

Lesson 03 Demo 04

Transcribing Audio Calls to Text

Objective: To generate a clean transcript using otter.ai

Tools required: Otter.ai

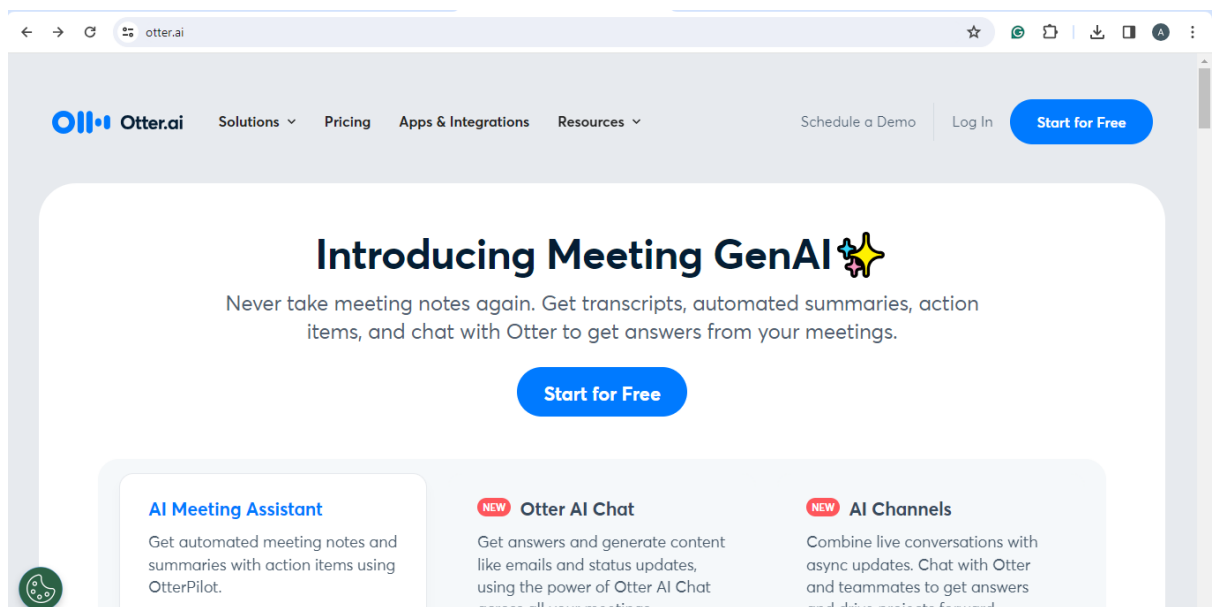
Prerequisites: None

Steps to be followed:

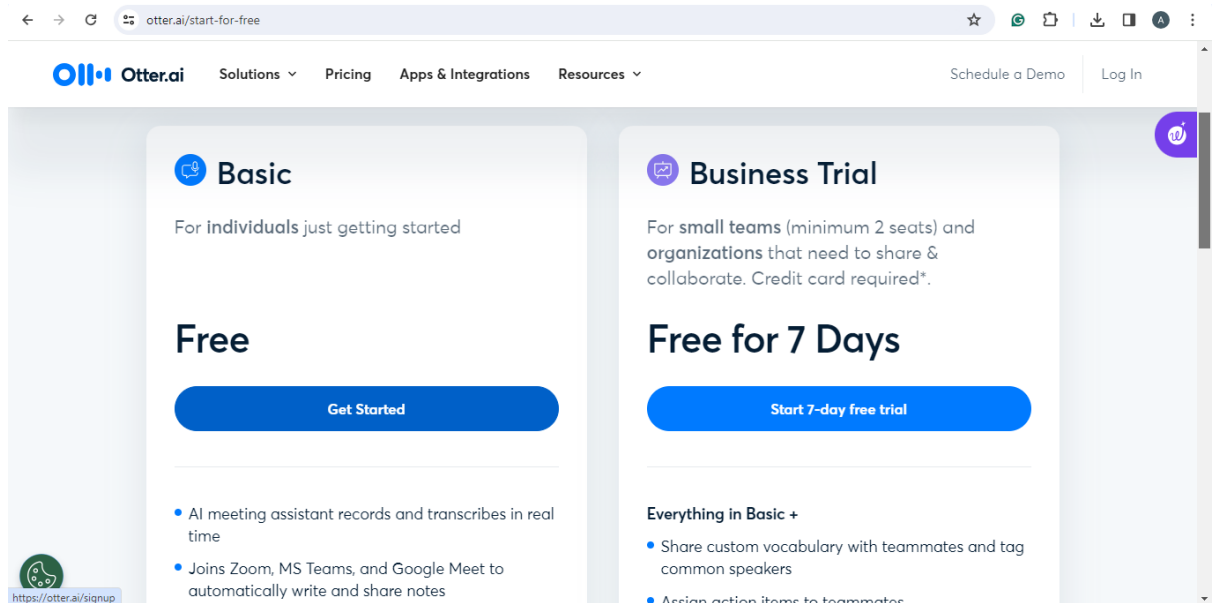
1. Log in to otter.ai and create an account
2. Generate the transcript

