The Sales Conversation Playbook

A tactical guide from John Barrows Sales + Otter.ai on prepping, running, and following up on meetings that convert.

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SALES

The Meeting Mastery Play

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Cut down on admin overhead. Master customer conversations. Drive next steps with clarity.

Sales meetings aren't just another step in the funnel, they're your biggest leverage point.

Every meeting is an opportunity to create alignment, build trust, uncover urgency, and drive the deal forward. But too many reps wing it. They don't prep. They talk too much. They forget to follow up.

This guide is about changing that. We'll walk you through a proven system to prepare for meetings, ask the right questions, and follow up like a pro.

You'll also see how I use tools like Otter and custom GPTs to make my process more efficient, repeatable, and effective.

Meetings can make or break your quarter.

Here's what I've learned after decades in the game and training thousands of reps:

- [x] Top reps don't just have better calls, they run better meetings.
- [x] They know what to ask, when to shut up, and how to align everyone.
- [x] They prepare like athletes, execute like pros, and follow up like closers.

This isn't about theory, it's about a system you can use right now.

> *"Meetings don't move deals forward, clear next steps do."*
> *John Barrows, CEO of JB Sales*

The Play

Step 1: Pre-call setup: Send a shared agenda

Before every call, send a brief note to set expectations and guide the conversation. This creates alignments and makes follow-through easier, especially with Otter capturing it all.

Sample Shared Agenda Email:
Looking forward to our call today. Below are a few things I want to make sure we cover. Let me know what else you'd like to add.

1. Problem: [brief summary]
2. Impact: [what is costing you]
3. Solution: [component we'll explore]
4. ...
5. ...
6. ...

This way we're aligned from the start and focus on what matters.

Here's a shared agenda template for quicker use in the future!

JB Sales Tip
Kick off the meeting by reviewing this agenda live and asking, 'Is there anything else you want to make sure we cover today?' That small move gives you control while showing respect for their time.

Otter Tip
Already had a call with this prospect? Ask Otter to summarize the last conversation and suggest agenda points for your next one. It's like having your own Chief of Staff.

Otter setup

- Ensure Otter is connected with your calendar and Zoom/Google Meet/Microsoft Teams
- Choose the kinds of meetings you'd like your AI notetaker to attend
- Inform the customer upfront: “For everyone’s clarity, I’m recording notes using Otter

Pro Tip
Use Otter’s Sales - Discovery meeting template with slots for Meeting Title, Participants, Agenda, and Key Outcomes or create your own template to save 10 mins every call.

Step 2: In-call structure, aka the 40-40-20 framework

This is your blueprint for a high-impact call:

40% Discovery:
Focus on impact questions not just pain, but consequence:

- “What’s the business cost if this doesn’t get solved?”
- “How does this problem affect your team’s ability to hit their goals?”

40% value alignment:
Tie their pain to your solution with proof points and real-world outcomes.

20% next steps:
Always close the loop. Confirm dates, owners, and actions live while Otter transcribes it verbatim.

Impact over features.
Tactical tip from JB: Customers don’t buy features; they buy outcomes. Stay locked in on asking better questions while Otter captures the details for you.

Step 3: Post-call handoff and automated follow-up

Right after the call:

- Click Otter’s Summary tab to quickly review key moments.
- Push call notes and key insights directly to your CRM with the Otter Salesforce or Hubspot integration.

JB Sales Tip

Pain gets attention. Impact gets budget. Always tie the problem to a business consequence. Look for risk-reduction opportunities you can anchor to. Buyers don't just choose what's best, they choose what feels safest."

Step 3: Send a summary email the right way

At the end of the call, say: "Thanks again for your time. Before I send over next steps, I'll send you a quick summary of what I heard today. Just reply to confirm or add anything I may have missed."

Then send a summary email that includes:

- The problem
- The impact
- Their current situation
- Decision process
- Timeline
- Agreed next steps

Crucial detail:
The goal is to get a reply saying, "Yes, that's accurate." That creates mutual agreement and something to refer back to throughout the deal.

20% next steps:
Always close the loop. Confirm dates, owners, and actions live while Otter transcribes it verbatim.

Otter Tip

Use Otter to pull verbatim language from the transcript and drop it into your summary. This makes the follow-up faster and more precise.

Bonus Tip

Otter can even flag action items for you in the transcript. You're not just saving time, you're building trust with clarity.

