

Otter.ai

**From Note-Taker to
Meeting Intelligence**



Our Vision



Otter.ai transforms conversations into action - capturing, understanding, predicting, and driving outcomes, even when you skip the meeting.

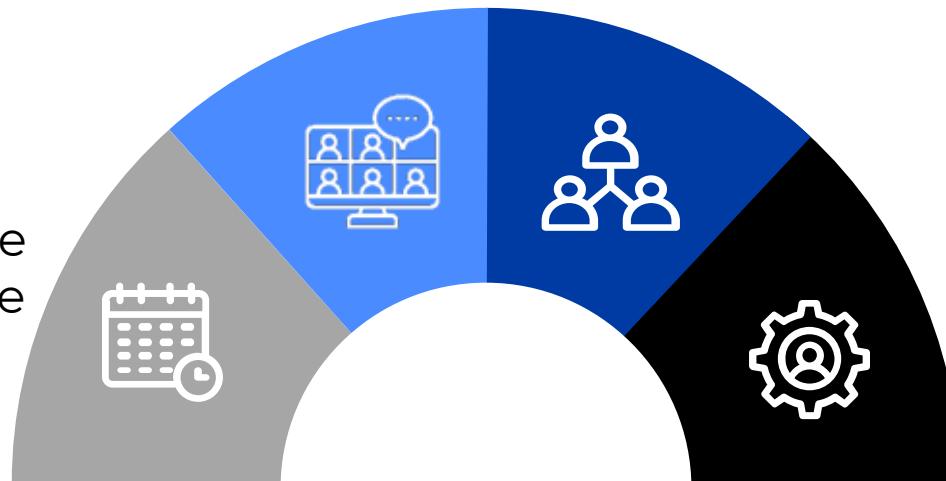
Our Vision

Remote & hybrid work =
more meetings than ever

Teams are overloaded
with manual follow-ups

AI copilots are
everywhere

Turning
transcription into
actions.



Introducing

Otter.ai AI Meeting Co-Pilot

Features



Attends meetings **for
you (or with you)**



Predicts follow-ups
and next steps



Captures every
decision, action
item, and risk



Syncs notes
across personal
& team spaces



Turns speech
into **instant
action**

Meet Bob



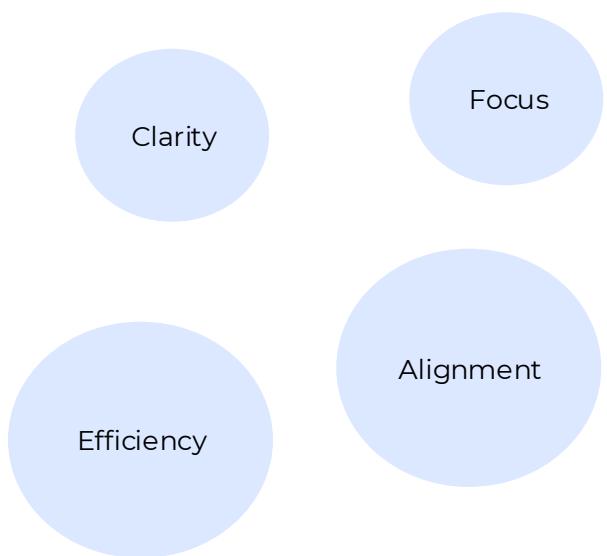
- Bob is a Business Development Manager with a packed schedule.
- He juggles back-to-back meetings, takes fragmented notes, and struggles to track decisions.
- By the end of the day, he feels overwhelmed, unsure if he missed key insights or follow-ups.

What He Cares About!