Step 1: Log in to otter.ai and create an account

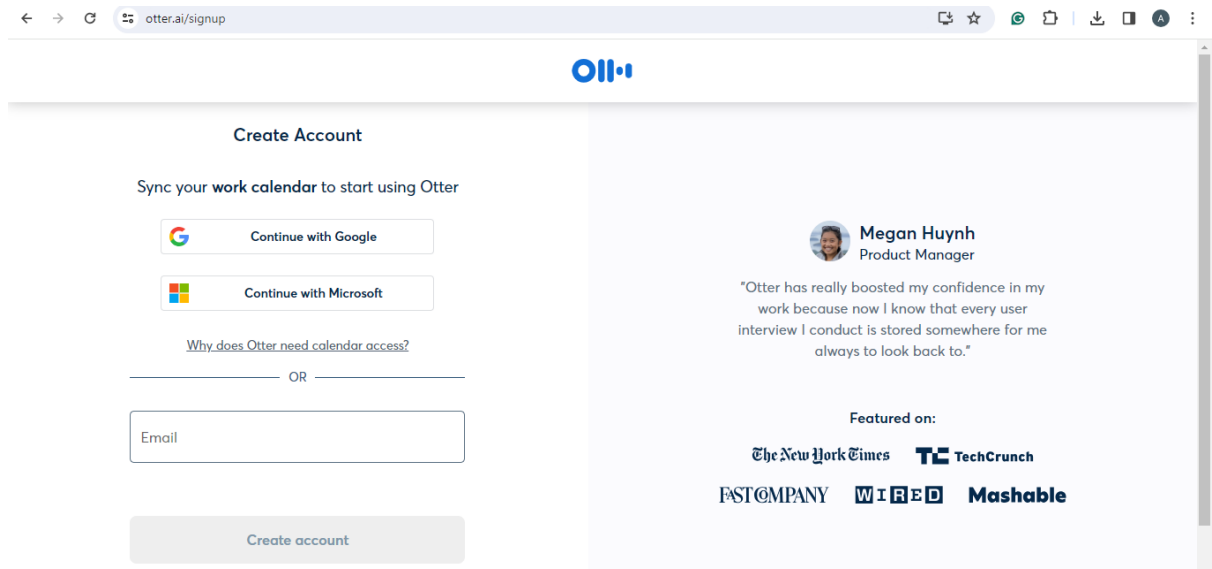
1.1 Go to otter.ai and click on **Start for Free**



1.2 Under **Basic**, click on **Get Started**



1.3 Enter **Email** or click on **Continue with Google**



1.4 Select the options as shown in the screenshot below:

Oll
STEP 1: CHOOSE MEETING RECORDING OPTIONS

Get automatic meeting notes

Which meetings do you want OtterPilot to record and summarize?

