

Lesson 01 Demo 06

Transcribing Audio Calls to Text

Objective: To generate a clean transcript using otter.ai

Tools required: Otter.ai

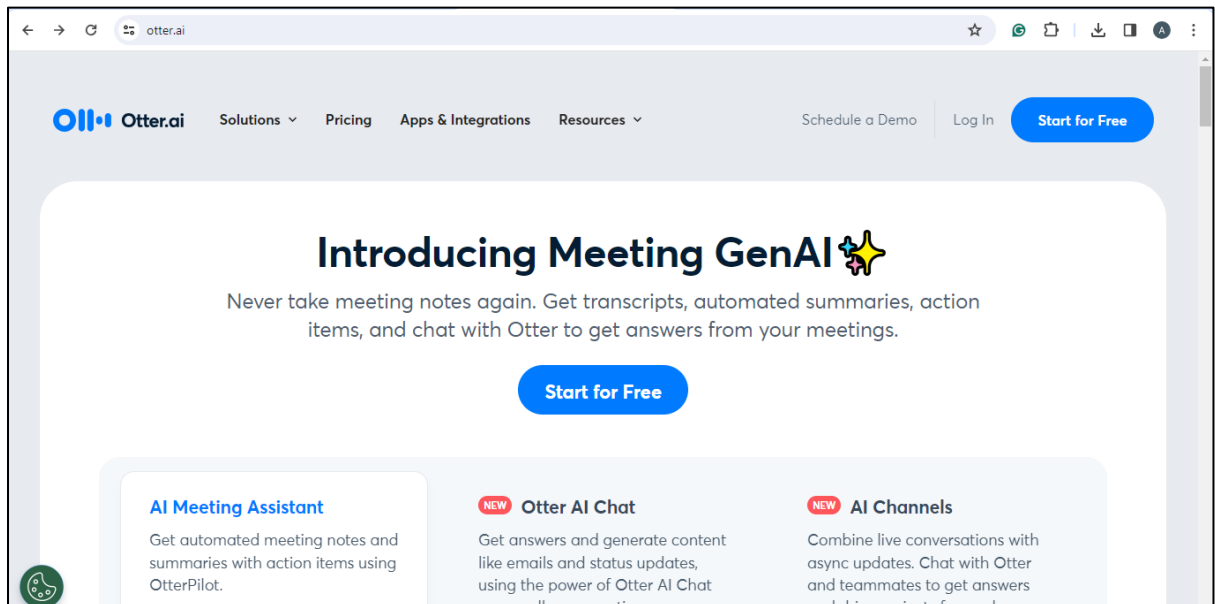
Prerequisites: None

Steps to be followed:

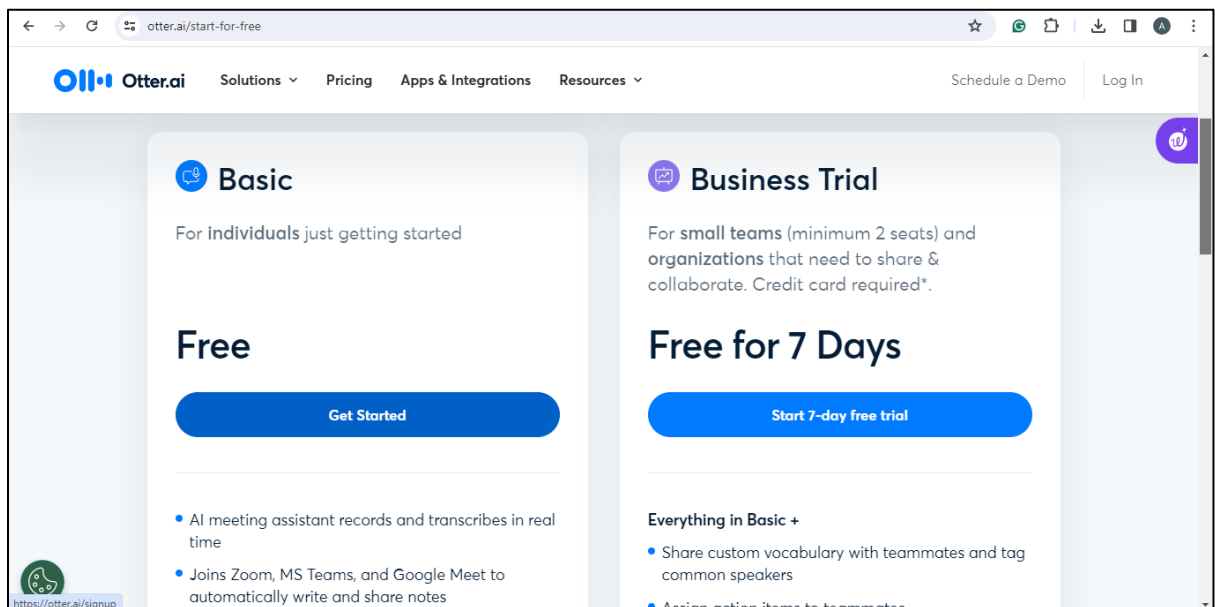
1. Log in to otter.ai and create an account
2. Generate the transcript

