

Transitioning to Tree Agent

Before we meet, here are a couple quick looms that you can watch:

- [Navigating Tree Agent](#) (high level)
- [Using Loop Chat to Change Course](#)
- [Using Loop Chat in Tree Agent \(Agent v. Ask\)](#)

Thanks for taking the time to get an overview of tree agent and for your willingness to give it a try while it's still getting finetuned! Here are a few important things to keep in mind:

- Quality is crucial and right now there are fewer checks and balances on verbiage in tree agent than in Howie 2.0. We really need to make sure quality is right, so rely on our canned verbiage, check your spelling and grammar, and make sure things are right.
 - AI Feedback JUST rolled out but still needs to be improved, so do still cross your ts and dot your is!
 - Please be extra careful about understanding the email and checking preferences so you can ensure all tool call details, like email content, who you are emailing, etc. are right.
 - Rely on our canned verbiage and use spellcheck or ChatGPT if you need to be sure things are spelled correctly and grammatically correct.
 - AI Feedback isn't autorefreshing after you make manual changes, so really do double check spelling, grammar, and the details
- Use Loop Chat! When you are using loop chat general v. loop chat for a specific tool call → think about which is best! In "context" keep just the relevant tool calls, so what you say to loop chat doesn't affect unrelated tool calls
 - Something like "no, we can't schedule this meeting until we get permission from the customer" works well in general, because it'll redo all the steps with that in mind.
 - Something like "change day/date format to use three letter abbreviations" is best for loop chat just for that a tool call (or you can change the verbiage manually).
 - Here's a tip to get it to use the right format, you can drop this in loop chat with context on a reply email: For timeslots, my usual format is three-letter day, three-letter month, numeric date: times in one timezone followed in parentheses with those times converted to the second timezone. Use a new line for each date. Do not include unnecessary zeroes, do not use any extra formatting (like bold or parentheses within times), and use abbreviated timezones only (e.g., PDT, not IANA names like America/Los_Angeles). For example, Thu, Aug 14: 10:30am, 1:30pm, 2:30pm PDT (1:30pm, 4:30pm, 5:30pm EDT) or in a sentence "on Thu, Aug 14 at 10:30am".
 - Be specific but talk to it like a human, so you don't waste time trying to translate things (for example you can say "nope, instead privately email the customer to ask if they want the meeting")
 - Tree Agent Chat now has 2 modes:
 - Agent: is the "fix with chat" that Tree Agent has supported
 - Ask: is similar to loop chat from . Does not change any toolcalls
 - Pro-tip: type ? in your chat message to quickly switch to ask mod, and ! to quickly switch to agent mode. (questions vs commands)

- Caveats:
 - There are a few user experience improvements coming soon (e.g. autoscroll, reducing confusion about the "Context")
 - The prompt for ask mode almost certainly needs tweaked - will wait to see what feedback comes up.
- Timer predictions are not fine tuned, so remember to check the timer guidance if you don't recall how long a timer should be. Timer notes need to be edited too.
- No preview email for timeslots (timezone additions), so if you need to add an extra timezone, you'll need to ask loop chat or copy and paste and add manually. Hopefully loop chat works! Much quicker.
- Make sure the calendar is queried and that step doesn't go away. When you make a big change to the simulations, it might remove that. Be clear with loop chat, tell it to keep the query in!
- Try not to let the excitement of testing out the new tree agent distract you from the attention to detail and quality that we know you all have!

Here's how to get started:

- Once you're setup, you'll see the blue "Open Tree Agent Loop" button next to "Open Highest Priority Loop". Click "Open Tree Agent Loop" to use tree agent.
- If you get stuck and really can't finish a loop in tree agent, you can switch to Howie 2.0.
- If we are super slammed and you feel like you're moving quicker in Howie 2.0, you can click "Open Highest Priority Loop" to work on loops in Howie 2.0. But we're trying to do as much as we can in tree agent, so we can improve it.
- If we don't have many loops, that's a great time to test tree agent! But, the blue button might not appear. You can claim any loop and then hit "view trajectory" to go to tree agent. You just will need to wait a bit for the predictions to run.
- Feedback and issues can be dropped into #tree-agent. Check that channel at the beginning of the day and throughout the day, in case they share updates or changes to the model.
- Positive feedback is great too! What feels like a major improvement from Howie 2.0? Or could be a massive improvement if there was a little tweak to it?

Something important to keep in mind: Howie is rapidly improving and changing. We often roll out new features, changes to the dashboard, revised process/canned emails, etc. So it's important to keep tabs on announcements in Slack, review revised documentation, and continue learning each day. Some training materials and examples in documentation might look a little outdated, even if they were recorded or created yesterday! That's just the nature of building new software. But the principles and general process remain pretty consistent, so try to focus on that, even if a button looks different now or is in a new place.