☒ Meetings on my calendar with a video conferencing link
Zoom, Google Meet, Microsoft Teams

☐ Only meetings I manually toggle

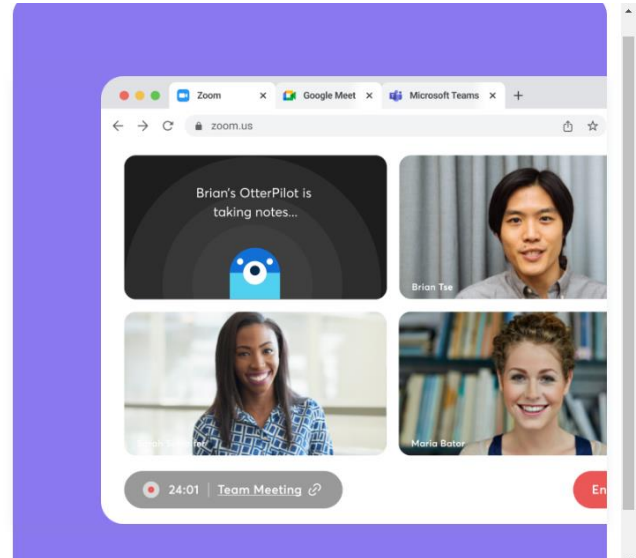
Who do you want to send meeting notes to?

☐ All meeting invitees

☐ Meeting invitees within @simplilearn.net

☒ Just me

[Continue](#)



The following dashboard will appear:

Oll Home [Paste meeting URL to record](#) [Record](#) [Import](#)

Ankita Choudhary
ankit... im...

[Create Workspace](#)

Home

- 🗨️ Otter AI Chat New
- 📁 My Conversations
- 📁 All Conversations
- 📁 Apps New
- ⋮ More

CHANNELS

DIRECT MESSAGES

Basic (Free)

0 of 300 monthly minutes used

[Get Otter Pro](#)

Getting Started

Learn the basics of using Otter in just a few minutes!

Connect your calendar to organize your day ✓

Record your first conversation [Start](#)

Mar 2024 Today

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	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	6

Today

🕒 11:30-12:00 [Join meeting](#)

Weekly Sync [Share](#)

OtterPilot is set to join

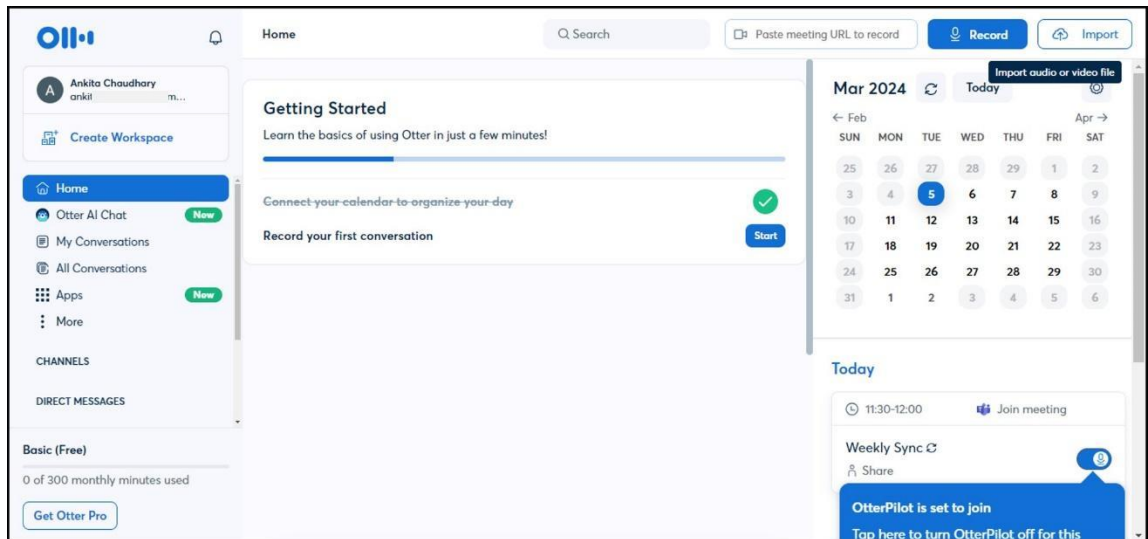
[Tap here to turn OtterPilot off for this](#)

