

The Complete Guide to Otter for Client-Facing Teams

From live transcription to
strategic insights and compliance,
Otter gives teams one source of
truth to serve clients better.

Whether you are in financial services, consulting, or any client-facing industry, the right Meeting Agent can turn any call into positive momentum.

In this guide, you'll learn how Otter's AI Meeting Agent for client calls helps teams:

- Eliminate manual note-taking so they can truly focus on the conversation
- Align all stakeholders with shared, searchable meeting records
- Extract strategic insights from discovery calls and client feedback
- Simplify compliance, reporting, and record-keeping
- Move faster, communicate better, and deliver more value to clients

Why client-facing roles need accurate meeting intelligence

Your days are likely packed with calls. In 2024, professionals averaged 14.8 hours each week — that's 37% of work time. Remote workers attend 50% more meetings than their in-office counterparts. Given all of the time we spend in meetings, it's crucial that everyone leave with the same understanding. A missed detail doesn't just slow you down — it can damage trust, derail deals, or strain relationships.

When you're under pressure to juggle client needs, internal coordination, and decision-making, there's no margin of error for miscommunication.

In high-stakes industries such as finance, consulting, and software, even a small oversight can have big consequences.

Transcription tools promise to ease the burden, but not all of them deliver. To truly reduce friction and help everyone move faster with confidence, you need more than a recording: You need a Meeting Agent with advanced AI note-taking and collaboration features for client calls. It's built for the way client-facing teams actually work.

The Otter approach to meeting transcription

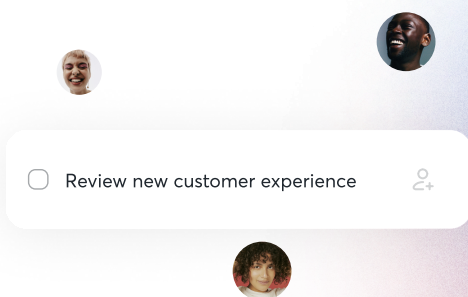
When the average cost of meeting time is \$29,000 per employee per year, you need to get the absolute most from each of those meetings. Client-facing teams need more than just transcription. They need accuracy, speed, context, and security — all built into a tool that people will immediately trust and use.

Otter's Meeting Agent addresses the six most crucial things your teams need from their transcriptions, making every conversation more valuable.



1. Accurate, real-time transcription

The smart people you've hired need to be focused on meeting conversations, not their keyboards — or, even worse, notebooks. (It happens!) Our Meeting Agent captures industry-specific terms, identifies speakers, and handles crosstalk or accents with precision — so you always have a reliable record of what was said.



2. Automated meeting summaries and action items

Forget the cumbersome replays. The Meeting Agent generates instant, structured, automated summaries with clear action items and decisions, making it easy to follow up and move forward with confidence.

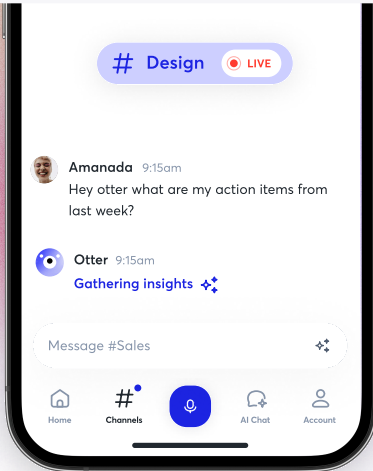
The Science of Creativity.

We tend to think of creativity as this mysterious, magical force—something that only artists, musicians, or designers have. But in reality? Creativity is a process, not a personality trait. And guess what? It's backed by science.

Q Science

3. Searchable, shareable, organized conversations

Need to revisit a specific point? No problem: Just ask the Meeting Agent. Our built-in AI chat helps you surface key takeaways, clarify what was said, or summarize an entire meeting.



4. On-demand AI chat support

Need to revisit a specific point? No problem: Just ask the Meeting Agent. Our built-in AI chat helps you surface key takeaways, clarify what was said, or summarize an entire meeting — no painful rewatching required.

5. Transcription tech built for compliance and workflow integration

You need a meeting transcription technology that integrates seamlessly into workflows while also ensuring regulatory compliance. From SOC 2 and HIPAA compliance to integrations with Zoom, Teams, Slack, and Salesforce.