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

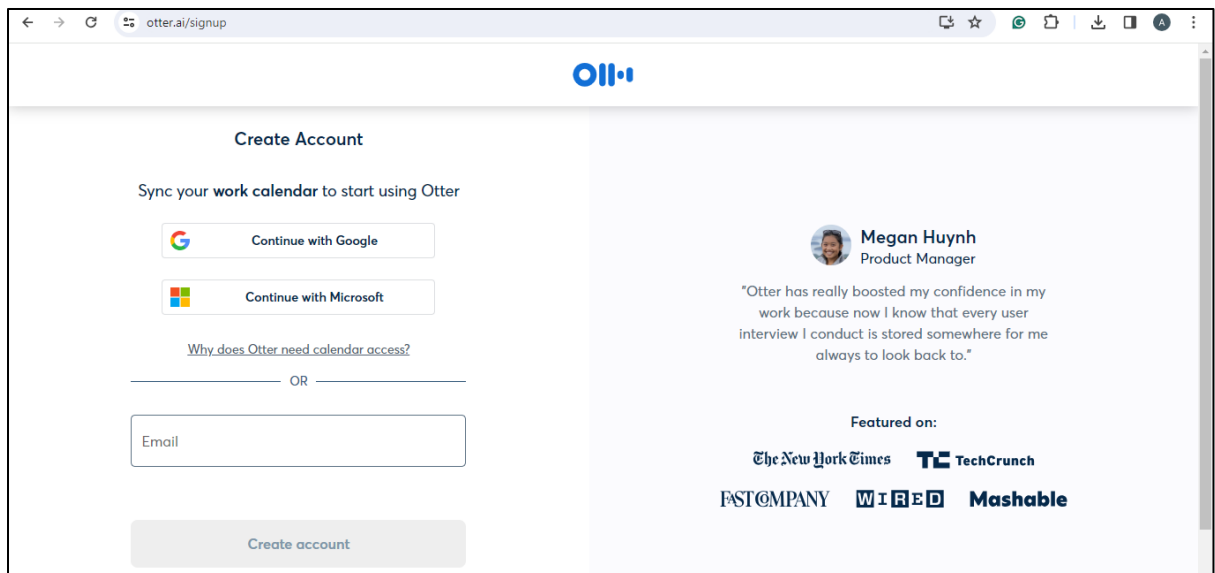
1.1 Go to otter.ai and click on **Start for Free**



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:

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:

Home

Search

Paste meeting URL to record

[Record](#)

[Import](#)

Getting Started

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

Connect your calendar to organize your day [Start](#)

Record your first conversation [Start](#)

Mar 2024

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](#)

Basic (Free)

0 of 300 monthly minutes used

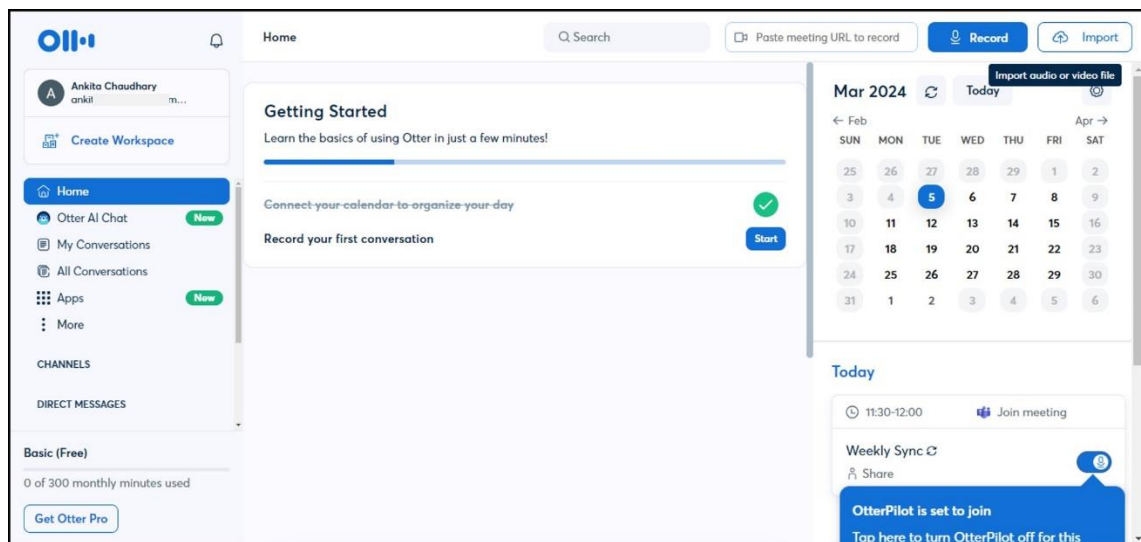
[Get Otter Pro](#)