Step 2: Generate the transcript

2.1 Click on **Import** to import an audio file to transcribe it

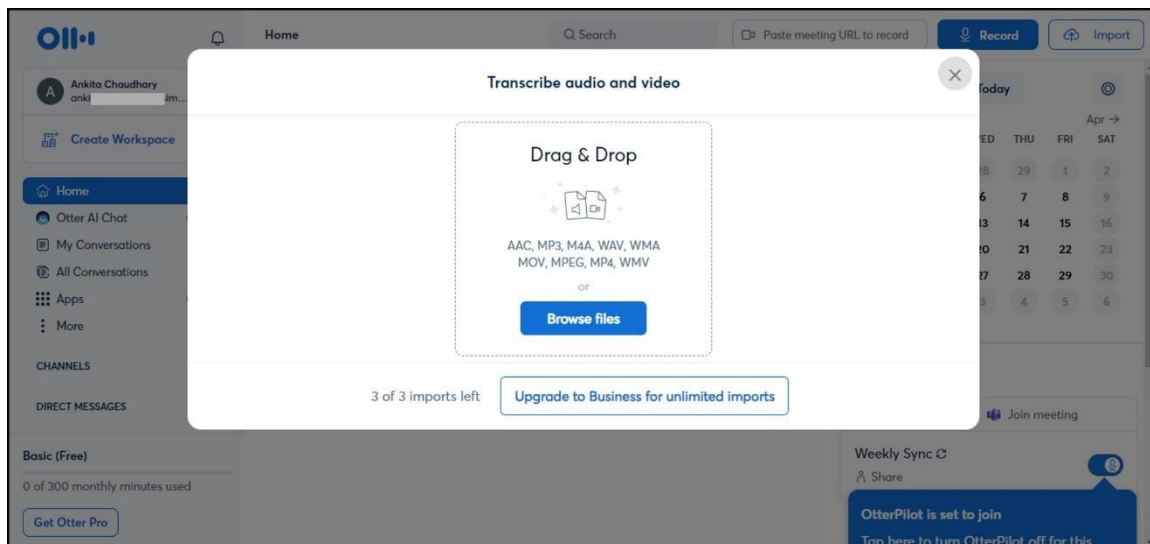
Note: In the free version, you will only get three imports.

Add a sample mp3: https://drive.google.com/file/d/1fd_oPtO5k_f2mHflsJiP3-lTyg-DFP5G/view?usp=sharing