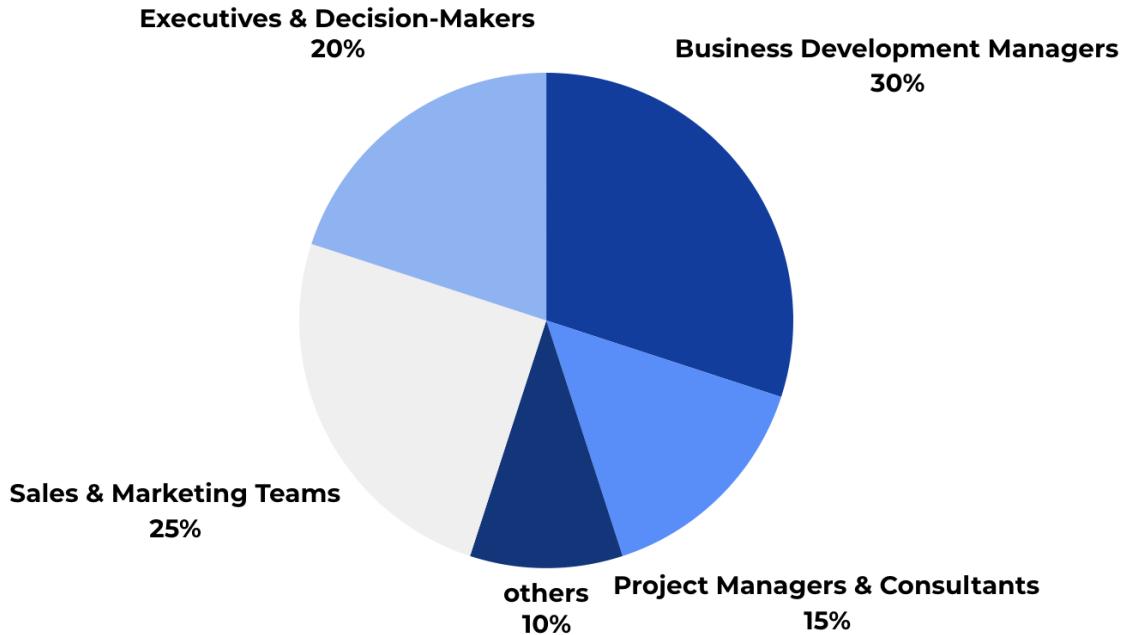
Typical Day of Bob

-  9:00 AM – Morning Standup & Team Check-In
-  10:30 AM – Investor Call
-  12:00 PM – Strategy Planning Session
-  2:00 PM – One-on-One with Marketing Team
-  4:30 PM – Product Development Update
-  6:00 PM – Wrapping Up & Follow-Ups

Challenges Bob faces

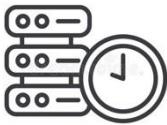


Bob is Not Alone



Bob's #1 job is to:

Capture & Apply Critical Insights to Decisions



Capture key decisions, action items, and risks — accurately, in real-time.



Ensure nothing slips through the cracks after the meeting.



Keep personal notes and team follow-ups perfectly aligned.

Challenges Faced



Decisions take longer because information is unstructured.



Time is wasted reconstructing meeting insights.



Teams lose alignment, leading to repeated conversations and inefficiencies.

Bob's Most Significant Pain

Difficulty in capturing decision and action immediately



AI Meeting Co-Pilot

- Attending meeting
with/without AI Co-Pilot
- Having AI Assistant attend
a meeting with **pre-defined instructions**
- **Enabling/Disabling smart suggestions** during a meeting



Transcription



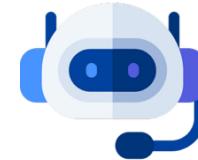
Summary
Generation



Insight
Generation



Smart
Suggestion



Chatbot
functionality

Prototype: Meeting Join

BOB

Invite Teammates

Home

Otter AI Chat NEW

Search

Apps

CHANNELS

General

> DIRECT MESSAGES

FOLDERS

Home Import Record

Saturday, March 1

Upcoming: Meeting with sales team

Meetings Calendar Action Items

Mar 2025 Today

← Feb Apr →

SUN	MON	TUE	WED	THU	FRI	SAT
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Otter.ai You