Step 2: Generate the transcript

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

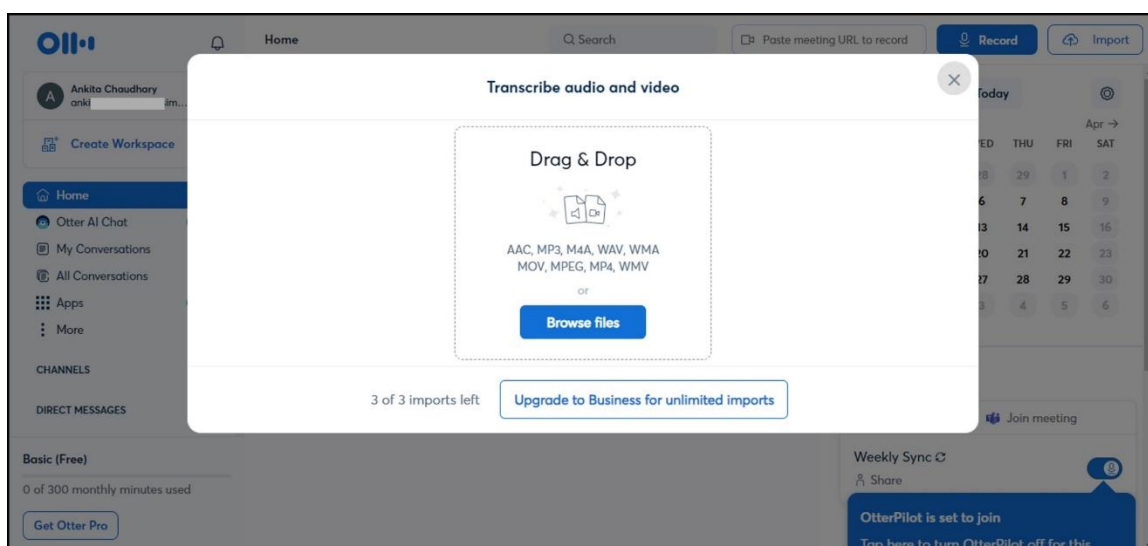
Note: In the free version, you will only get three imports.

Add a sample mp3: https://drive.google.com/file/d/1fd_oPtO5k_f2mHfIsJiP3-lTyg-DfP5G/view?usp=sharing