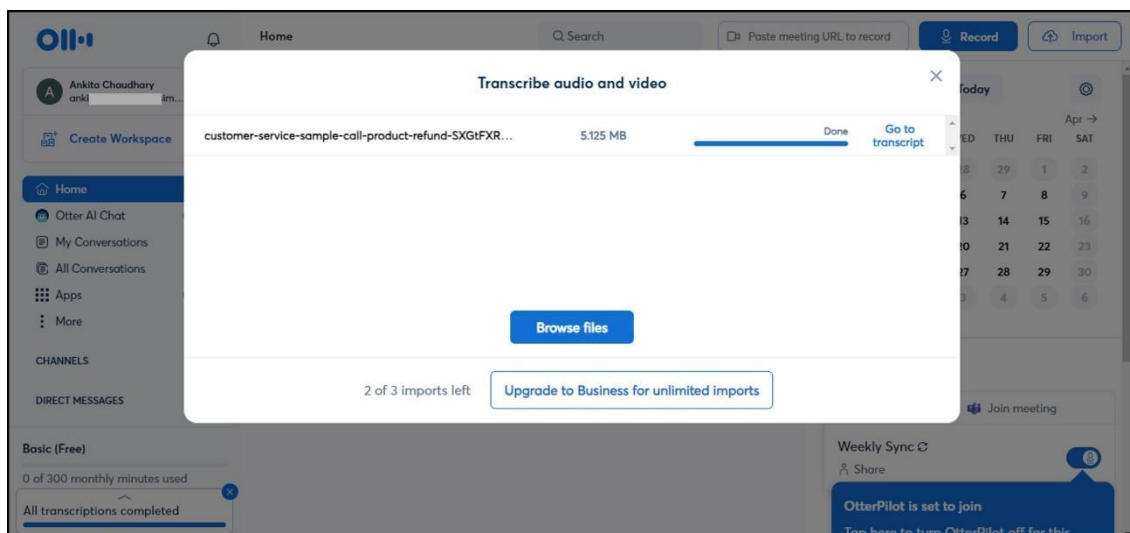


The tool will automatically join your online meetings if you have previously selected this option. Alternatively, when the window opens, you can upload your mp3 file. In this case, we will upload an mp3 of a customer service call for real-time transcription.

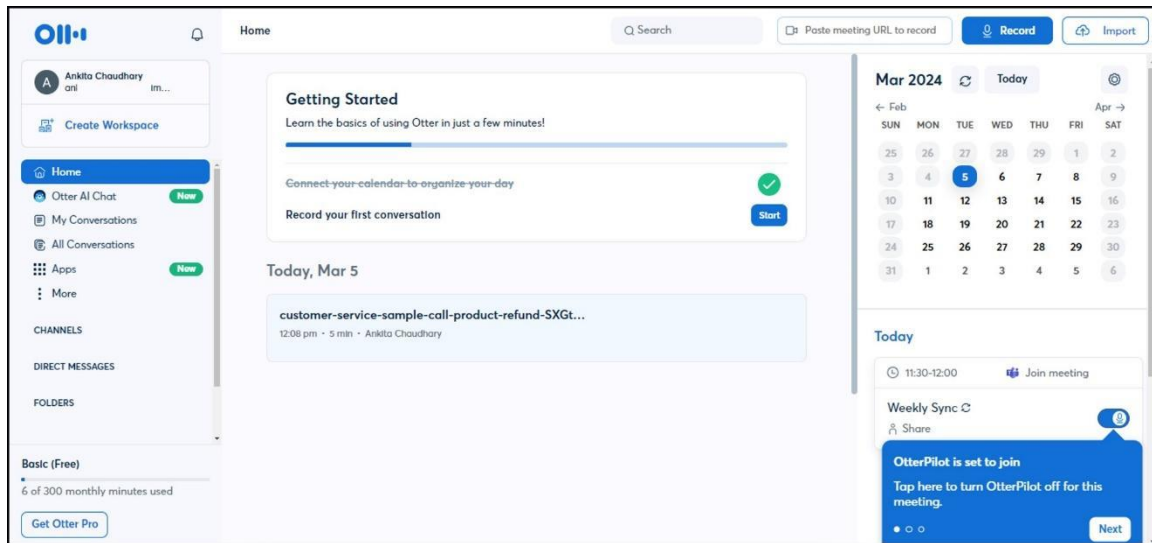
2.2 Now, click on **Browse files** to upload the mp3