Want to use the same summary email that JB's team uses after every meeting?
[Download the JB Sales Summary Template]

A real example from the field

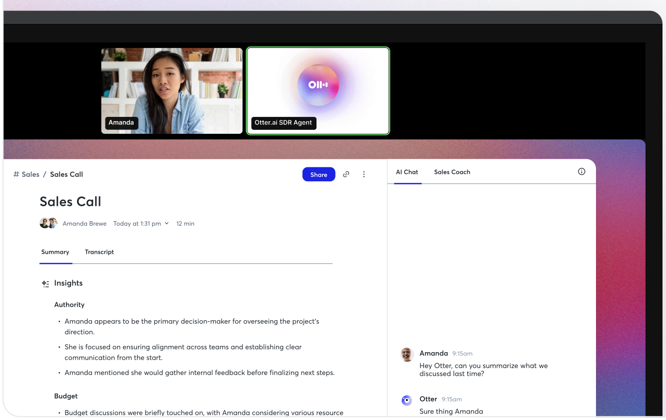
How a Top AE cut down on admin overhead using Otter

> *Sarah, an AE at a SaaS company, cut her note-taking time by 80% using Otter. She integrated Otter with her Zoom calls and started every meeting with a shared agenda slide.*

Result: more focused calls, 20% shorter sales cycles, and 95% CRM hygiene without manual updates.

Quick wins to deploy today

- [x] Connect Otter to your calendar + Zoom/Meet/Teams
- [x] Use a shared agenda to open every call.
- [x] Build a 3-minute pre-call prep sheet.
- [x] Use two new impact questions on your next call.
- [x] Send a summary email within 24 hours, pulling highlights from Otter.



Want the full meeting blueprint template?

[Download now]

The Sales Coach Accelerator Play

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Quickly turn every recorded call into a real coaching moment.

Why sales coaching is broken

Traditional sales is

- Reactive and based on lagging indicators like lost deals
- Random and based on gut feel, not real call data
- Slow, with weeks going by before feedback reaches reps

Using Otter to streamline sales coaching sessions improves win rates by 27% (CSO Insights).

The Play

Step 1: How to use Otter to streamline Sales Coaching

1. Identify key reps or calls from the transcript feed
2. Surface key moments like objection handling or missed follow-up
3. Drop timestamped comments into Otter for real-time coaching
4. Use the Summary tab to compare talk ratios, filler words, or call energy over time

"Feedback delayed is feedback denied" Bruce Tulgan, author of FAST Feedback

With Otter, managers don't have to wait for call reviews. You can coach in real time while it's still fresh and while your reps still remember it. Otter's platform allows managers to drop quick comments into the transcript **right after a call ends.**

Step 2: Coach reps to uncover urgency and business impact

Don't just coach on qualification questions. Coach on whether the rep uncovered urgency. Here are some questions managers should ask when reviewing calls:

- Did the rep uncover a meaningful business problem?
- Did they explore the impact of that problem on revenue, growth, or executive priorities?
- Did they tie that problem to why it matters now?

The Goal: Help the rep move beyond surface-level questions and dig into the "why now."

"If there's no urgency, there's no deal. If there's no impact, there's no budget."

Otter Tip
Use Otter's transcript and summary tools to jump directly to key discovery moments. Look for emotional language, buyer hesitation, or executive-level mentions and coach the rep on how to dig deeper.

Step 3: Build a coaching library

As you review calls:

- Tag best-in-class moments (great discovery, excellent objection handling)
- Create a highlight reel of top examples for new hire onboarding or peer learning

Otter's searchable archive lets you:

- Filter by keywords
- Pull clips for team-wide "listen and learn" sessions
- Standardize what "good" looks like

A real example from the field

How a sales manager slashed ramp time with Otter and a coaching rhythm

Using Otter's call archive and weekly coaching rhythm, a sales manager at a cybersecurity firm cut ramp time for new reps by 30% which saved two months per rep.
New hires hit quotas faster because they heard "what good sounds like" from day one.

Quick wins to deploy today

- [x] Pick two calls per rep this week for review.
- [x] Use the JB Sales Impact Question Checklist during reviews.
- [x] Deliver feedback within 48 hours, no exceptions.
- [x] Tag one “highlight moment” per call to start your coaching library.