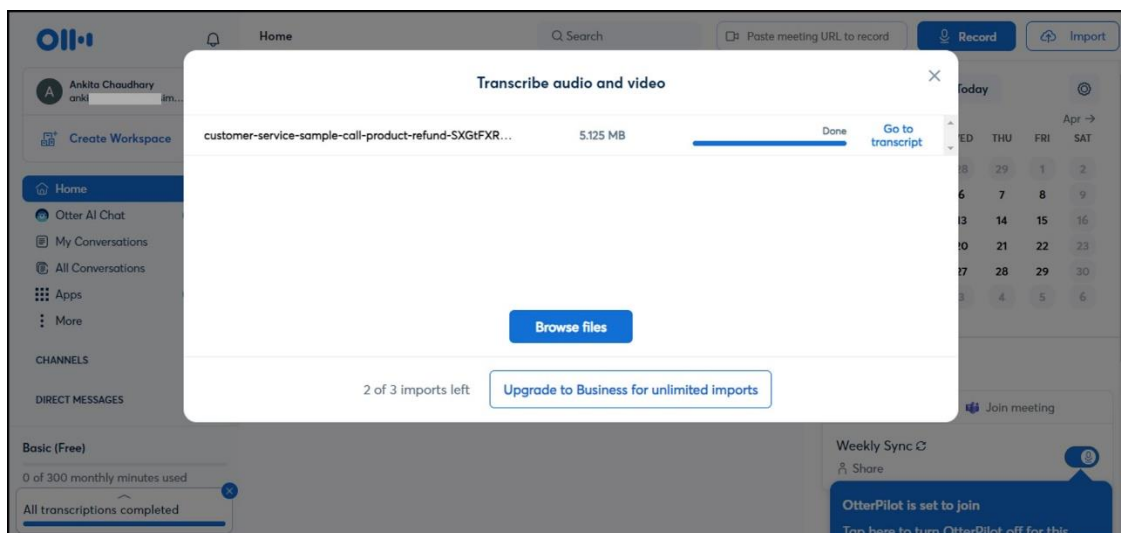


The tool will automatically join your online meetings if you have previously selected this option. Alternatively, when the window opens, you can upload your mp3 file. In this case, we will upload an mp3 of a customer service call for real-time transcription.

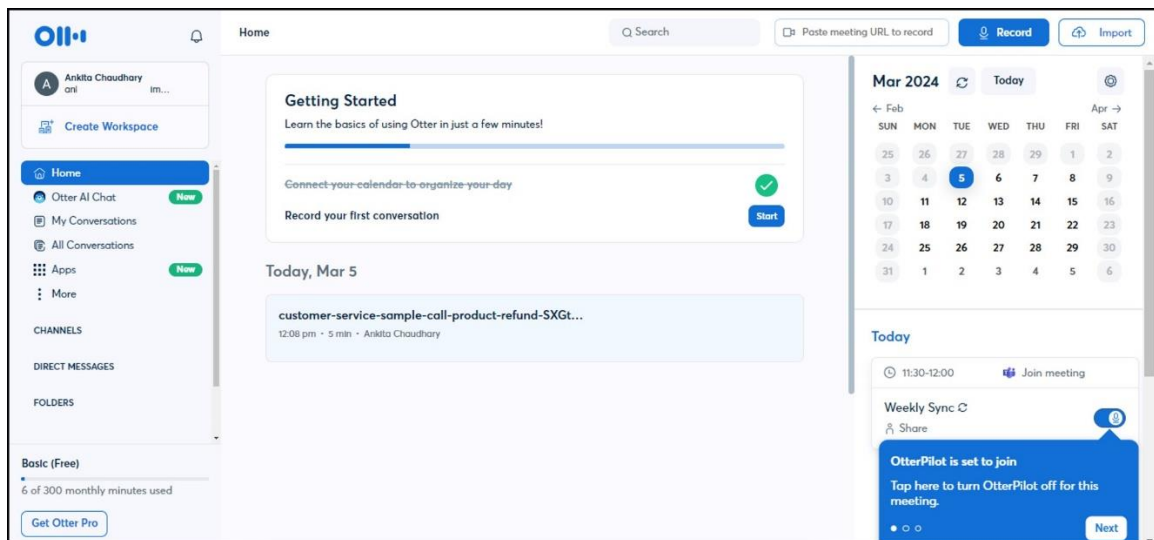
2.2 Now, click on **Browse files** to upload the mp3



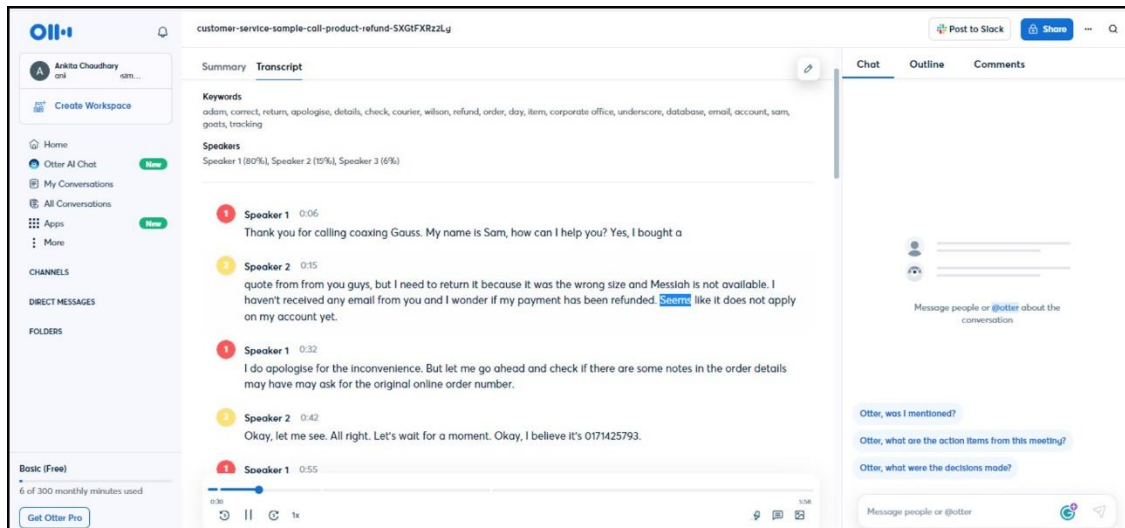
The following screenshot will appear:



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:



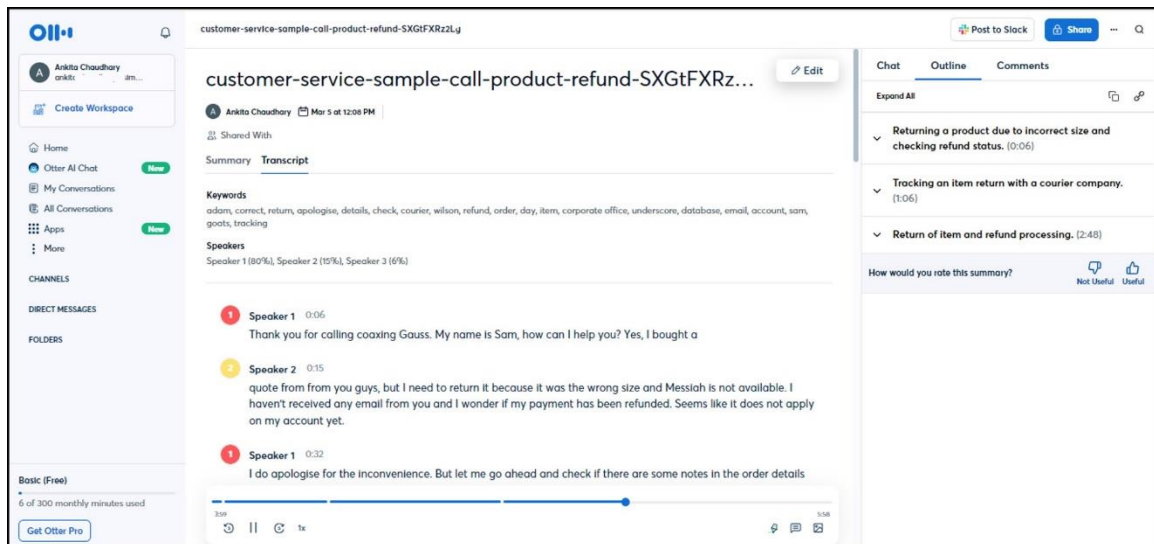
2.4 Click on **Summary** to read the entire details of the call

The screenshot displays the Otter.ai interface for a call titled "customer-service-sample-call-product-refund-SXGtFXRz...". The interface includes a sidebar with navigation options like Home, Otter AI Chat, My Conversations, All Conversations, Apps, and More. The main content area shows the call summary, which is divided into sections: "Returning a product due to incorrect size and checking refund status", "Tracking an item return with a courier company", and "Return of item and refund processing". Each section contains bullet points detailing the call's events. A progress bar at the bottom indicates the call duration is 5:58. On the right side, there is a "Chat" tab and a "Comments" section for adding notes or questions.

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 as before, but with a prompt added to the "Chat" section on the right. The prompt is: "Which points when spoken by customer care executive were empathetic?". Below the prompt, Otter.ai has generated a response summarizing the empathetic points from the call transcript. The response includes: "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 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.)", and "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 for a call transcript titled "customer-service-sample-call-product-refund-SXGtFXRzLg". The interface includes a left sidebar with navigation options like "Home", "Otter AI Chat", "My Conversations", and "All Conversations". The main area shows the transcript with a "Summary" tab selected. The transcript content includes:

- 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 (15%), Speaker 3 (5%)
- Transcript Snippets:**
 - 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, there is a progress bar and playback controls. On the right, the "Outline" tab is active, showing a list of summarized points from the transcript:

- 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 rating section: "How would you rate this summary?" with "Not Useful" and "Useful" buttons.

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