Otter.ai & You

Prototype: Instructions



Business Development Manager Bob

AI Co-Pilot

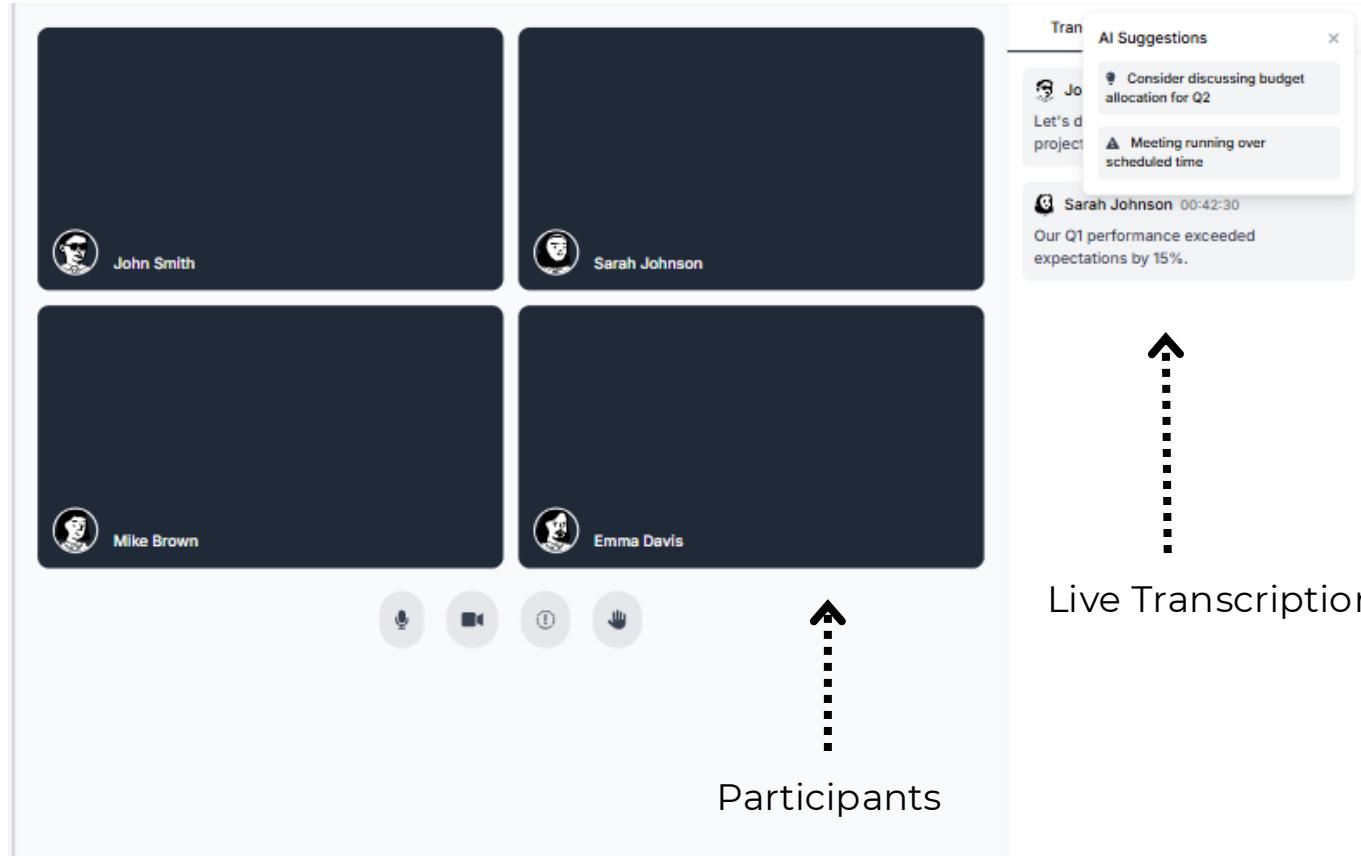
INSTRUCTIONS:

- Observe Meetings, do not instruct.
- Provide corrections, if necessary.
- Record activity
- Provide transcripts and summaries.

[Change Instructions](#)

Bob can select instructions that AI Co-Pilot will follow during the meeting.

Prototype: Video Conference



The interface features four participant cards in a 2x2 grid:

- Top-left: John Smith (male icon)
- Top-right: Sarah Johnson (female icon)
- Bottom-left: Mike Brown (male icon)
- Bottom-right: Emma Davis (female icon)

Below the participant cards are four circular control icons:

- Microphone
- Video camera
- Information (info)
- Hand (raise hand)

A vertical dashed arrow labeled "Participants" points upwards from the bottom of the participant grid towards the AI suggestions panel.

The AI suggestions panel, titled "AI Suggestions", is shown for the participant "Tran". It contains the following content:

- Consider discussing budget allocation for Q2
- Meeting running over scheduled time
- Sarah Johnson 00:42:30 Our Q1 performance exceeded expectations by 15%.