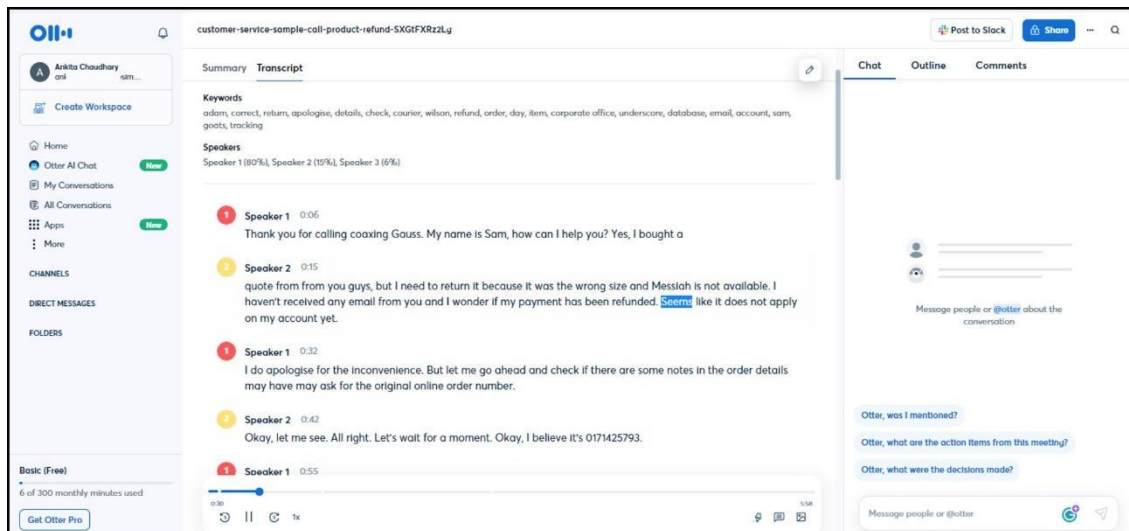
The following screenshot will appear:



2.3 Select the file and read the transcript



The tool offers a complete analysis of keywords and speaker identification as shown in the screenshot below:



2.4 Click on **Summary** to read the entire details of the call

The screenshot shows the Otter AI interface for a call titled "customer-service-sample-call-product-refund-SXGtFXRz...". The left sidebar contains navigation options like Home, Otter AI Chat, My Conversations, All Conversations, Apps, and More. The main content area is divided into sections: Summary, Transcript, Outline, and Add action item. The Summary section is active, displaying a list of key points from the call. The right sidebar shows the Chat and Comments tabs, with the Chat tab currently selected. A prompt is visible in the chat input field: "Otter, was I mentioned?".

Summary

Outline

- Returning a product due to incorrect size and checking refund status.
 - Sam contacts coaxing Gauss to return a wrongly-sized item and inquire about refund.
- Tracking an item return with a courier company.
 - Adam Wilson's name is spelled differently than originally entered in the database.
- Return of item and refund processing.
 - Adam Wilson called to return an item he purchased from Goats and Gals, and the customer service representative confirmed the details of the return and provided an estimated timeframe for the refund (2-4 business days).
 - The representative also checked Adam's account and confirmed that the refund had not been processed yet, and they forwarded the information to the corporate office for further processing.

2.5 You can also provide a prompt on the right side and ask questions about this call. Prompt: *Which points when spoken by customer care executives were empathetic?*

This screenshot shows the same Otter AI interface, but with the Chat tab selected on the right sidebar. A prompt has been entered in the chat input field: "Which points when spoken by customer care executives were empathetic?". The chat history shows a response from Otter AI, which lists several points of empathy from the customer care executive Sam. The prompt is also visible in the main content area's chat input field.

