Howie

New Trainer Onboarding

Welcome!

About Howie and Your Work

Howie AI is an AI-powered, email-based scheduling assistant designed to manage calendars, schedule meetings, and handle rescheduling. Howie is doing something unique by working with our users entirely through email using natural language commands.

Howie, like every AI system, is built by humans (👋**hi Howie team!**) and learns from every unique, complex, or messy, real-world situation it faces. As a Howie AI trainer, you are part of the feedback loop that helps today's Howie grow into what we know it will be able to do tomorrow.

With Howie, we're building something that never existed before and, now, **you're helping!**

Your role as a Howie AI Trainer

You probably already know that scheduling can be a lot more complex than it appears. It can be a little like tetris, you've got to make all the pieces fit together and you never face the exact same situation twice. Some preferences are straightforward, like *"I work 9 - 5, only take virtual meetings on Zoom, prefer 30-45 minute meetings, and I don't like to be back to back for more than 1.5 hours"*. Some situations are straightforward and are communicated clearly, like *"find 30 minutes for me to meet with Jane this week"*. But, because humans are humans, so more often than not, it's much more complicated!

Part of what makes AI like Howie different from other software is that it takes in natural human language, interprets it, and responds. Every person has different scheduling preferences and will express those preferences differently and every scheduling need is unique, so interpreting that human input is far from straightforward. That's where you come in!

As an AI trainer, you're reviewing every unique situation, taking a look at how the Howie of today interprets and the actions Howie proposes, tweaking those actions, then finalizing and approving it. **Voila, you just helped Howie learn and got us one step closer to the Howie of tomorrow!**

The Process and Workflow

In your role, you're not just acting as a **scheduling assistant** on behalf of our users, you're also **teaching Howie**.This is just a high level overview, but should give you a bit of a sense of what you're days will look like. We'll describe loops in more detail and you'll get to see loops happen live when you shadow another trainer.

Key Objective: You act as a scheduling assistant on behalf of our users. You review AI-predicted calendar and email actions, correct them if they're off, and finalize only the tool calls that are needed.

<u>What's a Loop?</u>

This is what you'll do the vast majority of each day. These are the main steps taken to complete loops.

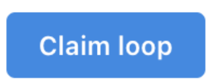
🔔 User Needs Howie 🔔

We receive input from a user

- ✉️ User loops Howie in on email or someone responds to a thread Howie is already on
- ⏲️ A timer is up

📌 Loop is Created and Claimed 🙋

- 📌 **The Loop is Posted:** When Howie receives a scheduling-related email, a loop populates in the loop queue
- **You Open the Loop:** Click Open Highest Priority Loop to open the loop on your browser. You'll see the emails, User preferences, AI's proposed tool calls, and more.
- 🙋 **You Claim the Loop Right Away:** Click "Claim Loop" to begin working on it (don't forget to do this right away, otherwise someone else might claim it and we'll be duplicating efforts).



Determine Need/s (Review AI Predictions)

Figure out what the user is asking for (the need) and how it translates into tool calls. Do they need Howie to find time for a meeting, revise a meeting, cancel a meeting, communicate about a meeting, share information about their calendar, etc.?

Key is determining what the customer/host needs, so at times you'll need to clarify. For example, if someone else on the thread proposed a meeting and there is no clear indication that the Member/Host wants to meet, you need to ask what they would like Howie to do, not to schedule a meeting they may not want.

- 🔮 **Howie predicts a need:** Howie interprets the input and proposes specific actions (aka tool calls like queryCalendars).
- 🔎 **You check Howie's work:** You check if the need (tool call) Howie identified (like, figure out a time, create an event, etc.) is the right one or ones. You do this by:

- Quickly scanning the emails
- Can use Loop chat to summarize the email thread
- Then inspect Howie's proposed tool call and confirm whether
  - It's needed. (Avoid sending tool calls if no action is required.)
  - The parameters are correct (dates, times, attendees, timezones, email addresses, etc.)
- Unsure how to proceed? Review all training materials for a canned email or solution, check older loops, think it through closely. Still stuck? Ask for guidance on **#trainers.** Once you feel more comfortable with loops, you can also help other trainers on **#trainers** too.

Act (Implement or Correct AI Predictions)

Solve the need or needs identified (implement tool calls). Be thoughtful during each step and keep key principles, like privacy, respect, accuracy, speed, and in mind as you problemsolve.