6. A solution everyone will want to use

Feel like you've been burned by AI note-taker tools before? They promise the world, but are too complicated and cumbersome to figure out, so your teams just don't use them. But our Meeting Agent isn't just smart — it's intuitive. Teams quickly adopt it because it removes friction, builds trust, and delivers value in every meeting.

How client-facing teams win with Otter

Otter's Meeting Agent gives hard-working hands a break and lets everyone focus on what's being said instead of on making sure everything is noted.

But what are the real-world outcomes that will help you turn every client call into an opportunity? Whether you're negotiating a deal, conducting a quarterly review, or onboarding a new client, you won't just be present in the moment — you'll win the moment.

Here's how:

No duplicated work, or missed details

Manual notes are inconsistent, easy to misplace, and often incomplete. When you use our Meeting Agent, you eliminate the need for multitasking or post-meeting transcription. That means no replays, no duplicated effort, and no missed details that could cost you a client or delay a decision.

One of the ways Otter helps with both efficiency and accuracy is by generating accurate and useful summarized transcriptions. That means it turns a full transcript into a short, concise version that captures every important key point. Otter's Meeting Agent listens to everything, filters out the fluff, and delivers only the most important insights to keep everyone focused on exactly what they need to do.

Turn conversations into strategic insights

Each client meeting provides valuable information, from business milestones to celebrations to understanding complex compliance needs. Using our AI Meeting Agent, you can transform discovery calls, interviews, and feedback sessions into searchable insights that help you identify patterns, anticipate needs, and personalize your approach.

Truly knowing and understanding your customers is a strategic advantage — especially in highly competitive industries.

Improve collaboration and alignment

Even when someone has a real talent for note-taking, relying on memory or secondhand notes leaves too much room for missed or mixed messages. The Meeting Agent makes it easy to share meeting transcripts, highlights, and action items across all stakeholders — from business development to legal to client relations.

Otter's Meeting Agent ensures that everyone is aligned, especially in hybrid or global teams. That means everyone is operating from the same source of truth, which reduces delays, rework, and internal miscommunication that could spill over into the client experience.

For example, you can tag team members in the Meeting Agent transcript so that they can view it and get the full context within minutes. This feature can be a real game-changer, as it was for a tech company that didn't just improve collaboration — it increased efficiency by 33%.

Our Meeting Agent helps you get that strategic advantage because it doesn't just record feedback, it helps you retain it, analyze it, and apply it to future pitches, service improvements, and client retention efforts.

For example, sales teams can use the Meeting Agent to analyze sales conversations and automatically generate valuable insights. The agent extracts key information from your meetings — including competitor mentions, objections, and action items — and organizes it into actionable bullet points. These easy-to-digest bullet points can give your sales team the intel they need to take the best next steps.

Streamline research and reporting — quickly

VC/PE analysts, management consultants, research associates, and marketing leads need to surface real insights from real conversations, fast. Whether you're dealing with internal audits, stakeholder interviews, or competitive research, you need the crucial information — and you don't have time for hours of manual analysis.

Time-consuming manual transcription slows reporting and delays decisions. With Otter, research becomes searchable, shareable, and ready for action, giving you a leg up in fast-moving, data-driven environments. Teams use Otter's Meeting Agent structured, insightful call reports to keep track of conversations and ensure critical details never slip through the cracks. These call records help teams fine-tune strategy and better connect with both prospects and current clients.

Compliance, record-keeping, and risk mitigation

Otter creates secure, time-stamped transcripts that serve as a defensible record of what was said and agreed upon. That means peace of mind for audits, disputes, and client accountability.

In well-regulated industries such as finance, wealth management, and technology, documentation is your first line of defense. Otter supports internal controls, reinforces transparency, and protects your firm against compliance risk — without extra work on your part.

Take UC Davis as an example — Otter has ensured it meets its cloud intrusion insurance requirements and has nearly completed all of the organization's SOC 2, Type II compliance requirements. The school gained special permission within its vendor risk assessment (VRA) process to deploy Otter based on its unique ability to meet a specific need.

Partner with Otter for all your client-facing meeting needs

Otter removes manual burden, mitigates risk, and helps client-facing team members stay aligned, accurate, and efficient. No matter the industry your clients count on you to make smart decisions, fast — Otter helps ensure that those decisions are based on shared understanding, not scrambled notes.

Ready to make every conversation more valuable?

Find out more about how Otter can streamline your client conversations, improve decision-making, and unlock new productivity across your organization. Let's chat.