Live AI Suggestions
By AI Co-Pilot

Live Transcription

Participants

Prototype: Action Items

Task app

- Active issues
- Actors
- Insights
- Transcript
- Summary

Active issues

Task	Title	Project	Priority	Date	Owner
FIG-123	Prioritize high-value prospects for outreach.	Lead Generation	High	Dec 5	
FIG-122	Align messaging with client pain points.	Sales Sequence	Low	Dec 5	
FIG-121	Delegate follow-ups for warm and cold leads.	Outreach	High	Dec 5	
FIG-120	Update based on recent client feedback.	Client Deliverable	Low	Dec 5	
FIG-119	Ensure new features are incorporated into sales narratives.	Client Feedback	Medium	Dec 5	
FIG-118	Schedule Internal Sales Training	Training Activity	Medium	Dec 5	
FIG-117	Area 2 not generating responses	Activity Analysis	Medium	Dec 5	
FIG-116	Text wrapping is awkward on older iPhones	Bug fixes	Low	Dec 5	
FIG-115	Research and evaluate potential business alliances.	Partnership	Low	Dec 5	
FIG-114	Press Release talking points	Media	Low	Dec 5	
FIG-113	Brainstorm co-branded campaigns or events with partners.	Event Planning	High	Dec 5	
FIG-112	Review lead conversion, email open rates, and inbound inquiries.	Sprint backlog	High	Dec 5	
FIG-111	Deliver a report on sprint outcomes and challenges.	Sprint Review	High	Dec 5	

Actions Items :

- Description
- Type of action or project
- Priority
- Date
- Product Owner

Prototype: Dashboard

Meeting Dashboard

... Share ⚙️

Tab Tab Tab

Search...

Meeting Insights

Priorities

- Refine outreach & segmentation.
- Strengthen sales messaging.
- Boost PR with success stories.

AI Recommendations

- Automate follow-ups.
- Improve objection handling.
- Use analytics for partnerships.

Risks & Mitigation

- Low engagement → Personalize outreach.
- Unclear value → Highlight strong case studies.

Next Steps

1. Optimize outreach.
2. Enhance sales materials.
3. Refine partnership criteria.

Participants

- Helena email@figmasfakedomain.net
- Oscar email@figmasfakedomain.net
- Daniel email@figmasfakedomain.net
- Daniel Jay Park email@figmasfakedomain.net
- Mark Rojas email@figmasfakedomain.net

Sales Figures



Month	Sales (\$)
Jan	50,000
Feb	55,000
Mar	50,000
Apr	48,000
May	58,000
Jun	80,000
Jul	60,000
Aug	68,000
Sep	55,000
Oct	52,000
Nov	48,000
Dec	10,000

Participants

Insights generated by

AI Co-Pilot

based on transcript

Sample figures discussed
For eg. Sales Figures

Prototype: Minute by Minute Transcript

Task app

- Active Issues
- Actors
- Insights
- Transcript
- Summary

Transcript

[00:00 - 05:00] Opening & Agenda Overview

Sales Lead: "Since [Business Development Manager] couldn't join, his AI avatar is recording and analyzing the discussion. We'll focus on lead generation, sales messaging, client feedback, and partnership strategies." Marketing Lead: "We'll also cover PR efforts and upcoming co-branded events. Let's make sure to document key action items."

[05:00 - 10:00] Lead Generation Strategy

Sales Rep 1: "We have a list of high-value prospects. The challenge is prioritization—some require cold outreach, while others are warm leads that need follow-ups." Sales Rep 2: "We should segment the prospects and assign owners accordingly." Marketing Lead: "Agreed. We also need alignment on the messaging—some potential clients still don't fully grasp our value proposition."

[10:00 - 15:00] Sales Messaging & Client Pain Points

Sales Rep 3: "Client objections are common around ROI expectations. We need stronger case studies to show impact." Marketing Lead: "Let's ensure sales materials highlight customer success stories effectively. We should also refine our automated outreach templates to address these concerns."

[15:00 - 20:00] Client Feedback & Product Integration

Product Manager: "Recent feedback suggests that new features are not being highlighted in demos effectively. We may need to adjust training for the sales team." Marketing Lead: "Can we get a list of these features? We'll ensure our pitch decks and marketing collateral reflect them."

[20:00 - 25:00] Sales Training & Internal Alignment

Sales Rep 1: "Some team members are struggling with objection handling. A dedicated sales training session would be useful." Marketing Lead: "Let's schedule a session focused on real-world scenarios."