The Real-Time Coaching Play

3

Win deals in the moment and not just in post-call reviews.

Why real-time coaching changes the game

Most deals are won or lost in the first conversation long before the pipeline review.

But reps miss buying signals, skip discovery depth, or get derailed by objections. Managers aren't always on the call to course-correct.

Companies using real-time coaching tools see a 29% improvement in rep performance (McKinsey).

With Otter's real-time transcription, live coaching, and automated call summaries, reps get smarter ***during*** the call

JB Sales Discovery Review Framework

Step 1: Anchor to the go-live date (not just the decision date)

"When do you need this fully up and running?"

Establishing a go-live date gives the rep a clear endpoint and lets them work backwards to map decision-making steps. It also frames the conversation in business outcomes, not procurement logistics.

Step 2: Uncover the Business Impact of Missing That Date

"What happens if that timeline slips?"

This gets to the core of urgency. If there's no real consequence to a delay, the deal is likely to stall. This question helps separate serious buyers from those just browsing.

Step 3: De-risk the decision by uncovering fear of the wrong choice

“What happens if you make the wrong decision here?”

Buyers aren’t just trying to choose the best option, they’re trying to avoid making the wrong one. This question reveals underlying concerns and blockers, often tied to internal politics or past failures.

Pro Tip
Deals often die from fear, not cost. Your job is to surface that fear and remove it.

Otter Integration Tip
Otter can help managers coach this sequence effectively by:

- Surfacing exact buyer language around timing, urgency, and hesitation
- Jumping to discovery moments in the transcript via keywords
- Creating timestamped feedback notes to coach reps on where they could’ve dug deeper

Step 4: Apply the objection handling framework

1. Pause: Let the objection land

Don’t interrupt. Show calm and control.

2. Clarify: Ask a soft follow-up question

Can you help me understand what’s behind that?

3. Validate: Acknowledge their concern. Make them feel heard

That makes total sense.

4. Isolate: Narrow it down

If we solved that, is there anything else holding you back?

5. Collaborate: Invite a solution

Mind if we bounce around a few ideas?

6. Confirm: Don’t lead the witness. Ask

What’s still unaddressed for you?

Otter Tip
Use Otter to flag objection moments, track common patterns across calls, and coach reps on real-time handling techniques using this framework.

The Activation Guide

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Get Otter deployed and delivering ROI in less than 30 days

Why fast activation matters

New tools fail when they sit unused. You need Otter up and integrated as part of your team's workflow.

Sales teams that fully onboard a tool within 30 days see 2x higher adoption rates and 50% faster time to value (SaaS Adoption Report).

The Play

Step 1: Sign up for an AI Sales Agent

- Visit otter.ai/sales-agent and start a free trial or book a demo
- Choose the Enterprise plan to unlock CRM and Zoom integrations

Step 2: Connect your tech stack

Make Otter a part of your sales system.

Integration Checklist:

Zoom or Microsoft Teams:
Auto-join meetings and record notes without disrupting the call flow

Salesforce:
Sync meeting transcripts directly to accounts, contacts, and opportunities

Slack:
Push live meeting notes into deal-specific Slack channels for visibility

Calendar:
Connect Google Calendar or Outlook so Otter can auto-join scheduled calls

Start by integrating Otter with your CRM, since that's where deals live or die.

Step 3: Launch your 30-day rollout plan

Day 1–7: Setup and early wins

- Enable integrations
- Train sales reps on how to share the agenda and set Otter expectations with customers
- Hold a 30-minute "Win Your Day with Otter" internal workshop

Day 8–21: Usage and coaching

- Managers pick 2–3 calls per week to review via Otter
- Reps send summary emails from the Sales Insights tab
- Capture early success stories and share them in team meetings

Day 22–30: Scale and celebrate

- Build your coaching library folder by tagging best practices
- Host a "Most Valuable Transcript" contest to drive engagement
- Collect rep feedback and optimize workflows

Quick wins to deploy today

- [x] Start your free trial or demo today
- [x] Connect Otter to Zoom, Salesforce, and Slack
- [x] Roll out the 30-Day Activation Plan
- [x] Celebrate first wins by Week 2!

Ready to boost your sales?

Start your free trial today or book a demo with the Otter.ai team.

Want to sell even smarter?

Unlock access to on-demand sales training, live coaching sessions, and tactical resources through the JB Sales Membership.