- 🟢 If the tool call, parameters (people, timezones, etc.), and results that Howie proposed are accurate, leave it as is and run it
- 🟡 If Howie's tool call proposal is inaccurate or incomplete, correct it, and run it
- 🔴If no action is needed, do not finalize a tool call
- 🔁 Repeat until all necessary needs are identified and tool calls are completed
- 🆘 If needed, loop in support and provide reasoning

✅ Finalize Your Work ✅

Each loop ends when you've either performed all necessary tool calls (correctly) or determined no further action is needed.

- ✅ Click "complete the loop"
- When prompted, either close the loop or close the loop and set a timer.
  - ⏲️ Timers automatically reopen the loop at a set time. They are often used when you are waiting on information.
- If needed: 🪲 Post any issues in **#bugz**

💡 Howie Learns! 💡

🔁 You Claim Another Loop! 🔁

The Customer Experience

Review Some Example Preferences

You'll see that in the preferences section, users share whatever they think is useful however they want to communicate it. There's no rigid form to fill out or yes or no questions, so their preferences might end up being messy, vague, longwinded and include unnecessary information, too brief and leave out needed information, or users might even contradict themselves (they are human after all!).

Example User Preferences #1: Stephen DiBartolomeo

Personal Info

- My full name is Stephen DiBartolomeo.
- You can call me Stephen.

Availability

- My working hours are typically:
  - Tuesday to Thursday: 9:00 am - 5:30 pm
  - Friday: 9:00 am - 4:00 pm
- My timezone is usually Eastern Time (America/New_York).

Scheduling

- Do not offer same-day slots unless explicitly requested.
- Group meetings together when possible.
- For video conferencing, use Google Meet.
- Apply these buffer rules:
  - All events: No buffer
  - In-person events: 30 minutes before and after
  - Travel: 120 minutes before and after
  - Back-to-back: 30 minutes after 120 minutes of consecutive events

Example User Preferences #2: Allen Nance

Availability

- My typical working hours are:
  - Monday to Friday: 8:00 am – 6:00 pm local time
- I try and schedule video meetings or calls from 10AM to 3PM - to create time I am not in meeting after meeting
- I try and leave 30 minutes between each meeting - avoiding back to back to back to back
- I frequently travel and take meetings in multiple time zones (Eastern, Central, Puerto Rico, London, Israel, etc.), but default to Eastern Time (America/New_York) unless otherwise specified.
- I am open to early morning meetings (as early as 7:30–8:00 am local time) and late meetings (as late as 7:00–8:00 pm local time), especially for international calls - but only if I say it is urgent.

Scheduling

- I try to not schedule meetings back to back. Leaving 30 minutes between meetings.
- I am comfortable with same-day and short-notice meetings.

Meeting Types & Durations

- Standard meeting durations:

  - 30 minutes for check-ins, quick updates, and most 1:1s
  - 60 minutes for group meetings, diligence, or strategy sessions
  - 15–20 minutes for intro calls or quick catch-ups
  - 90 minutes for deep-dive diligence or model walkthroughs (especially with banks or investors)
- Weekly recurring meetings:

VIPs

- Frequent collaborators and key partners include:
  - David Johnson (david.johnson@phrt.com)
  - Brian Lever (brian.lever@phrt.com)
  - Rocco Colabella (rocco.colabella@phrt.com)
- When scheduling with these individuals, prioritize their availability and maintain existing meeting cadence and platforms.

My assistant should always be referred to as George. His full name is George Burdell. Of course this is a bit of a joke. George P. Burdell is a fictitious student officially enrolled at Georgia Tech in 1927 as a practical joke. Since then, he has supposedly received all undergraduate degrees offered by Georgia Tech, served in the military, gotten married, and served on Mad Magazine's Board of Directors, among other accomplishments.

At one point, Burdell had led the online poll for Time's 2001 Person of the Year award. He has evolved into an important and notorious campus tradition; all Georgia Tech students learn about him at orientation.