[25:00 - 30:00] Market Engagement & Data Insights

Sales Rep 2: "Our outreach in Area 2 hasn't been generating responses. We need to revisit our engagement strategy there." Marketing Lead: "Let's analyze past interactions and identify potential bottlenecks."



Download as Word



Option to export transcript

Important points highlighted
by AI Co-Pilot

Prototype: Summary Transcript

Task app

- Active Issues
- Actors
- Insights
- Transcript
- Summary

Summary

[00:00 - 05:00] Opening & Agenda

- Meeting focused on lead generation, sales messaging, partnerships, and PR.
- AI avatar observing and recording insights in place of the Business Development Manager.

[05:00 - 10:00] Lead Generation

- Segmented prospects into warm vs. cold leads for better prioritization.
- Action Item: Assign follow-ups based on engagement level.
- Insight: Outreach needs more defined targeting strategy.

[10:00 - 15:00] Sales Messaging

- Objections around ROI expectations remain a challenge.
- Action Item: Strengthen case studies and proof points in sales materials.
- Insight: Marketing and sales teams need better alignment on messaging.

[15:00 - 20:00] Client Feedback

- New product features not effectively communicated in demos.
- Action Item: Update pitch decks and training materials accordingly.
- Insight: Improved feature positioning strategy needed.

[20:00 - 25:00] Sales Training

- Objection handling identified as a weak point among reps.
- Action Item: Schedule training session with real-world scenarios.
- Insight: AI suggests creating an internal knowledge repository for objections.

[25:00 - 30:00] Market Engagement

- Low response rates in Area 2 flagged for review.
- Action Item: Analyze past outreach and adjust approach.
- Insight: AI suggests automated follow-up sequences may help.

[30:00 - 35:00] Partnerships

- Shortlisted co-branding opportunities discussed.
- Action Item: Define selection criteria for partnerships.
- Insight: Prioritize partners based on audience fit and brand alignment.

Summary captured
In intervals

Useful in case of:

- Skimming important content
- In case someone joins late and needs to catch up.



Download as Word

Prototype: Enterprise Chat Portal

Enterprise Chat

Search chats

- Helena Hills**
Will head to the Help Center...
- Carlo Emilio**
Let's go
- Oscar Davis**
Trueeeeeee
- Daniel Jay Park**
lol yeah, are you coming to the lunc...
- Mark Rojas**
great catching up over dinner!!
- Giannis Constantinou**
yep 🙌
- Briana Lewis**
When are you coming back to town?...
- Mom**
Thanks!
- Sherry Roy**
Jack needs to find a sitter for the do...

Enter your message

Microphone icon

Smiley face icon

Image icon

Helena Hills
Active 20m ago

No honestly I'm thinking of a career pivot

This is the main chat template

Nov 30, 2023, 9:41 AM

Oh?

Cool

How does it work?

Simple

You just edit any text to type in the conversation you want to show, and delete any bubbles you don't want to use

Boom

Hmmmm

I think I get it

Will head to the Help Center if I have more questions tho

Search chat

Sent images

More options

View profile

Scenario Simulation

- Bob does not have time to read the entire transcript
- Wants to know the key points of the meeting
- Has read the immediate insights but wants more information
- What does he do?



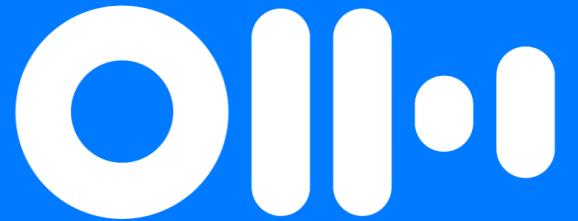
Solution: He speaks to his Co-Pilot of course.

What follows is a demonstration of the user interacting with their AI Co-Pilot chatbot to get additional insights based on their own prompts.





Otter.ai AI Meeting Co-Pilot



**From Note-Taker to
Meeting Intelligence**

Primary Persona: Bob

Business Development Manager



- Bob starts his day with an espresso and a notebook full of messy notes from yesterday's meetings.
- His schedule is packed with back-to-back calls, investor updates, and strategy sessions.
- Bob struggles to remember exact context from past meetings — was a deadline tied to the product launch or the marketing campaign?
- Bob's biggest challenge: Keeping track of action items, stakeholder concerns, and follow-ups without losing focus during discussions.
- By the end of the day, Bob's head is swimming with fragmented notes, half-remembered takeaways, and constant worry that he missed something important.