Chat

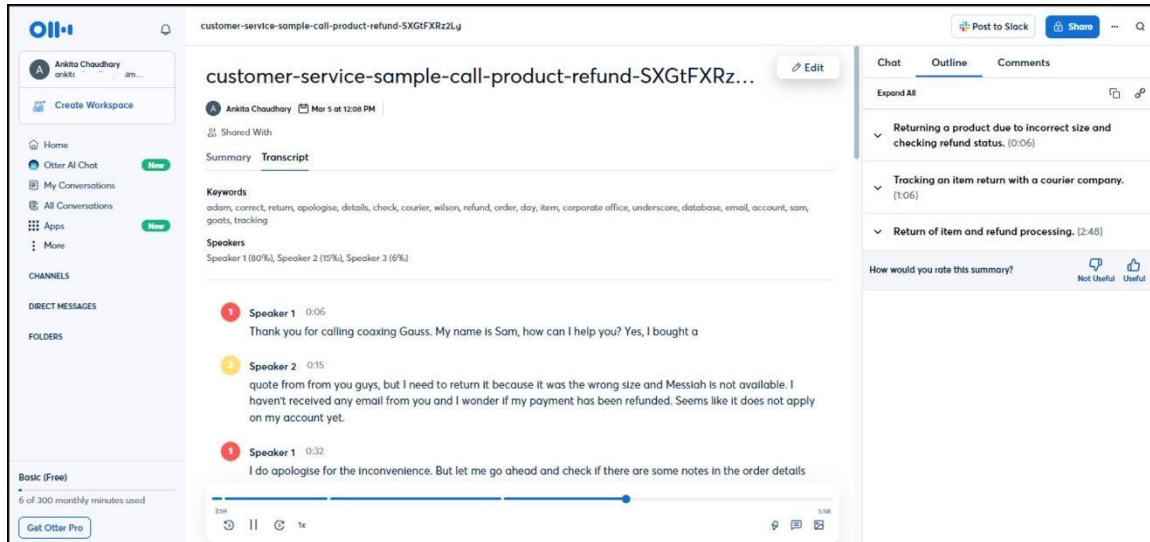
Chat is visible to all conversation participants

Ankita Chaudhary 1 minute ago
Which points when spoken by customer care executive were empathetic?

Otter 1 minute ago
Some points spoken by the customer care executive Sam that showed empathy were:

- Apologizing for the inconvenience when the customer's order details could not be found initially ("I do apologise for the inconvenience.")
- Reassuring the customer that the refund processing time would only be 2-4 business days, not 3-5 weeks as the customer had initially thought ("Don't worry, Adam. It's only two to four business days.")
- Thanking the customer for their patience while looking up the order details ("Thank you for patiently waiting, Adam.")
- Expressing understanding when the customer wasn't sure of exact return dates ("I understand.")

2.6 Click on **Outline** to get the outline of the call



The screenshot displays the Otter.ai web interface. On the left is a sidebar with navigation options: Home, Otter AI Chat (marked 'New'), My Conversations, All Conversations, Apps (marked 'New'), and More. Below these are sections for CHANNELS, DIRECT MESSAGES, and FOLDERS. At the bottom of the sidebar, it indicates 'Basic (Free)' with '6 of 300 monthly minutes used' and a 'Get Otter Pro' button.

The main content area shows a call transcript titled 'customer-service-sample-call-product-refund-SXGtFXRzLg'. It includes an 'Edit' button, a 'Shared With' section, and tabs for 'Summary' and 'Transcript'. The transcript content is as follows:

Keywords
adam, correct, return, apologise, details, check, courier, wilson, refund, order, day, item, corporate office, underscore, database, email, account, sam, goats, tracking

Speakers
Speaker 1 (80%), Speaker 2 (10%), Speaker 3 (6%)

Transcript:

- Speaker 1** 0:06
Thank you for calling coaxing Gauss. My name is Sam, how can I help you? Yes, I bought a
- Speaker 2** 0:15
quote from from you guys, but I need to return it because it was the wrong size and Messiah is not available. I haven't received any email from you and I wonder if my payment has been refunded. Seems like it does not apply on my account yet.
- Speaker 1** 0:32
I do apologise for the inconvenience. But let me go ahead and check if there are some notes in the order details

At the bottom of the transcript is a progress bar and playback controls.

On the right side, there are tabs for 'Chat', 'Outline', and 'Comments'. The 'Outline' tab is active, showing a list of summarized points from the call:

- Expand All
- Returning a product due to incorrect size and checking refund status. (0:06)
- Tracking an item return with a courier company. (1:06)
- Return of item and refund processing. (2:48)

Below the outline, there is a section titled 'How would you rate this summary?' with 'Not Useful' and 'Useful' feedback buttons.

By following these steps, you have successfully transcribed audio calls to text using otter.ai.