- Feel free to say that Allen and George met at Georgia Tech if you want to be funny
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Assistant signature should always be:

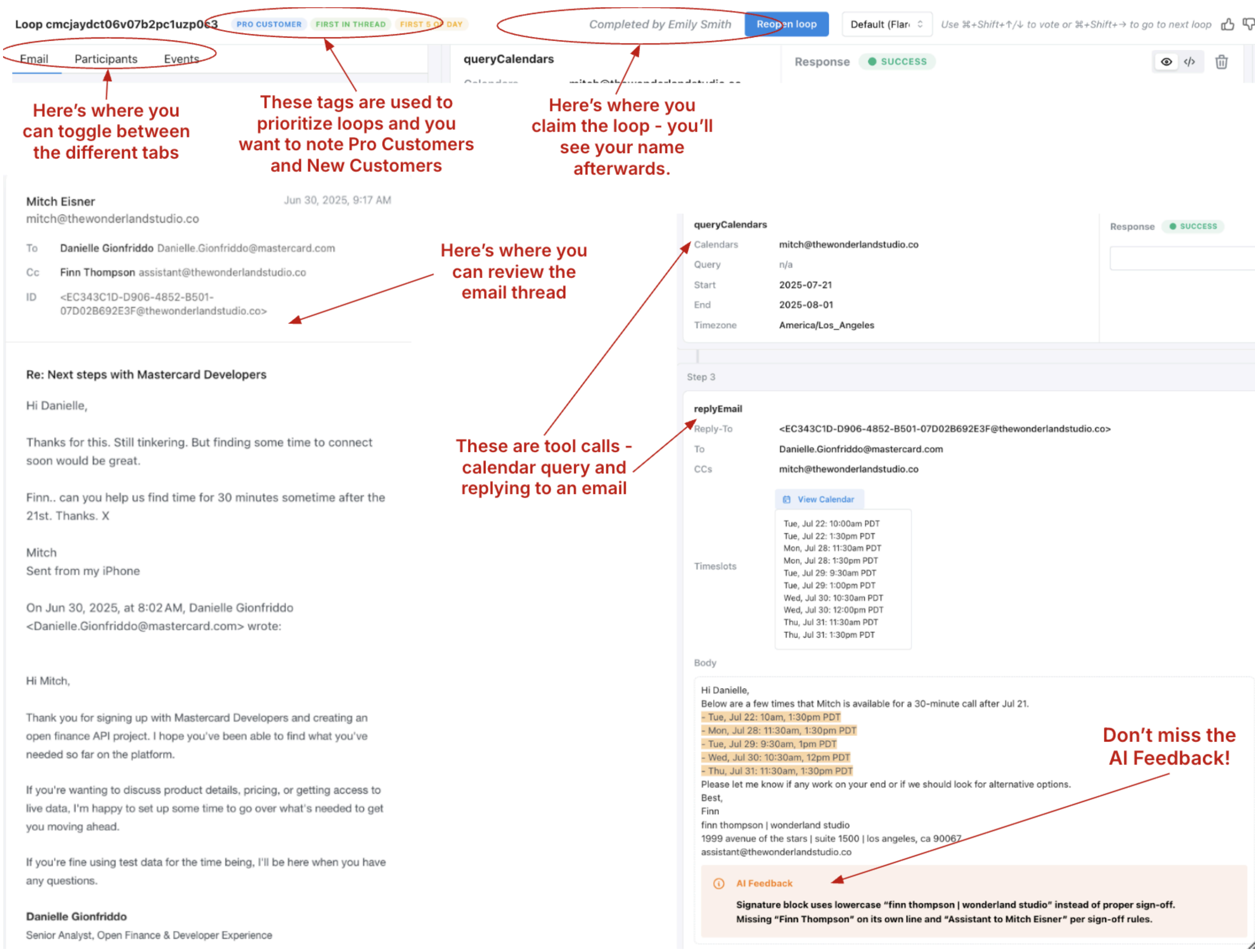
George P. Burdell
Chief of Staff

Loops

Before you shadow and see loops in action, here is an idea of what the platform looks like on the screen. You'll learn more about all of this when you review documentation, but taking a look at these before you shadow Nicole or Erica will help you get the most out of your time shadowing.