Primary Persona: Bob



Top of Mind Issues

- **Tracking Action Items:** Making sure nothing falls through the cracks.
- **Recalling Context:** Linking notes to key discussions.
- **Balancing Focus:** Staying present in meetings without losing key details.
- **Team Alignment:** Keeping everyone on the same page.
- **Information Overload:** Managing fragmented notes and insights.

Bob's Core Values

- **Clarity:** Actionable, organized takeaways.
- **Focus:** Engage in discussions without distraction.
- **Innovation:** Embrace new ideas to stay competitive.
- **Efficiency:** Fast workflows and decisions.
- **Alignment:** Keep teams and stakeholders synced.

JTBD 1: Capture & Apply Critical Insights to Decisions

Functional	Outcome	Emotional
<p>As Biz Dev Manager Bob...</p> <p>When trying to stay fully engaged in back-to-back high-stakes client meetings and strategy calls without losing critical decisions and action items.</p> <p>I want to...</p> <ul style="list-style-type: none">Automatically capture every important decision, action item, and stakeholder concern, even when I'm fully focused on the conversation itself.	<p>I struggle to...</p> <ul style="list-style-type: none">Achieve a complete, decision-ready summary within 5 minutes after each meeting.Realize faster decision-making without rewatching or reading full transcripts.Minimize time spent manually piecing together scattered notes (target: reduce to near zero).	<p>I want to feel...</p> <ul style="list-style-type: none">Confident that no critical decision or action item has slipped through the cracks.Focused on strategic discussions rather than note-taking. <p>I want to seem to my team, my boss, and my clients...</p> <ul style="list-style-type: none">Like a sharp, detail-oriented leader who never misses a beat.Like someone who runs organized, action-focused meetings.

JTBD 2 : Recall Context Instantly to Avoid Redundant Conversations

Functional	Outcome	Emotional
<p>As Biz Dev Manager Bob...</p> <p>When trying to ensure my team is aligned after meetings without manually sending follow-up summaries.</p> <p>I want to...</p> <ul style="list-style-type: none">Automatically share a clear, actionable summary with my team immediately after each meeting.	<p>I struggle to...</p> <ul style="list-style-type: none">Achieve automatic delivery of action items within 10 minutes after each meeting.Realize faster team alignment without needing to recap the same decisions repeatedly.Minimize time spent writing follow-up emails or chasing individual team members.	<p>I want to feel...</p> <ul style="list-style-type: none">In control of the workflow-confident that everyone knows exactly what to do without me chasing them.Free to focus on high-value strategic work instead of admin. <p>I want to seem to my team, my boss, and my clients...</p> <ul style="list-style-type: none">Like a clear, efficient leader who runs tight, action-oriented meetings.Like someone who respects their time and keeps communication seamless.

JTBD 3 : Keep My Team Aligned Without Constant Follow-Ups

Functional	Outcome	Emotional
<p>As Biz Dev Manager Bob...</p> <p>When trying to quickly recall context from a past meeting to guide today's discussions or negotiations.</p> <p>I want to...</p> <ul style="list-style-type: none">Instantly retrieve decisions, rationale, and action items from past meetings — without digging through emails, Slack, or messy notes.	<p>I struggle to...</p> <ul style="list-style-type: none">Achieve full recall of context in less than 60 seconds.Realize faster follow-up decisions without revisiting old discussions.Minimize time wasted searching for past notes across tools (emails, Notion, Slack).	<p>I want to feel...</p> <ul style="list-style-type: none">Fully prepared and in control when walking into follow-up conversations.Confident I won't be caught off guard by missing information. <p>I want to seem to my team, my boss, and my clients...</p> <ul style="list-style-type: none">Like someone who remembers everything and connects the dots effortlessly.Like a trusted source of clarity.

