

The key here is to confirm that your understanding of their business situation is correct.

V. Putting It All Together: The Mastery of Meetings

So there you have it. A guide that's helped close millions in closed-won opportunities.

1. Prep Like a Pro
2. Send a Shared Agenda
3. Make sure OtterPilot is turned on for your meetings
4. Send a Summary Email that shows you know what their situation is

Remember, the more you practice, the better you'll get.

Try it out and let us know how it goes –
Let's Make it Happen!