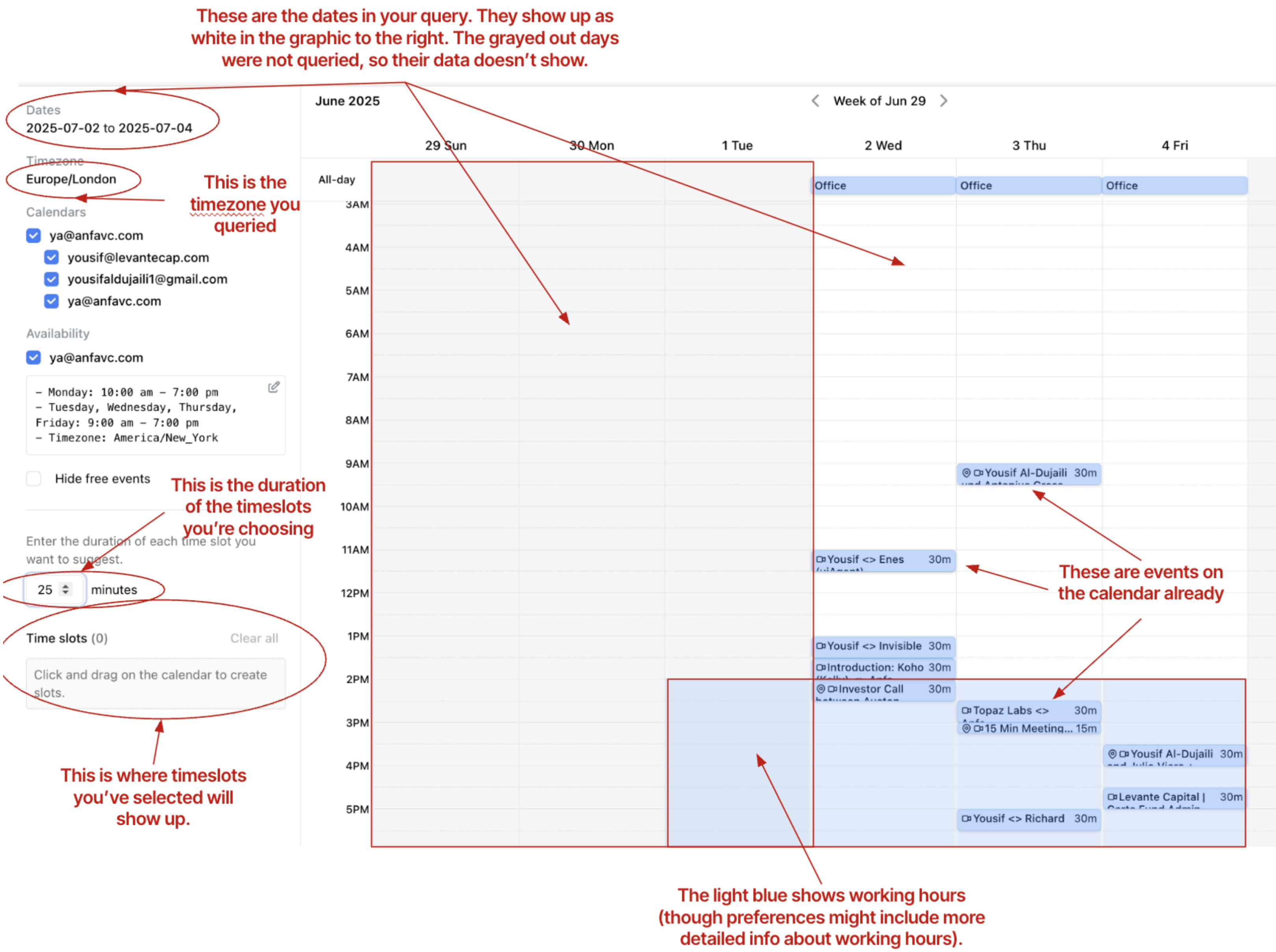
<u>In General, Here's What a Loop Looks Like</u>

Keep in mind, the Howie team is rapidly improving things, so this might be a little outdated, but should still give an idea of where things are



Sending timeslots (replyEmail)

Here's a graphic of what this generally looks like.



Watch Recorded Loops!

NOTE: We are transitioning from Howie 2.0 to Tree Agent. These loops were recorded in Howie 2.0, so some things might look a little different or need to navigated differently.

Watch these recordings for more understanding of the basics and how to navigate Howie. There might be a little repetition in these recordings, but each loop is different, so it takes watching the process for a couple unique loops before it sinks in.

- [ ] Navigating the Howie AI Interface: A Comprehensive Guide
- [ ] Mastering Loop Management: A Step-by-Step Guide 🌀