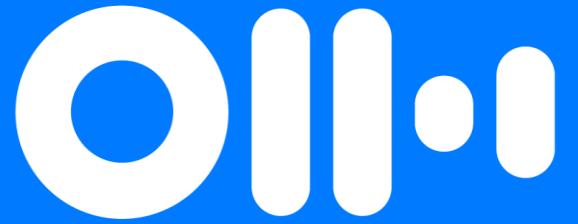
Opportunity Scoring

JTBD	JTBD NAME	OPPORTUNITY SCORE
A	Capture & Apply Critical Insights to Decisions – Otter.ai goes beyond simple transcription by automatically identifying key decisions, action items, and insights. This ensures that critical information is not just recorded but actively applied to decision-making, improving efficiency and accuracy.	Score: 15.2 Working: $9.6 + \max(9.6 - 4, 0)$ $= 9.6 + \max(5.6, 0)$ $= 9.6 + 5.6$
B	Recall Context Instantly to Avoid Redundant Conversations – AI-powered search allows users to retrieve past conversations with full context, not just keywords. By surfacing relevant insights and decision history instantly, Otter.ai eliminates the need for repetitive discussions and helps teams move forward faster.	Score: 12.4 Working: $9 + \max(9 - 5.6, 0)$ $= 9 + \max(3.4, 0)$ $= 9 + 3.4$
C	Keep My Team Aligned Without Constant Follow-Ups – Otter.ai ensures seamless execution by tracking discussions, predicting next steps, and keeping teams informed automatically. This reduces the need for constant check-ins and follow-ups, enabling teams to stay aligned effortlessly.	Score: 12.6 Working: $9 + \max(9 - 5.4, 0)$ $= 9 + \max(3.6, 0)$ $= 9 + 3.6$

JOB MAP

JTBD1: Capture & Apply Critical Insights from Meetings

DEFINE	LOCATE	PREPARE	CONFIRM	EXECUTE	MONITOR	MODIFY	CONCLUDE
Write down the main reason for the meeting	Open the calendar invite and read the meeting description	Write out the detailed objectives	Confirm attendance of key stakeholders.	Document each decision and action item immediately after it's made.	Review notes to catch anything missed or unclear.	Revise notes if decisions change after the meeting.	Draft a follow-up email that summarizes decisions, action items, and risks.
Define the type of meeting- decision making, update, brainstorming, etc	Search for relevant documents across different platforms.	List the topics to cover in order to reach the objectives.	Send a reminder with agenda and materials to ensure everyone is ready.	Record every action item with clear owner and deadline.	Organize notes into clear sections	Clarify anything that was misheard or miswritten if someone flags it later.	Highlight who owns each action item and their deadlines.
Identify the one or two critical outcomes you want by the end of the meeting	Review decisions and follow-ups from previous meetings on this topic	Decide where to capture notes	Verify that everyone understands their role.	Capture risks, blockers, and open questions as they arise.	Double-check that all action items have clear owners and deadline	Update notes if decisions change after the meeting.	Save final notes in a shared, accessible location.
Identify which stakeholders' input is critical.	Check for any pre-reading or preparation materials sent by the organizer or team	Assign note-taking roles if necessary		Note who said what when it matters for context or accountability.	Cross-check notes with follow-ups/clarifications sent by others to ensure alignment.		
Minimize the time it takes to write down the reason for the meeting.	Minimize the time it takes to read and understand the meeting invite.	Minimize the time it takes to write clear, actionable objectives.	Minimize the time it takes to confirm attendance.	Make it easier to capture decisions, actions, and risks without losing focus in the discussion.	Minimize the time it takes to review and spot missing information	Minimize the time it takes to update notes after decisions change post-meeting.	Minimize the time it takes to create and send the follow-up summary.
Minimize the time it takes to decide the meeting type	Minimize the time it takes to locate and open all necessary documents and notes.	Minimize the time it takes to create a clear agenda	Minimize the risk that attendees show up unprepared.	Maximize clarity and accuracy of action items	Minimize the risk of unclear or incomplete notes being saved.	Minimize the risk of incorrect information staying in the record	Maximize clarity of responsibilities and deadlines in follow-up emails.
Maximize clarity when identifying the critical outcomes for the meeting.	Maximize confidence that no past decision or action item is forgotten.	Minimize the mental load when choosing where to capture notes.	Maximize clarity on each attendee's role	Minimize the risk of missing or misrepresenting a key decision or action item.	Maximize confidence that notes are accurate and ready to share.	Maximize confidence that notes always reflect the latest agreements.	Minimize the time it takes for anyone to find and review the notes later.
Minimize the risk of missing input from key stakeholders.	Minimize the risk of missing important pre-reads or prep work sent by others.	Minimize uncertainty about who is responsible for capturing notes.			Minimize the time it takes to align personal notes with team follow-ups.		



Otter.ai

Thank You!